

WelcomeNEW MEMBERS



















































Safety SHARE





LOCK IT OUT!

AGENDA

01.

Safety Share

02.

Executive Committee Report



03.

Association Report: American Resource Security in a Changed World

04.

Upcoming Meetings

Meeting Sponsors THANK YOU









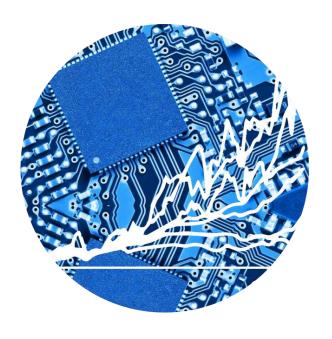






A Changed World GLOBAL MATERIAL SUPPLY CHAIN INSTABILITY

EXPONENTIAL GROWTH IN MINERALS DEMAND



DOMESTIC SUPPLY CHAIN LIMITATIONS



RUSSIA BANS DRIVE COAL AND MINERALS DEMAND



A Changed World ENERGY COMMODITIES

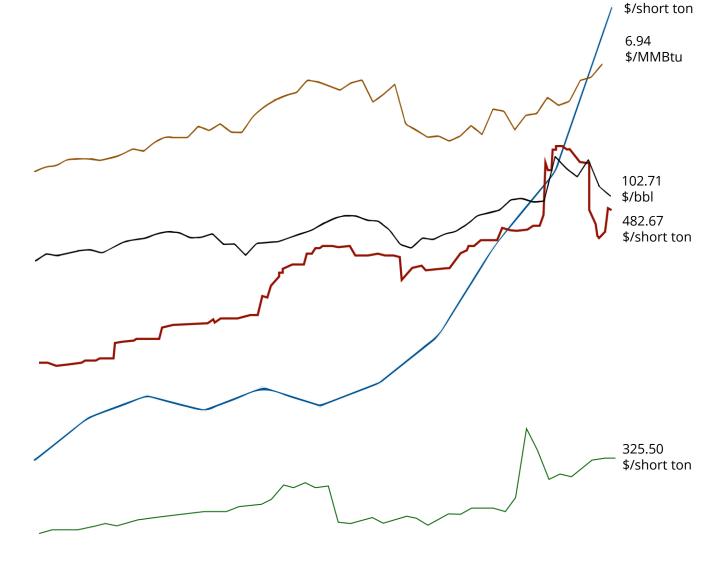
HENRY HUB
NATURAL GAS

WEST TEXAS INTERMEDIATE OIL

METALLURGICAL COAL

APPALACHIAN SPOT COAL PRICE

API 2 THERMAL BENCHMARK



89.70

April 2021 April 2022

A Changed World

MINERAL COMMODITIES

GOLD

SILVER

COPPER

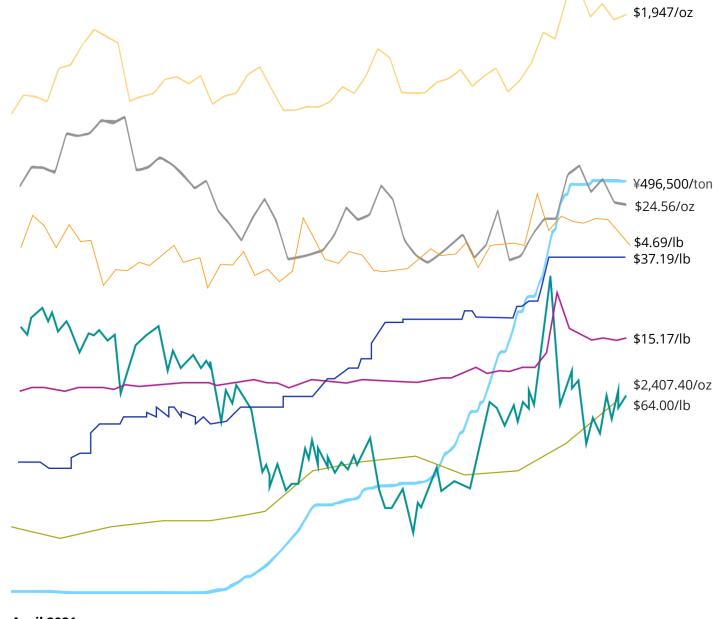
PALLADIUM

NICKEL

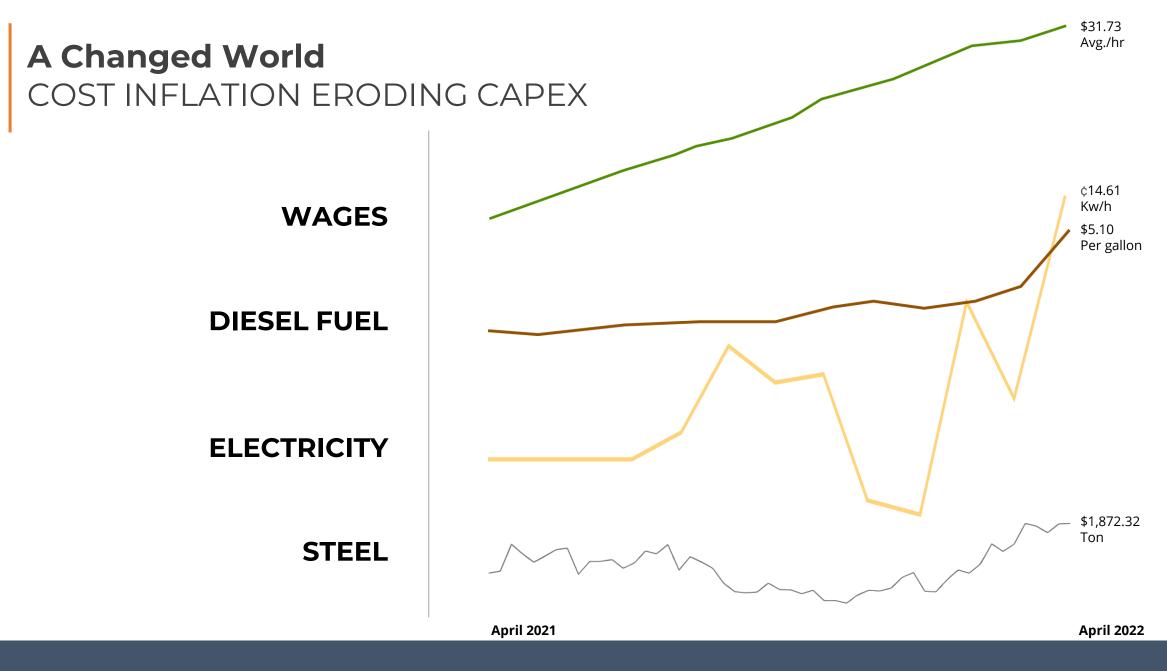
COBALT

URANIUM

LITHIUM



April 2021



A Changed World

U.S. RESPONSE TO INSTABILITY

WHITE HOUSE MINERAL SUPPLY CHAIN EXECUTIVE ORDER



CONGRESSIONAL RUSSIAN ENERGY IMPORT BAN



WHITE HOUSE DEFENSE PRODUCTION ACT FOR MINERALS



Memorandum on Presidential Determination Pursuant to Section 303 of the Defense Production Act of 1950, as amended

Presidential Determination
No. 2022-11

MEMORANDUM FOR THE SECRETARY OF DEFENSE

SUBJECT: Presidential Determination Pursuant to Section 200

A Changed World U.S. POLITICAL LANDSCAPE

MIDTERMS



BIDEN/TRUMP 2024



Trump DeSantis | Haley | Pence

STATE OF THE NATION



Inflation | Jobs/Economy Immigration | Pandemic | Crime Nat. Security | Climate



A Changed World BUILD BACK BETTER

2021 - PROVISIONS DEFEATED

- New hardrock royalties
- Increase coal royalties
- New dirt tax on hardrock mining
- Increase in the coal severance tax
- Upending hardrock mining regs
- Cancelling deferred coal bonus bids
- Ending coal royalty relief
- Targeted hardrock mineral withdrawals
- Damaging coal leasing terms
- Coal plant securitization



Mining Law reform

incentives

Fossil and renewable



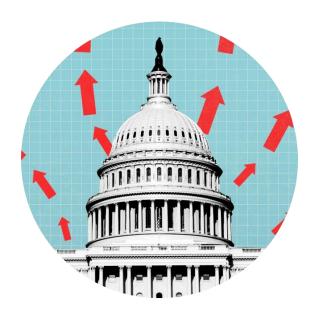
A Changed World: U.S. Congress SEN. MANCHIN

energy package

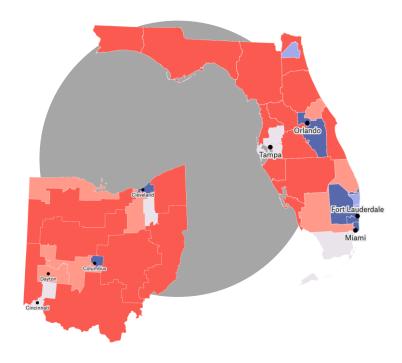


A Changed World: U.S. Congress 2022 MIDTERMS

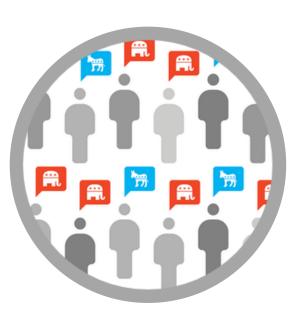
RETIREMENTS



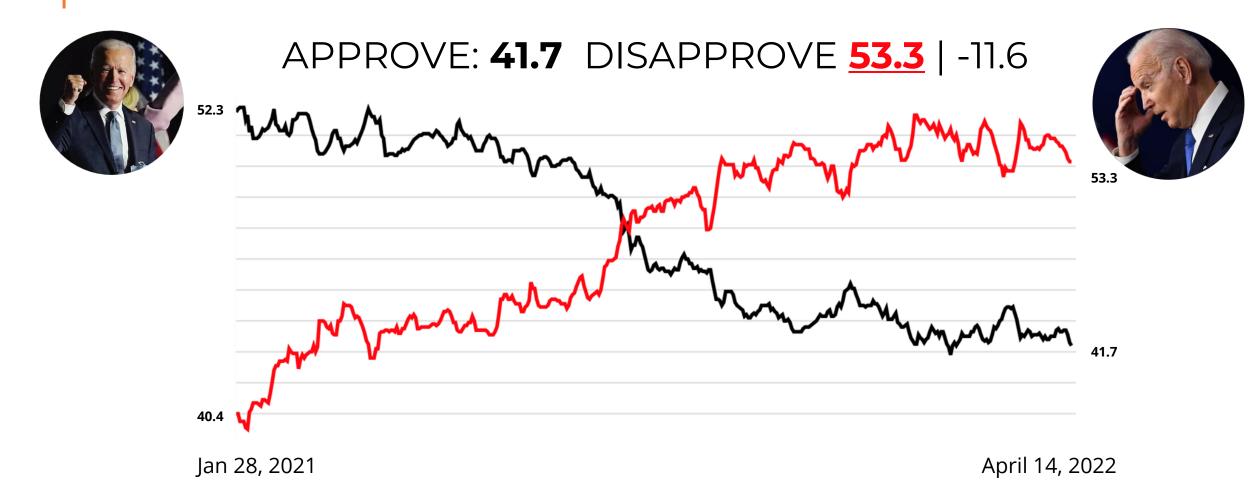
REDISTRICTING



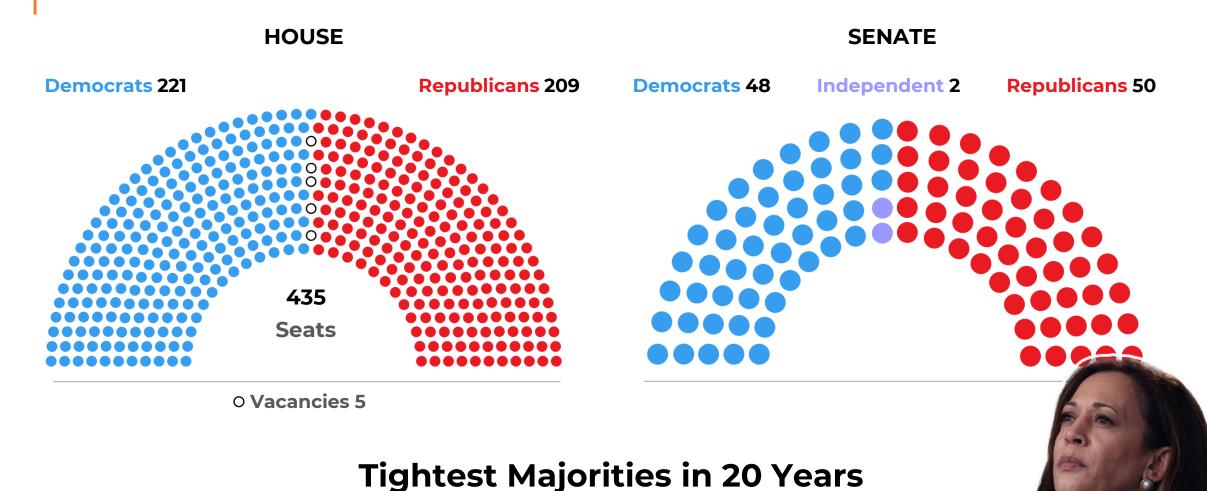
POLLING



A Changed World: U.S. Congress BIDEN APPROVAL RATING



A Changed World: U.S. Congress HOUSE & SENATE MAJORITIES



A Changed World: U.S. Congress SENATE COMPETITIVE RACES

Solid D	Likely D	Lean D	Toss Up	Lean R	Likely R	Solid R
CA Padilla CT Blumenthal HI Schatz IL Duckworth MD Van Hollen NY Schumer OR Wyden VT Open WA Murray	CO Bennet	NH Hassan ocrat-controlled seats a	AZ Kelly GA Warnock NV Cortez Masto - PA Open WI Johnson	FL Rubio NC Open OH Open	· election	AK Murkowski AL Open AR Boozman IA Grassley ID Crapo IN Young KS Moran KY Paul LA Kennedy MO Open ND Hoeven OK Lankford OK Open SC Scott SD Thune UT Lee

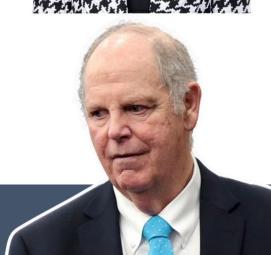
A Changed World: U.S. Congress HOUSE COMPETITIVE RACES



Lean D						
CA CA IL IL IN MD NV NV NV NY NY OR RI	Open Porter Merged Seat Open Underwood Mrvan Trone Open Titus Open Malliotakis Maloney Delgado Schrader					
Likely D						
NY	Open					

R Toss Up	Lean R
CA Valadao CA Garcia CA Steel CO New Seat MI Meijer NC Open NM Herrell OH Chabot	AZ Schwil AZ Open MI Open NJ Malind TX Open WI Open
orr chapet	Likely
	AZ O'Hall





A Changed World: U.S. Congress NMA POLITICAL ACTION COMMITTEES

















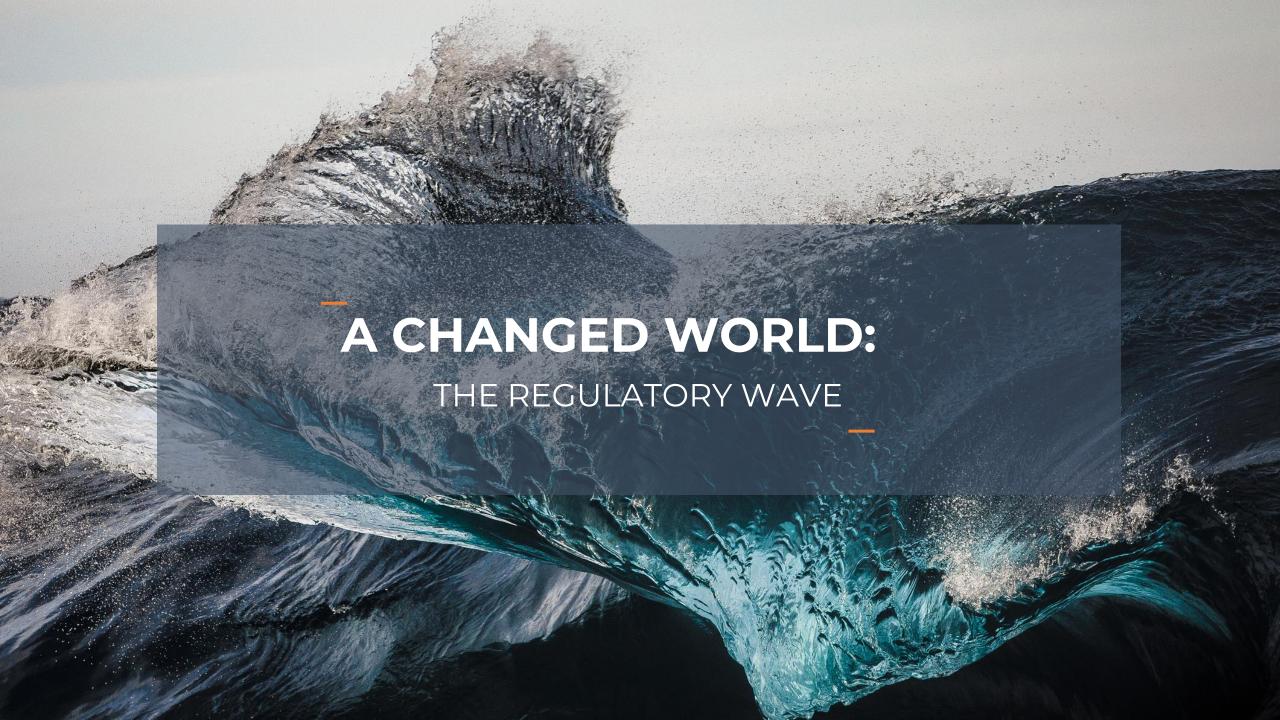


MINEPAC COALPAC

- \$600,000 contributed from member PACs and members
- Combined with hosted events and your contributions, the NMA contributed a total of \$222,000 to congressional allies in 2021
- Bipartisan contributions

Follow the QR code to donate today!





A Changed World: Regulatory Wave BIDEN ADMINISTRATION VIEWS ON MINING

PRESIDENT **BIDEN**

"You know, so we can avoid the historical injustices that too many mining operations left behind in American towns. And that's why we're working to modernize America's mining laws and regulations, some of which are 150 years old."

CLIMATE CZAR JOHN KERRY

At COP26 in Glasgow, "[b]y 2030 in the United States, we won't have coal."

EPA ADMINISTRATOR MICHAEL REGAN

EPA is "aligning all of our regulations so that we can basically present a suite of regulations to the industry at one time so that they can understand all of the investments that they will need to protect public health and the environment. And they'll have to determine whether or not those investments warrant the longevity of these coal plants."

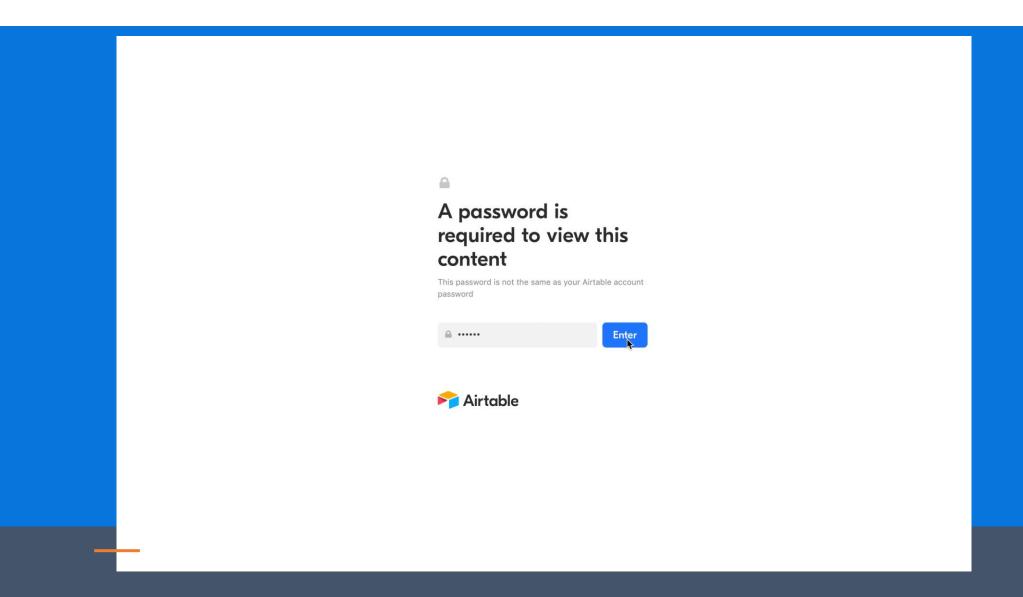
SEC. OF INTERIOR **HAALAND** ON FORMATION OF IWG

"The 150th anniversary of the Mining Law of 1872 is a great opportunity to take a hard look at how we regulate and permit mining in this country."



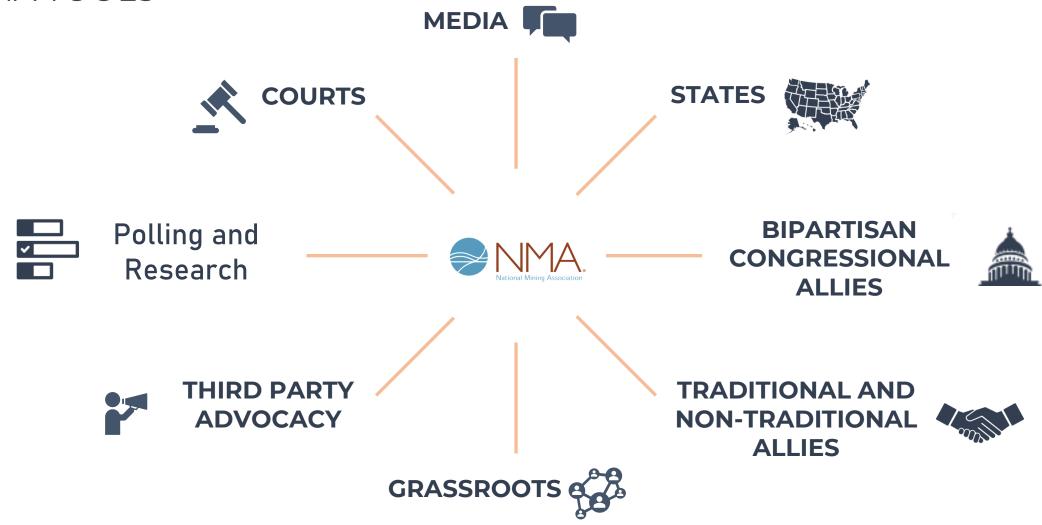
A Changed World: Regulatory Wave





A Changed World: Regulatory Wave

NMA TOOLS





A Changed World: Minerals Policy DIVERSE VIEWS ON MINERALS MINING

SEC. OF ENERGY GRANHOLM ON WORK TO STREAMLINE PERMITTING FOR NEW SOURCES OF EV MINERALS

"It takes forever to get a new permit. How crazy is that?"

EPA ADMINISTRATOR REGAN

"But it can't take place in the ways that it has in the past, which skirted some of the environmental laws and disproportionately impact communities of color and tribal communities"

FROM **EPA DRAFT STRATEGIC PLAN 2022-26:**

"There also are potential emerging risks to water and water quality from increased domestic mining for critical and rare earth elements needed to produce electric vehicles, motors, wind turbines, and other technologies that will be important to decarbonize the economy and reduce CO₂ emissions."

DIRECTOR OF THE NATIONAL ECONOMIC COUNCIL BRIAN DEESE

"As we transition to a clean energy economy, demand for these minerals is set to skyrocket by up to 6,000%. We're reliant on foreign sources for the mining and processing of many of these critical minerals, and they're often produced in ways that don't comport with our values."



A Changed World: Minerals Policy BIPARTISAN SUPPORT BUILDING



SEN. JOHN BARRASSO (R-Wyo.)

"Is it fair to say that this overly complex and long permitting process is actually the single largest roadblock to additional mineral production in the **United States?**"

SEN. JOE MANCHIN (D-W.Va.)

"Right now, we're not mining, processing, manufacturing, or recycling these materials domestically. And these issues aren't solved overnight"

SEN. CATHERINE CORTEZ MASTO (D-

Nev.)

"We need to streamline our permitting" SEN. RON WYDEN (D-Ore.)

"Reducing dependence on foreign minerals is as much a national security issue as it is an environmental question."

SEN. ANGUS KING (I-Maine)

"I don't think the permitting process itself should be used as a weapon to stop a project."

Congress of the United States Washington, DC 20515

President Joseph R. Biden, Jr The White House 1600 Pennsylvania Avenue, NW Washington, D.C. 20500

We write to express our support for your Administration's renewed focus on strengthening we write to express our support for your Administration is renewed rocus on such gamening America's supply chain security in order to promote economic recovery, national security and America's supply chain security in order to promote economic recovery, national security, a maintain U.S. competitiveness. Decades of low-cost labor, price manipulation, and market exploitation by geopolitical adversaries has shifted critical supply chains away from the U.S. and

merica's ability to respond to COVID-19 is just the most recent indicator, in a long line of warning signs, that the United States must diversify its supply chains and not be overly warning signs, that the Office States must diversify its supply chains and not be overly dependent on any one country for our economic prosperity. Further, in a global economy,

vulnerabilities, will not be an easy task, but we stand ready to engage in thoughtful, bipartisan vumerationines, with not be an easy tasts, but we statio ready to engage in inoughtor debate about the best way to secure our nation's economic and national security.

Please use us as a resource and engage our shared experience to help support a holistic approach rease use us as a resource and engage our snarcd experience to near support a nonsite appro-to providing the of the very resources and regulatory environment that domestic manufacture

Member of Congres

mile Lampson

A Changed World: Minerals Policy BIPARTISAN RECOGNITION OF PERMITTING CHALLENGES



A Changed World: Minerals Policy INTERAGENCY WORKING GROUP ON MINING REFORM





PURPOSE

To evaluate potential reforms to hardrock mining laws and regulations,

including financial assurance and permitting policies





SCOPE

IWG principles for reform







KICKOFF MEETING

March 2022



Request for information published on March 31 with comments due in July

Roundtables/field hearings to be held mid-April to July to gather feedback





TIMING Recommended changes to Mining Law by Nov.; proposed regulations

by end of 2022

David Hayes (former Dep. Sec. of DOI under Clinton and Obama)

PLAYERS

Steven Feldgus (former Grijalva staffer)

Stephenne Harding (former Obama CEQ)

A Changed World: Minerals Policy BIDEN DEFENSE PRODUCTION ACT DETERMINATION

BUILDS OFF E.O. 14017, AMERICA'S SUPPLY CHAINS

DRIVEN BY CONCERNS OVER BATTERY METALS FOR EVS

 "Securing materials needed for the large capacity batteries is essential to our national security"

 "Create, maintain, protect, expand, or restore sustainable and responsible domestic production capabilities of such strategic and critical materials"

DPA AUTHORIZES CONTRACTS, GRANTS, PURCHASE COMMITMENTS FOR:

- Feasibility studies
- Co-product/byproduct production
- Modernization of processes to increase productivity
- Other activities





A Changed World: Coal Policy EPA REGAN PLAN

A COMPREHENSIVE REGULATORY ASSAULT TO CLOSE COAL PLANTS

WHITE HOUSE CLIMATE CZAR GINA MCCARTHY

"We have lots of regulatory authority that we intend to use, regardless, and we'll move forward with those efforts to try to tackle the climate crisis."

EPA ADMINISTRATOR MICHAEL REGAN

"We don't have to overly rely on any one rule. It's looking at the full suite of authorities to maximize our ability to protect communities and public health," that include air, water and wastewater disposal rules.

"I will push the envelope" with the legal authorities available.

RULES IN THE WORKS | AIR: 8 | WATER: 2 | WASTE: 1 | OTHER: 1

EEI PRESIDENT & CEO TOM KUHN

"We look forward to continuing to work with Joe [Goffman, nominee for EPA Assistant Administrator for Air] on EPA's efforts to take a coordinated and holistic approach to policymaking, which can help to provide a regulatory framework that supports these investments and accelerates the clean energy transition."



A Changed World: Coal Policy PUSHING BACK ON EPA REGAN PLAN

Congress of the United States Mashington, DC 20515

April 18, 2022

Midcontinent Independent System Operator (MISO), Inc. Chief Executive Officer 720 City Center Drive

Inflation is the highest it has been in 40 years. Gas prices across the United all-time high, and expected to remain at those levels for the foresceable fut an-time riigh, and expected to remain at more revers for the forescenare but Environmental Protection Agency (EPA) continues to move forward with: regulate electric utilities, it is imperative that EPA suspend any of those as further constrain domestic energy supplies or raise energy costs. Otherwi nurner consum nomenic energy supplies or raise energy costs. Concern agenda will only further inflict devastating economic impacts on Americ

For example, EPA regulations governing the disposal of coal combustiv ror example, EPA regulations governing the disposal of coal contonions coal ash, from electric utilities went into effect on September 20, 2020 established a deadline of April 11, 2021, to individual units that failed what EPA calls

Congress of the United States Washington, DC 20515

April 18, 2022

Mr. Manu Asthana President & Chief Executive Officer PJM Interconnection, LLC 2750 Monroe Boulevard Audubon, PA 19403

Inflation is the highest it has been in 40 years. Gas prices across the United States are, too, at an article highest and accorded to recognize at those bounds for the forecombile fittings. As the U.S. minimum is the lightest it has oven in 40 years. One prices across the critical states are, 100, and limb high, and expected to remain at those levels for the foresceable future. As the U.S. an-time mgn, and expected to remain at those levels for the foreseeable future. As the U.S. Environmental Protection Agency (EPA) continues to move forward with a number of actions to regulate abactic utilities, it is impossing that EDA suspend move forward with a number of actions to Environmental Protection Agency (EPA) continues to move torward with a number of action regulate electric utilities, it is imperative that EPA suspend any of those actions that would be actionable to the control of t regulate electric utilities, it is imperative that EPA suspend any of those actions that would further constrain domestic energy supplies or raise energy costs. Otherwise, EPA's regulatory and a constraint of the constraint of t agenda will only further inflict devastating economic impacts on Americans.

se those

EPA grant

ecause

ions at 5

t portion

United States Senate

TTEE ON ENVIRONMENT AND PUBLIC WORKS HINGTON, DC 20510-6178

February 8, 2022

The Honorable Michael S. Regan US Environmental Protection Agency 1200 Pennsylvania Avenue, NW Washington, DC 20004

Dear Administrator Regan:

I was very disappointed to see recent news reports highlighting how the US Environmental I was very disappointed to see recent news reports migningning now the US Environmental Protection Agency (EPA) is developing a broad-based and aggressive regulatory strategy with the cinomlar intent to tarnet and shutter freed final power plants, including coal, final power. Protection Agency (EI/A) is developing a oroac-based and aggressive regulatory strategy with the singular intent to target and shutter fossil-fuel power plants, including coal-fired power plants, including coal-fired power plants, including coal-fired power plants, and a stable of the compressional authority and appear of the singular intent to target and smutter rossit-tuet power plants, including coal-tired power plants. This strategy, which is allegedly being established absent direct congressional authority, and another statements from this Administration come the nearest plants. piants: I nis strategy, which is allegedly being established absent direct congressional authority, unfortunately aligns with other policies and statements from this Administration over the past to the property of the prop unioritimatery augus with other policies and statements from this Administration over the past year, including recent comments made by White House International Climate Czar John Kerry at year, including recent comments made by write House international Climate Czar John Kerry the 26th United Nations Conference of the Parties (COP26) in Glasgow, who stated that "[b]y

Despite promises to be transparent and "work in partnership with Congress," EPA appears to be planning to use overly expansive interpretations of several federal environmental statutes to planning to use overty expansive interpretations of several tental environmental sources of aget affordable, reliable sources of electricity generation. In recent statements and media a management was to be a considered to the statement of the several sources of the several target affordable, reliable sources or electricity generation. In recent statements and media interviews, you have repeatedly detailed that the Agency will implement a "very aggressive aggressive and the statement of the page that ware former in program in programs." interviews, you have repeatedly detailed that the Agency will imprement a very aggressive agenda" on climate policy. 4 Details have emerged in the press that your agency is preparing to agenca: on cumate poncy." Details have energied in the press that your agency is preparing to advance this comprehensive targeting of power plants through a "sector-wide roadmap" that avoid transfer assess conventional air pollution, and water quality 3 Even more advance this comprehensive targeting or power plants already as account and accounting would target greenhouse gases, conventional air pollution, and water quality. 5 Even more accounting to the conventional accounting to the convention of the tools the administration stands accounting to the convention of the conven would target greenhouse gases, conventional air pollution, and water quanty. Even more concerning, many of the tools the Administration would potentially use would be for purposes

Calendar entries confirm the Administration – led by non-confirmed officials – began planning for a compactancial continuous habiture transferred on EDA Administrator J Canendar entries confirm the Administration – led by non-confirmed officials – began planning for a comprehensive, sector-wide strategy before you were confirmed as EPA Administrator. In a

¹ Timothy Puko, New EPA Rules to Target Power Plant Pollution, WALL ST. J. (Jan. 25, 2022) ¹ Timothy Puko, New EPA Rules to Target Power Plant Pollution, WALL ST. J. (Jan. 25, 2022)

1 Timothy Puko, New EPA Rules to Target Power Plant Pollution, WALL ST. J. (Jan. 25, 2022)

1 Timothy Amy was considerable sense of the State Power Plant Pollution | 1643112003/. Jean Chemnick, 2022) https://www.ness.eratricks.how-biden-could-close-coal-plants-without-co2-regulations. EEE Nitrus (Jan. https://www.bloomberg.com/news/articles/2021-11-09/u-s-won-t-have-coal-py-2030-john-kerry-predicts-in-diagnoss.

glasgow,

Nomination of Hearing on the Nomination of Michael S. Regen to be Administrator of the Environmental

Nomination of Hearing Before the S. Comm. on Environment and Public Works, (Feb. 3, 2021),

Hon. Michael, Address at the Washiness Tree of the Protecting Our Funct: Powering Change Event (Oct. 28, 2021), Stuart Parker, Regue Promises Yer's Aggressive Agenda' On Exe Of U.N. Climate, Missingle PA (Oct. 28, 2021), https://misideepa.com/daily-news/regue-promises-very-aggressive-aggnda-eve-un-climate-summir/s-em. auc.); Suar varser, regan rromees 'very regressive Agenda' (in Eve Cy U.A. Climate Summu, INSIDEEPA (UC. 28, 2021), https://insideepa.com/daily-news/regan-promises-very-aggressive-agenda-eve-un-climate-summit/s-em.

PUSH-BACK TACTICS

- Emphasizing Threats to Reliable & Affordable Energy
- New Congressional Oversight
- New State Impacts
- New State AG Litigation



Morrisey W.Va.



Rokita | Ind.



Yost I Ohio



Schmidt | Mo.

Congress of the United States Washington, DC 20515

April 18, 2022

The Honorable Marty Walsh U.S. Department of Labor 200 Constitution Ave, N.W. Washington, D.C. 20210

As members of the Congressional Coal Caucus, we write to you with serious concerns OB HIGHWAYS OF THE CONGRESSIONIAL CORE CONCESS, WE WITH TO YOU WITH SCIENDS CONCESS OF CORE OF CONTROL OF CONT STATES OF WORKERS COMPANISSION FROM THE STATES OF THE STATES AND HELD STATES OF THE ST establish confateral within the Diack Lung Denetits Act (DLDA) program for sen-ins companies. A real ability for stakeholder input is needed concerning changes to the We remain concerned by reports of recent ad hoc changes to processes used to set gamounts that coal operators must post to self-insure under the BLBA.

Coal operators currently pay for claimants' black lung benefits and medical costs Operations currently pay for ciannalis usacs rung usuarities and insolications. Contributions from an excise tax on domestic coal production and sales t

Lung Disability Trust runa (DLDTF).

2. Security in the form of cash, letters of credit, surety bonds, or other fine

to sett-insure for mack jung mannings; and.

3. Direct payments to both active and inactive miners who receive benef. care providers who provide medical care.

Adjustments have been made since 2017 to address the self-insurance progr stakeholders report a severe lack of transparency on rationale for and rease process changes. Coal companies have been contacted by OWCP seeking process changes. Cost companies have ocen connected by OWLP seeking requiring use of new actuarial data. In one case, a 2019 request for information of the cost o requiring use of new actuarial data. In one case, a 2019 request for most 2020 procedures resulted in an 1100 percent increase for a coal operator. historically reserved based on prior procedures. In another case, the OV was more than 100 percent higher than the report prepared by the open

The OWCP must dramatically improve decision-making transparency stakeholder engagement before the program takes further actions. In announced upcoming rulemaking process at least provides and open operators to self-insure, determine appropriate security amounts, an



A Changed World: Coal Policy COAL ASH + POWER PLANTS ELGS

COAL ASH | EPA DENIES EXTENSION REQUESTS

- 54 plants depending on extension requests
 (54.5 GW of capacity) under Part A closure rules
- Key dates:
 - Jan 11: EPA weighs in on **9 demonstrations**, proposing to conditionally approve 1, classify 4 as incomplete, deny 3, and reject 1 as ineligible
 - Feb. 23: Comment period ends for 4 decisions
 - Mar. 25: Comment period ends for 5 decisions
- NMA filed comments raising grid reliability impact concerns

ELGS | EPA RECONSIDERING 2020 RULE

- Could result in more stringent limitations and standards
- Likely to designate membrane treatment systems as the best available technology economically available for FGD wastewater over utilities' objections
- Proposed rule expected in November



A Changed World: Coal Policy

EPA INTERSTATE TRANSPORT RULE FOR OZONE

 New federal plan to reduce pollution from power plants and industrial sources that significantly contribute to downwind states' ground-level ozone

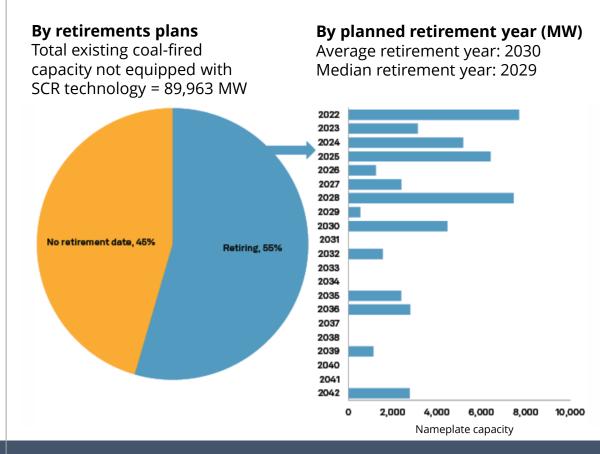
SIGNIFICANT IMPACTS:

- 18 GW in coal plant retirements projected
- Compliance costs estimated at \$1.1 billion
- Doubles number of covered states
- Designed for strict emissions reductions (e.g., Wyo. 73%; Mo. 61%; Utah 56%; Nev. 50%; Ky. 43%)

NOTABLE PROVISIONS:

- Daily limits on emissions from large coal-fired boilers
- Dynamic state budgets based on retirements
- Limits size of emissions allowance banks
- Sets first-time limits on certain industrial plant boilers
- NMA filing comments (June 6) and executing state strategy

U.S. COAL-FIRED GENERATION CAPACITY NOT EQUIPPED WITH SCR TECHNOLOGY





A Changed World: Cross Cutting Issues

SECURITIES AND EXCHANGE COMMISSION MANDATORY CLIMATE DISCLOSURE

OVERARCHING COMPONENTS:

- Short-, medium-, and long-term impacts of climate-related events and transition activities on financial statements
- Climate-related impacts on strategy, business model and outlook
- Risk management (including transition plans)
- Greenhouse gas emissions disclosures
- Governance (e.g., board oversight, management's role)

IMPLICATIONS:

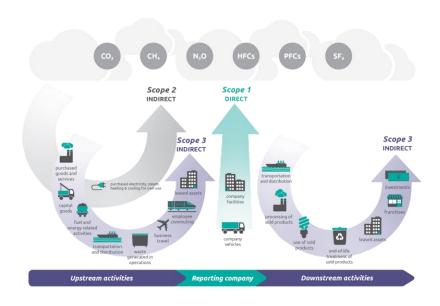
- Increased litigation exposure (securities fraud/climate tort/greenwashing)
- Potential new enforcement emphasis
- Indirect impacts to privately held companies through furnishing emissions data to customers

PHASED IN COMPLIANCE:

First reports 2024 or later

NMA NEXT STEPS:

- Requested extension of May 20 comment period
- Highlight legal infirmities and compliance issues in comments
- Engage in congressional oversight of the rulemaking



A Changed World: Cross Cutting Issues

NAAQS (PM AND OZONE)

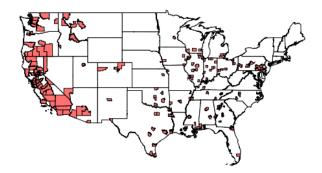
PARTICULATE MATTER CASAC RECOMMENDATIONS

Current Nonattainment



Potential 33% reduction in Annual PM_{2.5} Primary NAAQS

Potential Nonattainment





Potential 29% reduction in Daily PM_{2.5} Primary NAAQS



OZONE

- Not on regulatory agenda
- CASAC review panelists announced on Feb. 23
- CASAC review begins June 8 on the draft policy assessment
- Court filing in case challenging the 2020 decision indicates a proposed rule in spring 2023

A Changed World: Cross Cutting Issues WATERS OF THE UNITED STATES (WOTUS)

ADMINISTRATIVE ACTION

STEP 01.

- Proposed rule expanded federal jurisdiction
- NMA and coalition comments filed Feb. 7, 2022
- Final rule expected end of summer/early fall 2022
- "Pre-2015 framework" in effect in interim

STEP 02.

- Likely delayed
- Focus on implementation?
- 10 agency-led regional roundtables expected in spring/summer 2022
- NMA is working with allies on potential industry-led "national" roundtable this summer

LITIGATION

- Litigation expected on final Step One rule
- NMA and Waters Advocacy Coalition comments laid groundwork for challenges
- NMA coordinating with allied states

LITIGATION TWIST: FROM WOTUS TO SCOTUS

Sackett v. EPA

- "Did the Ninth Circuit set forth the proper test for determining whether wetlands are WOTUS?"
- NMA and other mining groups filed amicus brief on uncertainty from "significant nexus" test and need for clarity from the Court

Next Steps:

- EPA brief due June 10
- NGO briefs due June 17
- Oral argument in fall 2022
- Decision expected in early 2023



A Changed World: Cross Cutting Issues NEPA REFORMS

PHASE 1: FINALIZED IN APRIL

- Largely reverts back to pre-2020 regulations
- Three main revisions:
 - Effects analysis reinstated
 - CEQ's rule is the floor, not the ceiling for federal agencies
 - No requirement that federal agency base the purpose and need on the goals of an applicant

PHASE 2: TBD

 Broader set of changes, likely will include requirement of climate change analysis and others

NMA ACTIONS

- Comments on Phase 1 to retain key reforms
- Met with CEQ on Phase 2
- Member of U.S. Chamber Unlock American Potential Coalition



A Changed World: Cross Cutting Issues STATE ATTORNEYS GENERAL

BIPARTISAN DEFENSE

- Waters Of The United States (WOTUS)
- Endangered Species Act (ESA)
- Securities and Exchange Commission Climate Disclosure







Gov. Gordon | Wyo. Gov. Stitt | Okla.







Carr|Ga

Miller|Iowa

Balderas | N.M.







Taylor | Alaska



Marshall|Ala.



Knudsen | Mont.



KEY PERFORMANCE INDICATORS



TELLING OUR STORY YTD 2022



INFLUENCING STAKEHOLDERS 2022



DELIVERING VALUE 2022

Op-Eds 4.16 M Audience Reached 84 Press 225+Tweets + 24 Blogs

President & CEO Op-Eds

2 Media Audience 1574 Reached

Video Views 330K Followers 594K

Administration

6 K + Congressional 29 4 State 38 Congressional Letters & Testimony

288 Coalition/Ally Meetings

Press Releases

Committee Meetings 31

Memos to Members 160

MINE Update Newsletters 17

A Changed World: Communications

PROACTIVE COAL MESSAGING



RealClear Energy

America's Emerging Energy Crisis

The Tribune-Democrat

Rebuilding our bridges should also mean rebuilding our industrial base

The Intelligencer.
Wheeling News-Register

Government Foolish To Believe We Can Abandon Fossil Fuels

reno gazette journal

US must learn from Europe's energy crisis | Terry Jarrett

THE ROANOKE TIMES

Kandrach: Inflation, rising energy prices could squeeze U.S. families

A Changed World:

PROACTIVE MINERALS COMMUNICATIONS



RealClear Energy

American Mineral Supply Chains for 21st Century Energy Security



Biden eyes Cold War-era defense law to boost mining sector

WSJ | OPINION Critical Mineral Contradictions

Does Biden know that his own regulators are blocking mine projects?

Bloomberg

Biden's Battery-Metal Push Does Nothing to Ease Mining Permit Bottleneck

Biden's boost for mineral mining splits Hill climate hawks

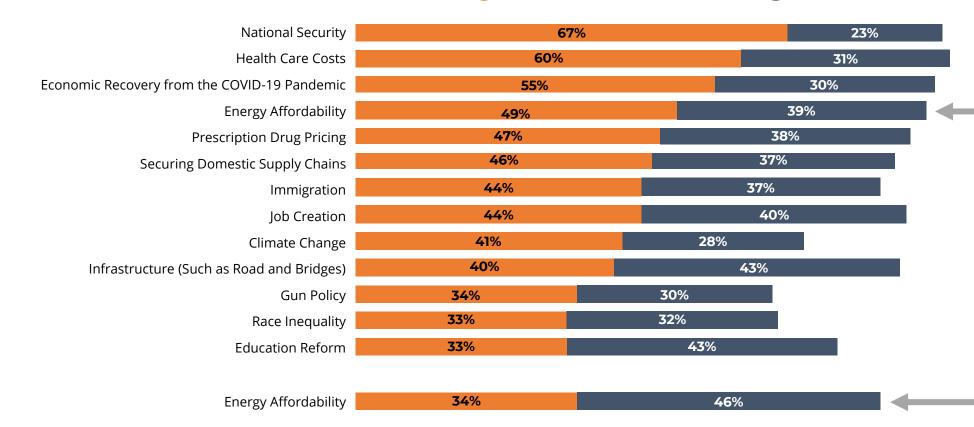
The Trentonian Guest column: Rebuild America's industrial base from the mine up

Democrats go big on mining. Will there be a backlash?

POLLING: ENERGY CRISIS, RUSSIA AND UKRAINE IMPACT

HOW MUCH OF A PRIORITY SHOULD THE FOLLOWING BE FOR CONGRESS TO ADDRESS?

A top priority: An important, but not top priority:



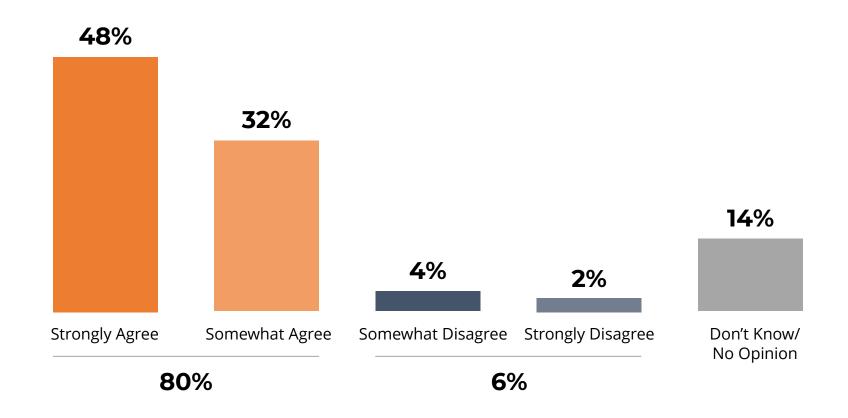
2021

2022



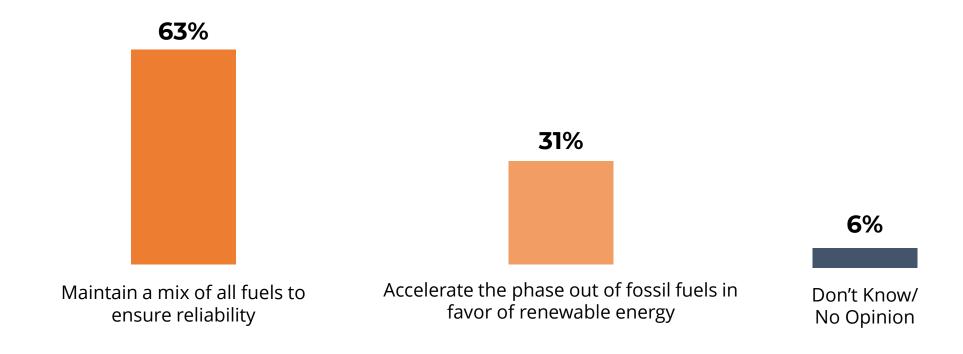
POLLING: ENERGY CRISIS, RUSSIA AND UKRAINE IMPACT

THE U.S. SHOULD CHANGE ITS ENERGY STRATEGY IN RESPONSE TO WHAT WE HAVE LEARNED FROM RUSSIA'S INVASION OF UKRAINE



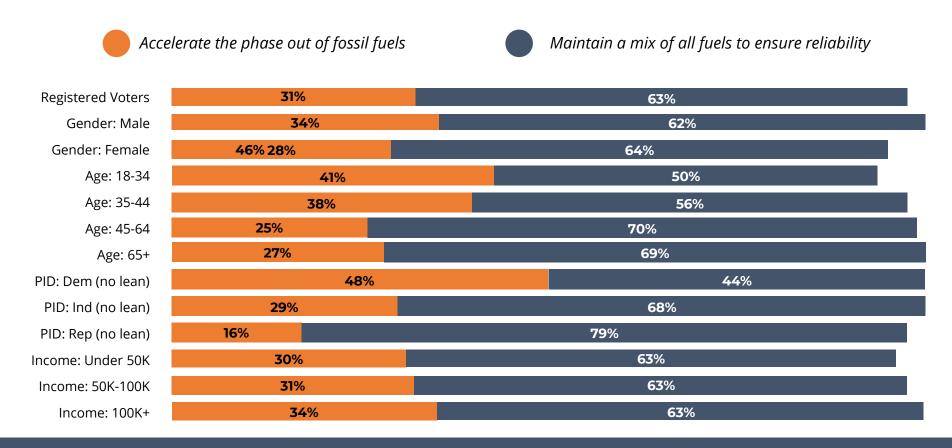
POLLING: ENERGY CRISIS, RUSSIA AND UKRAINE IMPACT

HOW SHOULD THE U.S. CHANGE ITS ENERGY STRATEGY IN RESPONSE TO WHAT WE LEARNED FROM RUSSIA'S INVASION IN UKRAINE?



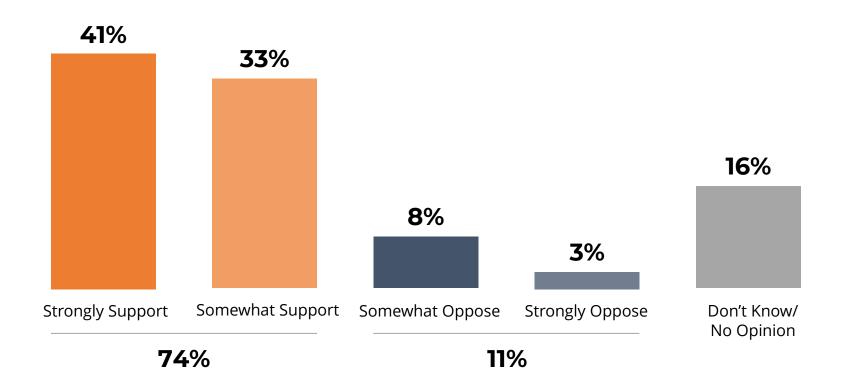
POLLING: ENERGY CRISIS, RUSSIA AND UKRAINE IMPACT

WHICH OF THE FOLLOWING COMES CLOSEST TO YOUR OPINION, EVEN IF NEITHER IS EXACTLY CORRECT?



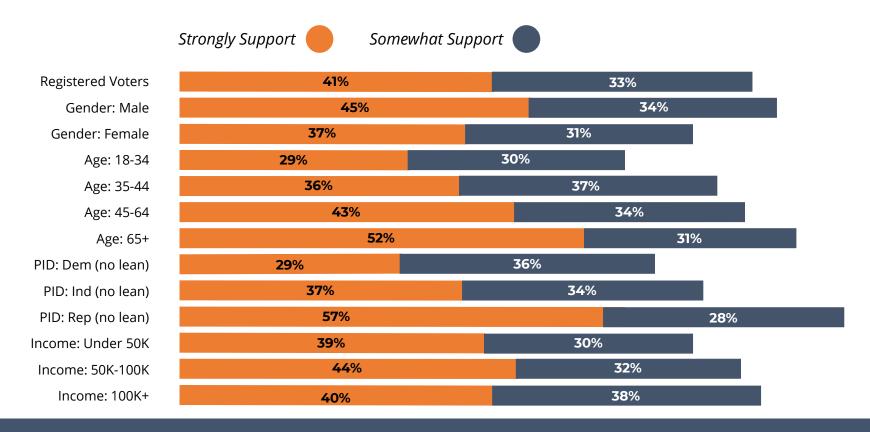
POLLING: ENERGY CRISIS, RUSSIA AND UKRAINE IMPACT

RUSSIA IS A MAJOR PRODUCER OF MINED MATERIALS. DO YOU SUPPORT OR OPPOSE MORE DOMESTIC (U.S.-BASED) MINING PROJECTS TO SECURE OUR SUPPLY CHAINS WITH MINED-IN-AMERICA MATERIALS?



POLLING: ENERGY CRISIS, RUSSIA AND UKRAINE IMPACT

RUSSIA IS A MAJOR PRODUCER OF MINED MATERIALS. DO YOU SUPPORT MORE DOMESTIC (U.S.-BASED) MINING PROJECTS TO SECURE OUR SUPPLY CHAINS WITH MINED-IN-AMERICA MATERIALS?



A Changed World: Messaging NMA REBRANDING

- NMA has strong name recognition among Hill Democrats and Republicans
- General consensus: name change not needed BUT participants liked the idea of shifting the focus from the process to the product, moving from mining and extraction (process) to incorporating more discussion of "natural resources" and how they are used
- Few participants knew that different types of coal were mined in the U.S.
- Once educated, some participants recognized the demand for steel and had concerns about not producing enough of it in the United States
- Participants were not surprised by the length of the permitting process relative to other countries. Most participants recognized the bureaucratic hurdles that U.S. mines likely had to overcome in order to get a permit. Participants in both groups mentioned the complexity of NEPA permitting processes, specifically



"SO MAYBE IT'S MORE OF A RE-BRANDING VERSUS RE-NAMING BECAUSE I THINK THE NAME IS PRETTY POWERFUL... IT'S BEEN AROUND FOR A WHILE."

DEMOCRATIC LEGISLATIVE DIRECTOR



Next Meeting

2022 FALL BOARD OF DIRECTORS AND ANNUAL MEMBERS MEETINGSEPTEMBER 15 – 16, 2022

M&S BOARD MEETING SEPTEMBER 14, 2022

THE CONRADWASHINGTON, D.C.

