



Regulatory Certainty for the Entire Coal Value Stream

An assessment of U.S. coal regulations and a pathway to modernization

Prepared for: The U.S. Secretary of Energy

Expected delivery: December 1, 2026

NATIONAL COAL COUNCIL · STUDY REPORT

The Challenge & the Mandate

Vast resources, removing barriers

- America's world-leading coal resources can substantially advance national energy dominance.
- A complex, burdensome framework spans the entire value stream, creating uncertainty and stifling investment.
- Streamlining can enhance regulatory effectiveness while continuing to protect public health, the environment, and worker safety.

EXECUTIVE ORDER 14241

"It is a national priority to support the domestic coal industry by removing Federal regulatory barriers that undermine coal production..."

ADDRESSING PRESIDENTIAL PRIORITIES

Economic & Job Growth

Energy Dominance

Infrastructure

Regulatory Reform

Study Report Outline

Three areas of consideration — from today's regulatory reality to a durable path forward.

01

The Current Regulatory Landscape

Catalogue and analyze the regulatory structure across the value stream, identifying inefficiency, redundancy, and excessive burden, and highlighting where current rules work well.

02

Opportunities for Modernization & Certainty

Recommend opportunities to streamline permitting, apply performance-based regulation, coordinate across agencies, and build durable frameworks without compromising protection or worker safety.

03

Benefits of a Streamlined Framework

Articulate the gains in regulatory certainty, economic growth and jobs, technological innovation, and continued environmental, health, and safety protection.

Pursuing pathways forward for durable, long-term regulatory certainty.

Regulations Across the Coal Value Stream

Cataloguing cumulative regulatory impact from mine to market to identify inefficiency, redundancy, and burden.

Upstream

Mine safety (MSHA), exploration and operating permits, environmental compliance and reporting.

Midstream

Coal transport by rail, truck, barge, terminal and vessel, and the logistics that move product to market.

Downstream — Power

EPA rules for new and existing generating plants: CO₂, Mercury and Air Toxics, wastewater, coal ash.

Industrial & Exports

Industrial safety (OSHA), Steel and cement, coal-derived products, and the impact of international regulation on exports.

Modernization goals: streamline permitting, performance-based rules, cross-agency coordination, and durable frameworks.

Benefits & Pathways Forward

A STREAMLINED FRAMEWORK DELIVERS

Regulatory Certainty

Durable rules that withstand administrative transitions and de-risk investment.

Economic Growth

Job creation and expanded output across the coal ecosystem.

Technological Innovation

Room to adapt, modernize, and develop coal-derived products.

Health & Environment

Continued protection of public health, safety, and the environment.

RECOMMENDATIONS FOR PATHWAYS FORWARD

- Pursue the opportunities with the greatest impact across every stage — suppliers, operators, power, steel, byproducts, transporters, and exporters.
- Institutionalize reform through legislative or permanent policy frameworks that endure future administrative transitions and mitigate investment uncertainty.

Next Steps

FROM MEMBER SURVEY TO REPORT DELIVERY

01

Member Survey

Please respond by July 28, 2026

Emailed to NCC members, please respond and include:

- Interest in participating in the subcommittee
- If you are interested in chairing the subcommittee
- Information for working contact in your organization

02

First Subcommittee Meeting

Early August 2026

The study report subcommittee convenes for its first working session to shape the effort ahead.

03

Report Delivery

Target of December 1, 2026

Deliver the completed study report to the Secretary of Energy.



Questions



U.S. DEPARTMENT
of **ENERGY**