### Coal Transitions Case Study Countries: Key Facts

**DATA FROM CASE STUDIES ANALYSED**

<table>
<thead>
<tr>
<th>Country</th>
<th>Coal transition policy debate status</th>
<th>Current Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>Emerging debate</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Limiting stranded power and mining assets due to overbuild and falling coal demand</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Coordinating a progressive and managed phase down of coal assets to manage social impacts of already declining coal employment and public services provided by coal SOEs</td>
<td></td>
</tr>
<tr>
<td>India</td>
<td>Emerging debate</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Providing access to electricity to all through renewable «minigrid» solutions</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Avoiding growth of new and unnecessary coal plant, mine and transport infrastructure given existing sector overcapacity</td>
<td></td>
</tr>
<tr>
<td>South Africa</td>
<td>Active debate</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Phasing in cheaper domestic renewables as old coal assets retire as per existing plans</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Strengthening national industrial diversification and workforce skills</td>
<td></td>
</tr>
<tr>
<td>Germany</td>
<td>Active debate</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Reaching consensus on the end date for coal use in 3 remaining lignite-producing regions</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Agreeing on a fair transition policy package for affected workers and regions</td>
<td></td>
</tr>
<tr>
<td>Poland</td>
<td>Emerging debate</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Agreeing labour transition strategy as old mines become uncompetitive by 2030s</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Developing alternative domestic energy sources for energy security from Russian gas</td>
<td></td>
</tr>
<tr>
<td>Australia</td>
<td>Stalled</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Developing trans-partisan political agreement on energy transition policy and social transition strategy, building on existing stakeholders demands and proposals</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Preparing for the coming decline to export revenues due to lower future international coal demand, as China and other Asian customers transition from coal post 2020.</td>
<td></td>
</tr>
</tbody>
</table>

**Coal Transitions Case Study Countries: Key Facts**

**Legend**

- Share of global coal consumption
- Share of coal in domestic power production
- Change in coal mining jobs since 2000
- Share of global imports
- Share of global exports

**Country**

- China
- South Africa
- India
- Germany
- Poland
- Australia

**Share of global coal consumption**

- **China**: 49%
- **South Africa**: 3%
- **India**: 13%
- **Germany**: 3%
- **Poland**: 2%
- **Australia**: 2%

**Share of coal in domestic power production**

- **China**: 62%
- **South Africa**: 82%
- **India**: 70%
- **Germany**: 37%
- **Poland**: 81%
- **Australia**: 82%

**Change in coal mining jobs since 2000**

- **China**: -30%
- **South Africa**: +60%
- **India**: -63%
- **Germany**: -68%
- **Poland**: -67%
- **Australia**: -18%

**Share of global imports**

- **China**: 4,500,000 current jobs
- **South Africa**: 77,000 current jobs
- **India**: 315,000 current jobs
- **Germany**: 30,000 current jobs
- **Poland**: 88,000 current jobs
- **Australia**: 49,000 current jobs

**Share of global exports**

- **China**: 35%
- **South Africa**: 7%
- **India**: 18%
- **Germany**: 7%
- **Poland**: 88%
- **Australia**: 27%

* from 2012 to 2017 for Australia; forecast for 2013-2020 for China