

No More Lifelines to Coal!

A photograph of a coal power plant at night. Several large cooling towers and smokestacks are visible, with thick white steam or smoke rising from them into a dark sky. The plant's lights are on, and some structures are illuminated.

**Stop
subsidies
for coal**

A photograph of a wind turbine in a green field. The turbine is white with a red stripe near the base. The sun is shining brightly behind the blades, creating a starburst effect. The sky is blue with scattered white clouds. In the foreground, there are some green plants and small purple flowers.

**Support
clean
energy**

Existing coal

<i>In GW (no. Plants)</i>	Construction	Operating – all	Operating – <u>left to go</u> ¹	Total ² – <u>left to go</u>
EU	5.8 (3)	156.5 (251)	144.1 (234)	149.9 (237)
W. Balkan	0 (-)	8.8 (16)	8.8 (16)	8.8 (16)
Turkey	1.2 (3)	19.5 (26)	19.5 (26)	20.7 (29)
TOTAL	7.0 (6)	184.8 (293)	172.4 (276)	179.4 (283)

59% hard coal
41% lignite

EUROPEAN COAL PLANT COUNTDOWN

How many of Europe's coal plants have retired since January 2016 and how many are left to go?



RETIRED



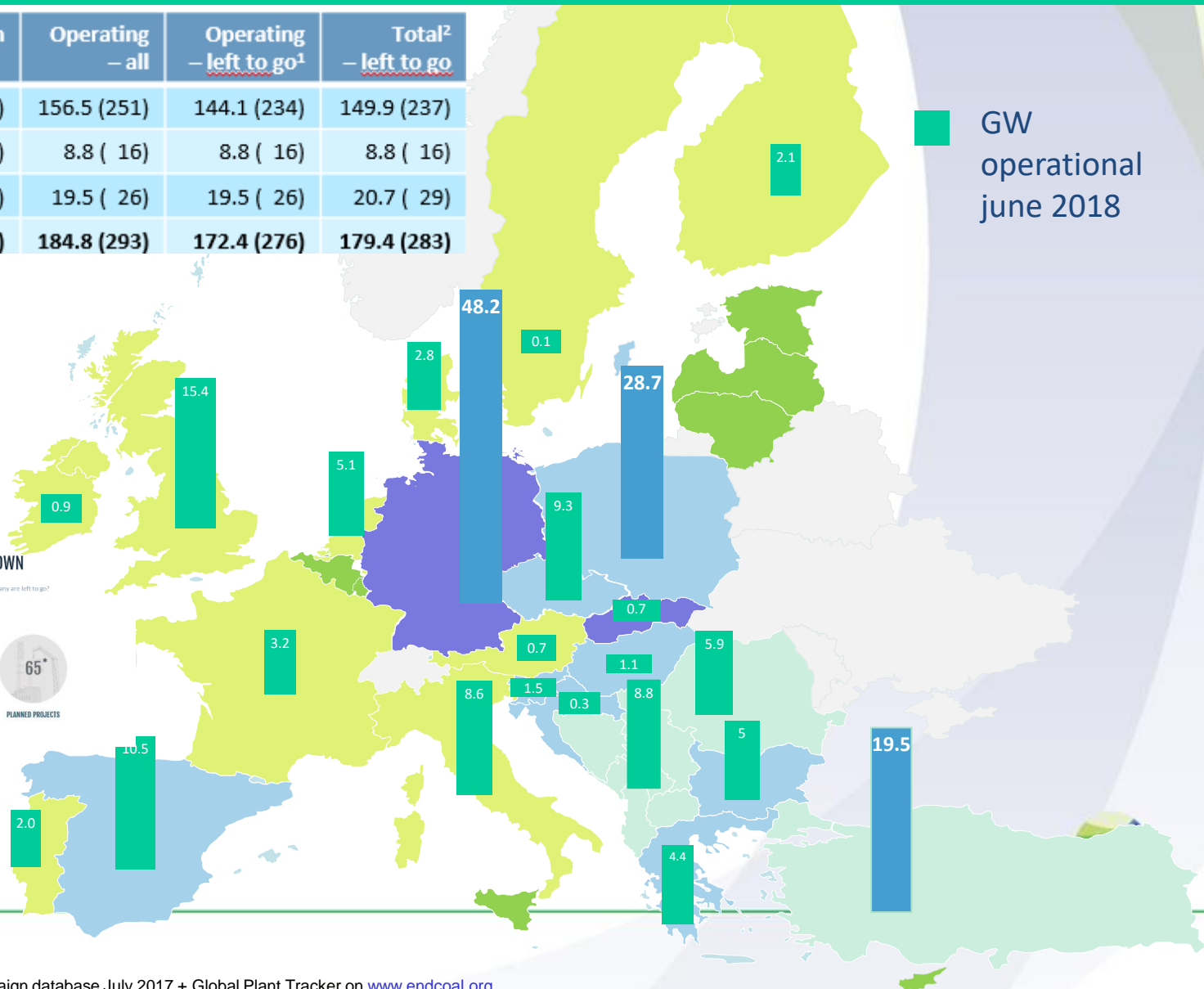
ANNOUNCED TO RETIRE



LEFT TO GO



PLANNED PROJECTS



EU policy-related processes that can help the coal phase-out

- **Ongoing:**
 - Capacity mechanisms negotiations
 - «Coal Platform» → money for the just transition
 - But, risk for hidden subsidies
- **Upcoming:**
 - State Aid Guidelines revision
 - National Energy and Climate Plans (NECPs)
 - COP 24

The New Coal Threat, Turkey & WB



Turkey

July 2018 global coal database update:

- 28 operating plants: 19GW
- 43 projects in the pipeline: 38GW
- Cancelled pipeline 2010-2018: 38GW
- Rehabilitation of old plants → capacity expansion & life extension:
 - 1 GW of increase in operating capacity only due to rehabilitations.
 - 1 more GW expected in 2019

Economic recession against coal projects:

- 1GW Eskişehir Alpu lignite Project got postponed the 5th time since 2017
- 2 big energy companies investing in existing and new coal projects have asked banks for debt restructuring

Turkey

Policies favor coal!

- While coal is subsidised with incentives (fixed price and purchase guarantee for local coal + capacity payments for local and imported coal)
- and crowned with lack of environmental standards, RES are compatible IF they can actually compete with fair rules...

But market favors renewables!

- Wind and solar auctions have shown advantageous prices compared to coal in Turkey.
- Feed-in-tariffs for RES in USD are announced to be replaced by a different, non-foreign-currency mechanism as of 2020. Whereas local coal still benefits from price and purchase guarantees in USD.

The Western Balkans

- The Sofia Declaration
- An energy union with the Western Balkans: To strengthen the EU's Energy Union, all of its dimensions should be expanded to the Western Balkans... „
- The EU agrees to promote... climate-friendly societies in line with Paris agreement.
- EU welcomes the WB partners commitment, inter alia, to accelerate the implementation of the acquis under the **Energy Community Treaty**

The Western Balkans

- **The EU Council conclusions on Western Balkans**
- Kosovo to up energy efficiency, to foster renewable energies and to follow up on its commitment to decommission the Kosovo A power plant, one of the biggest sources of pollution in the WB
- Some progress Macedonia, Albania + accession recommendation, Montenegro
- **The Energy Community Secretariat Study**
- (ongoing) to develop an EU-convergent methodology for the calculation of the 2030 targets in the EnC

The Western Balkans Forecast

- **Wachau manifesto:** „The Energy Community’s second energy transition started on 1 January 2018 at the latest...
- in the Energy Community the LCPD (existing) and IED entered into effect.
- In many Contracting Parties, this **date marks the beginning of the end of the coal and lignite era**“.
- **The Kosovo World Bank victory:**
 - “RES is cheaper-we are definitely not going to do that!”
 - No more (WB) lifelines to coal!
- **BiH Framework Energy Strategy to 2035:** “Useless without related laws...”

Thank you!

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