



The National Coal Council
Power for America from America

NATIONAL COAL ADVISORY – AUGUST 2013

EYES ON THE HORIZON

Planning for the Future

**The health of the eye seems to demand a horizon.
We are never tired, so long as we can see far enough.**
Ralph Waldo Emerson

I used to skydive as a hobby. Being female in a predominantly male sport I often found myself crammed in to the back of the little Cessna airplane. The pilot would first drop off the bigger, heavier guys, one or two at a time and then steeply bank the plane to return to the drop point.

While the pilot was banking, I'd be crawling to the front of the plane with 20 pounds of equipment on my back and air rushing through the open door. Needless to say, it was a tad disorienting. I remember how calming it felt when the horizon eventually became horizontal. The world stabilized when I could look out and see the horizon.

It's a very disorienting time for the U.S. coal industry these days. Uncertainty associated with markets and public policy has seemed to set the horizon on end. Re-orienting the horizon involves looking ahead, defining and planning for our industry's future.

It's with that in mind that a number of NCC representatives convened in mid-July to conduct a Strategic Visioning Session. Our objective was to chart a future course for the NCC, taking into consideration various social, technological, economic, environmental and political drivers of change. Among the questions we addressed:

- What is the most distinctive value that NCC can provide to its members and the coal industry?
- What can be done to improve the quality of NCC studies and implementation of study recommendations?
- What activities or services would enhance the value of the NCC to its members and the coal industry?

As an advisory group to the U.S. Secretary of Energy, NCC offers its members the distinctive opportunity to provide input to Secretary Moniz on policy matters related to the coal industry. This input is offered through NCC studies as well as through meetings hosted by

NATIONAL COAL COUNCIL
FALL 2013 MEETING
~ RECEPTION ~
OCTOBER 31ST 6-8 PM
~ FULL COUNCIL MEETING ~
NOVEMBER 1ST 9 AM-NOON
WASHINGTON COURT HOTEL
WASHINGTON, DC
Registration Details Forthcoming

NCC with DOE representatives.

President Obama and Secretary Moniz have expressed support for an All-of-the-Above energy strategy; NCC can help define coal's role in AOTA. Addressing U.S. economic, energy and environmental security issues also calls for increased liaison between industry, academia and the national labs to advance technological solutions to policy issues. NCC's broad-based membership and the expertise that membership represents make NCC uniquely suited to address these needs.

NCC LEADERSHIP

John Eaves, NCC Chair

President & CEO, Arch Coal

John Long, NCC Vice Chair

COO, Connemara Ltd.

Fred Palmer, Coal Policy Chair

Senior VP, Peabody Energy

Executive Committee

Stevan Bobb, Group Vice Pres.
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PPL Energy Plus

Jerry Hollinden, Consultant
Joe Hopf, Mgr. Coal Trading
PPL Energy Plus

Mike Sorensen, Sr. Mgr. Fuel
Tri-State G&T

Michael Sutherlin, CEO/Pres.
Joy Global Inc.

Kathy Walker, President
Elm Street Resources

Ex Officio

Mike Mueller, President

Ameren Energy Fuels & Svcs
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Finance

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Dominion Resources
Robert Bibb, PE

Bibb Engineers, Architects
Paul Gatzemeier, CBCC

Kathy Walton, Principal
The Basic Industries Group

Communications

CHAIR ~ David Surber
Environmental TV Journalist

NCC Staff

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EYES ON THE HORIZON (CONTINUED)

PROMOTING THE VALUE IN EXISTING NCC STUDIES

NCC's existing studies contain a wealth of valuable information for addressing current policy directives. In the near term, we'll be highlighting findings and recommendations on topical subjects from existing NCC reports in various formats ~ including fact sheets, articles and briefings.

Energy issues have gained increased visibility and importance with public policy makers, media and community leaders. In recognition of this, we'll be making greater use of our website to feature study data and results, and we'll be scheduling meetings with key stakeholders to educate them about our NCC information assets.

We're also planning to post all of our studies up on the NCC website. We currently have nine of our reports up on the site (2001-2009) under the "Information/Reports" tab. We've prepared over 30 reports since our inception in 1984; we recognize the need to make these reports widely available ~ even those produced before the Internet age.

EXPANDING NCC COMMUNITY & OUTREACH

To enhance our outreach efforts, NCC will be developing a database of industry stakeholders. We will use this resource to expand the distribution of our study results and increase participation in our studies and meetings.

At the end of this year, NCC will be undergoing its biennial re-chartering. For the 2014-2015 term, we'll continue to include among our membership a diverse group of industry, NGO, academic and government representatives with an interest in coal's future. We'll seek out members that are able and willing to support the NCC, both financially and through their active participation in the organization's studies, outreach and education initiatives.

We plan to reinvigorate our recruitment efforts to ensure that our membership represents a broad cross-section of coal industry interests. I'm putting together a member prospects list and would welcome your suggestions on potential new members for our consideration.

ENHANCING THE VALUE OF FUTURE NCC STUDIES

Our Strategic Visioning group also discussed prospective study topics that would be topical, timely and of importance to DOE and Secretary Moniz, as well as to the coal industry. In an effort to enhance our responsiveness to the Secretary's needs, we hope to begin conducting more frequent, focused and timely studies. Ideally, these will take less time to prepare and result in a more robust compendium of resources on topical issues.

P.S. I'm still eager to hear your comments and suggestions on the new newsletter format. Let me know what we can do to make it better.

NCC members are encouraged to submit suggestions for future study topics. In the meantime, we have begun working with DOE to identify a topic for our next report. I'll keep you posted on those developments.

NCC ADMINISTRATION & MEMBER DUES

Administratively, we've been working to curtail expenses, improve member communications and collect unpaid dues for 2013. If you've not yet paid your dues, we would greatly appreciate your doing so. We are a unique FACA group in that we do not receive funding from DOE to support our efforts. Your financial support enables us to do the important work of providing Secretary Moniz with timely advice on coal industry issues.

NCC FALL MEETING 2013

We've secured DOE's approval to host our next meeting on October 31st (reception) and November 1st (Full Council Meeting). Both events will be hosted at the Washington Court Hotel on Capitol Hill in Washington, DC. We hope that our move to Capitol Hill will encourage the attendance of more Congressional delegates and staff members at our events.

We're also working to improve our Full Council Meeting programs to provide timely information on critical industry issues. Your suggestions on topics and prospective speakers are welcomed.

We are finalizing details with the host hotel. NCC Administrative Assistant Pam Martin will have details out to you within the next few weeks regarding hotel reservations. In the meantime, please hold the dates of October 31st-November 1st.

THANK YOU!

If you have questions or comments regarding our Strategic Visioning efforts, please let me know. I'm excited about the vision we're developing for the future of the National Coal Council. Lots to do ~ all good stuff on the horizon!

Finally, I'd like to thank the members of our Strategic Visioning Team for their time and insights. Much appreciated gentlemen.

- Fred Palmer, Peabody Energy
~ Chair of the Strategic Visioning Session
- John Eaves, Arch Coal ~ NCC Chair
- John Long, Connemara Ltd. ~ NCC Vice Chair
- Chris Jenkins, CSX Transportation
- Rich Lopriore, PSEG Fossil LLC
- Jeff Wallace, Southern Company
- Mike Durham, ADA Environmental Solutions
- Bill Brownell, Hunton & Williams
- Larry Grimes, NCC Legal Counsel

Cheers ~Janet Gellici

jjgellici@NCC1.org

NCC REPORT FOCUS

Coal & Coal Technology Exports

Throughout its nearly 30 year history, the NCC has prepared more than 30 studies for the U.S. Secretary of Energy. This section of the National Coal Advisory features highlights from NCC studies of relevance to current industry and public policy issues. ~ Janet Gellici

On July 10, 2013, the U.S. and China agreed to work together to develop Carbon Capture Utilization and Storage (CCUS) technology, including implementing several large-scale, integrated CCUS demonstration projects in both countries. The initiative, which was developed by the U.S.-China Working Group on Climate Change, is expected to engage companies in the U.S. and China and to provide enhanced trade and commerce opportunities. [U.S.-China Climate Working Group Fact Sheet](#)

The importance of advancing emissions control technologies and to drive investments in them to reduce costs and enhance their utilization worldwide was underscored by a recent study lead by MIT on the impacts of domestic coal use in China. The study correlates a reduction in life expectancy with high levels of particulate emissions. [MIT Study on China Particulate Emissions Impacts](#) The study results emphasize the pressing need for deployment of modern coal-fueled power plants employing emissions control technologies that have been used in the U.S. for decades. It further suggests a significant international market demand for export of U.S. coal technologies ~ a topic which the NCC has reported on in two previously published reports:

- Improving International Competitiveness of U.S. Coal & Coal Technologies ~ June 1987
- The Export of U.S. Coal & Coal Technologies ~ November 1993

Both reports note the more obvious advantages for the U.S. of advancing export opportunities for coal and coal technologies, including reducing the trade deficit, enhancing domestic employment and increasing tax revenues. These benefits continue to provide valuable opportunities for the U.S. in light of the President's National Export Initiative <http://trade.gov/nei/> and Trans-Pacific Partnership [TPP Fact Sheet](#) negotiations currently underway.

Both reports provide details on the prospective export markets for U.S. coal and coal technologies. The 1987 report references the near doubling of world coal trade between 1973-1985 due to an increase in demand for steam coal for electricity generation. China is notably absent as a prospective coal importer in this report but is highlighted as a competitive coal exporter. By 1993, a mere 20 years ago, China is still not showing up as a major coal importer and there's no mention of India. My how times have changed!

What hasn't changed are the findings and recommendations from both reports related to the value of coal technology exports.

- Recommendation from the 1987 report ~ "Further funding by the U.S. government and private industry of research and development efforts for clean coal technologies will contribute to increased competitiveness of U.S. coal exports."
- Recommendation from the 1993 report ~ "The need for coal and coal-use technologies should be demonstrated. Increased use of coal can contribute significantly to the economic future of the world, and technologies are available to use coal cleanly and safely. The out-dated concept that coal use is inherently damaging to the environment should be dispelled with information on available conventional and advanced clean coal-use technologies. This message must be delivered convincingly worldwide."

The players have changed somewhat but the message remains the same ~ global deployment of advanced coal technologies will improve economic and environmental conditions throughout the world and here at home in the USA.

[Hard (paper) copies of these NCC reports are available through the NCC office.]

COAL RESOURCES

Department of Energy
www.doe.gov
Office of Fossil Energy

National Energy Technology
Laboratory
www.netl.doe.gov
Coal & Power Systems

Secretary Moniz's Reorganization of DOE, July 2013
[DOE Reshuffled ~ The Hill](#)
[Moniz Town Hall Video on Reorganization](#)
[New DOE Organizational Chart](#)

EIA's International Energy Outlook Release, July 2013
[CSIS Video Presentation by EIA's Adam Sieminski](#)
[IEO2013 Presentation Slides](#)

The Cloud Begins with Coal: Big Data, Big Networks, Big Infrastructure and Big Power ~ July 2013
An overview of electricity used by the global digital ecosystem
[Cloud Begins with Coal Report ~ Mark Mills](#)

USGS Report on U.S. potential to sequester 3 trillion metric tons of CO2
<http://www.usgs.gov/newsroom/article.asp?ID=3628>

U.S. Energy Sector Vulnerabilities to Climate Change and Extreme Weather ~ July 2013
[Energy Sector Climate Vulnerabilities Report](#)

EPA Administrator Gina McCarthy's Inaugural Speech Focuses on Climate, July 2013
[McCarthy at Harvard Law](#)

World Coal Association Magazine ~ including Greg Boyce, Peabody on 21st Century Coal
[Cornerstone Magazine #2](#)

A Summer Read "Gridlock"
Senator Byron L. Dorgan & David Hagberg
[Gridlock: A Cyber-Thriller](#)

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NCC Member Focus

Janos Beér is no stranger to members of the National Coal Council. He has been among the most active and longest standing members of NCC since his appointment in 1994. His pioneering contributions in the field of combustion science and technology have been a tremendous asset to the NCC in many, many studies. ~ Janet Gellici

Janos Beér is that rare combination of a gentleman and a scholar. His depth of knowledge on the subject of combustion science is exceeded only by his graciousness in imparting that knowledge to students, fellow scientists, industry associates, policy makers and anyone willing to listen closely and learn from this soft-spoken teacher.

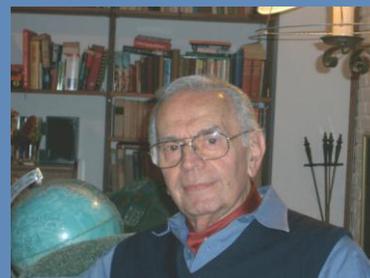
Janos earned economics and engineering degrees at the Technical University of Budapest (Hungary) in the 1940s. He achieved both his Ph.D. in 1960 and his D.Sc. (Tech) in 1968 from the University of Sheffield (England). He headed up numerous divisions at prestigious research facilities such as the International Flame Research Foundation in The Netherlands and the Dept. of Chemical Engineering and Fuel Technology at The University of Sheffield where he also served as Dean of Engineering.

From 1976 to 1993, Janos served as Professor of Chemical and Fuel Engineering and Director of the Combustion Research Facility at the Massachusetts Institute of Technology (Cambridge, MA), where is currently a Professor Emeritus. He is the author or co-author of over 300 technical and scientific papers and has served on various committees and advisory councils, including the UK Department of the Environment, the Scientific Advisory Committee for the Italian National Research Council and the Clean Coal Utilization in China Committee of the U.S. National Academy of Engineering.

Janos and his beloved wife of nearly 70 years, Marta, fled Hungary in November 1956 after Russian tanks crushed the 1956 Hungarian revolution. To learn more about Janos' meritorious efforts working with the Swedish Legation to rescue Jews during World War II click [here](#). His documents related to these efforts have been donated to the U.S. Holocaust Museum in Washington, D.C.



Janos Beér receiving the Washington Coal Club Lifetime Achievement Award 2011 from NCC Member Jackie Bird.



DR. JANOS MIKLOS BEÉR
PROFESSOR EMERITUS
CHEMICAL & FUEL ENGINEERING
MIT

Sampling of Honors & Awards

- Senior Fellow of the Institute of Fuel, London 1963
- Moody Award ~ ASME 1965
- Fellow Royal Academy of Engineering, UK 1979
- The Alfred Egerton Gold Medal, The Combustion Institute 1986
- Foreign Member Finnish Academy of Engineering, 1989
- Axel Axelson Johnson Medal Royal Swedish Academy of Engineering Science, presented by H.M. Carl XIV Gustaf, King of Sweden, 1995
- American Institute of Aeronautics and Astronautics Energy Systems Award, 1998
- Homer Lowry Gold Medal, U.S. DOE, presented by U.S. Secretary of Energy, 2004
- Knight's Cross of the Order of Merit of the Hungarian Republic, 2008



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COAL CURRENTS

Todd Cunningham, Contributing Editor



A brief survey of leading coal industry stories of the past month. Highlighted underlined text links to the cited articles.

CLIMATE CHANGE

President to Implement Climate Agenda

President Obama has begun what the AP called "the arduous task" of implementing his ambitious climate change agenda. The news service described it as "a complicated mix of rulemaking and federal permitting" centered on the first-ever limits on carbon dioxide emissions from existing power plants. The Environmental Protection Agency has sent a reworked proposal for emissions limits on new plants – not yet publicly released – to the White House, "essentially bowing to claims that the original rule was ill-conceived," the AP reported. But rules for regulating existing plants will be "a far trickier proposition," it added, in part because the President is invoking authority from the Clean Air Act, which has never been used for such a purpose.

White House Confident on Prospects

White House energy advisor Heather Zichal has expressed confidence that [EPA can finish its climate change regulations](#) for new and existing plants by 2016, the end of President Obama's second term. Speaking at an event hosted by the newspaper *POLITICO*, Zichal said the agency would reach out to the utility industry, the states and other stakeholders. She also traveled to Capitol Hill to brief Democratic lawmakers and seek support in selling it to the public. According to the newspaper *The Hill*, members of the Sustainable Energy and Environment Coalition told her it was important to highlight local efforts to mitigate climate change. Zichal agreed, indicating the administration would launch a task force to enhance cooperation between federal and local governments on climate efforts.

U.S., China to Cooperate on Technology

The United States and China, which together account for more than 40% of the world's coal usage, have [agreed to cooperate on development of technology](#) to capture carbon dioxide from power plants, *Bloomberg* reported. The agreement, concluded in Washington, D.C., specified large-scale, integrated demonstration projects to capture, utilize or store carbon dioxide. While calling China "an unlikely climate change partner," AP noted that from the U.S. perspective, reducing domestic greenhouse gases "will only go so far," with mounting global emissions apt to blunt the impact of what is done at home. "That's where China could play a critical role," as part of a global consensus for action rather than as a spoiler, it added.

ENVIRONMENTAL REGULATION

EPA Administrator Gets Senate Nod

Following months of delay, the Senate confirmed President Obama's nominee to head EPA. Gina McCarthy, who had served as assistant administrator in the agency's Office of Air and Radiation, was approved by a vote of 59-40, with opposition based in part on some lawmakers' denunciation of what they branded her support for the Administration's anti-coal policies. According to *The Hill* newspaper, the new EPA chief told staff members in a video message that the agency "has a clear responsibility to act now on climate change," adding that "We can make it happen – but we need all hands on deck." *The Hill* also reported that McCarthy's deputy, Janet McCabe, was [named as interim air quality chief](#).

For the past few years, Todd Cunningham has been authoring the policy updates section for the NCC newsletter. With this new version of *The National Coal Advisory*, NCC is pleased to give full acknowledgement and thanks to Todd for his contribution as author of the Coal Currents column. ~ Janet Gellici

Coal Currents (continued)

ENVIRONMENTAL REGULATION (continued)

SCOTUS May Hear Carbon Regs Challenges

The U.S. Supreme Court has been asked to hear challenges to EPA's carbon regulations from numerous stakeholders, and may decide whether to take the case this fall, *Megawatt Daily* reported. That decision "could rock the U.S. energy markets," the newsletter asserted. The publication acknowledged that the high court takes only a fraction of cases on which review is sought, but suggested that several factors could push this one forward. One is that four justices "vigorously dissented" from the ruling in a 1997 case that cleared the way for EPA to regulate carbon dioxide as a pollutant under the Clean Air Act; the court has a policy of taking a case if four members want to hear it, the newsletter indicated.

WV Mining Controversy May Go to High Court

A federal appeals court has denied rehearing of a case in which it allowed EPA to withdraw portions of a Clean Water Act permit for a mountaintop removal mining operation in West Virginia. The matter now [appears headed for the U.S. Supreme Court](#), according to the *West Virginia Record*. A three-judge panel of the U.S. Court of Appeals for the D.C. Circuit ruled against Mingo Logan Coal Company in April, citing "unacceptable adverse effects," and the full court declined en banc rehearing. According to the *Record*, one judge wrote that EPA's withdrawal of a specification of discharge sites after a permit had been issued by the Army Corps of Engineers was "unprecedented in the history of the Clean Water Act."

Republican AGs Sue EPA Over "Sue and Settle"

Republican attorneys general from a dozen states are taking EPA to court over the agency's legal approach with environmental groups. According to *The Hill* newspaper, the state officials, led by Oklahoma, are seeking to uncover whether the agency is using the legal tactic of "sue and settle," where environmental groups file a lawsuit for a missed deadline or other reason, and the regulators can choose to settle. According to the GOP officials, *The Hill* specified, the [EPA has acted in concert with the environmentalists](#) as a way to impose new regulations without letting states get involved. The newspaper reported that they pointed to instances where EPA filed a consent decree moving regulations forward the same day the lawsuits were filed.

ON CAPITOL HILL

Lawmakers Seek an End to "War on Coal"

A bipartisan group of 22 House members has written President Obama to urge abandonment of environmental policies harmful to the coal industry, *The Daily Caller* reported. The lawmakers noted that their prior characterizations of a "War on Coal" have been firmly denied by the White House and environmentalists. However, they asserted, the cumulative impact of administration actions – including continued mine permit delays, EPA regulations and annual cuts to Department of Energy fossil fuel R&D programs – leads to the conclusion that the goal is [the attempted systematic elimination of the use of carbon fuels](#), particularly coal. These efforts are producing dire impacts in coal-producing areas, and will prove disastrous if pursued, the letter cautioned.

House OKs Bipartisan Coal Ash Measure

The House of Representatives has approved a bill to allow states greater control of regulating the byproduct of coal-fired power plants, coal ash. According to *Bloomberg*, the measure, introduced by Rep. David McKinley (R-WV), would protect recycling of the material, which is used in concrete, cement, drywall and a range of other products. It would prevent EPA from classifying it as hazardous, which would entail strict storage conditions. Instead, [the bill would set minimum federal standards](#) for management and disposal of the material. While the House has previously passed similar legislation, the Senate has not. Meanwhile, the White House issued a statement saying that officials there would like to work with Congress on appropriate standards, while encouraging beneficial use of the byproduct material.

West Virginia Delegation Heading to Capital

A delegation of West Virginians – state Democratic Party leaders, union and business leaders – is traveling to Washington, D.C., in an effort to prevent new restrictions on coal-fired power plants. The group of 15 to 17 will [meet with EPA and Obama Administration officials](#), attempting to "put a face on the problem," explained state Democratic Party Chairman Larry Puccio. "I don't think that people are really seeing the devastation of these new EPA regulations, what it's going to cause downstream in our communities," Del. Mike Caputo (D), a UMW member, told the *State Journal*. "We need to have an energy policy that includes all of the above, and that includes coal," added State Senate President Jeff Kessler (D).

COAL CURRENTS (CONTINUED)

DOE DEVELOPMENTS

In the Nation's Energy Strategy, Role for Coal

The investment of \$6 billion in clean coal technology, with an emphasis on the capture, storage and reuse of carbon emissions, is an indication of the administration's, and the Energy Department's, [commitment to a role for coal in national energy strategy](#). Energy Secretary Ernest Moniz asserted. Speaking at the National Energy Technology Laboratory in Morgantown, West Virginia, the secretary said that while the challenges of climate change are serious, "we've always found a way to innovate our way to a more prosperous future." According to the AP, Moniz couldn't predict coal's role, saying it is up to consumers, but underscored it will be part of the fuel mix for decades to come.

Tweaking the Department's Structure

Recently arrived Energy Secretary Ernest Moniz has [launched a reorganization of the Department](#). As reported in *The Hill*, the DOE chief said it is intended to provide an alignment of management functions, and strengthened management, necessary to support the President's Climate Action Plan, an "all of the above" energy strategy, and other key priorities. The Office of Fossil Energy will be part of a broadened Office of the Under Secretary for Science and Energy; other offices in this section include Science, Energy Efficiency and Renewable Energy, Nuclear Energy, and Electricity Delivery and Energy Reliability.

DULY NOTED

A Conflicted Commission Chair?

President Obama's nominee to head the Federal Energy Regulatory Commission (FERC), which has broad authority over many energy matters, is no friend of coal, a *Washington Times* columnist asserted. According to Ben Wolfgang, former Colorado Public Utilities Commission leader, Ron Binz has displayed "[an outright hostility to coal](#) and an 'anti-business' bent." He acknowledged that Binz backers, including renewable energy advocates and some utility executives, have praised his support for "diversity in U.S. electricity supply." Conversely, Wolfgang wrote, the Colorado Mining Association filed suit over Binz's role in crafting a bill that offered companies incentives to close coal-fired power plants or revamp them to use alternative fuels, charging that this posed a conflict of interest with his role as a regulator.

BY THE NUMBERS

Coal's Share of U.S. Generation on the Rise

The use of coal in U.S. electric generating plants [increased during the first four months of 2013](#), while natural gas's share of electricity production fell, the Energy Information Administration reported. Specifically, EIA said that coal's share of total domestic power production during this period averaged 39.5%, compared with 35.4% during the same period last year, while the respective shares for gas were 25.8% in 2013 and 29.5% a year earlier. The underlying cause was the drop in coal prices and rise in those for gas. EIA's *Short-Term Energy Outlook* forecast that the use of coal would remain on the rise, accounting for 40.1% of electricity generation through 2014, while natural gas would account for about 27.3%.

EIA: Coal Consumption Up, Stockpiles Down

While U.S. coal consumption has been rising – by 11% in the first quarter of 2013 compared with the same period in 2012 – this has not translated into increased sales by producers, the Energy Information Administration reported. Rather, the DOE statistical unit said, most power plants are [burning down record coal stockpile levels](#) rather than increasing purchases. Accordingly, plants' coal inventories dropped below the monthly five-year average across much of the nation in April, the first time this has happened since December 2011. The weak domestic market for coal producers is expected to continue through 2013, EIA reported. Production will increase in 2014, by about 3% over 2013, the agency forecast.