



Update on the South African Coal Roadmap Study – October 2010

The South African Coal Roadmap (SACRM) study was initiated with the overall aim of providing the South African coal industry with a comprehensive information resource that spans the entire coal value chain in South Africa as well as presenting both a projected outlook for the industry and alternative future scenarios. The value of the SACRM is in supporting stakeholders in both maximizing economic value from the sector, and in policy, planning and strategy development.

The first phase of the study, due for completion mid-2011, will result in the development of a comprehensive status quo assessment of the industry, and the evolution of a likely future for the entire value chain. Further phases of the study will explore potential alternative futures, and how these might be realised.

After confirmation of the SA Government's willingness to participate in the Roadmap in March 2010, it has been possible to commence the process. A Board has been constituted, comprising members of the Department of Energy, Anglo American Thermal Coal, Exxaro, Sasol, Eskom, SANEA, the Council for Geosciences and consultants from the industry. A Steering Committee has also been established to guide the day-to-day development of the Roadmap. The Fossil Fuel Foundation of Africa and SA National Energy Research Institute (SANERI) act as administration and financial managers respectively. In June 2010 The Green House, a Cape Town based consultancy, was appointed as the technical project manager.

The SACRM is being developed with the extensive input of industry experts, through a series of focus group meetings and follow up interviews. The technical project manager is responsible for co-ordination of the focus groups, collection of the required information and formulation of the study outputs. The focus groups have been established and are due to convene during the first two weeks of October 2010. They comprise a broad range of stakeholders, from technical experts to civil society and environmental groups.

All participants are required to comply with a Charter, which includes an anti-trust protocol and other provisions such as protection of intellectual property and confidentiality.

For further information, including how to contribute to the study, please contact the FFF on www.fossilfuel.co.za or secretary@fossilfuel.co.za.