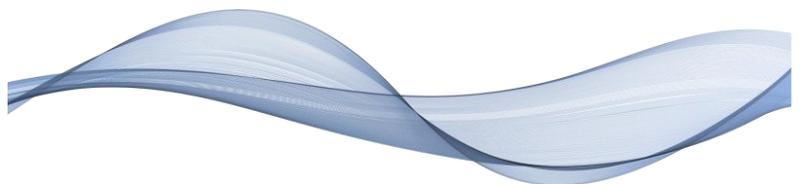


# EURACOAL



European Association for Coal and Lignite AISBL

# Annual Report 2020



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## MESSAGE FROM THE PRESIDENT

*Tomasz Rogala*



*The times are changing and the coal industry is changing with them. Decisions have been taken that mean a finite, but still crucial role for coal in a European Union that still depends on coal for one-fifth of its electricity. EURACOAL members are navigating a policy environment heavily skewed against coal, despite the socio-economic benefits it offers in terms of accessible, affordable and reliable energy. In the EU, high carbon prices have pushed the cost of coal-fired power generation above the costs of competing energy sources, hitting coal-dependent member states especially hard. These realities are reflected in EU coal supply which fell by 22% in 2020, a year otherwise dominated by the ongoing COVID-19 pandemic and resulting economic crisis. Managing change has taken on a new sense of urgency, with well-planned phase-outs in some member states as others hurry to close mines and power plants without replacement. A common theme is the growing reliance on imported electricity.*

Total hard coal supply in the EU was 146 million tonnes in 2020 – 57 million tonnes of indigenous production plus 89 million tonnes imported. A further 244 million tonnes of lignite were mined in nine member states. The pandemic resulted in an unprecedented collapse of coal demand on a scale not seen in peacetime since the Great Depression.

Every single EU member state recorded downturns in electricity demand, with coal power generation hit hardest. Looking at the coal consumption of individual member states, compared with non-EU countries, it should be noted that pro-climate policies in the EU alone are not enough to deliver the intended climate policy goal. Global coal and lignite consumption is set to grow in 2021 to above pre-pandemic levels, having fallen back 4% in 2020 to 7 500 million tonnes. The EU's share of this production was just 4%. Similarly for greenhouse gas emissions – the EU's impact is small. China produced half of the world's coal in 2020 – output was barely affected by the pandemic – and, together with other non-OECD countries, accounts for two-thirds of global CO<sub>2</sub> emissions. Moreover, as the EU has a negative trade balance of hundreds of billions of euros each year with countries where the production of goods is not burdened by emission costs, it is no surprise that a carbon border tax is now being considered to protect EU industry.

For many coal companies, the forces against coal have led to the preparation of restructuring plans involving intense negotiations with trade unions, regional governments and other stakeholders. In some cases, compromises have been reached to phase out hard coal and lignite mining by certain dates. Other negotiations are ongoing with a similar aim: to find solutions that avoid catastrophic job losses and regional deprivation during the “transition”.

Transition refers not only to the necessary actions to protect the environment, but to a much more complex problem involving all sectors of the economy. The climate challenge has a political aspect, as evidenced by the pressure on coal which has intensified since 2015 and the UNFCCC Paris Agreement. The price of allowances under the EU Emissions Trading System (ETS) has multiplied as a result of changes to the ETS Directive that took effect in January 2019. A new goal to be climate-neutral by 2050 was set, and an intermediate, EU-wide 2030 target of a 55% reduction in greenhouse gas emissions was agreed by member states in December 2020. The European Investment Bank effectively ended its financing of fossil fuel-based energy projects from

## Launch of *Coal industry across Europe* in the European Parliament



EURACOAL members with MEPs at the European Parliament, Brussels, 28 January 2020

On 28 January 2020 at an event in the European Parliament, MEPs previewed EURACOAL's latest publication – the seventh edition of *Coal industry across Europe*. MEP Grzegorz Tobiszowski hosted the evening event dedicated to the coal industry in transition, bringing together eight fellow MEPs with EURACOAL members and colleagues from China, Japan, the UK and the United States.

Guest speaker, Lou Hrkman, Deputy Assistant Secretary at the US Department of Energy, spoke on his government's approach to coal, after remarking that, "the US has no greater friends than Poland and the EU". The current US administration supports innovations that will reduce GHG emissions from coal to zero, he said,



Lou Hrkman, Deputy Assistant Secretary for Clean Coal and Carbon Management, US Department of Energy; MEP Grzegorz Tobiszowski; MEP Zbigniew Kuźmiuk; Vladimír Budinský, EURACOAL President-designate

while improving the efficiency and reducing the costs of power plants. He offered the new Allam cycle as an example of a power plant with zero emissions – it supplies pure CO<sub>2</sub> to the oil industry and even produces water. Work on smaller, modular power plants will lead to cheaper units that many coal-using countries can rely on to supply heat and power while meeting their Paris Agreement commitments. He predicted the 21<sup>st</sup> century would bring new opportunities, with products made from coal, such as new construction materials and hydrogen for transport. "Technology and innovation by the private sector is much better than heavy regulation and taxes", he concluded.



Referring to the European Green Deal, MEP Tobiszowski, a former Secretary of State in the Polish Ministry of Energy, highlighted the importance of the proposed Just Transition Mechanism for the coal regions. He explained how Poland's Energy Policy to 2040 responds to current EU climate and energy policy with plans for a new coal gasification power plant near Lublin in partnership with Mitsubishi Hitachi Power Systems of Japan. Thanks to biomass co-firing, Mr. Tobiszowski said it would meet an EU emission performance standard of 550 gCO<sub>2</sub>/kWh.

The EURACOAL President-designate, Vladimír Budinský, presented MEPs with a preview of the association's latest report *Coal industry across Europe*. As EURACOAL's flagship publication, it provides a snap shot of the coal and lignite mining industry and the influence of EU policy on the coal sector, including power generation. With many facts and figures, it covers not only the EU, but also Energy Community countries. According to Mr. Budinský, future editions should cover the US and Russia as both are major coal exporters and of growing importance to meeting EU coal demand.

2021. All these point to further reductions in the demand for coal and hence job losses across the coal and related industries, even as the EU economy reels from the COVID-19 pandemic.

The EU reduced its emissions by only 24% from 1990 to 2019, largely reflecting the collapse of heavy industry, especially in the former Eastern Bloc. The additional 31% or so by 2030 means throttling emissions three times faster with consequences for *all* consumers of oil, gas and coal. This highlights the importance of the new Just Transition Fund. In discussions with European Commission officials and MEPs, EURACOAL highlighted the importance of the coal sector's value chain to the EU economy and society. This chain includes knowledge and technologies, human capital and budget income for central and local governments. We should protect this chain as mining regions are transformed, so that wealth generation is preserved. Thanks in part to EURACOAL's efforts, the €17.5 billion Just Transition Fund is a welcome increase from the initial €7.5 billion proposed by the Commission. Even with the envisaged co-financing under the EU Recovery Package, it is still far from enough to ensure a "just transition". In Germany, Poland and the Czech Republic alone, the cost of transition is estimated to be around €2.5 trillion!

More financial assistance during the transition is needed to ensure it is just for those directly affected. Member states have different financial possibilities and, for historic reasons, different starting points from which to overhaul their energy systems. It is clear that the EU funds foreseen for the transition are only a fraction of what will be required, but they represent an important start.

Apart from the costs of transition, there are also energy security issues to be considered. An electricity system dominated by renewable energy sources needs a means of alternative supply or backup to maintain electricity supplies during those periods of *Dunkelflaute* when there is little generation from wind or solar power. A too rapid or even complete elimination of conventional thermal power plants is a risk without new solutions, such as large-scale energy storage, that

## EU leaders agree "Next Generation EU" recovery package

In July 2020, at the second-longest summit on record, EU leaders agreed a €1.1 trillion multi-annual financial framework (MFF) for 2021-2027, plus a €750 billion recovery package of borrowed money. Crucial for the coal regions in transition, a Just Transition Fund of €17.5 billion was agreed, smaller than the €40 billion promised in the Next Generation EU recovery plan published in May. A dedicated Just Transition Scheme under InvestEU is the second pillar of the overarching Just Transition Mechanism, while a public-sector loan facility run by the European Investment Bank forms the third pillar. Together, the three pillars are expected to mobilise at least €150 billion of investments in the EU economy over the period 2021-2027.

To repay borrowings, the Commission proposes as "own resources" an EU-wide plastic packaging waste tax, a carbon-border tax and digital taxes. A Tobin tax is also being considered, as well as a revision of the EU Emissions Trading System that would see aviation and maritime included as own-resources.



European Commission President Ursula von der Leyen and European Council President Charles Michel at the first face-to-face EU summit since the COVID-19 outbreak, Brussels, 20 July 2020 © European Union

ensure continuity of power supply. In this respect, existing coal power plants provide security without any need for large capital investments in, say, new fossil gas power plants which, for climate policy reasons, would in any case be forced to close after only a few years' operation.

If the EU is to lead the world towards climate-neutrality, renewed efforts are needed. Frans Timmermans, the Executive Vice President of the European Commission, has said, “CCUS [carbon capture, use and storage] is a building block for a climate-neutral Europe”. Indeed, this technology should be an option for any country with a large dependence on coal. More support for research and pilot projects is urgently needed. At the same time, EU expertise and infrastructure assets can support the rollout of the EU’s new hydrogen strategy; many EURACOAL members are already exploring the opportunities on this exciting, new frontier. Hence, EURACOAL was pleased to see the modernisation package tabled by the European Commission to bring new direction to the Research Fund for Coal and Steel. This fund was established in 2002 using monies from past levies on the coal and steel sectors. Although the Commission initially excluded coal research, the report of MEP Cristian-Silviu Buşoi, chair of the influential Industry, Research and Energy Committee in the European Parliament, was positive on repurposing coal-related infrastructure for clean energy, recycling of wastes and innovative, non-energetic uses of coal such as for carbon-based materials.

Meanwhile, EU policymakers are finalising the ambitious greenhouse gas emissions reduction target of at least 55% for 2030 with amendments to the proposed European Climate Law, or “law of laws” in the words of Vice President Timmermans. The European Parliament called for the current 40% target to be raised to 60%, but the debate has now shifted to an EU-wide climate neutrality target for 2050 which is already being used to justify tougher interim targets that would further increase the pressure on coal.

Against this challenging backdrop, I would like to express my sincere thanks to all EURACOAL members – especially the chairwomen and

chairmen of our committees and working groups – for their support during my presidency. Together, we kept coal’s flame alight. Looking ahead, I wish President Budinský “Zdař Bůh!” or good luck as we work to ensure the European Green Deal builds on the legacy of Europe’s black gold.

## European Council agrees a 55% GHG reduction target for 2030

On 11 December 2020, EU leaders ended a two-day summit to resolve disagreements over the future EU budget, including the €750 billion Next Generation EU recovery package. Important conclusions were also reached on energy and climate policy. The Council endorsed a new, binding target for 2030 of a net domestic reduction in EU-wide greenhouse gas (GHG) emissions of at least 55% compared with 1990 levels. During 2020, Parliament had argued for a 60% reduction with binding targets on member states, but Council stayed close to the Commission’s proposal.





## COMMITTEE ACTIVITIES: Energy and Environment Policy Committee

*Dr. Thorsten Diercks, Chairman*

The EURACOAL Energy and Environment Policy Committee deals mainly with energy, climate and environmental matters of concern to the coal sector, with a focus on EU policy initiatives. Given the importance of member state policies, an exchange of views on these is another essential element of the committee’s work. Issues are analysed, discussed and conclusions agreed on appropriate actions. The Committee’s position papers are used to inform opinion leaders and decision-makers in Brussels and beyond.

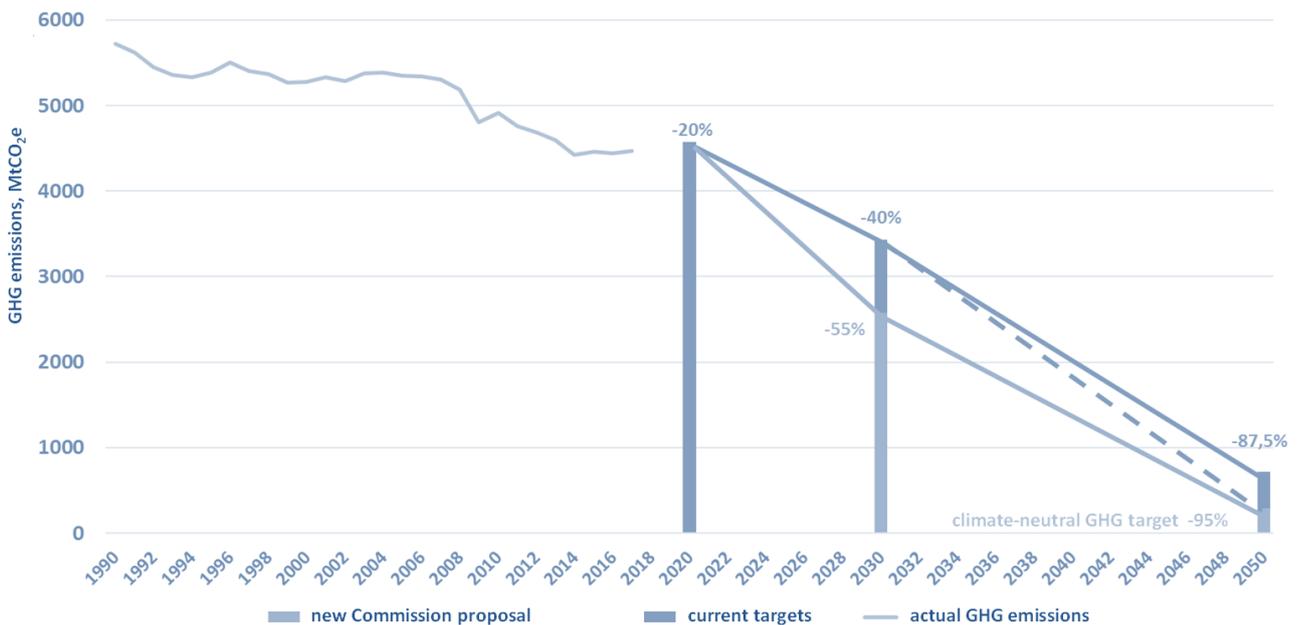
The Committee held two formal meetings in 2020, both online, and worked actively on several files of importance to members. Many new EU policies were announced by the European Commission President-designate in July 2019 as part of a “European Green Deal”. Proposals followed after the appointment of a new College of Commissioners later in the year. The EURACOAL Energy and Environment Policy Committee was therefore very active, responding to many public consultations and engaging with policymakers. All

this came as the world fought against the COVID-19 pandemic. Below, we explore only a few of the files, those that have attracted most interest. Nevertheless, EURACOAL gave its full attention also to soils, nature restoration, emissions trading and effort sharing, carbon-leakage protection and the overarching “zero pollution ambition” of the new European Commission under President Ursula von der Leyen.

### European Climate Law

To co-ordinate the coal sector’s response to an increasingly ambitious EU climate policy, EURACOAL discussed and then published in June 2020 a position paper on the European Climate Law. The law was proposed by the European Commission in March, but with the intention to quickly amend it if and when new climate targets were agreed. In September 2020, a 55% greenhouse gas reduction target for 2030 was indeed proposed as an amendment. By year end, the climate law proposal entered trilogue negotiations between the European Parliament, Council and the Commission. The EURACOAL paper offers conditional support for the law, providing several principles are respected: security of energy supply, a market-based EU Emissions Trading System, differentiated carbon

**Greenhouse gas emissions and future EU targets, 1990-2050**



pricing for non-ETS sectors such as transport and buildings, individual impact assessments for member states, increased support funding via the Just Transition Mechanism and EU action only as part of a global climate response. More generally, EURACOAL reiterates the Treaty requirement that the European Commission respects a member state's right to choose its energy mix and determine the conditions for exploiting its own energy resources, particularly in respect of policies towards coal.

## Just Transition Fund

After announcing a "Marshall Plan for the EU" in April 2020, President von der Leyen presented the Commission's recovery plan – "Europe's moment: repair and prepare for the next generation" – on 27 May 2020. An EU-level response is justified because the "asymmetric impact of the crisis is exacerbated by the different capacities of member states to support their economies." The plan will boost investment in "a green and digital transition", leveraging an estimated €3.1 trillion, and has two main components:

- a new, €750 billion "Next Generation EU" instrument for 2021-2024, financed, for the first time, by borrowings guaranteed by member states' future EU budget contributions; and
- a €1.135 trillion Multiannual Financial Framework (MFF), as proposed by the Commission in May 2018, this being 1.11% of the EU-27 GNI.

When added to the €540 billion Pandemic Crisis Support under the European Stability Mechanism, agreed at the beginning of April 2020, the new €750 billion instrument brings the total stimulus to €1.29 trillion – by far the largest fiscal stimulus in EU history.

More than 25% of the funds must be earmarked for climate action in connection with the European Green Deal. In many cases, investment funds will be made available only in accordance with the Taxonomy Regulation on sustainable finance. Thus, companies deemed to be environmentally harmful will not be eligible.

In parallel, the Just Transition Fund, announced in January 2020 to help the energy transition, was allocated a budget of €40 billion, far greater than the initial €7.5 billion proposed by the Commission, thanks to a concerted lobbying effort by those affected in the coal regions. The seed for such a fund was sown by Prof. Jerzy Buzek MEP and his colleagues in the European Parliament who proposed a modest €2 million budget line in June 2017 as an amendment to the EU budget for 2018. This established a pilot project for comprehensive support of the coal and carbon-intensive regions in transition. By December 2017, with the launch of the Coal Regions in Transition Platform in Strasbourg, the seed had germinated into an important Commission initiative backed by Vice President Maroš Šefčovič. Today's Just Transition Fund, although not yet on the scale needed to address all the impacts of transition, is nevertheless a very welcome outcome of a process supported by EURACOAL throughout.

## Annulment of rules on large combustion plants

On 27 January 2021, the Court of Justice of the European Union ruled on a case brought by Poland, supported by Bulgaria and Hungary, against the European Commission decision establishing conclusions on best available techniques (BAT) for large combustion plants (LCPs). The verdict annulled a vote of member state representative on 31 July 2017 when the Commission wrongly denied Poland the right for a vote according to the Nice Treaty which member states had the right to request during a transitional period. The Court instructed the Commission to hold a new vote within twelve months. At the same time, the Court decided, on environmental grounds, not to block the entry into force of the contested BAT in August 2021 or the requirement for permitting authorities to act. The Commission has appealed against the Court's decision and therefore the LCP BAT file is in limbo.

It is noteworthy that the Court only considered the first of Poland's pleas, on the voting procedures, and did not consider other pleas on the actual content of the BAT conclusions. A

similar complaint, brought by EURACOAL *et al*, was finally dismissed after appeal as “manifestly unfounded” by the UK judge on 31 January 2020, his last working day at the Court of Justice.

### Water Framework Directive

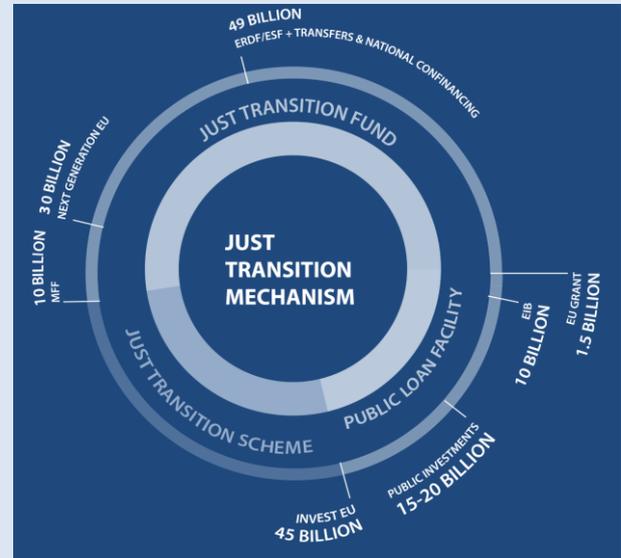
According to the Water Framework Directive (WFD), all EU water bodies should reach “good-quality” status by 2027. Given the uncertain definition of the “non-deterioration principle”, reaching this goal will be challenging for the many industries that use or discharge water. Currently, the principle is understood to mean “one out, all out”, *i.e.* the lowest value of the parameters used in an assessment determines the final status of a water body. Even a minor deterioration of a parameter cannot be compensated for by a significant increase of a priority parameter. The one-out-all-out principle is widely seen as inadequate and disproportionate, as acknowledged in the Commission’s own fitness-check review of December 2019. For now and until 2027, member states may decide on less stringent requirements for particular water bodies where there is no possibility of achieving good-quality status. However, industry needs clarity on the situation beyond 2027 so that water resources remain available.

On 1 December 2020, the European Parliament passed a resolution outlining a possible solution that would leave the one-out-all-out principle intact. It calls on the Commission to elaborate complementary reporting methodologies, such as “distance to target” and others that would better assess progress towards good-quality status for all water bodies. Although this resolution is non-binding, it sets the scene for possible future revisions of the WFD or guidelines. In the meantime, member states must prepare water management plans for the 2022-2027 period and beyond with this in mind.

### Methane strategy

For some months prior to its publication on 14 October 2020, EURACOAL participated in consultations on the European Commission’s new methane strategy. The strategy covers several

## Just Transition Mechanism



The three pillars of the Just Transition Mechanism as proposed by the European Commission in May 2020 © European Parliamentary Research Service

A Just Transition Fund is very much needed if the EU, with the agreement of member states and the European Parliament, is to complete the huge transformation to a climate-neutral continent. Under the European Green Deal, many member states need to make great changes to their energy systems as they are no longer viable under current EU rules or the even greater efforts envisaged in light of more ambitious climate targets for 2030. Investments will be required and so EURACOAL welcomed, in principle, the proposals contained in the European Commission’s communication of 14 January 2020 for a Just Transition Fund. The promise of linking the new fund to existing Structural Funds as part of a Just Transition Mechanism to lever investment was especially welcome. In this respect, amendments to the Common Provisions Regulation is as important as the Just Transition Fund itself.

areas of human activity, including agriculture and waste. For the energy sector, the focus is on fugitive emissions from the oil and gas sector. Given the methane emissions associated with the imports of oil and gas, this is the right approach and the strategy should be seen as part of the EU’s climate diplomacy efforts.

In relation to methane emissions from coal, which have been measured in detail over recent decades, EURACOAL raised a number of points with the Commission. Emissions from lignite, which is produced widely across Europe at surface mines for use in power plants, are known to be marginal from a climate perspective. Hard coal is now mined in only a small number of member states and emissions of coal mine methane (CMM) from active mines are currently a tiny fraction of past emissions as the industry has shrunk markedly since 1990. Also, it is important to keep in mind that methane ventilation at active underground coal mines is necessary to keep mineworkers safe.

Given the declining trend of EU coal mining, focus should be placed on abandoned mine methane (AMM) with smart closure plans and repurposing of assets to limit emissions through capture and use. Methane is widely used for heating and power generation, and the potential exists to use more CMM and AMM with the right incentives. Therefore, EURACOAL has put forward specific legislative proposals that would see mine methane included in state-aid guidelines and the CO<sub>2</sub> emissions from the use of mine methane excluded from the EU Emissions Trading System.

EURACOAL remains open to working with the European Commission so that knowledge and experience can be shared on how best to address methane emissions, especially emissions in non-EU countries which now account for 95% of global coal use.

## Aarhus Convention

In April 2020, EURACOAL submitted a position paper to the European Commission in which we warn against measures that risk slowing new investment in clean technologies, and submitted an updated paper in December. Current proposals to revise the Aarhus Regulation, which implements the UNECE convention named after the Danish city, would delay transformation of the EU energy sector as interest groups would be free to challenge new developments of all types. Every new project could be argued to have a climate impact, and any NGO could claim to represent the environment.

EURACOAL supports equal access to justice. Indeed and as noted above, the association itself has been denied access on a matter that affects our members. However, access to justice should only be granted to those directly affected. Extending justice to all under climate law risks opening a Pandora's box whereby literally anyone can claim harm caused by others.

To transform the EU energy sector and economy, we need faster permitting procedures, not slower ones. EURACOAL has urged the European Commission to begin a process to renegotiate the UNECE Aarhus Convention at the international level, so that a better balance can be found between access to justice and a secure planning framework for clean-tech investments.

All EURACOAL members – large and small – take each of the above matters seriously and together seek solutions that bring respect to those EU member states, regions and companies that depend on coal.

## Polish-French strategic partnership includes energy

On 3 February 2020, the Polish and French governments signed a communiqué for a more united, more integrated Europe with more solidarity, building on their strategic partnership agreement of 28 May 2008. Poland and France reaffirmed their support of the Paris Agreement and efforts to reach the EU-wide goal of climate neutrality by 2050. The new declaration adds co-operation on nuclear power and changes to state-aid and public procurement rules.



PM Mateusz Morawiecki and President Emmanuel Macron in Warsaw after signature of a communiqué as part of the broader Weimar Triangle of co-operation between Germany, France and Poland. © TVN24

## COMMITTEE ACTIVITIES:

### Market Committee

*Anetta Piszczek, Chairwoman  
with a market report prepared by the  
EURACOAL secretariat*

*The aim of the Market Committee is to deliver accurate, consistent and timely data on production, imports and consumption of hard coal and lignite in Europe, and to publish such data in regular market reports. These reports have a wide circulation beyond the EURACOAL membership and include, each year, the first aggregated annual data for the European Union.*

In 2020, the committee held two online meetings – in April and October. Members discussed agenda items on a possible revision of the Energy Taxation Directive and a carbon border adjustment mechanism (CBAM). The European Commission proposes a CBAM which would protect EU industry from more competitive imports from those third countries with more lenient or even no climate regulation. In October, a presentation on the Commission's impact assessment of the proposed 2030 Climate Target Plan, based on a detailed communication to members, led to the conclusion that security of energy supply had not been adequately addressed, if at all. EURACOAL issued two coal market reports in 2020: one in May, accompanied by a "Coal in Europe" map, and another in November.

In 2020, global hard coal production fell 4% to an estimated 6 900 million tonnes as the SARS-CoV-2 virus spread around the world leading to a pandemic and lockdowns that hit demand for fossil fuels and electricity, although with very different regional impacts. The Western world saw a sharp contraction, notably in the EU where coal supply was 22% down on 2019 – an even greater shock than the Great Depression. In contrast, Asian coal demand remained buoyant in 2020. Looking ahead, the International Energy Agency forecasts a strong rebound in 2021 with global coal demand rising 4.5% to above 2019 levels. Such a recovery trend is already visible in the EU.

## World Coal Market Developments in 2020

At 3 690 million tonnes in 2020, coal production in China, the world's largest producer, was barely affected by the COVID-19 pandemic which began in Wuhan – coal output was just 0.1% less than in 2019. China's coal demand recovered quickly in the second quarter from the disruptions seen earlier in the year.

Already the second largest coal producer in the world, with 743 million tonnes in 2020 (-5.1%), India aims to boost coal mining after the first drop in coal production since 1998. The state-owned Coal India Limited (CIL) has been instructed to replace imports with domestic production which may include the opening of more private mines.

In Indonesia, after record coal and lignite production of 616 million tonnes in 2019, coal output fell by 14.1% to 529 million tonnes in 2020. In June 2020, a relaxation of environmental requirements for mining allowed the Ministry of Energy and Mineral Resources to set a production target of 550 million tonnes for 2021.

The largest falls in coal production in 2020 were seen in the EU, where output fell 19.3%, and the United States. US production fell a massive 156 million tonnes or 24.4% as coal-fired power generation contracted sharply and coal exports declined 26.3% to 62.7 million tonnes. Steam coal exports declined by more than one-third, while coking coal suffered a smaller, but still significant, decrease of 20%. The COVID-19 pandemic not only slowed export demand, but also forced some US coal mines to idle for extended periods to slow the spread of the virus.

In Australia, production is expected to recover in 2021 after dropping 29 million tonnes or 6.3% to 434 million tonnes in 2020. Chinese import quotas and customs clearance difficulties forced exporters to look elsewhere, notably India, resulting in a significant change to the pattern of global seaborne coal trade.

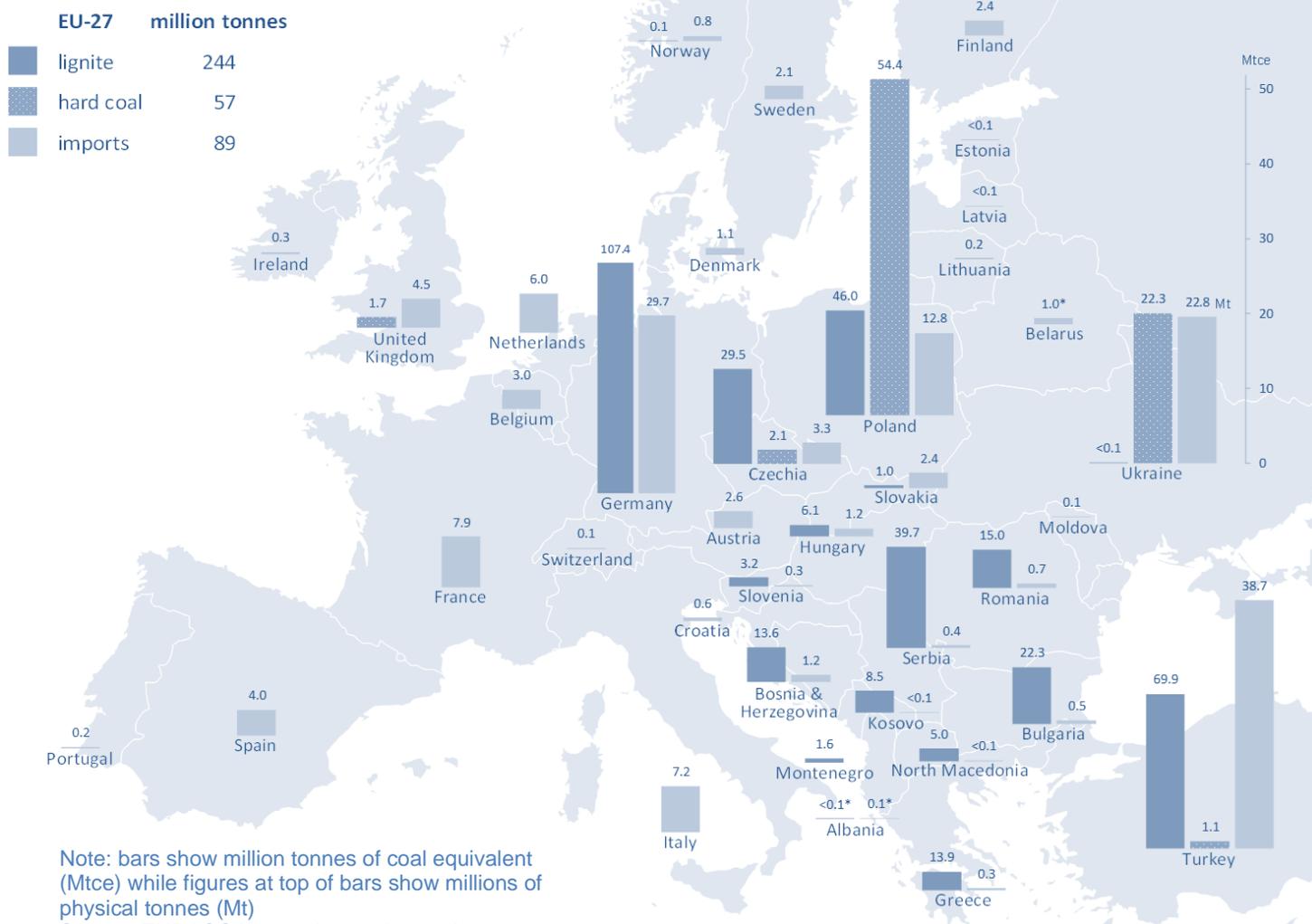
Overall, the international hard coal market – steam coal and coking coal – can be broken down as follows: Australia and Indonesia each supply around one third; Russia, the US, South Africa and

Colombia together supply the remainder. Seaborne hard coal trade decreased by 120 million tonnes or 9.5% to 1 147 million tonnes in 2020, with the slump in EU import demand accounting for 40.6 million tonnes or one third of this fall. Australia dominated seaborne export trade with 371 million tonnes of coal, followed by Indonesia with 342 million tonnes. Adding Indonesia’s lignite exports of 65.3 million tonnes positions this country as the world’s top coal exporter. Coal imports similarly fell, except in Turkey and Vietnam.

Turkey became Europe’s largest hard coal importer in 2020, overtaking Germany. The

country’s coal imports rose markedly, by 7.4% compared with 2019, to 38.7 million tonnes, with Russia being the most important supplier. The Turkish government’s policy of favouring indigenous energy sources, such as lignite, hydro and wind, came to a temporary halt, despite the steady devaluation of the Turkish Lira since the 2008 financial crisis and a growing trade deficit. Compared with 2019, Turkish lignite production fell by 19.9% in 2020 to an estimated 69.9 million tonnes as the pandemic struck economic activity. Turkish Coal Enterprises (TKİ) is the largest lignite producer. The small quantity of hard coal production from the Zonguldak basin on the Black Sea coast fell in 2020 to just 1.1 million tonnes.

**European hard coal production, lignite production and coal imports, 2020**



Ukrainian coal production continued to drop, by 12.9% in 2020 to 22.3 million tonnes, according to government statistics. DTEK is Ukraine's biggest coal producer. By the end of January 2021, the company completed the transfer of "Dobropilska" coal mine back to the state. Lower output at state-owned coal mines pushed up costs and increased the need for subsidies. In response, the government aims to close unprofitable mines. An EU-Ukraine Memorandum on Strategic Partnership in Energy has presented a plan to restructure the coal sector, while diplomatic guidelines for EU foreign ministers put pressure on Ukraine to align with the European Green Deal, including entry into the EU ETS in the mid-term, perhaps by 2030.

In conclusion, "green" initiatives and a transition to cleaner energy sources in developed countries increasingly damaged the prospects for coal in 2020. The newly elected US President, Joe Biden, returned his country to the UNFCCC Paris Agreement of 2015. EU member states agreed to cut GHG emission by 55% compared with 1990 levels by 2030. However, the cold winter of 2020-2021, notably in Texas, again raises the question of how to secure reliable energy supplies during the politically desired transition.

## European Union Coal Market in 2020

Hard coal production in the European Union fell to 56.5 million tonnes in 2020 (8.5 million tonnes or 13.1% lower than in 2019), this being a much larger relative production fall than seen at the global level. Coal imports, including into the UK, were heavily depressed at 93.3 million tonnes, a massive 29.9% lower than in 2019. Steam coal demand suffered as less coal was used for power generation due to the COVID-19 crisis, low fossil gas prices and high EU ETS allowance prices. For the same reasons, lignite production fell by 20.6% to 244.3 million tonnes in 2020 compared with 2019.

Lignite production in **Bulgaria** fell 20.4% in 2020, compared with 2019, to 22.3 million tonnes. Mini Maritsa Iztok EAD (MMI), a subsidiary of the state-owned Bulgarian Energy Holdings EAD, is by far the country's largest lignite producer, supplying three nearby power plants in southeast Bulgaria

## US energy policy under President Biden

The US is the world's second-largest energy consumer after China, and the third-largest coal producer after China and India, at 639 million tonnes in 2019. Elected in November 2020, US President Joe Biden plans to "build back better" with clean energy, although the exact shape of future US energy policy depends on co-operation with the US Congress where the Senate is finely balanced.



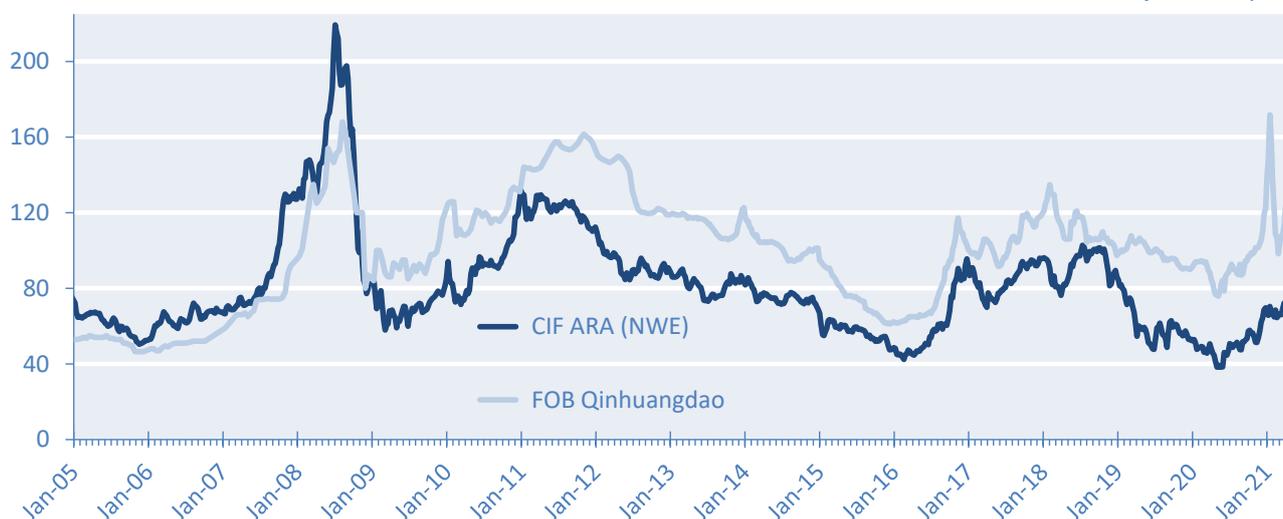
President Biden re-joined the UNFCCC Paris Agreement "on day one in office", so 20 January 2021, to put the country on an "irreversible path" to achieve net-zero emissions by 2050, he said. As the agreement's targets are voluntary, President Obama did not consider it a legally binding treaty and so joined by an executive order that President Trump rescinded. Hence, Biden re-joined by executive order, without reference to the Senate.

that generate around 45% of the country's electricity: one owned by ContourGlobal, one by AES and the state-owned TPP Maritsa East 2. According to accounts filed by TPP Maritsa East 2 EAD, more than half the power plant's operating costs cover the purchase of EU ETS allowances, the cost of these being more than the combined costs of fuel and labour. As such, the company is heavily loss making.

In the **Czech Republic**, hard coal production fell by 38% in 2020 to 2.1 million tonnes, including coking coal production of just 1.0 million tonnes despite demand from the steel industry. OKD, the only hard coal producer, closed Darkov and ČSA mines

US\$/tonne

**Steam coal import prices** at ARA ports in northwest Europe (NWE) & Qinhuangdao port in China, 2005-2021  
Source: IHS McCloskey Coal Report



at the end of February 2021, while its remaining ČSM mine is expected close in 2022. Hard coal imports fell 5.2% compared with 2019 to 3.3 million tonnes. Brown coal production fell 21.3% to 29.5 million tonnes in 2020, mostly supplied for power generation. In August 2020, Sokolovská uhelná (SUAS) decommissioned its IGCC syngas plant, mainly due to high EU ETS allowance prices. Meanwhile, in December 2020, Sev.en Energy acquired the 1 000 MW Počerady brown coal-fired power station from ČEZ.

Total energy consumption in **Germany** fell by 8% in 2020 compared with 2019, over 80% from conventional sources and almost 30% from indigenous sources, predominantly renewable energy sources. The COVID-19 pandemic reduced power demand, especially during the period from April to July 2020, but lignite power demand was also affected by favourable weather for wind and solar PV power generation, the transfer of lignite-fired power plant units to a safety standby reserve, unplanned outages, shifts in the competitiveness of lignite versus fossil gas, and high EU ETS allowance prices. As such, German lignite production fell in 2020 to 107.4 million tonnes (-18.2%). Lignite and hard coal – all imported – accounted for 23.6% of total power generation in 2020. Since September 2020, lignite demand has returned to pre-pandemic levels or above, with a strong recovery in the first three

months of 2021, up 24.6% on 2020, although production has not returned to 2019 levels.

In **Greece**, lignite production from mines owned by the Public Power Corporation (PPC) almost halved in 2020, falling by 49% to 13.1 million tonnes. Small producers added 0.8 million tonnes. Power generation from lignite was 5.7 TWh, accounting for just 11.4% of total generation on the interconnected system (excluding many islands), compared with over 50% back in 2010. The higher prices of EU ETS allowances and environmental restrictions on older lignite units, as well as greater electricity imports and growth in fossil gas-fired generation, have driven the decline in lignite use. PPC plans to decommission all operating units by 2023 and run the new 660 MW Ptolemais V on lignite until mid-decade.

Estimates for 2020 show that indigenous power production in **Hungary** met three quarters of total supply including imports, with lignite accounting for 8.7%. Lignite production in 2020 was 10.5% less than in 2019, at 6.1 million tonnes, and was mainly used at the state-owned Mátra power plant in northeast Hungary which remains important for security of electricity supply in the region, at least until 2025 when grid improvements are expected to be completed. Industry restructuring will then mean replacing the lignite units at Mátra with advanced power generation technologies.



In **Poland**, Europe’s largest hard coal producer, output totalled 54.4 million tonnes in 2020, a fall of 11.7% compared with 2019. Hard coal exports from Poland rose 19% to 4.4 million tonnes as the closure of coal mines in the Czech Republic created a higher demand for Polish coking coal. At the same time, imports of hard coal into Poland decreased 23% from 16.7 million tonnes in 2019 to 12.8 million tonnes in 2020, with Russia taking a 73% share. Electricity generation from hard coal fell by 8.5% in 2020 to 70.4 TWh, while overall electricity demand fell by 2.0% to 171.0 TWh in 2020 compared with 2019. Imports of electricity grew significantly, by 24.9% to 13.3 TWh. Output from lignite-fired power plants also fell, by 8.3% to 38.3 TWh, meaning that coal and lignite together accounted for a 69% share of total generation in 2020, down from 72% in 2019. In 2020, lignite production was 46.0 million tonnes, a drop of 8.6% compared with 2019. The smallest lignite mine, Adamów, was closed in 2020, leaving the Bełchatów, Konin and Turów mines.

The COVID-19 crisis hit the energy sector in **Romania** with overall power production down by 4 TWh and lignite production by 6.7 million tonnes or 30.7% to 15.0 million tonnes as the country moved from a net exporter of electricity to a net importer. Romgaz postponed the commissioning of a new 450 MW gas-fired power plant until June 2021 while aid to Complexul Energetic Oltenia was notified to the European Commission who proceeded to open an in-depth inquiry. SN Nuclearelectrica halted negotiations with China

General Nuclear Power Corporation for the construction of two new nuclear power plants and the Romanian government instead signed an agreement with the US government on co-operation to build new units at Cernavodă.

In **Slovakia**, coal production fell by one third compared with 2019 to 980 thousand tonnes in 2020. The government has agreed a coal phase-out by 2023, covering both mining and power generation. Hornonitrianske bane Prievidza (HBP) is thus preparing projects for the revitalisation of its former mining sites. In December 2020, EP Power Europe had to temporarily restart the 110 MW coal-fired Vojany plant on hard coal imported from Russia and Ukraine.

The only operating lignite mine in **Slovenia** is owned by Premogovnik Velenje d.o.o. – a subsidiary of the state-owned utility, Holding Slovenske elektrarne d.o.o. (HSE). In 2020 and bucking the trend seen elsewhere in the EU, lignite production grew by 1.0% in Slovenia to 3.2 million tonnes. Lignite is supplied to TEŠ unit 5, one of the most modern power plants in Europe.

### Coal Prices

Steam coal prices remained low for almost all of 2020 due to an economic contraction caused by the COVID-19 pandemic. In the second quarter, regional benchmark prices fell to lows not seen in many years: below 40 US\$/tonne in Europe and below 50 \$US/tonne in Asia. Yet by year end,

**Baltic Dry Index (BDI) 2005-2021**

Source: Baltic Exchange Information Services Ltd.



prices had recovered to close to 70 US\$/tonne in Europe and 90 US\$/tonne in Asia as fossil gas prices almost quadrupled and coal supplies from Colombia were disrupted due to a long strike at Cerrejón coal mine. The ongoing tensions between China and Australia, including the unofficial restrictions on coal imports, as well as early signs of inflation make for an uncertain steam coal market outlook.

The last quarter of 2020 was a volatile period for coking coal, with prices rising sharply to reach 140 \$US/tonne before falling to 98 \$US/tonne in November. Whereas the early 2020 fall in prices was driven by a slowdown in the steel industry due to the COVID-19 pandemic, the November price decline came when the economy was recovering, reflecting uncertainties in Australia-China coal trade. Domestic coking coal prices in China moved higher and Chinese companies switched to supplies of coking coal from Canada, Mongolia, Russia and the US.

### Freight Rates

Freight rates, reflecting the general macro-economic situation, collapsed early in 2020 to below US\$ 3/tonne for the formerly important Richards Bay to Rotterdam route as the pandemic struck. The Baltic Dry Index (BDI) averaged 1 068 in 2020 – 20% lower than in 2019 and ranging from 393 in May to 2 097 in October. The index is a weighted composite of Capesize (40%), Panamax (30%) and Supramax (30%) average time-charter

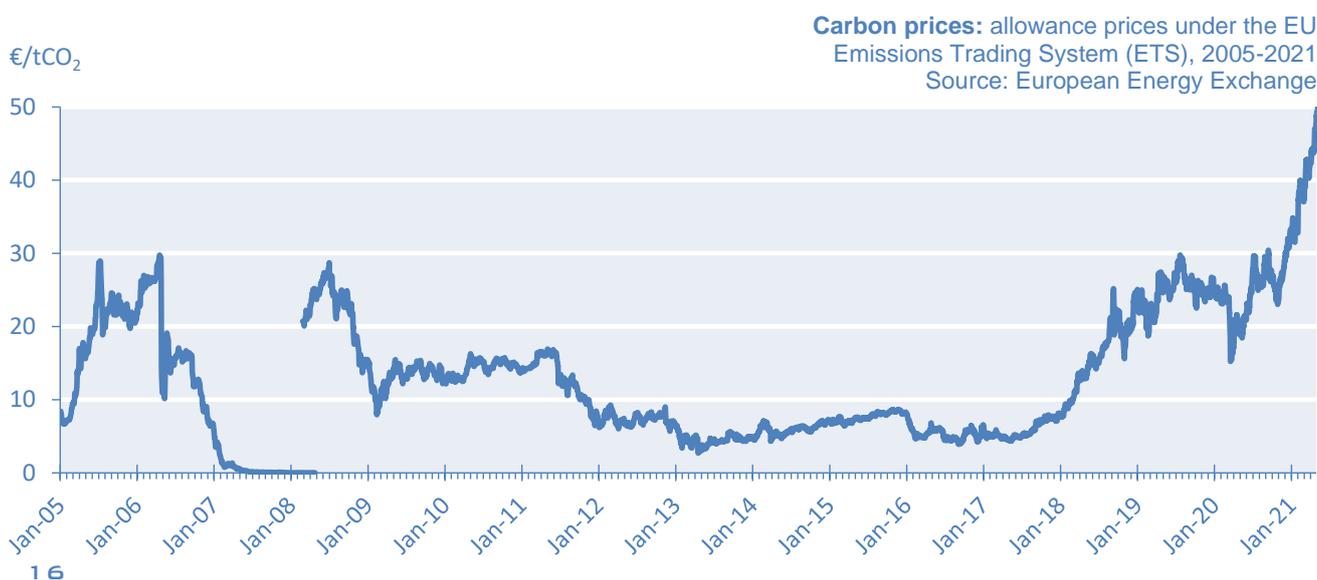
rates and is reported as a proxy indicator for the dry bulk shipping market. Rates have rebounded sharply with increasing economic activity such that the BDI reached a ten-year high of over 3 000 at the end of April 2021.

The total combined fleet capacity of all dry bulk vessels stood at 893 million dead-weight tonnes (dwt) in December 2020, with Panamax and Capesize carriers accounting for the greatest share of this total, followed by Handymax and Handysize. The newbuild orderbook declined to a historically low level of just 6.1% of capacity, the lowest in almost thirty years, reflecting uncertainties over the future market outlook and doubts on whether new, low-emission vessels can be developed.

The International Maritime Organization greenhouse gas (GHG) strategy, adopted in 2018, sets ambitious targets to reduce the carbon intensity of shipping by 40% by 2030, and to halve GHG emissions from shipping by 2050, both compared with 2008. There are no commercially available technologies to achieve the 2050 target.

### Carbon Prices

Allowance prices under the EU emissions trading system (ETS) began 2020 at 25 €/tCO<sub>2</sub> and fell, in line with reduced economic activity, to end the first quarter below 20 €/tCO<sub>2</sub>. Prices then began an upward trend, breaking through the 30 €/tCO<sub>2</sub> ceiling to reach historic highs, ending 2020 at



33 €/tCO<sub>2</sub>. The unweighted annual average allowance price in 2020 was 25 €/tCO<sub>2</sub>. In 2021, this upward trend has continued, with allowance prices hitting 50 €/tCO<sub>2</sub> at the beginning of May: equivalent to a 200% royalty tax on EU coal production. A political driver for this price development was the September 2020 proposal from the European Commission to set a new 55% GHG reduction target for 2030, up from 40%. This was agreed with member states and the European Parliament in April 2021.

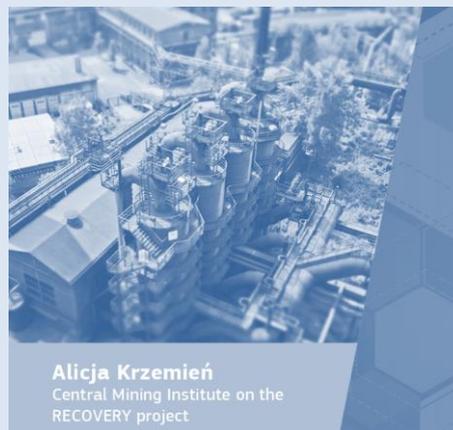
Early in 2020, some had called for a market intervention as EU emission allowance prices fell. Now, with prices that make using coal uneconomic, there are calls to ban speculators from the market. However, the introduction of the market stability reserve (MSR) in January 2019 complicates the picture. While some major players buy allowances from the market only when they need to surrender them to cover their previous year’s emissions, as required under the EU ETS Directive, others have stated they are fully hedged out to 2030.

Hedging operations add to the “total number of allowances in circulation” (TNAC), even though they are held to cover *future* emissions, not the *past* emissions used in MSR calculations. As such, the aggregate effect of long-term hedging forces the MSR to repeatedly withdraw allowances from a market that always appears to be in surplus. This means too few allowances enter the market via auctions to meet current demand from those who wish to cover their previous year’s emissions. Prices rise and eventually destroy demand, unless those with hedging positions sell and return to the market the allowance supply assumed in MSR calculations.

The EU ETS plus MSR is an unstable system because its legal basis did not foresee the impact of long-term hedging positions beyond one year which, in aggregate, mean the market always appears to have “surplus” allowances. It is legitimate hedging, not speculation, that is now determining the fate of coal power plant operators in poorer member states who, despite their lower purchasing power, must pay the same high carbon price.

## Coal Regions in Transition Platform grows stronger

Since 2017, the Coal Regions in Transition Platform (CRiTP) initiative has addressed the negative impacts on coal communities, promising a “just transition” that leaves no one behind. Coal is still mined in thirty-one regions across eleven EU member states, providing around 230 000 jobs and 18% of EU electricity in 2019. The CRiTP initiative – now part of the Just Transition Platform – attracts good input from the many stakeholders who want to exchange knowledge and ideas, as well as benefit from the technical assistance offered by the full-time secretariat.



The Commission hopes to mobilise at least €100 billion over the period 2021-2027 in the most affected regions. Behind this headline figure is the Just Transition Fund which, at €17.5 billion, is considered inadequate in a report published on 22 July 2020 by the European Court of Auditors. EURACOAL members continued to actively support the CRiTP in 2020 with innovative project proposals and research work such as the RECOVERY project presented by our Technical Research Committee chair, Prof. Alicja Krzemień.

Every challenge and region requires context-specific solutions. But what is clear is that we need to find solutions that come from within the regions and support circular economy as much as possible.

Initiative for coal regions in transition  
Supporting a just transition

## COMMITTEE ACTIVITIES: Technical Research Committee

*Prof. Alicja Krzemień, Chairwoman*

*The Technical Research Committee is the longest-established of the EURACOAL committees, having met regularly since 1956. The committee provides networking opportunities for EURACOAL members and others interested in submitting proposals to research programmes supported by the European Union. In addition, it advocates for favourable European policies towards coal-related research.*

The Technical Research Committee met twice in 2020, on 29 June and 7 December, both as online video meetings. The policy matter of most interest to the Committee during these meetings concerned the European Commission's proposal to modernise the EU Research Fund for Coal and Steel (RFCS), this fund being the only means to support public, coal-related RTD at the EU level. The proposed Modernisation Package would see the assets of the "European Coal and Steel Community in liquidation" (ECSC i.L.) opened up and modifications to the RFCS legal basis. This had become necessary due to the very low interest rate earned on the €1.6 billion assets under management by the European Commission on behalf of member states: 27.2% dedicated to coal and 72.8% to steel. Of direct impact on EURACOAL members were proposed changes to the RFCS technical guidelines – a legal document that describes the broad areas of coal- and steel-related research of ongoing interest to EU member states.



Carlos Fernández Alvarez, Senior Energy Analyst, International Energy Agency presents the agency's latest coal market report, 28 January 2020, Brussels

Once tabled by the Commission in July 2020, EURACOAL informed MEPs of the Modernisation Package and its importance to the coal sector. This effort was supported by a EURACOAL position paper published in August 2020 with input from members and making good use of the results from the CoalTech2051 project (see box). The chair of the European Parliament Committee on Industry, Research and Energy (ITRE), MEP Silviu Buşoi who acted as rapporteur, prepared a well-balanced report, including many useful amendments to improve the Commission's proposal, especially amendments to the technical guidelines which EURACOAL had addressed in its position paper.

On 14 January 2021, MEPs debated the proposal and draft report at first reading. MEPs tabled further amendments before the 20 January deadline and a compromise version of the report passed a vote in the ITRE committee by 60 votes to 14. Then, on 18 May 2021, the report was voted in a Plenary session of the European Parliament where it passed with a comfortable 75% majority. Last-minute amendments tabled by the Greens/EFA political group were rejected. A decision in the Council of the EU is now awaited.

If the Modernisation Package proceeds as expected to formal adoption, then a "big ticket" RFCS call is feasible with a value of €19.3 million for coal project(s). In addition, an annual €40 million RTD call worth €10.9 million for coal-related research will support the energy transition demanded under the European Green Deal communication which sets the Commission's political agenda for a modern, clean, circular, resource-efficient and climate-neutral economy.

To keep industry and civil society stakeholders informed, a RFCS Coal Advisory Group (CAG) online meeting was hosted by the Commission on 20 April 2020. This was followed by a joint CAG-SAG meeting bringing in the steel sector on 17 July 2020 during which the Commission presented its proposal to modernise the RFCS under a new legal basis. The proposal presented had just received consent during the required interservice consultation between European Commission Directorate-Generals. At the same time, member state representatives sitting on the RFCS Coal and Steel Committee considered the proposal.

The first initiative of the Technical Research Committee in 2020 was a EURACOAL workshop on 3-4 March in Katowice, just days before much of Europe entered long periods of lockdown in response to the COVID-19 pandemic. Forty-seven participants brought forty-two new research ideas to the table on topics of interest to a coal industry in transition. Under the leadership of Prof. Prusek, staff from the Central Mining Institute (GIG) organised a very successful workshop. Ten outline proposals were clustered on coal conversion, advanced monitoring/sensors, robotics, mine water management, climate impacts, mine site restoration, waste dump reclamation and coal regions in transition. Several of the proposals initiated during the workshop went on to win funding under the RFCS research programme following a competitive call.

Towards the end of the year, on 8 December 2020, the European Commission hosted the 21<sup>st</sup> meeting of the RFCS Coal Advisory Group to take the group’s advice, including on the research priorities for the RFCS 2021 call. EURACOAL recommended “*proposals addressing innovative technologies supporting coal regions in transition in line with the objectives of the Green Deal*”.



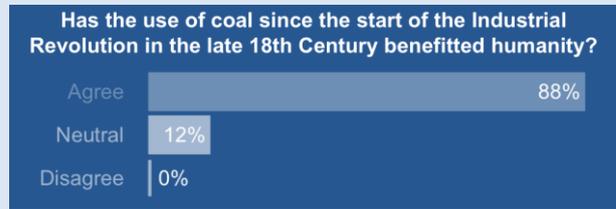
**European Clean Hydrogen Alliance**



Finally, in 2020, EURACOAL joined the European Raw Materials Alliance and the European Clean Hydrogen Alliance which both offer members new opportunities. The European Clean Hydrogen Alliance places a new emphasis on developing an EU hydrogen industry and infrastructure, with estimated investments of €470 billion by 2050. While the priority is “green hydrogen” produced from renewables, low-carbon hydrogen and carbon capture and storage (CCS) will also be supported via cross-sector, cross-border partnerships.

### CoalTech2051 on European coal research in light of EU policy objectives to 2050 and future global trends in coal use

This RFCS project completed in 2020 with a final report and brochure on “Changing the face of coal – a strategy for future coal-related RTD in the EU”. The third and final workshop – involving international colleagues from China, Japan and the USA, including US Deputy Assistant Secretary of State, Lou Hrkman – was held in Brussels on 28 January 2020 at the Renaissance Hotel with ninety registered participants. A comprehensive workshop report was prepared and published on the CoalTech2051 website with results from the interactive Q&A sessions. The final project working group meeting on 27 April 2020, held by necessity as an online video conference, attracted sixty scientists, engineers and government officials from around the world, including Bosnia and Herzegovina, Botswana, Bulgaria, Germany, India, Poland, Russia, South Africa and Ukraine.



Looking ahead, the project team recommends that the EU Research Fund for Coal and Steel should support an ongoing collaborative research programme with annual proposal calls for industrial research to: support the just transition of the coal sector and regions, improve health and safety, and minimise the environmental impacts of the coal sector in transition.

In addition, the European Commission should consider financing some “big-ticket” projects that help the coal industry navigate the energy transition and sector coupling. Within the EU, a growing surplus of renewable energy and policy aims under the European Green Deal mean that novel approaches to energy storage, gasification, circularity and CCUS will all have roles to play in moving the coal sector forward into new areas.

## EURACOAL ACTIVITIES: serving the interests of the European coal industry

The European Association for Coal and Lignite – EURACOAL – is the umbrella organisation of the European coal industry. EURACOAL evolved in 2002 from the European Solid Fuels’ Association – CECSO – after the expiry of the Treaty establishing the European Coal and Steel Community.

**EURACOAL** has 22 members including national coal associations, importers associations, research institutes and individual companies. Members come from 12 countries: Bosnia-Herzegovina, the Czech Republic, Germany, Greece, Hungary, Poland, Romania, Serbia, Slovakia, Slovenia, Spain and Ukraine.

**EURACOAL’s** mission is to highlight the importance of coal to security of energy supply in the EU, to energy price stability, to economic added value and to environmental protection. EURACOAL seeks to be an active communicator, with the aim of creating an appropriate framework within which the European coal industry and coal consumers can operate.

**EURACOAL** has three committees:

- Energy and Environment Policy Committee
- Market Committee
- Technical Research Committee

**EURACOAL** is officially represented in the European Commission RFCS Coal Advisory Group (DG Research & Innovation).

**EURACOAL** participates in the European Commission Social Dialogue (DG Employment, Social Affairs & Inclusion).

**EURACOAL** supports the *Coal Regions in Transition Platform*, an initiative of the European Commission led by DG Energy.

**EURACOAL** co-operates with Members of the European Parliament in the cross-party European Round Table on Coal and European Energy Forum.

**EURACOAL** organises meetings and workshops, and participates in projects, e.g. CoalTech2051.

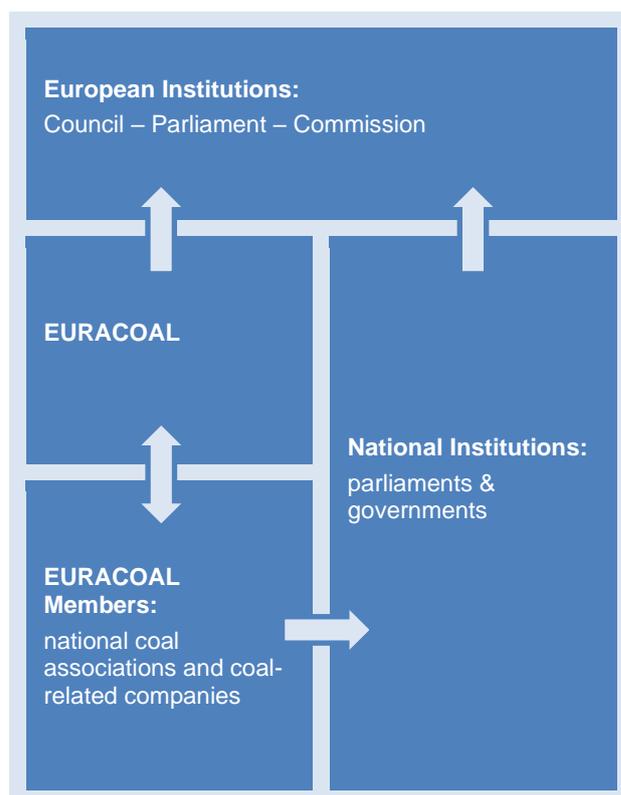
**EURACOAL** informs and works with many stakeholders, notably:

- European Commission (DG Competition, DG Energy, DG Research & Innovation and DG Employment, Social Affairs & Inclusion)
- European Parliament (ITRE, ENVI and REGI committees)
- European Economic & Social Committee (CCMI – Consultative Commission on Industrial Change)
- International Energy Agency
- World Coal Association

## FINANCIAL REPORT FOR 2020

Total income (a):	388 071 €
membership fees:	354 000 €
contributions, RFCS grant & other:	34 071 €
Total operating costs & write-downs (b):	375 277 €
Net surplus (a – b):	12 794 €

Accounts for 2020, prepared on the basis of Belgian accounting standards, were audited by RSM InterAudit. The income statement shows a net surplus of €12 794 for the year and total assets amounted to €548 936 at year end.



<b>General Assembly</b> coal producers, importers, traders, coal-based power utilities, R&D institutes	
<b>Executive Committee</b> discussions, opinion forming, work programme, lobbying positions	
<b>President</b> Mr. Vladimír Budinský – ZSDNP	<b>Vice Presidents</b> Ms. Wioletta Czemieli-Grzybowska – PPWB Dr. Lars Kulik – DEBRIV
<b>Senior Vice President</b> Mr. Tomasz Rogala – PGG	
<b>National Delegations</b> 22 members from 12 countries	<b>Committees &amp; Chairs</b> <b>Energy and Environment Policy Committee</b> Dr. Thorsten Diercks – DEBRIV <b>Market Committee</b> Ms. Anetta Piszczek – Węglokoks S.A. (GIPH) <b>Technical Research Committee</b> Prof. Alicja Krzemień – GIG
<b>Brussels Secretariat</b> Secretary-General: Mr. Brian Ricketts Policy Manager: Mr. David Bonson-Hesener	

## EXECUTIVE COMMITTEE

Member	Country	Affiliation	as at 1 June 2021
Ing. Vladimír BUDINSKÝ	Czech Republic	President of EURACOAL and President of ZSDNP – Zaměstnavatelský svaz důlního a naftového průmyslu (Employers' Association of Mining and Oil Industries)	
Mr. Tomasz ROGALA	Poland	Senior Vice President of EURACOAL and Chairman of the Board, PGG – Polska Grupa Górnicza S.A.	
Ms. Wioletta CZEMIEL-GRZYBOWSKA	Poland	Vice President of EURACOAL and President of the Management Board, PGE Górnictwo i Energetyka Konwencjonalna S.A.	
Dr. Lars KULIK	Germany	Vice President of EURACOAL and Chief Technology Officer – Lignite, RWE Power AG	
Mr. Munever ČERGIĆ	Bosnia-Herzegovina	Chief Executive, RMU "Banovići" d.d. Banovići	
Mr. Yuriy CHEREDNYCHENKO	Ukraine	General Director, DTEK Dobropolyeugol	
Ms. Lacramioara DIACONU	Romania	Director for Strategy, Complexul Energetic Oltenia S.A. (Oltenia Energy Complex)	
Dr. Armin EICHHOLZ	Germany	Chairman of the Board, MIBRAG mbH	
Dr. Renata EISENVORTOVÁ	Czech Republic	European Affairs Manager, Sev.en Energy Group	

Ms. Boglárka BÁNNÉ dr. GÁL	Hungary	President of Borsod-Abaúj-Zemplén County Government
Dipl.-Ing. Uwe GROSSER	Germany	Member of the Board – Director of Mining, LEAG – Lausitz Energie Bergbau AG & Lausitz Energie Kraftwerke AG
Mr. Milan JAKOVLJEVIĆ	Serbia	Head of Mining Efficiency Improvement and Environmental Protection, EPS – Elektroprivreda Srbije (Electric Power Industry of Serbia)
Ing. Rastislav JANUŠČÁK	Slovak Republic	Director of Strategy and External Affairs Department, HBP – Hornonitrianske bane Prievidza, a.s.
Dr. Nikolaos KOUKOUZAS	Greece	Director of Research, CERTH/CPERI – Chemical Process & Energy Resources Institute
Dr. Roger MIESEN	Germany	Chief Executive Officer & Chief Operating Officer, RWE Generation SE
Mr. Janusz OLSZOWSKI	Poland	President, GIPH – Górnicza Izba Przemysłowo-Handlowa (Mining Chamber of Industry and Commerce)
Mr. Rafał PATYK	Poland	Director of Investor Relations, PGG – Polska Grupa Górnicza S.A. (Polish Mining Group)
Prof. Stanisław PRUSEK	Poland	Director, GIG – Główny Instytut Górnictwa (Central Mining Institute)
Dr. Janez ROŠER	Slovenia	General Director, Premogovnik Velenje, d.o.o. (Coal Mine Velenje)
Dr. Christos ROUMPOS	Greece	Head of Mining Engineering Unit, PPC – Public Power Corporation S.A.
Mr. Ildar SALEEV	Ukraine	Chief Executive Officer, DTEK Energy
Mr. Alexander SELISCHEV	Ukraine	Business Development Director, DTEK
Ing. Radim TABÁŠEK	Czech Republic	Executive Director, OKD, a.s.
Prof. Dr. rer. oec. Kai VAN DE LOO	Germany	Scientific Director Reactivation and Transition, Technische Hochschule Georg Agricola (Technical University Georg Agricola)
Mr. Artur WASIL	Poland	President of the Board, Lubelski Węgiel „Bogdanka” S.A.
Mr. Michael WEBERINK	Germany	Managing Director, bsn – Branchenverband Steinkohle und Nachbergbau e. V. (Association for Hard Coal and Post-Mining)
Mr. Sławomir WOCHNA	Poland	President, PPWB – Porozumienie Producentów Węgla Brunatnego (Confederation of Polish Lignite Producers) and Director – Kopalnia Węgla Brunatnego Turów, PGE GiEK S.A.



## EURACOAL MEMBERS & OBSERVERS: an international partnership

Country	Member Association / Company	as at 1 June 2021
Bosnia-Herzegovina	RMU "Banovići" d.d. Banovići	
Bulgaria	MMI – Mini Maritsa Iztok EAD	
Czech Republic	ZSDNP – Zaměstnavatelský svaz důlního a naftového průmyslu (Employers' Association of Mining and Oil Industries)	
Germany	DEBRIV – Deutscher Braunkohlen-Industrie-Verein e.V. (German Association of Lignite Producers)  DMT GmbH & Co KG  bsn – Branchenverband Steinkohle und Nachbergbau e. V. (Association for Hard Coal and Post-Mining)	
Greece	PPC – Public Power Corporation S.A.  CERTH/CPERI – Chemical Process and Energy Resources Institute	
Hungary	Borsod-Abaúj-Zemplén County Government	
Poland	GIPH – Górnictwa Izba Przemysłowo-Handlowa (Mining Chamber of Industry and Commerce)  PPWB – Porozumienie Producentów Węgla Brunatnego (Confederation of Polish Lignite Producers)  PGG – Polska Grupa Górnictwa S.A. (Polish Mining Group)  Lubelski Węgiel „Bogdanka” S.A.  GIG – Główny Instytut Górnictwa (Central Mining Institute)  KOMAG Institute of Mining Technology	
Romania	PATROMIN – Asociația Patronală Minieră din Romania (Mining Employers Association of Romania)	
Serbia	EPS – Elektroprivreda Srbije (Electric Power Industry of Serbia)	
Slovak Republic	HBP – Hornonitrianske bane Prievidza a.s.	
Slovenia	Premogovnik Velenje d.o.o.	
Spain	Geocontrol S.A.  SUBTERRA Ingeniería S.L.	
Turkey	TKİ – Turkish Coal Enterprises	
Ukraine	DTEK  Donetsksteel	

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July 2021

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Printed by Media Process s.a., Brussels