

Issue 3, 2023

— Coal Energy —

FROM THE MINE TO THE UTILITY



GRID OPERATORS ISSUE RELIABILITY WARNING



BNI Starts Mining Under New Coal Lease at Center Mine

Coal Drives West Virginia's Economy

The Latest Biden Energy Crisis

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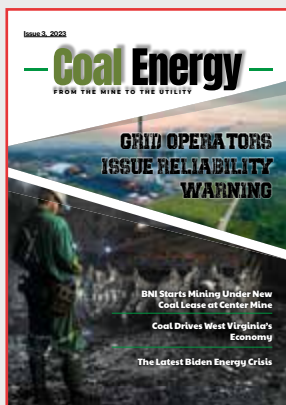
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LETTER FROM THE PUBLISHER

Dear Readers,

I hope this letter finds you in good health and high spirits. As the Publisher of **Coal Energy** magazine, it is my pleasure to introduce you to the highly anticipated Issue 3, 2023 which embraces the promising future of coal in America.

Coal has been a cornerstone of America's energy landscape for decades, fueling economic growth, providing reliable power, and supporting countless communities across the nation. Despite various challenges and debates surrounding the industry, it is important to shed light on the positive aspects and opportunities that lie ahead for coal in America.

Issue 3, 2023 of **Coal Energy** magazine is dedicated to sharing inspiring stories, groundbreaking technologies, and forward-thinking solutions that showcase the resilience and potential of the coal industry. We recognize that the future of coal rests not only on embracing responsible production methods but also on developing and adopting innovative coal technologies that enhance efficiency while reducing environmental impact.

This issue will feature in-depth articles, expert opinions, and insightful interviews that explore the following:

- Economic Benefits and Job Creation: Coal mining and its

associated industries provide employment opportunities and economic growth in many regions of America. We will highlight success stories of coal communities that have thrived and diversified their economies, demonstrating the potential for coal to remain an integral part of America's energy mix while supporting local livelihoods.

- Role of **Coal in Energy** Security: Coal continues to play a crucial role in ensuring America's energy security by providing a stable and dependable source of power. We will examine how coal can complement other energy sources, contribute to grid resiliency, and support a diverse energy portfolio that safeguards our nation's energy independence.

Coal Energy remains proud to be the source journal for information about coal related associations in the industry. We currently provide information at your fingertips on different groups to benefit your companies' needs and targets. By providing information at a glance on each group, and including current member lists, your company can analyze the forums available to market, promote, and lobby for America's future regarding coal energy.

At **Coal Energy**, we believe in providing our readers with a balanced and comprehensive view of the coal industry. **Coal Energy** is dedicated to showcasing the positive aspects and immense potential of coal in America's energy future. By highlighting success stories, innovation, and responsible practices, we aim to contribute to a meaningful dialogue about the role of coal in our nation's energy transition.

I am excited to embark on this journey with you, exploring the bright future of coal in America's energy landscape. Stay tuned for engaging articles, informative features, and thought-provoking insights in the upcoming issue of **Coal Energy** magazine.

Please visit our website, www.coalenergyonline.com, for current and prior editions of **Coal Energy**.

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If you have any questions, editorial submissions, advertising interest or just comments about **Coal Energy** please feel free to email me directly at maria@martonickpublications.com.

Together, let us embrace the possibilities and pave the way for a sustainable, efficient, and prosperous coal industry that benefits all.

Warm regards,

Maria Martonick

President

Martonick Publications, Inc.



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Association Comparisons



<https://www.nma.org>

THE NATIONAL MINING ASSOCIATION

Mission:

NMA's mission is to build support for public policies that will help Americans fully and responsibly benefit from our abundant domestic coal and mineral resources.

Our objective is to engage in and influence the public process on the most significant and timely issues that impact mining's ability to safely and sustainably locate, permit, mine, transport and utilize the nation's vast resources.

NMA serves its membership by:

- Promoting the safe production and use of coal and mineral resources
- Establishing a strong political presence in the Nation's Capital
- Serving as the information center for and a single voice of U.S. mining
- Addressing the current and future policy needs of U.S. mining, mining equipment manufacturers and support for services members of NMA



<https://www.movecoal.org/>

NATIONAL COAL TRANSPORTATION ASSOCIATION

Mission:

To promote the safe, economical, and reliable transport of coal by facilitating communication among coal transport, allied industries and associations to maximize sharing of best practices to serve the needs of the industry and the public.



<https://WWW.ASRS.US>

AMERICAN SOCIETY OF RECLAMATION SCIENCES

Mission:

ASRS's mission is to represent and serve a diverse international community of scientists, practitioners, private industry, technicians, educators, planners, and government regulators involved in mineral extraction and disturbed ecosystem reclamation.

ASRS promotes the advancement of basic and applied reclamation science through research and technology transfer in the Society's annual meetings, workshops, published proceedings, newsletters, Reclamation Matters publication, Reclamation Sciences, and the ASRS website.



WWW.ACAAMEMBERS.ACAA-USA.ORG

AMERICAN COAL ASH ASSOCIATION

Mission:

The ACAA advances the management and use of coal combustion products in ways that are environmentally responsible, technically sound, commercially competitive and more supportive of a sustainable global community.



<https://www.americancoalcouncil.org>

AMERICAN COAL COUNCIL

Mission:

American Coal Council (ACC) provides relevant educational programs, market intelligence, advocacy support and peer-to-peer networking forums to advance members' commercial and professional development interests.

ACC represents the collective interests of the American coal industry ~ from the hole-in-the-ground to the plug-in-the-wall ~ in advocating for coal as an economic, abundant and environmentally sound fuel source ACC serves as an essential resource for industry, policy makers and public interest groups.

The Association supports activities and objectives that advance coal supply, consumption, transportation and trading.



<https://www.worldcoal.org>

WORLD COAL ASSOCIATION

Mission:

The World Coal Association is a global industry association comprising the major international coal producers and stakeholders. WCA works to demonstrate and gain acceptance for the fundamental role coal plays in achieving a sustainable and lower carbon energy future. Membership is open to companies and not-for-profit organizations with a stake in the future of coal from anywhere in the world, with member companies represented at Chief Executive level. WCA is the global network for the coal industry.



<https://www.rmcl.org>

RMEL

Mission:

RMEL, through its diverse membership, educational events, and programs, facilitates the discovery of solutions and strategies for vital issues facing the electric utility industry.

PJM, MISO, others warn of 'significant power shortages' from EPA's power plant carbon rule

The agency's proposed limits on power plant carbon emissions rely on "green" hydrogen and carbon capture, technologies that may not be widely available, four grid operators told the agency.

By :Ethan Howland

A power plant in Pennsylvania where the PJM Interconnection is headquartered. PJM and other grid operators on Aug. 8, 2023, warned an EPA proposal to limit carbon emissions from power plants could hurt grid reliability

The Environmental Protection Agency's proposed greenhouse gas emissions standards for power plants could hurt grid reliability, with the potential for "significant power shortages," according to major U.S. grid operators.

"The joint [independent system operators/ regional transmission organizations] are concerned that the proposed rule could result in material, adverse impacts to the reliability of the power grid," four of the largest U.S. grid operators said in joint comments to the agency Tuesday.

Their reliability concerns mainly stem from the chance that the EPA is overestimating how quickly technological advances may occur in "green" hydrogen production, transport and generation, as well as in carbon capture and storage, or CCS — the key compliance pathways for meeting the proposed rule, according to the Electric Reliability Council of Texas, the Midcontinent Independent System Operator, the PJM Interconnection and the Southwest Power Pool, organizations that operate the grid in 30 states and the District of Columbia, serving about 154 million people.

"If the technology and associated infrastructure fail to timely materialize, then the future supply of compliant

generation — given forced retirements of non-compliant generation — would be far below what is needed to serve power demand, increasing the likelihood of significant power shortages," the grid operators said.

Also, the proposed rule could speed the retirement of fossil-fueled power plants before they can be replaced with new generation that can supply needed reliability services, the grid operators said.

In a near-term threat to grid reliability, power plant owners may decide to retire their units or skimp on maintenance because of the financial risks related to the proposed rule and other power sector-related EPA regulations, the grid operators said.

In May, the EPA proposed greenhouse gas emissions limits for coal-, gas- and oil-fired power plants, with initial requirements beginning in 2030 for coal-fired generators and 2032 for gas-fired units. The limits can be met by highly efficient operations, carbon capture and sequestration, co-firing natural gas for coal units, and with green hydrogen for gas generators, according to the proposal.

The proposal requires coal-fired power plants that intend to operate past 2039 to

install CCS that captures 90% of carbon emissions. Coal plants that plan to retire by 2035 and run at no more than a 20% capacity factor and units that will be shuttered before 2032 don't face GHG emissions limits.

Gas-fired combustion turbines larger than 300 MW and with at least a 50% capacity factor have two compliance options: CCS with 90% carbon capture by 2035, or co-firing of 30% low-GHG hydrogen beginning in 2032 and co-firing 96% starting in 2038, according to the agency. The power sector accounts for about a quarter of U.S. carbon emissions, according to the EPA.

Grid operators see inadequate reliability analysis

By solely focusing on resource adequacy — the need for enough energy supplies to meet demand — the EPA failed to adequately assess how its proposal would affect grid reliability, according to the grid operators.

They said the EPA didn't consider the grid operators' need for various grid services and attributes needed to maintain reliability, such as inertia, primary frequency response, reactive power support, system stability, system strength,

frequency regulation, ramping, flexibility, dispatchability, black start capability, fuel and energy assurance, and extreme weather performance. Currently, those attributes are generally supplied by thermal power plants, according to the grid operators.

The grid operators urged the EPA to assess how its proposal would affect grid reliability using additional metrics around essential reliability services and attributes.

If EPA moves forward with the proposal, the grid operators asked the agency to create a sub-category of existing power plants for units that RTOs and ISOs deem needed for grid reliability. The units would be allowed to run past compliance deadlines until longer-term solutions, such as transmission, demand response or new generation resources are in place, they said.

The EPA should also allow carbon allowance trading on at least a regional scope to allow for greater flexibility and incentivize "over-compliance" by generating units that can exceed the standards, the grid operators said. ISO-NE warns of unintended consequence. Separately, ISO New England warned the proposal could have unintended consequences.

The proposed rule, for example, would regulate natural gas combined-cycle power

plants that are larger than 300 MW and run at a greater than 50% capacity factor, ISO-NE said. As a result, generators may opt to run smaller, less efficient units, increasing carbon emissions, the grid operator said.

Also, New England lacks the geology to make storing carbon dioxide or hydrogen underground feasible, according to ISO-NE. ISO-NE said it didn't have enough time to thoroughly assess the effects of the proposal.

The EPA proposed allowing power plants to run without complying with the proposed rule if shuttering them would hurt grid reliability. The California Independent System Operator asked the EPA to establish additional pathways so power plants could run temporarily if needed to support grid reliability.

The New York Independent System Operator and the North American Electric Reliability Corp. didn't file comments on the proposal, officials from NYISO and NERC said.

The Federal Energy Regulatory Commission plans to review the EPA's proposal at its annual grid reliability technical conference, set to be held Nov. 9.



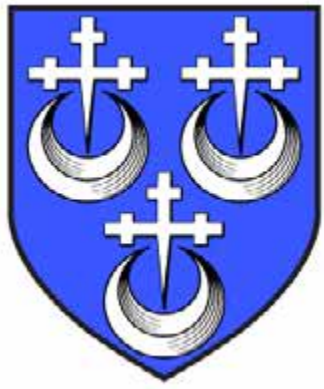
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WV COAL ASSOCIATION ENDORSES SLATE OF PRO- COAL CANDIDATES FOR 2024 ELECTION

The West Virginia Coal Association, the state's primary coal membership organization representing over 90 percent of state thermal coal production and 65 percent of metallurgical coal production, today announced the organization's endorsements for the 2024 election cycle.



• WEST VIRGINIA COAL ASSOCIATION •



Chris Hamilton

Hamilton announced the following endorsements:



U.S. Senate: Jim Justice

"Our industry views the race for U.S. Senate as important as the Presidential race," said

Hamilton. "This race may determine control of the Senate and whether New York Democrat Chuck Schumer continues to set the agenda, name committee chairs, and call the plays. We believe West Virginia will be better served with a new and insightful leader in the Senate which is why we offer our unconditional support for Jim Justice to succeed Senator Joe Manchin."



U.S. House of Representatives: Carol Miller, Riley Moore

"Our veteran Congressional Member,

Carol Miller, who serves as Co-Chair of the Congressional Coal Caucus, is leading her national colleagues against the anti-coal forces in the U.S. House of Representatives. We wholeheartedly

support her re-election to Congress," said Hamilton.

"We also endorse State Treasurer Riley Moore in his bid for the congressional seat being vacated by Alex Mooney. Moore has crusaded against national and international financial interests who have adopted lending policies that discriminate against fossil energy extraction. Treasurer Moore will work with and complement Congresswoman Miller very well."



Governor: Patrick Morrisey

"The field of candidates in the race for Governor has never been as strong as it is this election

cycle," said Hamilton. "Chris Miller is an accomplished entrepreneur and philanthropist with numerous businesses around the state and region and as such exudes tremendous promise going forward."

"Moore Capito, son of U.S. Senator Shelley Moore Capito, we know and respect. He has done brilliant work in the Legislature and in his role as House Judiciary Chairman. He's an accomplished energy lawyer and we've



"The 2024 state and federal election cycle is the most important in our industry's history dating back before West Virginia became a state. Our industry is challenged like never before and our mere existence is threatened. We need political leaders who are willing to go the extra mile for our business and the 50,000 West Virginians who show up at a mine site or coal fired manufacturing facility every day. We will immediately go to work to boost our endorsed candidates' chances of prevailing in the Spring."

Chris Hamilton
President and Chief Executive Officer of the West
Virginia Coal Association

always supported his candidacy and have endorsed him multiple times before."

"The same can be said of our current Secretary of State, Mac Warner, who we have previously endorsed. He is a top-notch individual, has done a praiseworthy job as Secretary of State, and represents West Virginia extremely well."

"These are extraordinary times and our industry is under attack from the Democratic establishment. Attorney General Patrick Morrisey has mounted legal challenge after legal challenge to hold off or stop President Biden's Environmental Protection Agency from eradicating coal from America's energy mix. We are indebted to General Morrisey and believe he is the most qualified in these unprecedented times to lead our state forward. We proudly announce our endorsement for



Patrick Morrisey for Governor.

**Attorney General:
Mike Stuart**

"Like the field of gubernatorial

candidate, there are three great candidates running for Attorney General who are friends of coal," said Hamilton. "Current State Auditor JB McCuskey and State Senator Ryan Weld are honorable individuals with great political futures."

"State Senator Mike Stuart has stepped up in so many ways to defend and support West Virginia's coal industry. He is the son of a coal miner and the state's coalfields, and served as President Trump's appointment as U.S. Attorney for West Virginia's Southern District. Stuart is uniquely qualified to sustain the programs which originated under General Morrisey, and we are pleased to endorse him for Attorney General."



**Supreme Court:
Haley Bunn, Charles
Trump**

The Supreme Court of Appeals is vitally important to the business climate and stability we now enjoy in West Virginia," said Hamilton. "The composition of the High Court is as stellar as it's ever been and

the addition of Justice Bunn to the bench has only enhanced it. Justice Bunn is extremely bright, understands the rule of law, and serves as inspiration to our youth. We wholeheartedly endorse her candidacy."

"We also endorse Charlie Trump for the second open seat on the Supreme Court. Trump, from Morgan County, is held in the highest regard throughout West Virginia's Legislative and Judicial circles. A legal scholar and absolute statesman, no one is more prepared or deserving to be called 'Justice.'"

**Contact: Chris Hamilton at (304)
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Federal board sides with Navajo coal company, says BNSF Railway must ship to Canadian port



A BNSF railroad train hauling carloads of coal from the Powder River Basin of Montana and Wyoming is seen east of Hardin, Mont., July 15, 2020. On Friday, June 23, 2023, a federal board ordered BNSF Railway to transport at least 4.2 million tons of coal from a Montana mine to a port in British Columbia, Canada, this year to allow one of the largest coal producers in the United States to meet its overseas contracts.

HELENA, Mont. (AP) — A federal board has sided with one of the largest coal producers in the United States in a contract dispute with a major freight railroad, ordering BNSF Railway to transport at least 4.2 million tons of coal this year for overseas use.

The U.S. Surface Transportation Board's 3-2 order last week said BNSF has the ability to fulfill the contract and still meet the needs of other shippers. The Navajo Transitional Energy Co. sought the order in April. The company had filed a lawsuit late last year saying that major shortcomings in BNSF service cost it \$150 million in lost revenue this year and another \$15 million in charges when coal wasn't loaded in a timely manner onto ships destined for Japan and Korea.

The transportation board said NTEC was highly likely to succeed on the merits of its claim.

"The common carrier obligation is a core tenet of the Board's regulation of the freight railroad industry and is a pillar of the railroads' responsibility to our country's economy," Chairman Martin Oberman said in a statement Friday.

The Navajo Nation-owned energy company runs three coal mines in the Powder River Basin of Montana and Wyoming and another near Farmington, New Mexico — making it the third-largest coal company in the country.

The board also said NTEC was likely to suffer damage to its reputation as a dependable coal supplier, and that the order meets the public good because NTEC plays a critical role in the Navajo Nation's economy.

BNSF Railway and NTEC did not immediately respond to emails Tuesday seeking comment about the board's decision or the status of the coal company's lawsuit.

The board says BNSF must move 23 trains of coal per month for NTEC beginning immediately, and another six trains per month when additional trains and crew become available. The additional capacity would total 1 million tons, the board said.

Like other freight railroads, BNSF struggled to deliver products on time and handle all the shipments that companies want to move because of

worker shortages coming out of the coronavirus pandemic. One of the dissenting board members, Patrick Fuchs, said NTEC didn't meet its contracted tonnage requirements with BNSF in 2020 and that the company then sought a contract with BNSF without tonnage requirements.

The coal company's lawsuit, filed in December in federal court in Montana, alleged the railroad breached its 2022 contract to transport 5.5 million tons of coal. According to the lawsuit, BNSF said in the spring of last year that it could commit to delivering only 3.1 million tons of coal.

BNSF has said the 2022 contract called for transporting up to 5.5 million tons but did not set a minimum guarantee, Fuchs said in his dissent. The lawsuit also alleged BNSF favored other coal companies that ship on the railroad.



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Leveraging Komatsu's electric drive truck experience, the 980E-5SE offers the highest-in-class horsepower available on an ultra-class truck. Engineered to promote increased productivity and a reduced carbon footprint, the 980E-5SE's electric drive means fewer mechanical components, less maintenance and potentially reduced life cycle costs.

When cycling through big loads, durability is key. The 980E-5SE was developed using advanced computer-aided design, finite element analysis and full-scale dynamic testing. Its truck frame is verified to carry a rated payload with the utmost structural reliability.

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Learn more about how Komatsu's 980E-5SE electric drive ultra-class truck can help mines reach higher production and lower lifetime cost per ton (CPT) [by visiting our website](#).

(Note: all comparisons are to the prior Komatsu model unless otherwise specifically stated.)



Quick specs for the 980E-5SE electric mining truck:

- Gross horsepower: 4,400 HP (3,281kW) @ 1,800 rpm
- Operating weight: 1,400,000 lbs. (635,029 kg)
- Capacity: 400 st (363 mt)

About Komatsu

Komatsu develops and supplies technologies, equipment and services for the construction, mining, forklift, industrial and forestry markets. For more than a century, the company has been creating value for its customers through manufacturing and technology innovation, partnering with others to empower a sustainable future where people, business and the planet thrive together. Front-line industries worldwide use Komatsu solutions to develop modern infrastructure, extract fundamental minerals, maintain forests and create consumer products. The company's global service and distributor networks support customer operations to enhance safety and productivity while optimizing performance.



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ALABAMA MINING ASSOCIATION

AMA SEEKING CANDIDATES TO FILL THE ROLE OF ASSOCIATION PRESIDENT

The Alabama Mining Association (AMA) is seeking a new President. A qualified candidate will have ample professional experience that demonstrates their ability to excel in the position described below. Well-qualified candidates are invited to apply by sending a resume and cover letter to presidentsearch@alabamamining.org. The deadline to apply has been extended to the close of business on September 14, 2023.

The President of the Alabama Mining Association is a highly motivated self-starter who knows how to develop trusting and productive relationships with public

officials, regulatory agency leaders, and government employees at all levels. As the public face of Alabama's mining industry, the President must develop a robust understating of mining and be able to serve as the bridge between industry experts and decision-makers. The President embraces the challenge of developing and implementing a vision for the association that adds value to its members today and anticipates the future challenges and opportunities facing the mining industry. Furthermore, the President is an effective leader and administrator who keeps the Board of Directors informed, updated, and engaged.



The President of the Alabama Mining Association

- Represents the interests of AMA's members at the state legislature.
- Maintains productive relationships with members of Alabama's federal delegation and their staff.
- Proactively develops relationships with leaders at regulatory agencies, including the Alabama Department of Environmental Management, Alabama Surface Mining Commission, Alabama Department of Labor, the Mining Safety and Health Administration, and the U.S. Army Corps of Engineers.
- Submits written comments and testifies on mining industry issues at public hearings.
- Knows and adheres to all lobbying laws and ethics reporting requirements.
- Meets with candidates for public office and develops the campaign contribution strategy for AMA's Political Action Committee.
- Serves as a state partner for the National Stone, Sand, and Gravel Association and the National Mining Association.
- Serves as the Chair of the Alabama Mine Safety & Training Foundation.
- Responds to media inquiries and drafts and distributes press releases, writes email newsletters, and updates the website.
- Regularly communicates with AMA members and prospective members.
- Plans and organizes meetings of AMA's Environmental, Safety, and Community Responsibility & Engagement committees.
- Develops and implements goals and objectives that position AMA to achieve its mission.
- Prudently manages AMA's annual budget and works with the accounting firm to accurately monitor the association's income and expenses.
- Manages and oversees AMA's Executive Assistant.
- Plans and organizes AMA events.
- Plans Board of Directors meetings and provides accurate and timely updates on the association's activities.



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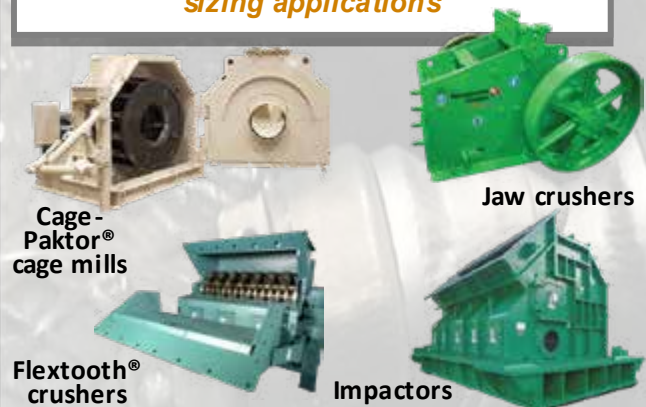
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NAVAJO TRANSITIONAL ENERGY COMPANY WINS 2023 NEW MEXICO ENERGY, MINERALS AND NATURAL RESOURCES (EMNRD) EXCELLENCE IN RECLAMATION AWARD



Yazzie Wildlife Bluff Project Showcases NTEC's Commitment to Reclamation

Farmington, NM – Navajo Transitional Energy Company (NTEC) was awarded the 2023 New Mexico EMNRD Excellence in Reclamation award for its work at the Yazzie Wildlife Bluff at Navajo Mine. The award was presented at the New Mexico Mining Association's 84th Annual Convention and Trade Show on Thursday, August 24, 2023. Reclamation efforts in Yazzie Pit began in 2018 and concluded in 2022. In that time, 22.5 million cubic yards of material were moved safely. The project was completed with the assistance of the Office of Surface Mining and Reclamation (OSMRE), the Navajo Nation Minerals Department, and the Navajo Nation Fish and Wildlife Services Department, representing an extraordinary collaboration between governing agencies and

Navajo Mine.

During reclamation efforts, golden eagles had been observed in the area of the Yazzie highwall. Revered in the United States and by Indigenous populations, the golden eagle became the focus of the crew at Navajo Mine and a symbol of renewal. **"We really enjoyed the reclamation effort at Yazzie Pit. It was phenomenal to see the land transformed and the golden eagle settling into the environment. As soon as we spotted the eagle, we were dedicated to ensuring its health and safety in its new habitat,"** recalled Dacia Jaques, Reclamation Engineer at NTEC. In addition, the eagle's reemergence enabled the opportunity to explore stable highwall options for the purpose of preserving future wildlife habitats.



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"We take great pride in our reclamation efforts at Yazzie Wildlife Bluff and at all NTEC locations. We believe in doing the right thing and going the extra mile to protect the land, the water, the air, and living things," said Shawn Smith, Engineering Manager for NTEC. **"This project exemplifies that commitment in partnership and effect. We are thankful for the collaboration of all the agencies involved and are thrilled with the return of the sacred golden eagle!"**

The Yazzie Wildlife Bluff project represents the ability to effectively preserve the habitat of a wild species while achieving reclamation that exceeds pre-mining conditions. NTEC continues to work with OSMRE, honoring its commitment to stewardship of the natural resources under its care. To date, NTEC has reclaimed more than 24,000 acres and won numerous awards for excellence in reclamation, including the National 2022 OSMRE Excellence in Reclamation Award for Large Surface Mining.

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About NTEC

NTEC is an autonomous single-member limited liability company, organized under the laws of the Navajo Nation, which owns mines in Montana, New Mexico, and Wyoming. The mission of NTEC is to be a reliable, safe producer of coal, while diversifying the Navajo Nation's energy resources to create economic sustainability for the Nation and the Navajo people. NTEC's sole shareholder is the Navajo Nation.

NTEC is a leader in safety and reclamation and was recognized with the Sentinels of Safety award from the National Mining Association, the Safety Award for Large Surface Mine from the Rocky Mountain Coal Institute, and the National Award for Excellence in Surface Mining Reclamation from the Office of Surface Mining Reclamation and Enforcement in 2022.



A close-up, diagonal view of the American flag, showing the blue field with white stars and the red and white stripes. The flag is draped over a dark, textured surface.

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IEA: Global coal demand set to remain at record levels in 2023

According to the IEA, continued strong growth in Asian economies is offsetting declines in Europe and North America, maintaining coal demand at record levels in 2023.

Global coal consumption climbed to a new all-time high in 2022 and will stay near that record level this year as strong growth in Asia for both power generation and industrial applications outpaces declines in the US and Europe, according to the IEA's latest market update.

Coal consumption in 2022 rose by 3.3% to 8.3 billion t, setting a new record, according to the IEA's mid-year Coal Market Update. In 2023 and 2024, small declines in coal-fired power generation are likely to be offset by rises in industrial use of coal, the report predicts, although there are wide variations between geographic regions.

China, India and Southeast Asian countries together are expected to account for 3 out of every 4 t of coal consumed worldwide in 2023. In the EU, growth in coal demand was minimal in 2022 as a temporary spike in coal-fired power generation was almost offset by lower use in industry. European coal use is expected to fall sharply this year as renewables expand, and as nuclear and hydropower partially recover from their recent slumps. In the US, the move away from

coal is also being accentuated by lower natural gas prices.

After three turbulent years marked by the COVID-19 shock in 2020, the strong post-pandemic rebound in 2021 and the turmoil caused by Russia's invasion of Ukraine in 2022, coal markets have so far returned to more predictable and stable patterns in 2023. Global coal demand is estimated to have grown by about 1.5% in 1H23 to a total of about 4.7 billion t, lifted by an increase of 1% in power generation and 2% in non-power industrial uses.

By region, coal demand fell faster than previously expected in the first half of this year in the US and the EU – by 24% and 16%, respectively. However, demand from the two largest consumers, China and India, grew by over 5% during the first half, more than offsetting declines elsewhere.

“Coal is the largest single source of carbon emissions from the energy sector, and in Europe and the US, the growth of clean energy has put coal use into structural decline,” said IEA Director of Energy Markets and Security Keisuke Sadamori. **“But demand remains stubbornly high in Asia, even as many of those**



WORLD NEWS



economies have significantly ramped up renewable energy sources. We need greater policy efforts and investments – backed by stronger international cooperation – to drive a massive surge in clean energy and energy efficiency to reduce coal demand in economies where energy needs are growing fast.”

The shift of coal demand to Asia continues. In 2021, China and India already accounted for two-thirds of global consumption, meaning together they used twice as much coal as the rest of the world combined. In 2023, their share will be close to 70%. By contrast, the US and the EU – which together accounted for 40% three decades ago and over 35% at the beginning of this century – represent less than 10% today.

The same split is observed on the production side. The three largest coal producers – China, India, and Indonesia – all produced record amounts in 2022. In March 2023, both China and India set new monthly records, with China surpassing 400 million t for the second time ever and India surpassing 100 million t for the first time. Also, in March,

Indonesia exported almost 50 million t, a volume never shipped by any country before. By contrast, the US, once the world's largest coal producer, has more than halved production since its peak in 2008.

After the extreme volatility and high prices of last year, coal prices fell in 1H23 to the same levels as those seen in summer 2021, driven by ample supply and lower natural gas prices. Thermal coal returned to being priced below coking coal, and the big premium for Australian coal narrowed following the easing of disruptive La Niña weather that had hampered production. Russian coal has found new outlets after being barred in Europe, but often at considerable discounts.

Cheaper coal has made imports more attractive for some price-sensitive buyers. Chinese imports have almost doubled in the first half of this year, and global coal trade in 2023 is set to grow by more than 7%, outpacing overall demand growth, to approach the record levels seen in 2019. Seaborne coal trade in 2023 may well surpass the record of 1.3 billion t set in 2019.



BNI STARTS MINING UNDER NEW COAL LEASE AT CENTER MINE



Working with BNI Coal General Manager Mike Heger and Minnkota Power Cooperative CEO Mac McLennan, North Dakota Senator John Hoeven secured the regulatory approval needed for a new coal lease area at the Center mine. The operations can now move forward thanks to Hoeven's efforts, which prevented \$35 million in costs from being imposed on homeowners and businesses through higher electricity prices.

Hoeven worked to advance the approval of federal mine plans that enable BNI to develop the new section, preventing significant cost increases that would have burdened the company's operations, as well as that of Minnkota Power Cooperative's Milton R. Young Station:

The new plans were needed to allow mining of federal coal under a lease awarded in January 2021. Last year, Hoeven convened a meeting between Minnkota, BNI and Department of the Interior (DoI) officials to make the case for timely approvals of mine plans. The senator stressed the importance of preventing further energy price increases on

American consumers and maintaining the affordability and reliability of the grid. The senator also secured a commitment from DoI Deputy Secretary Tommy Beaudreau to expedite the plan's review. Without the approval, BNI and Minnkota

utilization and storage (CCUS) project being developed at the Milton R. Young Station, a 700-MW, coal-fired power plant that provides baseload electricity in North Dakota and Minnesota. The senator has worked for 15 years to establish

"Securing approval for the operations under BNI's new coal lease area is about ensuring access to affordable and reliable baseload power for homes and businesses that remains available 24/7, regardless of weather conditions. In particular, preventing these \$35 million in cost increases were key as we continue working to advance the coal-fired electric industry of the future through Project Tundra,"

"We've put in place important tools, like 45Q and loan guarantees, to help coal-based projects get off the ground, and we continue working to make this technology a reality to promote U.S. energy security and ensure a continued role for coal in our nation's energy mix."

Senator Hoeven

North Dakota's leadership in CCUS to help ensure the future of the state's coal industry and promote the affordability and reliability of the grid.

Hoeven's efforts include securing \$43 million in federal funding for the project to date, as well as loan guarantees and the 45Q tax credit to help make coal-fired CCUS projects commercially viable. Earlier this year, Minnkota announced that Project Tundra has entered its final stage of development

would have needed to make and implement costly contingency plans to move the dragline and develop other portions of the mine. Securing approval not only prevented increased electricity prices across the region, it also supports the development of Project Tundra and the coal-fired electric industry of the future.

Project Tundra is a major carbon capture,

as new affiliates, including TC Energy, Mitsubishi Heavy Industries and Kiewit, were added to build the project.

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COAL WILL CONTINUE TO DRIVE WEST VIRGINIA'S ECONOMY

By: Chris Hamilton

President & CEO West Virginia Coal Association

Throughout our state's 160-year history, the coal industry has been a major driver behind West Virginia's economy and billions of dollars of new investment will ensure that similar benefits are generated for the next 160 years.

Despite all the hype you hear about a zero-carbon economy and transitioning to renewable, or intermittent energy forms, West Virginia's metallurgical and thermal coals will continue to drive our economy while remaining a stable component of our state and nation's energy mix.

John Deskins the state's leading economist and director of West Virginia University's Bureau of Business and Economic Research recently concluded that West Virginia coal and coal-fired power generators account for over \$14 billion in annual economic activity for our state and supply 24/7, base load electricity for our state and the PJM region.

Despite the decade-long downturn, coal continues to sustain 50,000-plus West Virginia jobs, provide record level severance tax collections, and places food on the table for Mountain State families.

Remarkably, there's been over \$8 billion dollars in new investments in West Virginia

mining operations over the past several years, including approximately \$2 billion in 2022-2023. This important industry will continue to thrive and provide the jobs, taxes, incomes, and spending power our state so desperately needs.

A more recent study by Deskins and his team of economists valued West Virginia metallurgical coal used in the domestic steel manufacturing process at \$186 billion, while providing 547,000 American jobs throughout our country. West Virginia Coal Association members account for the lion share of all metallurgical coal produced in West Virginia.

Our state's thermal and metallurgical coal producers stand united in support of good public policy to promote and sustain the growth of our extractive industries in West Virginia. We oppose the woke and liberal dimensions of state and federal governments desiring to see this amazing economic engine and honorable profession diminished or removed from our great state.

We invite you to join us as a "Friend of Coal" and take an active role in standing up for miners and their families, this great American industry, and benefits it provides to all West Virginians.

Here's a few additional facts we thought you should know:

- World coal use is growing with over 8 billion tons consumed in 2022.
- Coal accounts for over 50% of West Virginia's total export product.
- West Virginia-produced coal accounts for over 40% of our nation's total coal exports.
- Forty countries and 30 states rely on West Virginia coal to power their energy needs.
- West Virginia produces the highest quality metallurgical coal found anywhere in the world and 69% of the base fuel for domestic steel making.

THE LATEST BIDEN ENERGY CRISIS



When it comes to the nation's supply of energy, the United States has an unfortunate tendency of stumbling from one crisis to another. Just as we turn the corner on energy-driven inflation and the shock of a global energy crisis, there is a new crisis now on the horizon: the rapidly eroding reliability of the nation's supply of electricity.

The situation is increasingly dire and made so by a spectacular failure of policy. In one congressional hearing after another, the nation's energy regulators, grid operators, and utilities have warned that we're bungling the energy transition.

U.S. electricity demand is on the verge of skyrocketing, driven by electrification, as in the rapid uptake of electric vehicles and the stunning growth of data centers and artificial intelligence.

Just as demand is beginning to soar, the Environmental Protection Agency and a host of state clean energy mandates are forcing traditional sources of power — namely coal and natural gas plants — off the grid. Unfortunately, replacement renewable energy capacity and its enabling infrastructure, such as high-voltage interstate transmission lines — aren't materializing nearly fast enough to bridge the gap between what's needed and what's currently available.

A theoretical mismatch between supply and demand is now turning into an on-the-ground crisis from one coast to the other.

Potential supply shortfalls during periods of peak demand — think scorching heat or bitter cold — is a new reality for most of the country. This summer, for example, the North American Electric Reliability Corporation, the regulator overseeing



the reliability of the nation's power supply, has warned that two-thirds of the nation is at high risk of outages should we see extended heat waves stretching across multiple states.

So singularly focused on meeting carbon reduction goals, the Biden administration is pretending the grid crisis all but doesn't exist. While EPA is pushing through a blitz of rules targeting fossil fuel plants that will only accelerate the loss of essential capacity, the folks tasked with keeping the lights on are begging for a rethink.



Jim Robb, president and CEO of NERC, told Congress, **"We must manage the pace of the transformation**

[of the grid] in an orderly way, which is currently not happening." When asked if the generating capacity EPA's power plant regulations are forcing into retirement can be replaced with renewables without affecting reliability, he said, **"Not in the time frame we're looking at. No."**

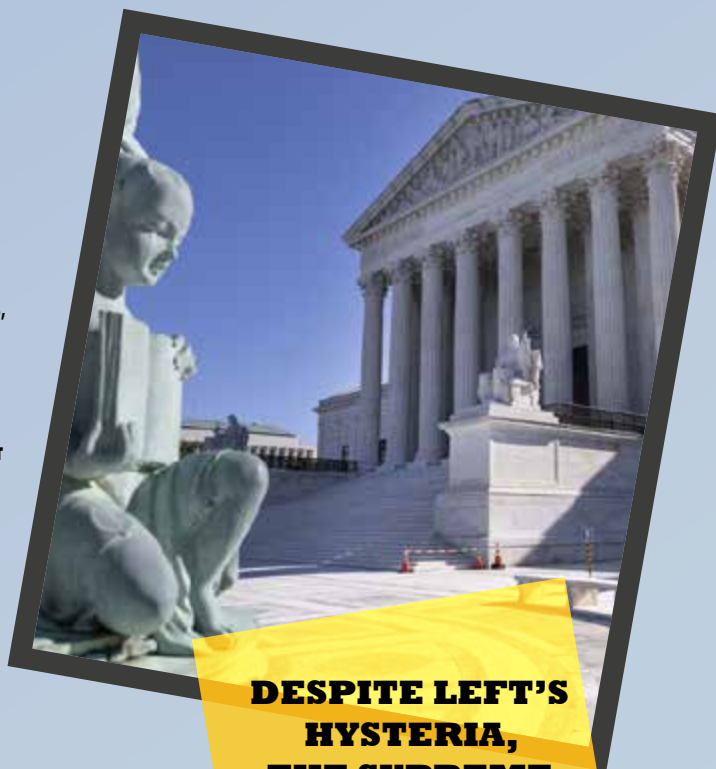
Federal Energy Regulatory Commission member Mark Christie

testified that **"the United States is heading for a reliability crisis."** He added, **"I do not use the term 'crisis' for melodrama ... The core problem is this: dispatchable generating resources are retiring far too quickly and in quantities that threaten our ability to keep the lights on."**

Even FERC Chairman Willie Phillips, hand-picked by President Joe Biden, testified, **"I am extremely concerned about the pace of retirements we are seeing of generators which are needed for reliability on our system."**

What's particularly appalling is how unnecessary this crisis is. At Biden's direction, the EPA has hijacked the nation's energy policy. Congress must now step in to right the ship.

There's an obvious off-ramp. Instead of tearing down the generating capacity we have, which currently underpins the system, we should be adding to it. New additions of wind and solar power should come on the shoulders of existing plants, increasing available capacity and providing an expanded reliability backstop.



DESPITE LEFT'S HYSTERIA, THE SUPREME COURT IS WORKING AS IT SHOULD

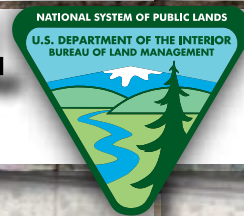
Despite claims to the contrary, there is nothing easy or simple about reshaping the nation's supply of power. Trying to do so as electricity demand soars is a doubly difficult task. It's past time we stop demonizing the coal and natural gas plants that are the very backbone of reliable, affordable power and instead pump the brakes on EPA's regulatory march. The warnings couldn't be clearer about the grid crisis we now face.

When — not if — the blackouts come, the culprit won't be a heat wave, bitter cold, or a technological glitch. It will be the Biden administration's unwillingness to pivot from a grossly irresponsible and dangerous agenda.

Matthew Kandrach is president of CASE, Consumer Action for a Strong Economy, a free-market-oriented consumer advocacy organization.



FEDERAL COAL LEASING IS A SUCCESS STORY



As the Department of the Interior considers the future of the federal coal leasing program, it's worth noting what a success the program has been, how important it remains to mining states and communities and how essential coal remains in the nation's energy mix.

The federal coal leasing program has provided hundreds of millions of dollars of federal, state and local revenue per year, while also providing a low cost, reliable and secure source of energy for all Americans. Thirty-seven states consume coal from federal leases to generate electricity and fuel industrial and commercial facilities. The coal produced from federal lands is essential to the nation's energy security and economic competitiveness, especially in the wake of a global energy crisis and the troubling return of natural gas price volatility.

One of the clear lessons of the global energy crisis is the danger posed by policy that limits supply of essential

fuels while demand remains as strong as ever. With global demand for fossil fuels continuing to grow – and with coal playing an outsized role in helping allies pivot from Russian energy – maintaining the federal coal leasing program, and the affordable, secure energy it provides, is critically important to the nation's energy and economic future.

Coal is America's most abundant energy resource—making up nearly 85% of U.S. fossil energy reserves on a Btu basis. And coal production on federal lands meets 40% of U.S. coal demand. That production also remains an economic pillar for mining states.

Coal mining provides employment of nearly 97,000 people and the creation of 3.2 jobs for every job in mining, for a total of more than 314,000 jobs nationally. In addition, coal-based electric power plants directly employ another 70,000 Americans. Coal industry jobs are high paying, with an annual average salary of a coal miner at over \$93,000 – 38% above



the U.S. average wage of \$68,000. Coal generated \$20 billion in sales and paid \$8 billion in direct wages and salaries according to 2021 analysis by the NMA. The economic activity attributable to coal mining is also subject to billions of dollars in taxation at the federal, state and local levels.

The federal coal leasing program, specifically, has delivered more than \$9 billion in federal, state and local revenues over the last decade, revenues critically important to state operations. For example, in 2020, the financial contribution from federal coal to Wyoming state and local governments in the form of taxes, royalties and fees was over \$550 million – revenues that underpin education and school construction as well as highway maintenance and other county and city infrastructure projects.

Underpinning Dispatchable Fuel Diversity

The federal coal leasing program and domestic coal production aren't just a regional success story. Coal remains an energy and economic workhorse for the nation, with a particularly important role to play as the nation tries to navigate an unfolding grid reliability crisis, surging electricity demand and a U.S. natural gas market increasingly shaped by gas-hungry buyers in Europe and Asia.

Last year was the most volatile on record for natural gas prices, raising the price of electricity, the cost to heat homes and the cost of manufacturing economic building blocks like fertilizer and steel. With the U.S. gas export capacity continuing to soar, global demand for gas will only play a larger and larger role in shaping domestic gas prices.

While much reduced by an ongoing regulatory onslaught, U.S. coal generating capacity and coal production are a critical hedge to gas price volatility, providing optionality in energy markets when gas prices spike or when gas supply is constrained. And increasingly – when it's needed most – gas supplies are constrained

or altogether unavailable. As Bloomberg recently reported, "The grid's newfound reliance on natural gas was for more than a decade hailed as a breakthrough. It's now one of its biggest vulnerabilities." The inability to get gas to generators during episodes of peak demand – particularly bitter cold when instrumentation and even gas flows freeze up – has become its own crisis.

Repeatedly, gas delivery systems and gas power plants are failing to perform when they're needed most. Just last Christmas, the PJM grid, the nation's largest, was pushed to the verge of rolling blackouts during a biting cold snap. As Bloomberg observed, "gas was largely to blame." PJM saw 23% of its generating fleet shutdown on Dec. 24. Natural gas plants accounted for 70% – or 32 gigawatts – of the nearly 46 gigawatts of outages despite representing just 44% of the market's total installed capacity.

"If you have assets that you can't get fuel to, it's useless," explained Thomas Coleman, executive director of Grid Security Project and a former adviser to North American Electric Reliability Corp. **"We have a broken system, and it's threatening our national security and it's threatening our economic viability."** The fuel security and reliability of the coal fleet – backed up by robust domestic coal production – provides the essential dispatchable fuel diversity that time and again bails out grids when other sources of power falter.

The federal coal leasing program is the cornerstone of the nation's fuel security, energy affordability and our grid reliability. Moving forward with continued leasing – and a program that clearly works – should be an easy decision.



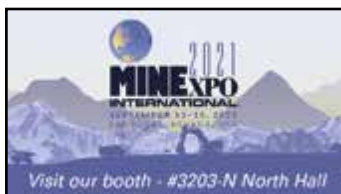


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NCTA (NATIONAL COAL TRANSPORTATION ASSOCIATION)

September 18 – 20, 2023

NCTA 49th Annual Business Meeting and Conference

Cheyenne Mountain Resort
Colorado Springs, CO

October 18, 2023

NCTA On Track Live

November 15, 2023

NCTA On Track Live

December 28, 2023

UMLER Waiver forms must be submitted

ACAA (AMERICAN COAL ASH ASSOCIATION)

October 10 – 11, 2023

ACAA 2023 Fall Membership Meeting

Marriott Myrtle Beach
Resort & Spa at Grande
Dunes, Myrtle Beach,
South Carolina

October 11 – 12, 2023

Exploring the Current Opportunities in Coal Ash

Marriott Myrtle Beach
Resort & Spa at Grande
Dunes, Myrtle Beach,
South Carolina

ACC (AMERICAN COAL COUNCIL)

September 19 – 20, 2023

American Coal Council Day on Capitol Hill

National Mining Association (9/19/23)
Capitol Hill Meetings (9/20/23)
101 Constitution Ave NW
Unite 500E
Washington 20001

February 20 – 22, 2024

2024 Winter Meeting

Mayfair House Hotel & Garden
3000 Florida Avenue
Coconut Grove, FL 33133

RMEL

September 11 – 13, 2023

2023 RMEL Fall Convention

Omni Tempe Hotel at ASU
7 E University Dr.
Tempe, AZ 85281

September 20 – 21, 2023

Grounding & Arc Flash Workshop

Austin Energy Headquarters
4815 Mueller Blvd
Room 1111
Austin, TX 78723

October 12 – 13, 2023

Asset Management & Data Conference

Omaha Public Power District
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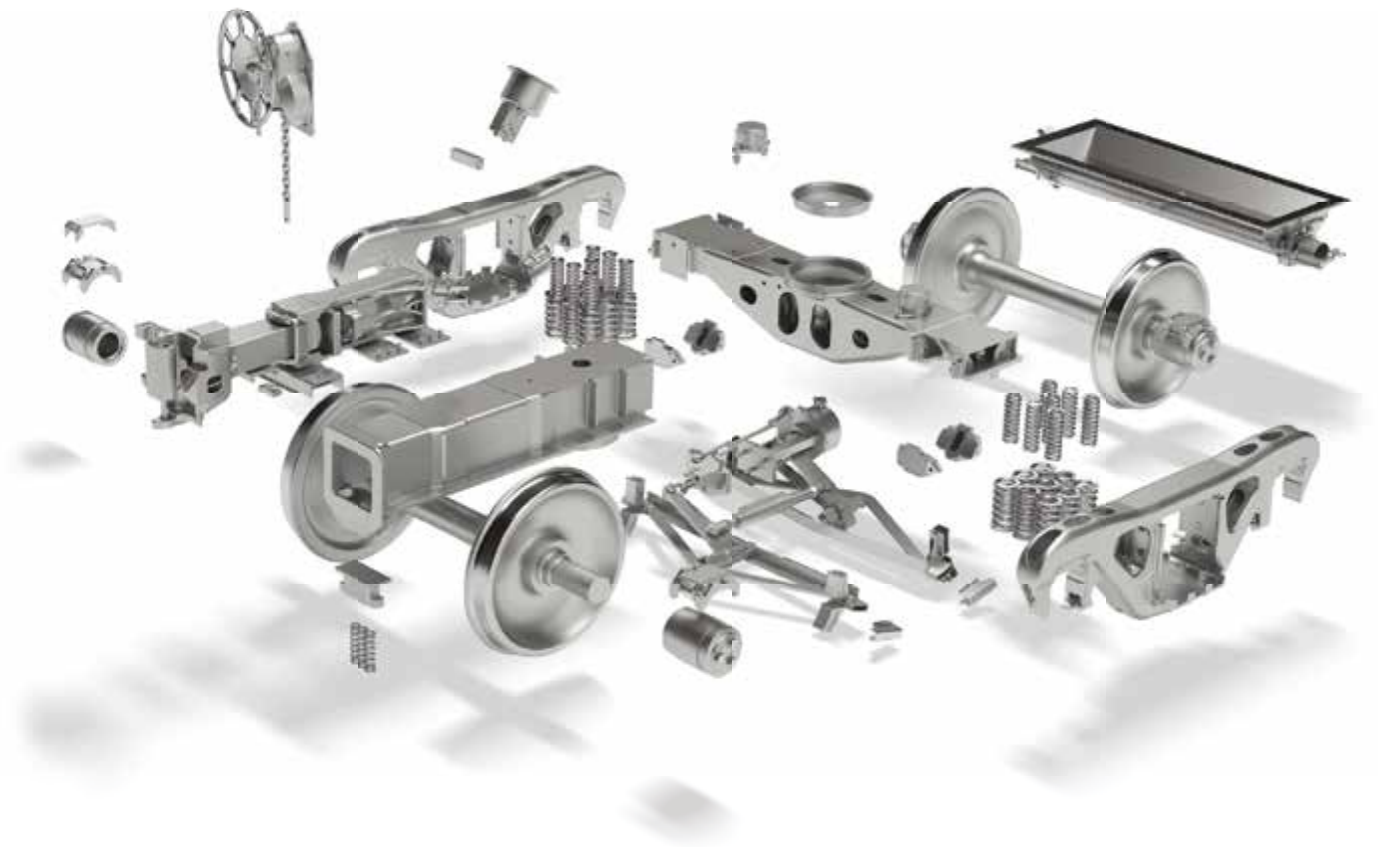


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