

Contents

	<i>Page</i>
Chapter 1: Executive Summary	1
Chapter 2: Overview	8
Chapter 3: Federal Coal Leases 1985: An Analysis of Current Development Status, Ownership Trends, and Potential Section 3 Compliance	38
Chapter 4: Legal and Legislative Analysis: Section 3 and Other Production Requirements for Federal Coal Leases	77
Chapter 5: Alternative Legislative Options for Promoting Timely Development of Federal Coal Leases	119
Appendix A: Background: Federal Coal Lease Ownership and Section 3 Compliance Status by Industry	143
Appendix B: The Top 20 Federal Coal Reserve Holders and Their Section 3 Compliance Status	147
Appendix C: Assessment of Coal Lease Holding Fees	156
Appendix D: Federal Coal Lessees and Their Parent Corporations	159
Parent Companies and Leaseholding Subsidiaries	164
Development Status of Federal Coal Leases	169
Key	185

List of Tables

	<i>page</i>
1. Development Status of Federal Coal Leases.....,	~.. 19
2. Production Status of Federal Coal Lease in Seven Western States	20
3. Development Status of Pre-FCLAA Leases in Seven Western States	21
4. Section 3 Dates for Pre-FCLAA Federal Coal Leases in the Seven Western States	2 2
5. Reasons for Projected Section 3 Compliance Status for Pre-FCLAA Leases in Seven Western States	23
6. Ownership of Federal Coal Leases by Industry Category - 1975, 1980, and 1984	29
7. Section 3 Compliance Status of Western Pre-FCLAA Federal Coal Leases by Industry Category	30
8. The Top 20 Federal Reserve Holders - Section 3 Compliance Status	31
9. Options for Promoting Timely Production From Federal Coal Leases Comparison of Section 3 Options and Policy Objectives	37
10. Development Status of Federal Coal Leases	39
11. Production Status of Federal Coal Leases in Seven Western States	4 0
12. Development Status of Pre-FCLAA Leases in Seven Western States	4 3
13. Section 3 Dates for Pre-FCLAA Federal Coal Leases in the Seven Western States	4 4
14. Section 3 Compliance Status of Pre-FCLAA Leases in Seven Western Coal States	45
15. Reasons for Projected Section 3 Compliance Status for Pre-FCLAA Leases in Seven Western States	46
16. Joint Ventures Owning Federal Coal Leases	49
17. Corporate Acquisitions Affecting Lessees Since Passage of FCLAA	51
18. Ownership of Federal Coal Leases by Industry Category - 1975, 1980, and 1984	5 2

19. Ownership and Production of Federal Coal Leases by Industry Category - Mid-1970s	53
20. Ownership and Production of Federal Coal Leases by Industry Category - About 1980	5 4
21. Ownership and Production of Federal Coal Leases by Industry Category - About 1984	5 4
22. Section 3 Compliance Status of Western Pre-FCLAA Federal Coal Leases by Industry Category	55
23. The Top 20 Federal Reserve Holders - Section 3 Compliance Status	57
24. Federal Onshore Mineral Leases	59
25. Selected Forecasts for Total U.S. Coal Demand in 1980 and 1985	66
26. Forecasts for Western and Federal Coal Demand Circa 1976	68
27. Comparison of 1979 and 1985 Coal Leasing EIS Coal Production Forecasts	69
28. Selected Forecasts for Western Coal Production 1980-95	70
29. Top 13 Federal Leaseholders 1975	80
30. Selected Holding Fee Proposals for Federal Coal Leases	116
31. Analysis of Selected Holding Fee Proposals	117
32. Options for Promoting Timely Production From Federal Coal Leases Comparison of Section 3 Options and Policy Objectives	122
A1. The Top 20 Federal Reserve Holders - Section 3 Compliance Status	155
A2. Analysis of Holding Fee options - After Tax Net present Cost to Lessee	158

List of Figures

	page
1. Forecasted 1990 Demand	2 5
2. Age of Federal Coal Leases	41
3. How Long Have Leases Been Held?	42
4. How Federal Coal Leases Were Acquired	50
5. Forecasted 1990 Demand	72
6. Fort Union Region: Capacity and Production 1980 - 2000	73
7. Powder River Basin: Capacity and Production 1980 - 2000	74
8. Southern Wyoming: Capacity and Production 1980 - 2000	74
9. Colorado: Capacity and Production 1980 - 2000	75
10. Utah: Capacity and Production 1980-2000	75
11. New Mexico: Capacity and Production 1980-2000	76