



NMA[®]

National Mining Association

25

YEAR
ANNIVERSARY

The National Mining Association October 2020 Board of Directors and
Annual Members Meeting Will Begin at 1 p.m. Eastern



THANK YOU TO OUR MEETING CO-SPONSORS



NMA FALL MEETING AGENDA



- Welcome and Introductions
- Safety Share
- Awards
- Approval of Meeting Agenda*
- Approval of Minutes from Board Meeting Held June 30, 2020*
- Executive Committee Report
- Association Report
- MINExpo INTERNATIONAL[®] 2021
- Audit and Finance Committee Report*
 - Budget Presentation
- Bylaw Amendments*
- Nominating Committee Report*
 - Officers
 - Audit & Finance Committee
 - Executive Committee
 - Directors
- Adjournment

*Requires Board Action



SAFETY SHARE CORESAFETY.

10

CORESAFETY®

Certified member companies

- New resources + additional emphasis in 2021
- Most recent NMA member to be CORESafety® certified:





NMA AWARD WINNERS

2019 Sentinels of Safety – NMA Members

Large

- Open Pit – Rio Tinto, US Borax Inc, Boron Operations – Boron, CA
- Surface Coal – Luminant Mining Company, Koss Strip Mine – Koss, TX
- UG Coal – Arch Resources Inc., ACI Tygart Valley, Leer Mine – Grafton, WV
- UG Metal – Barrick, Nevada Gold Mines LLC, Cortez District – Underground – Crescent Valley, NV

Small

- Coal Processing – Arch Resources Inc., Thunder Basin Coal Company LLC, Black Thunder Mine – Wright, WY
- Surface Coal – Ramaco Resources LLC, Highwall Miner #1 – Verner, WV



2020 NIOSH Mine Safety and Health Technology Innovations Award

- Metal Sector – Freeport-McMoRan Inc.
- Coal Sector – Matrix Design Group, sub. of Alliance Resource Partners, L.P.

2020 Excellence in Surface Coal Mining Reclamation Award – National Award

Navajo Traditional Energy Company – Bisti Fuels
Work in San Juan County, New Mexico

2020 Excellence in Surface Coal Mining Reclamation Award – Good Neighbor Award

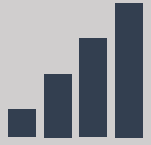
Arch Resources, Inc.
Wolf Run Mining, LLC
Leer South Mining Complex
Barbour County, West Virginia



A photograph of two miners in a dark tunnel. The miner in the foreground is wearing a grey shirt, a hard hat with a headlamp, safety glasses, and large black earplugs. He is holding a large metal rod. The miner in the background is wearing a tan shirt, a hard hat with a headlamp, and safety glasses. He is also holding the same metal rod. The tunnel walls are dark and rocky, with some orange spray-painted lines. A chain-link fence is visible in the background.

FALL ASSOCIATION REPORT

Sustainable Strategies in a Changing Environment



2020 KEY PERFORMANCE INDICATORS

Q1-Q3



TELLING OUR STORY

292 Op-Eds

4.79M Audience Reached

201 Press Inquiries

813 Tweets + Posts

46 Blogs

President & CEO Op-Eds 20

Media Audience Reached 5K

YOY editorial Increase 40%

Followers 555K



INFLUENCING STAKEHOLDERS

161 Administration Contacts

5K+ Congressional Contacts

553 State Contacts

66 Congressional Letters & Testimony



DELIVERING VALUE

24 Comments

47 Legal Filings

252 Coalition/Ally Meetings

Committee Meetings 43

Memos to Members 120



POLICY WINS IN Q3

Improve Mine Permitting

- Final CEQ NEPA Regulations
- Retention of Ozone and Particulate Matter Standards
- Revised ESA Habitat Definition
- Proposed ESA Habitat Exclusion Process
- Revised Army Corps Nationwide Permits
- OSM Guidance on Approximate Original Contour
- NRC/EPA Memorandum of Understanding on Uranium Recovery

Fleet Defense

- Public Utility Regulatory Policies Act
- Effluent Guidelines Plan Rule
- Coal Ash Closure Rules

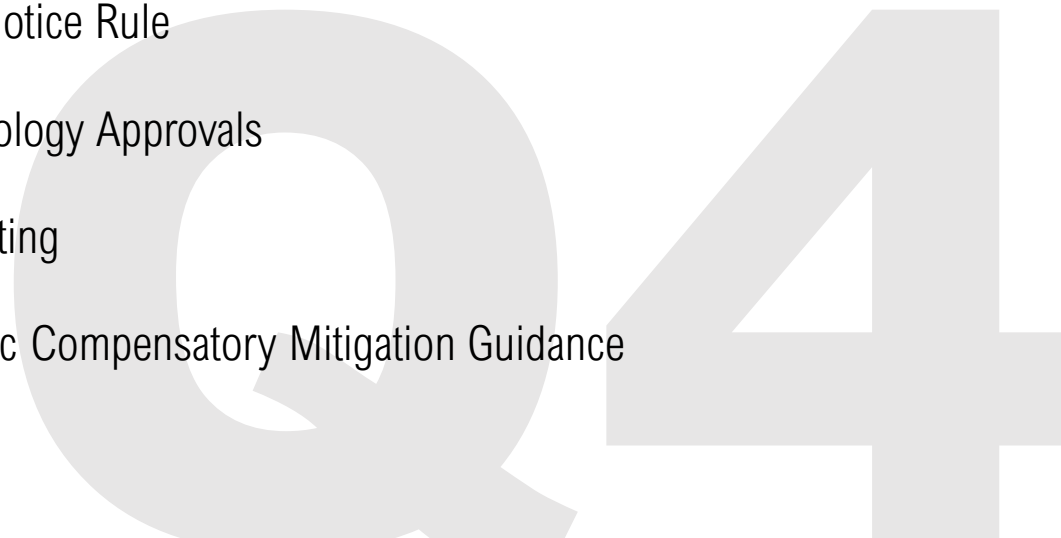
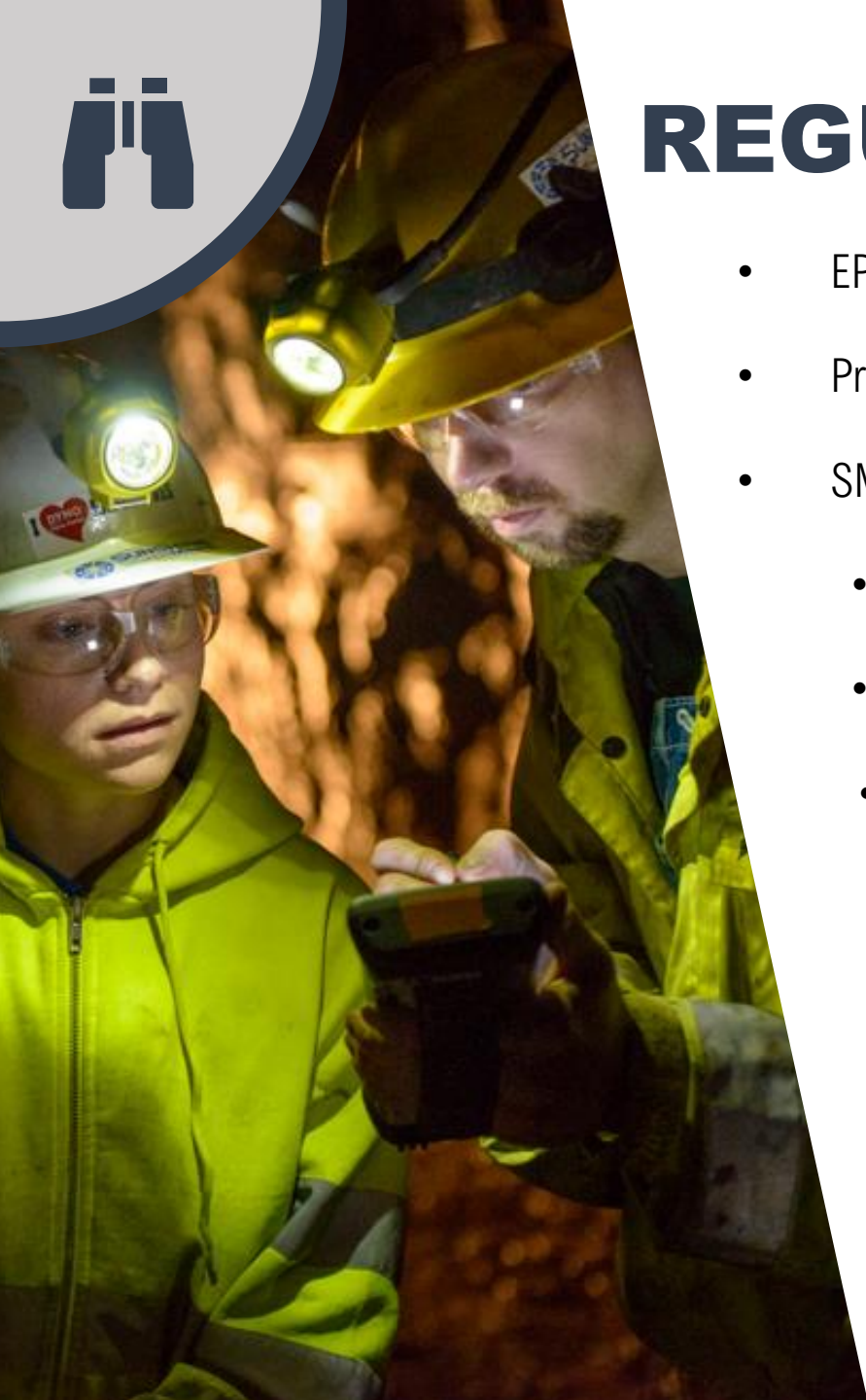
Additional Legal Certainty

- DOI Solicitor's Opinion on Reasonably Incident Mining Uses
- D.C. Circuit Denial of UMWA Petition on COVID Emergency Temporary Standard



REGULATORY PRIORITIES Q4

- EPA Groundwater Permitting Guidance
- Proposed Forest Service Locatable Mineral Regulation Revisions
- SMCRA Biological Opinion
 - FAST-41 Mining Rule
 - Proposed BLM Surface Management Regulation Revisions
 - FWS Final Definition of Habitat
 - OSM Final Ten-Day Notice Rule
 - MSHA Part 18 Technology Approvals
 - MSHA Part 50 Reporting
 - Corps Mining-specific Compensatory Mitigation Guidance



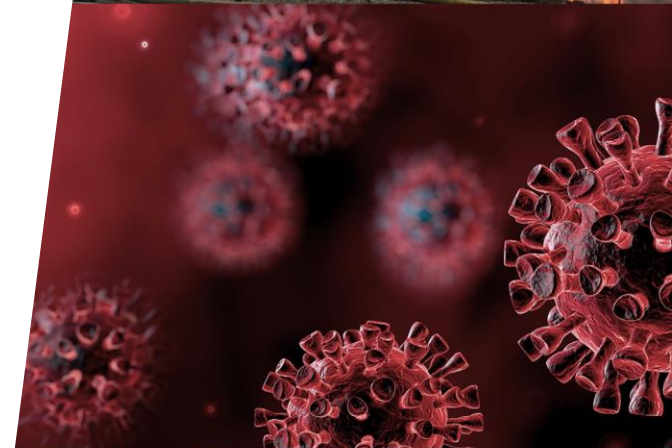
A CHANGING ENVIRONMENT





CHALLENGING ENVIRONMENT

- COVID-19 Pandemic
- Contentious Election Affecting President, Senate and House
- Wildfires, Hurricanes, Natural Disasters
- Supreme Court Vacancy Controversy
- Civil Unrest Across the Country
- School Closings, Education Strains
- Congressional Gridlock in Addressing the COVID-19 Pandemic
- Trade Tensions
- Mounting Debt and Deficits from COVID-19 Pandemic
- State and Local Budgets Running Out of Money





2020 ELECTION OUTCOMES

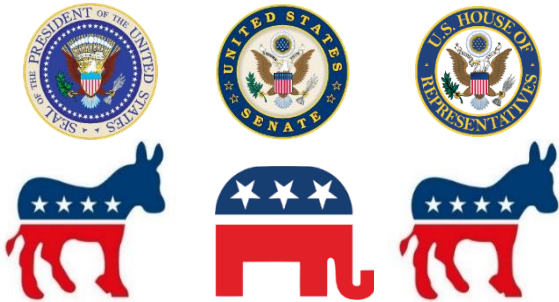
Democratic Washington

- Regulatory pendulum swings toward new Democratic administration's priorities
- New Democratic Senate supports Biden agenda, but will need to contend with a more progressive House and Senate moderates
- Senate filibuster at risk of being eliminated



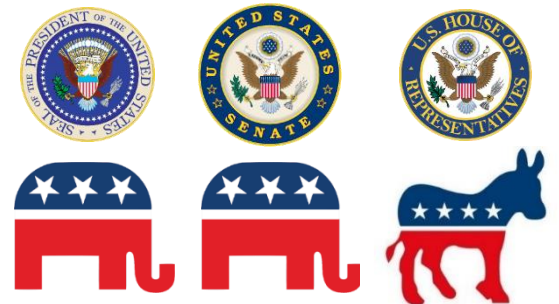
Republican Senate – Biden White House

- Senate filibuster blocks bills short of 60 votes
- Enacting legislation will require bi-partisan compromise
- Gridlock in Congress will inspire new regulatory actions by new administration



Status Quo

- Continued Trump deregulatory and tax agenda
- Continued lawsuits challenging deregulatory agenda
- Gridlock in Congress means limited opportunities for any partisan legislation





ELECTION 2020



ELECTORAL VOTE COUNT – OCT 3

2016: **Trump 306** vs. **Clinton 232**

Trump flipped FL, IA, MI, OH, PA, WI from 2012

Likely Democratic		Lean Democratic		Toss Up		Lean Republican		Likely Republican	
Virginia (13)	Biden +11	Pennsylvania (20)	Biden +5.7	Florida (29)	Biden +1.3	Texas (38) Trump +3.6			
Colorado (9)	Biden +10	Michigan (16)	Biden +5.2	Ohio (18)	Biden +3.3				
Maine (2)	Biden +15.3	Arizona (11)	Biden +3.4	Georgia (16)	Trump +0.3				
		Minnesota (10)	Biden +9.4	North Carolina (15)	Biden +0.8				
		Wisconsin (10)	Biden +5.5	Iowa (6)	Tie				
		Nevada (6)	Biden +5.3	Maine 2CD (1)	Biden +4				
		New Hampshire (4)	Biden +8.4						
		Nebraska 2CD (1)	Biden +6						

Biden has 232 electoral votes in the Solid, Likely and Lean categories and would need 39 (38%) electoral votes from the Toss Up column

Trump has 204 electoral votes in the Solid, Likely and Lean categories and would need 67 (66%) electoral votes from the Toss Up column

188

28

102

54

25

125



TRUMP SECOND TERM

Make America Great Again

- COVID-19 Relief, Infrastructure
- Additional Tax Cut Legislation
- Continue Record-setting Judicial Confirmations
- Continued Focus on International Trade Agreements
- Domestic Manufacturing – Onshoring
- Continued Regulatory Agenda
 - NSR Reforms to Accompany ACE Rule
 - Revisions to BLM and Forest Service's Hardrock Mining Regulations
 - New Source Performance Standards for New/Modified Coal Plants
 - TRI Reforms
 - Workable Ozone and Particulate Matter Standards
 - Additional Tax Reforms/Relief
 - EPA Groundwater Permitting Rule





BIDEN FIRST TERM AGENDA

Build Back Better

- COVID 19 Relief
- Healthcare
- Increase Corporate Rates from 21 Percent to 28 Percent
- By 2050, 100% Clean Energy Economy and Net-zero Emissions
- Investments and Enhance Tax Incentives for Carbon Capture, Use and Storage
- New Investments in Rare Earth Element and Critical Mineral Research and Development
 - Domestic Manufacturing – 5 Million New Manufacturing Jobs, Buy American Requirements, On-shoring Jobs
 - Social Cost of Carbon in Federal Decisions
 - Coal Leasing Moratorium on Federal Lands – Keep it in the Ground
 - Nominate and Confirm Key Personnel
 - Obama Administration Proposal for Royalties on Federal Land Hardrock Mines



SENATE OUTLOOK



SENATE ELECTION OUTLOOK

Lean Democratic

Toss-Up

Lean Republican

Likely Republican

MI | **Peters (D)** 47 +3.8
James (R) 43.2

AZ | McSally (R) 43.8%
Kelly (D) 49.8% +6

CO | Gardner (R) 42%
Hickenlooper (D) 49% +7

GA | **Perdue (R)** 45.8% +2.8
Ossoff (D) 43%

IA | Ernst (R) 40.3%
Greenfield (D) 45.3% +5

ME | Collins (R) 42%
Gideon (D) 48.5% +6.5

MT | **Daines (R)** 46.3% +1.6%
Bullock 44.7%

NC | Tillis (R) 40.5%
Cunningham (D) 46.5% +6

GA | Collins (R) 21.3% +
Warnock (D) 21.3%
Lieberman (D) 10.3%
Loeffler (R) 23.8% +2.5

KS | **Marshall (R)** 50% +7
Bollier (D) 43%

SC | **Graham (R)** 47% +1
Harrison (D) 46%

AK | **Sullivan (R)** 46% +1
Gross (I) 45%

TX | **Cornyn (R)** 44.5% +7.5
Hegar (D) 37%

Current Senate Makeup:

47 - **53**

Democrat | Republican

- Democrats need a net three seats for majority + Vice President



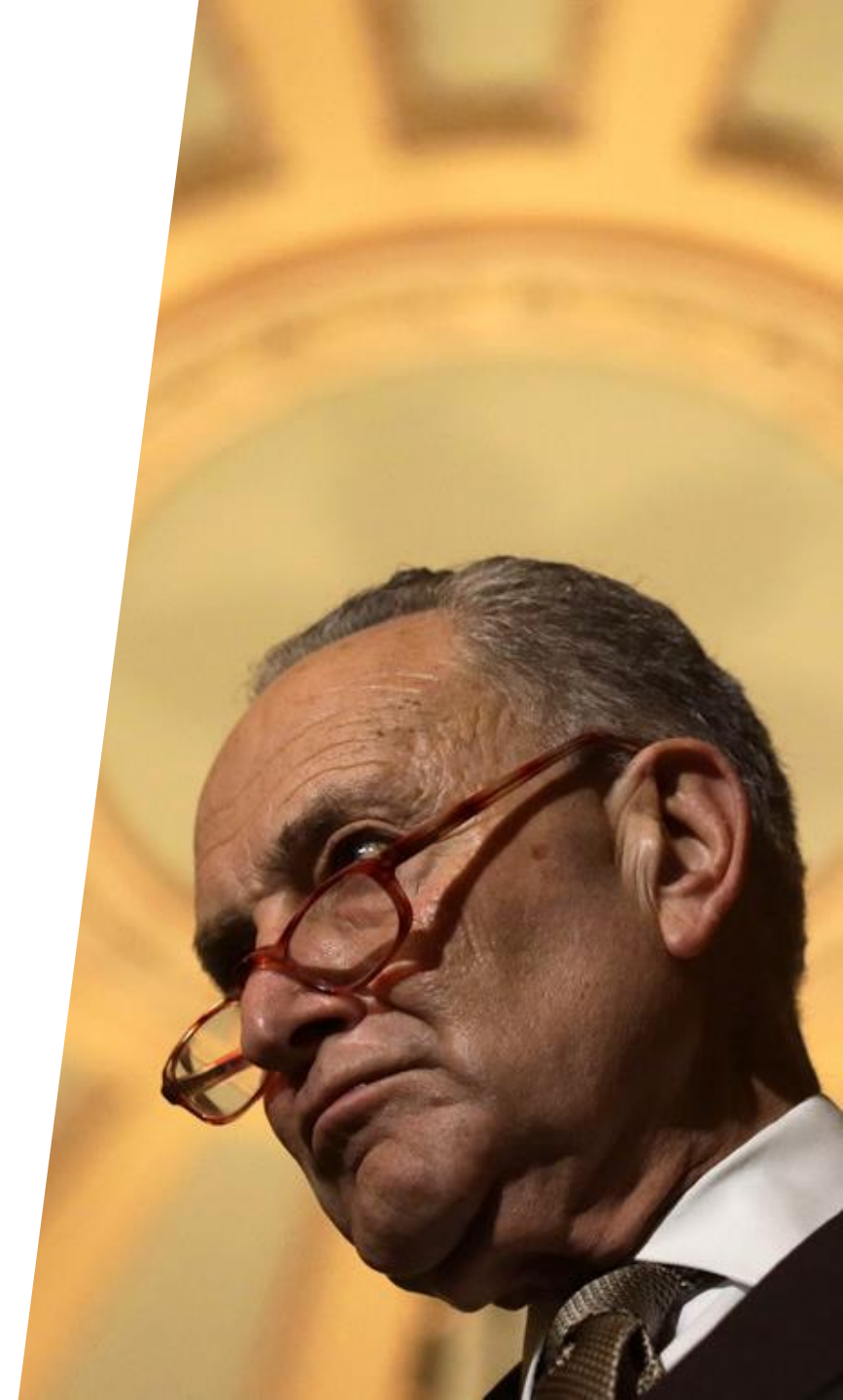
SCHUMER AGENDA

Bills

- COVID 19 Relief
- Healthcare
- Confirm Biden Nominations
- Remove Trump tax cuts
- Climate Change Legislation
 - Clean Energy Standard for Electricity Production or Price on Carbon
 - Support Renewable Energy Generation
 - Net-zero Emissions by 2050
- Coal Abandoned Mine Land Reauthorization
- Black Lung Excise Tax Increase
- Hardrock Royalty

Trump Regulation Rollbacks

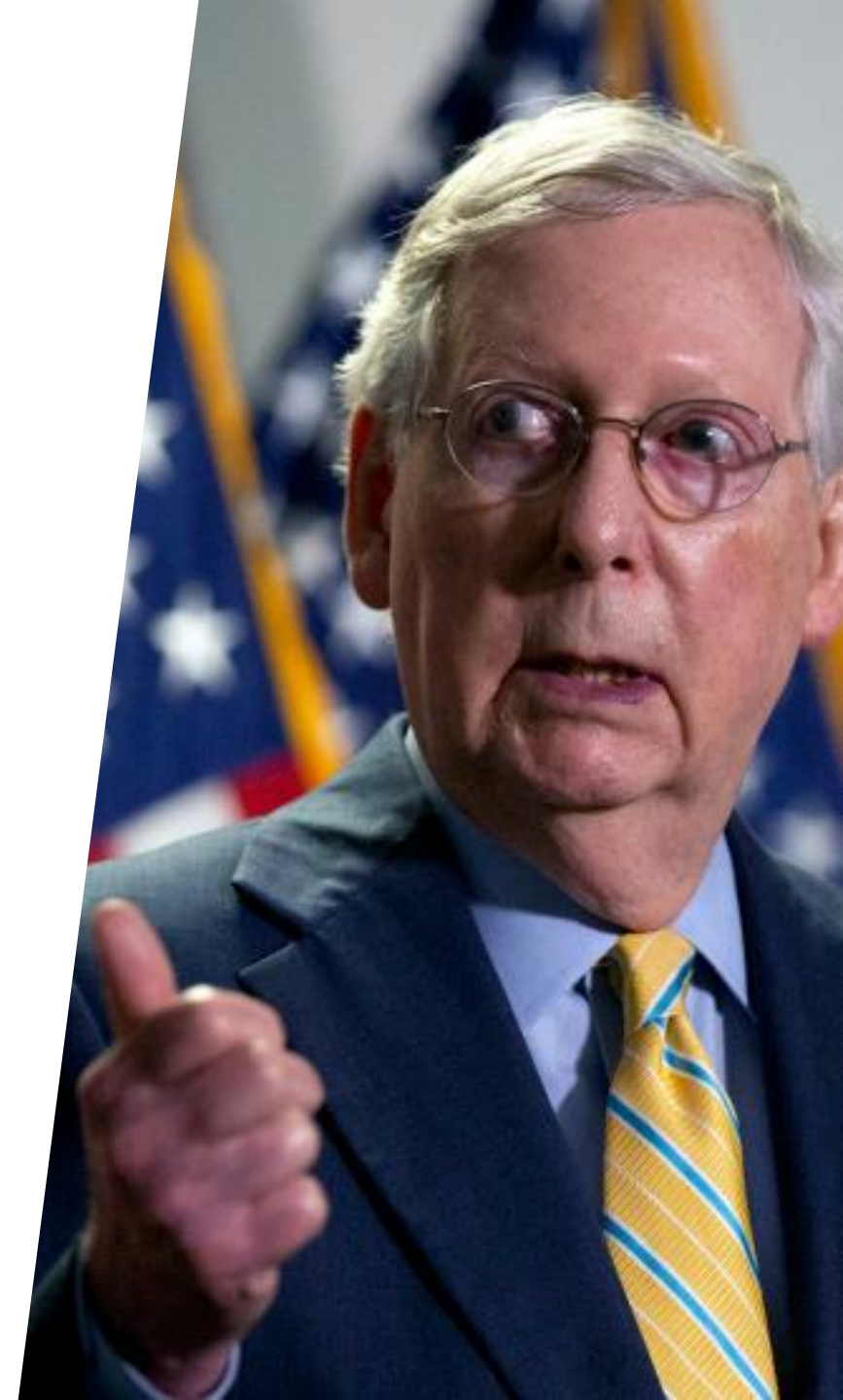
- NEPA Rules
- WOTUS Rule
- ESA Rules
- Mining Ten Day Notice Rule

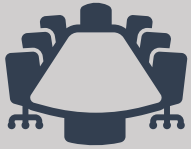




McCONNELL AGENDA

- Economic Stimulus Focused on COVID-19 Relief, Infrastructure
- Continued Confirmation of Federal District and Circuit Court Judges
 - Confirmed 218 federal judges to date
- America First Healthcare Plan
- Preservation of Filibuster for Legislation
- Confirmation of Trump Administration Nominees
- Scrutinized Confirmation of Biden Administration Nominees
- Protecting Trump Regulatory Agenda From Legislative Riders
- Preserve Trump 2017 Tax Law and Further Tax Relief
- Support for Fossil Fuel Production and Infrastructure
- Focus on Onshoring Jobs
- Tempering Biden Administration Accomplishments
- Long-term Working Relationship with Biden Affects Biden Administration Accomplishments





SENATE COMMITTEE CHAIRS

Energy and Natural Resources Committee

Joe Manchin (D-WV)



John Barrasso (R-WY)

Environment and Public Works Committee

Tom Carper (D-DE)



Shelley Moore Capito (R-WV)

Finance Committee

Ron Wyden (D-OR)



Mike Crapo (R-ID)

Health, Education, Labor, and Pensions Committee

Patty Murray (D-WA)



Rand Paul (R-KY) / Richard Burr (R-NC)

Interior and Environment Appropriations Subcommittee

Jeff Merkley (D-OR)



Lisa Murkowski (R-AK)



PELOSI AGENDA

- COVID 19 Relief
- Affordable Care Act
- Infrastructure
- Immigration Reform
- Rollback Trump Tax Cuts and Regulatory Agenda
- Climate Legislation
 - 100% clean energy by 2040 with focus on renewable energy sources (CES), auto electrification by 2035, and new residential and commercial building standards
- Mining Law Changes
 - New federal access restrictions and new taxes (12.5% royalty on new production, 8% on existing production, and 7 cent per ton tax on extraction)



A close-up, profile view of a firefighter. He is wearing a yellow helmet with a headlamp that is turned on, casting a bright light. He also wears a high-visibility yellow jacket over a dark shirt. His expression is focused and serious as he looks towards the right. The background is blurred, showing what appears to be an industrial or emergency scene with some red and orange tones.

PREPARING FOR A CHANGING ENVIRONMENT



ANTICIPATING CONGRESSIONAL TACTICS

Congressional Review Act

- Disapproval resolutions to eliminate targeted regulations from May 2020 to end of year

Budget Reconciliation

- Individual tax priorities, possibly tax increases and climate change

Elimination of Filibuster for Legislation

- All legislation can pass the Senate with a simple majority vote rather than 60 vote requirement for passage

Appropriations Riders

- Provisions in large federal government funding legislation prohibiting funding for implementation of Trump regulations

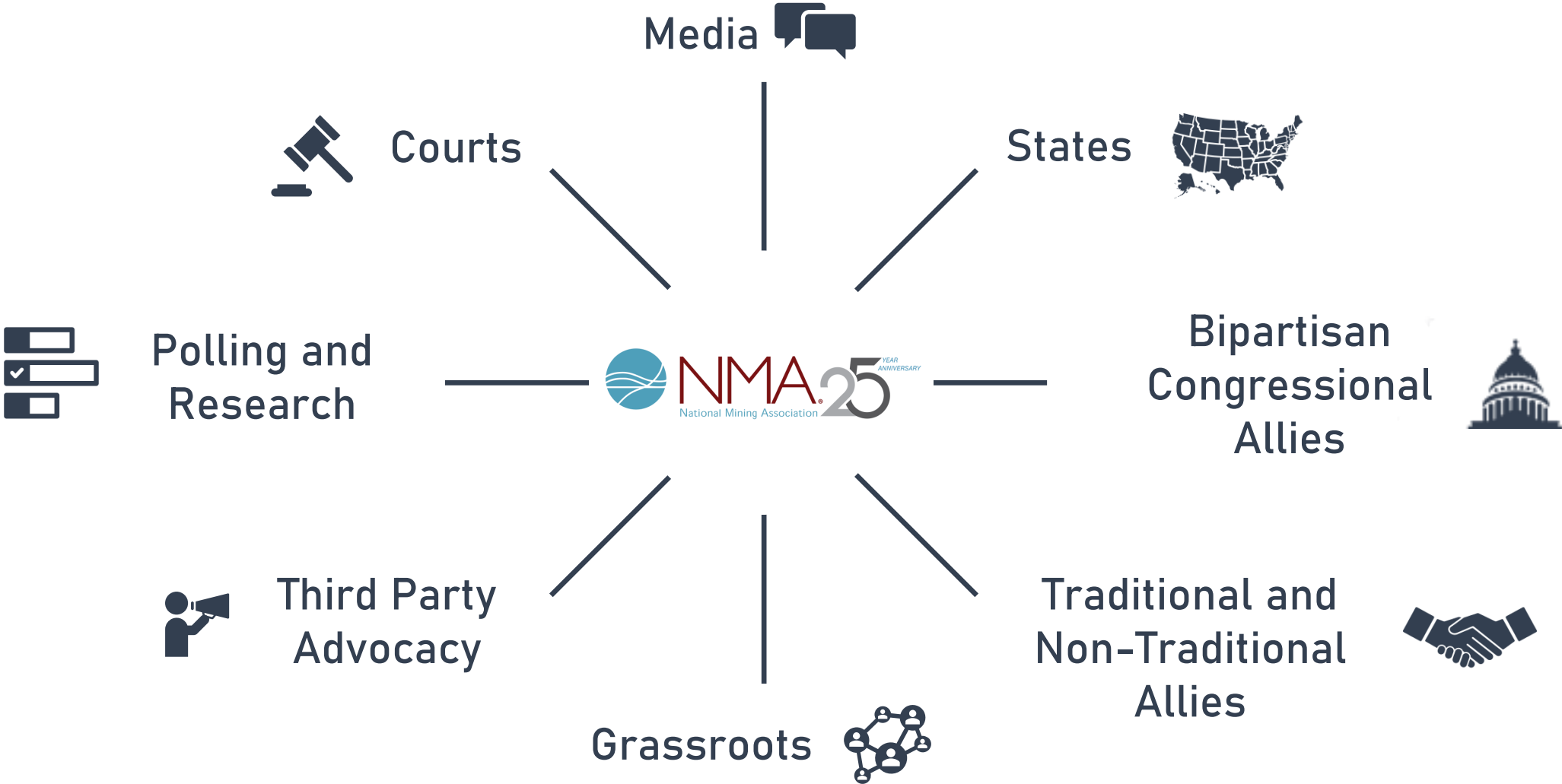


**The lesson of 2020:
remain flexible, anticipate and
plan for change**





NMA TOOLS





BIPARTISAN POLITICAL OUTREACH



Sen. Mitch McConnell (R-KY)

Rep. Kevin McCarthy (R-CA)

Rep. Liz Cheney (R-WY)

Sen. Shelley Moore Capito (R-WV)

Rep. Bruce Westerman (R-AR)

Rep. Paul Gosar (R-AZ)

Rep. Cathy McMorris Rodgers (R-WA)

Sen. Steve Daines (R-MT)

Rep. Cynthia Lummis (R-WY)

Rep. Kevin Brady (R-TX)

Rep. Guy Reschenthaler (R-PA)

Rep. Steny Hoyer (D-MD)

Ben Ray Lujan (Sen. Candidate D-NM)

Rep. Anthony Brandisi (D-NY)

Rep. Jim Costa (D-CA)

Rep. Collin Peterson (D-MN)

Rep. Sanford Bishop (D-GA)

Rep. Steven Horsford (D-NV)

Rep. Susie Lee (D-NV)

Rep. Eric Swalwell (D-CA)

Rep. Dina Titus (D-NV)

Rep. Vicente Gonzales (D-TX)

Rep. Henry Cuellar (D-TX)



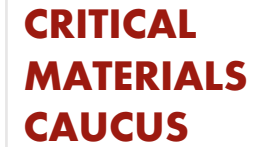
NMA has distributed direct and leveraged contributions of \$593,000+ to congressional allies this cycle.

Thank you for your support and contributions!



COALITION BUILDING: FEDERAL + STATE

Congressional committees and caucuses



State-based associations



Outreach to campaigns continues in the transition





COALITION BUILDING: THIRD PARTIES





BIPARTISAN INITIATIVES

Hardrock

- Bipartisan Critical Materials Caucus
- Bipartisan Mining Law Opportunities
- Minerals Permitting Reform
- Supply Chain Awareness in Regulatory Policy
- China Task Force

Coal

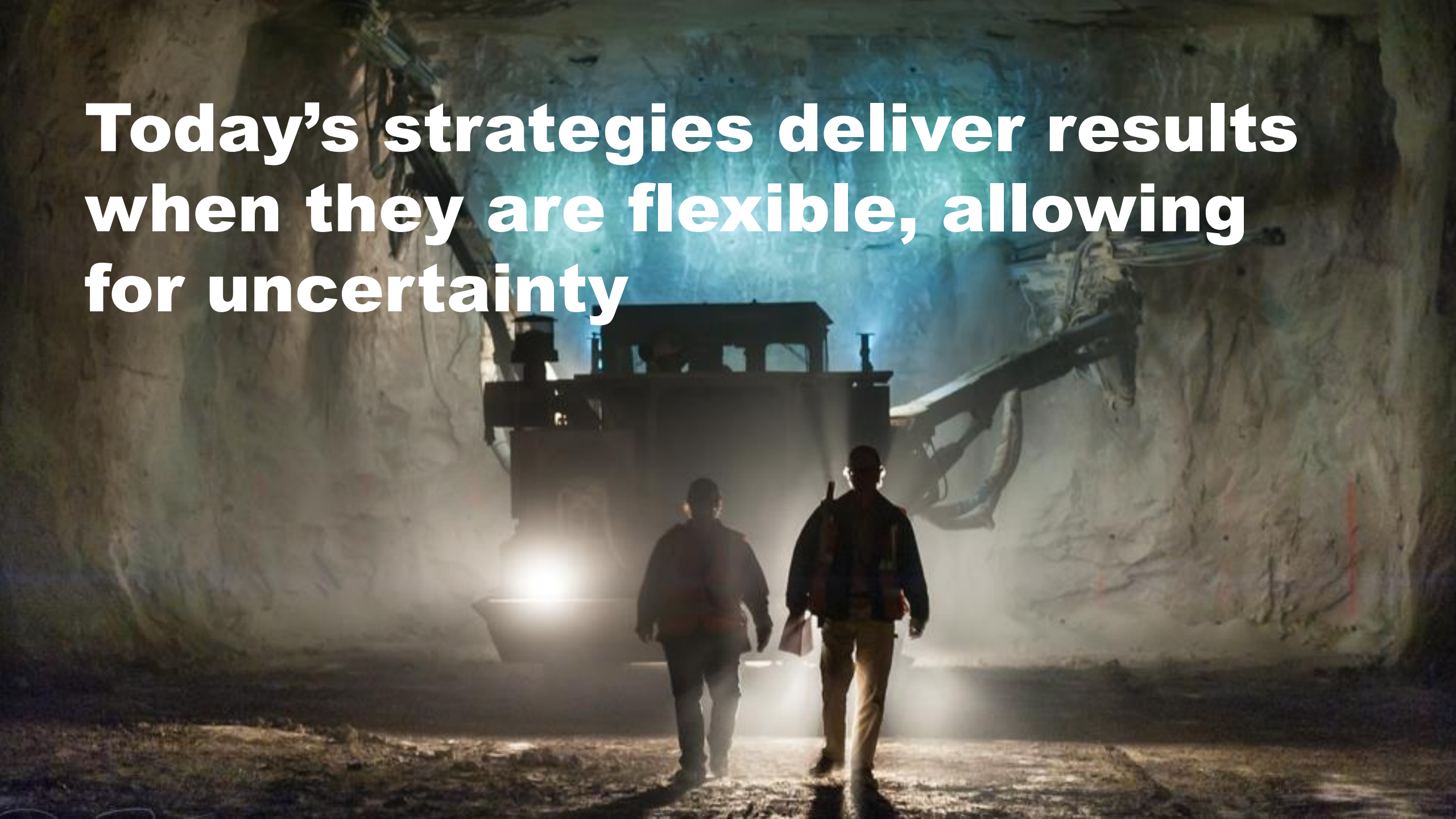
- Bipartisan Congressional Coal Caucus
- Water Infrastructure and Port Improvements
- Extension of Tax Incentives for Carbon Capture Utilization and Storage (CCUS)
- CCUS and Coal-to-Product Funding, Research and Development at DOE
- Remediation of Abandoned Mine Land



SUSTAINABLE STRATEGIES



**Today's strategies deliver results
when they are flexible, allowing
for uncertainty**



MINERALS





MINERALS MESSAGES THAT WORK

Polling

China, Supply Chains and Import Reliance

China has come to control an alarming number of key supply chains that are critical to U.S. economic and national security. China is using a dominant position in the production and processing of essential mineral commodities to win the race for key industries of the future, such as the electric vehicle, renewable energy and robotics industries. The U.S. should work to rebuild essential supply chains and recommit to producing and processing key mineral commodities at home to build secure supply chains to bolster national security while ensuring American industry and American workers remain globally competitive.

75 percent agree, including

70 percent of Democrats

83 percent of Republicans

Just 9 percent disagree

And 16 percent are unsure or have no opinion

*Strongest overall mining message
with both parties, least negative responses*



MINERALS MESSAGES THAT WORK

Polling

COVID and Supply Chain Security

The COVID-19 pandemic exposed the dangers of a heavily import-dependent supply chain. Our import dependence for key mineral commodities has doubled over the past two decades with the U.S. now 100 percent import-reliant for 17 key minerals and 50 percent or more import-reliant for an additional 29 key mineral commodities — even though we have significant mineral deposits of some of these commodities within our borders. U.S. policy should better support responsible domestic mining projects to better protect American industries from extended, complex and fragile supply chains.

72 percent agree, including

70 percent of Democrats

77 percent of Republicans

Just 10 percent disagree

And 18 percent are unsure or have no opinion

Equally strong performance with Democrats



MINERALS MESSAGES THAT WORK

Polling

Future Demand

The World Bank estimates that the production of minerals, such as graphite, lithium and cobalt, could increase by nearly 500% by 2050, to meet the growing demand for advanced energy technologies, yet many of the minerals that will be required to fuel the world's future technologies are sourced from America's geopolitical rivals or countries with far fewer environmental restrictions than exist in America. U.S. policy should support the responsible sourcing of these minerals in the U.S., home to some of the strictest environmental regulations in the world, rather than yielding our supply chains to competitors abroad.

62 percent agree, including

60 percent of Democrats

68 percent of Republicans

Just 12 percent disagree

And 26 percent are unsure or have no opinion

Still positive performance – with few negatives

But ambivalence begins to creep in



MINERALS MESSAGES THAT WORK

Polling

AML/Royalty – Solutions

The U.S. mining industry already pays between 40 to 50 percent of earnings in federal, state and local royalties, taxes, and other fees to benefit the communities in which it operates and to the federal government for taxpayer priorities and domestic programs. Adding excessive additional new royalties would push the U.S. beyond the upper limit currently in effect in other countries, significantly impairing our global competitiveness and making investments in the U.S. far less attractive.

49 percent agree, including

40 percent of Democrats

61 percent of Republicans

20 percent disagree

30 percent are unsure or have no opinion

Highest portion to disagree on a minerals message, also highest ambivalence in all messages



BIPARTISAN CRITICAL MATERIALS CAUCUS

Focus on U.S. Dependence on Critical Materials from Foreign Countries

- Co-chaired by Reps. Eric Swalwell (CA-15) and Guy Reschenthaler (PA-14), the caucus will explore U.S. dependence on critical materials from foreign sources, supply chain security issues, and help raise awareness in Congress about these issues
- NMA is working closely with the caucus to support its efforts, build the caucus in a bipartisan way, and be a resource
- NMA is coordinating with bipartisan allies to start the caucus in the Senate
- House co-chairs Swalwell and Reschenthaler headlined a panel hosted by NMA in coordination with RealClearPolitics to discuss the caucus and its engagement with congressional colleagues on these issues



Rep. Swalwell



Rep. Reschenthaler



BIPARTISAN PATH TO MINING LAW

NMA AML/Royalty Workgroup

- Guided by NMA Principles, Discussions Have Focused On Refining Approach to:
 - Royalty, including rate, timing and deductions
 - Grandfathering of existing claims
 - Use of claims maintenance fees to partially fund AML cleanups
 - Use of other fees to provide additional AML funding

“So if members are interested in reasonable legislation that understands the unique challenges and disadvantages of mining on public lands and that protects our prospectors and miners who put tremendous time and certainly tremendous resources to find, explore, risk and prove up our mineral deposits, **then I’m ready....**”

– Sen. Murkowski (R-AK)
June 25, 2020, U.S. Senate Energy and Natural Resources Committee
hearing on the Impact of COVID-19 on Mineral Supply Chains





MINERALS PERMITTING REFORM

Confluence of COVID, China threat, increasing mineral demands and supply chain concerns create bipartisan interest

- Reintroduce Legislation to Address U.S. Mineral Import Reliance, Incentivize Domestic Mineral Production, and Improve the Permitting Process
 - American Mineral Security Act
 - Securing Energy Critical Elements and American Jobs Act
- Expand Focus on Minerals and Mineral Supply Chain Security Beyond Traditional Committees of Jurisdiction (Armed Services/Transportation and Infrastructure)
 - National Defense Appropriations Act, FAST-41 Reauthorization
- Seek Out Emerging Issues to Help Address the Minerals Permitting Process and Our Increasingly Vulnerable Supply Chains:
 - Antimicrobial surface materials
 - Minerals in medicine
 - China Task Force





MINERALS COMMUNICATIONS

Message Traction “Inside the Beltway” & Across the U.S.

- NMA Polling Finds the Pandemic Has Increased All Voters’ Concerns About Supply Chain Vulnerabilities:
 - 70 percent of Republicans, 60 percent of Democrats and 63 percent of Independents
- 60 Percent Increase in Minerals-related Placements Year-over-Year
 - 138 op-ed placements 2020 vs. 86 YTD in 2019 – reaching 2 million readers through 15 different third-party voices
- Deployment of Original Content Including Videos, E-comms, Blogs to More Than 130,000 Followers
- RealClearPolitics Bipartisan Minerals Supply Chain Event
 - Co-chairs of House Critical Materials Caucus
 - Congressman Guy Reschenthaler (R-PA)
 - Congressman Eric Swalwell (D-CA)
 - Noteworthy voices including:
 - Morgan Bazilian: Director of the Payne Institute, Professor of Public Policy, Colorado School of Mines
 - Joe Bryan: Senior Fellow, Atlantic Council Global Energy Center
 - Jane Nakano: Senior Fellow, CSIS Energy Security and Climate Change Program



RealClear Energy

America's Mining Industry Deserves Strategic Support to Weather the Storm

By Rich Nolan
March 20, 2020

RealClear Politics

FEATURING
Rep. Eric Swalwell (D-CA) and
Rep. Guy Reschenthaler (R-PA)

Reinventing Our Domestic Minerals Supply Chain in a Post-Pandemic World

Energy | Technology | Medical | Manufacturing
Join us for an in-depth conversation on the challenges facing the U.S.' overreliance on mineral imports and domestic mineral production

OCT 1, 2020
10:30 AM - 11:30 AM

RSVP HERE

SPONSORED BY



A photograph of a coal mine interior. The scene is dimly lit, with a bright light source on the right illuminating the machinery and the coal face. On the left, a large, dark, textured coal face is visible. In the center, a yellow and black hydraulic mining machine is positioned. To the right, a large, dark, cylindrical object, possibly a conveyor or a large pipe, is visible. The floor is covered with coal dust and debris. The word "COAL" is overlaid in large, white, bold letters on the left side of the image.

COAL



COAL MESSAGES THAT WORK

Polling

Affordability, economic uncertainty

Americans are concerned about electricity affordability in the midst of so much economic uncertainty, yet policymakers continue to pursue aggressive changes to the grid that will raise consumer rates. While the cost of electricity from renewable sources of power is falling, the system costs of integrating these intermittent sources of energy is rising and those costs are passed onto the consumer. Before retiring well-operating power plants, utilities should consider the impact of the transition to renewables on their customers.

71 percent agree, including

67 percent of Democrats

79 percent of Republicans

Just 14 percent disagree

15 percent unsure / have no opinion

Favorability is second only to supply chain message of all mining messages



COAL MESSAGES THAT WORK

Polling

Affordability, specific \$, specific fuels

A major U.S. electric utility with more than 7 million customers just reported that moving aggressively to renewable sources of power, which would require early retirement of well-operating baseload coal and natural gas plants, could add \$50 or more to monthly electricity bills. An additional \$50 per month in electricity bills is too much to ask of ratepayers.

67 percent agree, including

61 percent of Democrats

76 percent of Republicans

21 percent disagree

And 13 percent unsure / no opinion

Still strong performance but

adding \$ causes support decline, opposition boost, highest negative of all messages



COAL MESSAGES THAT WORK

Polling

Infrastructure

Together with iron ore, coal is indispensable in the production of steel. As countries around the world look to large-scale infrastructure projects to aid in their post-pandemic economic recovery plans – from new bridges or dams to renewable energy systems and subways – the world needs metallurgical coal. The U.S. should be supporting export policies that ensure that the world's appetite for coal is met with supplies from the U.S., where we know it is mined under the strictest environmental and safety standards.

60 percent agree, including

54 percent of Democrats

71 percent of Republicans

17 percent disagree

And 23 percent are unsure or have no opinion

The farther we get away from personal impact messages, the less support we have, particularly from Democrats

Global competitiveness appeals to Republicans

High degree of ambivalence



COAL MESSAGES THAT WORK

Polling

Clean Coal Technology

Meeting global emissions targets will require significant momentum in commercially viable advanced coal technologies and carbon capture, utilization and storage (CCUS). As policymakers consider investments in energy innovation and deployment of advanced technologies as part of the nation's economic recovery, U.S. leadership in advancing CCUS and other essential coal technologies must be a priority.

56 percent agree, including

51 percent of Democrats

66 percent of Republicans

20 percent disagree

And 23 percent are unsure or have no opinion

Less personal, less support, high ambivalence



BIPARTISAN CLEAN COAL TECHNOLOGY

USE IT Act

Supports carbon utilization and direct air capture research, and the construction and development of Carbon Capture, Utilization and Storage (CCUS) facilities and pipelines

EFFECT Act

Establishes four Department of Energy (DOE) R&D programs focused on coal and natural gas technology, carbon storage, carbon utilization and carbon removal

COAL TeCC Act

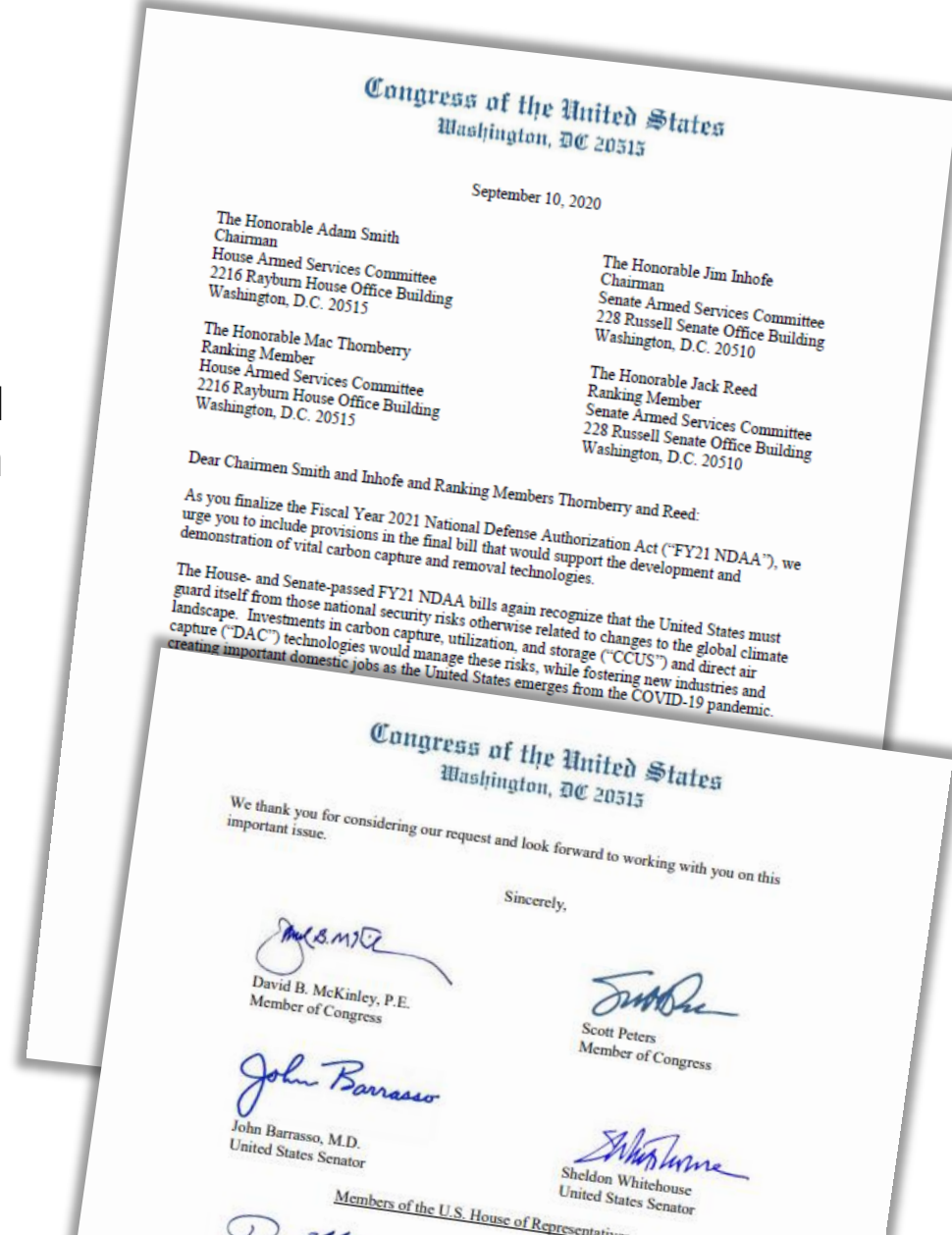
Establishes a dedicated program within the DOE focused on advancing the research and promotion of coal-derived carbon products

DOE Coal FIRST

Bipartisan support to increase funding for DOE's Coal FIRST initiative, which aims to develop coal plants of the future

45Q Tax Credit

Provides a tax credit on a per-ton basis for CO₂ that is sequestered by 2026





RELIABILITY OF THE FLEET

Affordable Clean Energy (ACE) Rule Litigation

- Oral argument October 8
 - Challenging panel with two Obama-appointed judges (Millett and Pillard) who signaled support for the Clean Power Plan (CPP) during prior litigation
 - Recent Trump-appointed judge (Walker) gave new voice in this litigation
- WV Solicitor General Lyndsay See represented state and industry intervenors in support of CPP repeal and ACE replacement
- Oklahoma and West Virginia are on track for pre-election State Implementation Plan (SIP) submissions. Several states are poised to move on a SIP after the election

Effluent Limitations Guidelines (ELGs)

- Timing of final rule allows coal plants to avoid state permit conditions requiring compliance with Obama rule
- Extends compliance dates for flue gas desulfurization (FGD) wastewater and bottom ash transport water (BATW) for at least a year and in some instances to 2025

PJM Capacity Market

- Federal Energy Regulatory Commission (FERC) approval of PJM's compliance filings and proposed auction schedule pending
- Ongoing litigation challenging the MOPR order in 7th Circuit with several challenges also filed in DC Circuit

Clean Energy Standard

- Presidential candidate Joe Biden's plan to eliminate carbon dioxide emissions from the electric sector by 2035
- Retirement positioning and EVA data analysis modeling
- State Engagement Team - development and deployment





COAL EXPORTS AND METALLURGICAL COAL

- Active Engagement with Administration (DOE, USTR, EXIM) and Foreign Governments
- Oversight of China - Phase One Purchase Commitment
- 2021 Export Market Strengthening
- Engage Congress on Export Costs and Trade Challenges
- Identify Infrastructure Priorities for Next Round of Legislation
- Reduce Transportation Costs: Water Resources Development Act/American Water Infrastructure Act Protecting Crucial Harbor Maintenance and Inland Waterway System





COAL COMMUNICATIONS

Making an Impact with Key Audiences

- Count on Coal blog recognized, followed and quoted by high-profile media
- Editorial placements hold strong
 - 153 op-eds in 2020 vs. 157 in 2019 – reaching 3 million readers through 18 different third-party voices
- NMA polling finds all voters are concerned about increasingly expensive electricity costs:
 - 85 percent of Republicans, 88 percent of Democrats and 80 percent of Independents
- Many are unwilling to pay more in electricity costs to support lofty grid transformation goal:
 - 74 percent of Republicans, 34 percent of Democrats and 54 percent of Independents

The Washington Post

California can't keep the power on

Rolling blackouts are needed to protect the integrity of the grid -- while putting millions in the dark

Grid operators, utilities and politicians have fallen over themselves not to blame the state's headlong pivot to renewable power for the current crisis

And in a [blog post](#) as part of its "Count on Coal" campaign, the National Mining Association, a mining industry trade group, said the difficulty of managing "the intermittency of renewable sources of power is the elephant in the room" in California.

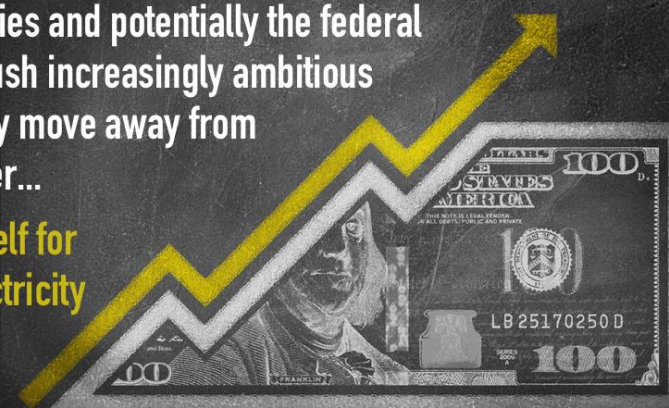
California leaders suggested climate change is too big of a crisis to back down from its clean energy goals.

In a [press conference](#) this week, Gov. Gavin Newsom (D) blamed the outages on "extraordinary weather conditions" and [demanded](#) an investigation into what happened. But he also acknowledged the "episodic nature of the renewable portfolio" made California "vulnerable to these conditions."

He added, however, that it is still economically and ecologically important for the state to wean itself off of fossil fuels to forestall dangerous heat waves in the first place.

As states, utilities and potentially the federal government push increasingly ambitious plans to rapidly move away from baseload power...

Prepare yourself for the higher electricity costs that will follow



Sustainable Strategies in a Changing Environment





MINExpo INTERNATIONAL[®] 2021



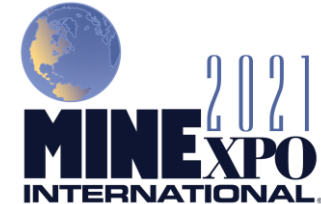
MINExpo INTERNATIONAL[®] 2021

Moving Forward

September 13-15, 2021 – Las Vegas Convention Center

Safety and health are priorities for MINExpo

- Outreach underway to 2020 exhibitors with options to participate in 2021 show – deadline Nov. 23, 2020
- Insurance coverage for 2020 show is triggered, subject to all conditions of the policy including contagious disease rider
- 29 hotel and 20 vendor contracts moved to 2021 with no penalties
- Attendee surveys ongoing to gauge acceptance/concerns to in-person events
- New safety and health guidelines from convention center
 - NMA working group evaluating show changes and industry best practices



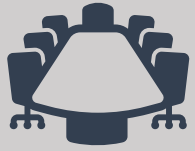
NMA FALL MEETING AGENDA

- Welcome and Introductions
- Safety Share
- Awards
- Approval of Meeting Agenda*
- Approval of Minutes from Board Meeting Held June 30, 2020*
- Executive Committee Report
- Association Report
- MINExpo INTERNATIONAL[®] 2021
- Audit and Finance Committee Report*
 - Budget Presentation
- Bylaw Amendments*
- Nominating Committee Report*
 - Officers
 - Audit & Finance Committee
 - Executive Committee
 - Directors
- Adjournment

*Requires Board Action

BYLAW AMENDMENTS





NOMINATING COMMITTEE REPORT

OFFICERS

AUDIT & FINANCE COMMITTEE

EXECUTIVE COMMITTEE

DIRECTORS





WELCOME JIMMY BROCK

PRESIDENT & CEO CONSOL ENERGY



Next Chairman of the National Mining Association Board of Directors



PHIL BAKER

PRESIDENT & CEO HECLA MINING COMPANY



Presented by the National Mining Association Board of Directors to Phillips S. Baker, Jr.,
with grateful appreciation for outstanding leadership and service as Chairman of the Board



THANK YOU TO ALL OUR SPONSORS





NEXT MEETING

Spring 2021

April 19-20, 2021

The Ritz-Carlton, Sarasota, FL
(In person or virtual)

Fall 2021 | MINExpo

September 12, 2021

Las Vegas, NV





NMA[®]

National Mining Association

25

YEAR
ANNIVERSARY