



E3G

BRIEFING PAPER MARCH 2023

## DRIVING FORWARD: WORLD OUTSIDE CHINA CLOSES IN ON “NO NEW COAL”

OYKU SENLEN, LEO ROBERTS, CHRIS LITTLECOTT  
KATRINE PETERSEN, SASHA KINNEY, HANNAH BLITZER  
AND SAMORA LEVY

The latest data<sup>1</sup> for the second half of 2022 tells a tale of two trends. China and the rest of the world are now taking diverging pathways on the journey away from the pursuit of new coal power plants.

Ending the construction of new coal power is a critical milestone towards achieving the goals of the Paris Agreement. The IPCC and the IEA are clear that no new unabated coal power plants should be built if the world is to limit warming to 1.5 °C.

The rest of the world continues to drive forward towards the milestone of “No New Coal”. This briefing paper provides an overview of the positive dynamics and data trends for OECD and non-OECD countries. It provides regional comparisons and identifies remaining challenges.

Conversely, China saw its largest ever increase in new coal plant proposals and continues to head in the opposite direction. Our parallel analysis of the divergence between China and the rest of world is “Diverging pathways: China’s new coal boom takes it on a detour”.<sup>2</sup>

---

<sup>1</sup> E3G analysis of the latest data from Global Energy Monitor’s Global Coal Plant Tracker, released in February 2023. The tracker categorises proposed new coal plant projects according to their progress through the different stages of the project development “pipeline”: Announced; Pre-Permit; Permitted; Under Construction; Operating. It also tracks whether a proposal has been Shelved (through inactivity) or Cancelled. This briefing concentrates on projects that are in the first three “pre-construction” categories.

<sup>2</sup> E3G, 2023, [Diverging pathways: China’s new coal boom takes it on a detour](#)



E3G

E3G produces regular analysis of the global new coal power landscape. Visit our No New Coal explainer<sup>3</sup> for further information on why the world must stop building new coal power stations – and what governments and other actors can do to progress this agenda.

The E3G website is also home to the No New Coal Progress Tracker,<sup>4</sup> an interactive tool tracking progress towards the end of new coal power, updated at regular intervals across the year to reflect the latest data and political commitments.

## Key findings

### Progress towards No New Coal

- > The amount of proposed new coal power capacity in the world outside China fell by 9% (10 GW) in the second half of 2022.
- > As a result, the total proposed new coal power capacity in the world outside China fell to 97 GW, as of January 2023. **Total pre-construction capacity outside China is now less than 100 gigawatts for the first time since data collection began.**
- > The scale of proposed new coal power capacity outside of China is down by 84% since the Paris Agreement was signed in 2015, with reductions of 90% in OECD / EU and 83% in non-OECD countries.
- > Aside from China, all world regions saw a **decline** or **plateau** in the scale of new coal under consideration in the second half of 2022. Only seven coal projects were proposed in the entire world outside China: six reactivated projects in India and one new project in Indonesia.
- > As of January 2023, **98 countries** had either explicitly committed to No New Coal or had considered coal in the past decade but no longer have any active planned projects.
- > The **world's wealthiest nations** (those in the Organisation for Economic Cooperation and Development (OECD) and European Union (EU)) have seen a **90% collapse** in the amount of new coal under consideration since 2015. No

---

<sup>3</sup> E3G, March 2023, [Explained: what does “No New Coal” mean?](#)

<sup>4</sup> E3G, updated March 2023, [No New Coal Progress Tracker](#)



E3G

coal power projects have entered construction in the OECD / EU since the end of 2019.

- > There are now **32 countries** outside China with proposed new coal power plants, down from 33 in July 2022. Of these 33, 31 have either seen their pre-construction coal capacity decline or remain stable since July 2022.
- > Globally, **13 countries**<sup>5</sup> have only one new pre-construction coal project still under consideration, including Australia and Japan.
- > Among these countries, five<sup>6</sup> have coal projects that were previously seeking financing from China, which has committed to end its overseas coal power financing.<sup>7</sup> These projects are small (only 2 GW in total capacity), providing a clear opportunity for replacement with clean energy alternatives.

Pre-construction capacity since 2015: OECD / EU and the non-OECD (excl. China)

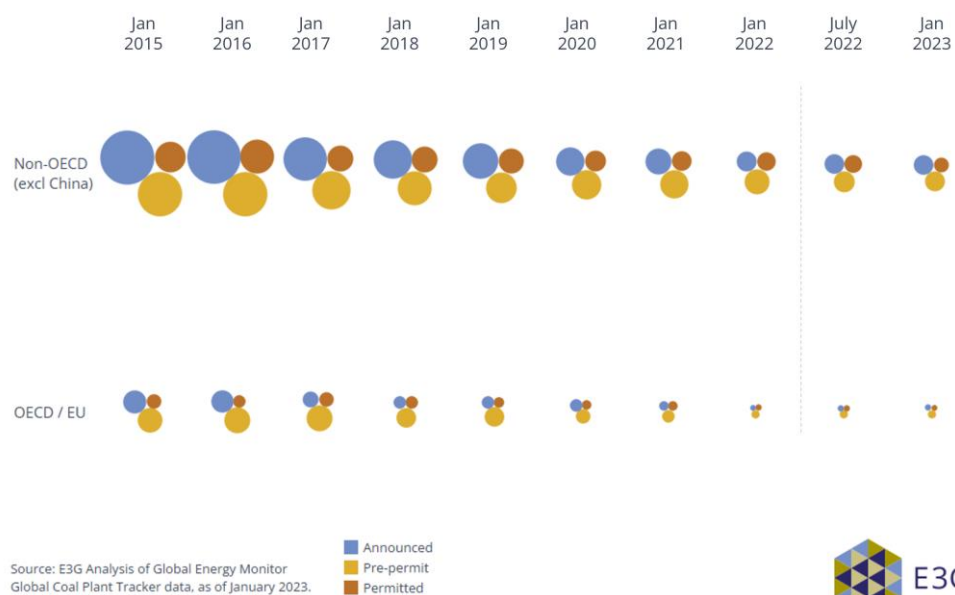


Figure 1: Coal projects in pre-construction have been declining since the signing of the Paris Agreement in 2015.

<sup>5</sup> From low to high pipeline capacity: Madagascar, Kenya, Niger, Eswatini, Zambia, Japan, Kyrgyzstan, Tanzania, Thailand, Uzbekistan, Ukraine, Cambodia, Australia.

<sup>6</sup> Madagascar, Niger, Tanzania, Ukraine and Cambodia.

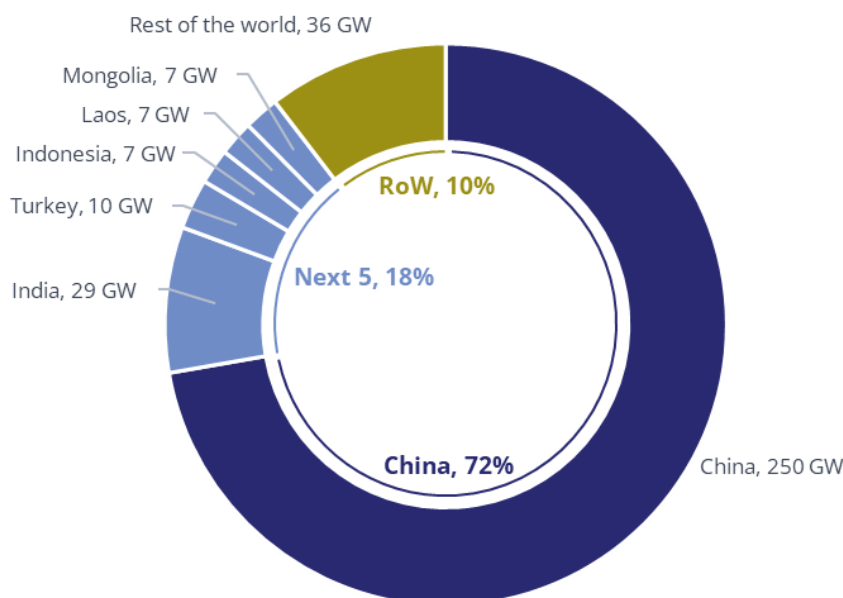
<sup>7</sup> Centre for Research on Energy and Clean Air, 2022, **1-Year Later: China’s Ban on Overseas Coal Power Projects and It’s Global Climate Impacts**



E3G

- > There are **no new coal projects under consideration anywhere in North America for the first time ever**, following the shelving of the proposed CONSOL project in the United States. This is the second world region to reach this milestone, after the **European Union did so in the first half of 2022**.
- > The remaining proposed new coal power projects in the OECD – in Australia, Japan and Turkey – are all unlikely to proceed, leaving the OECD close to achieving No New Coal.
- > **Non-OECD countries have seen an 83% collapse** in the amount of new coal under consideration since 2015.
- > **Brazil** is now the only country with pre-construction capacity in **all of the Americas**.
- > Another notable area of progress in the non-OECD is the reduction of the scale of Viet Nam’s coal project pipeline. Viet Nam has seen **more than four-fifths (7 GW)** of its planned coal capacity shelved or cancelled since July 2022, resulting in it **dropping out of the top 5** countries for planned pre-construction projects outside China (Figure 2Figure 2Figure 2).

### Remaining planned coal capacity (GW)



Source: E3G Analysis of Global Energy Monitor Global Coal Plant Tracker data, as of January 2023



Figure 2: 90% of the world’s remaining new coal power projects are in China and the next five countries.



E3G

---

### Continuing challenges

- > A total of seven new and restored projects have been proposed since July 2022. Out of these seven, six restored projects are in India, and the only new project is located in Indonesia. This is the smallest number of projects proposed in any half year period since 2015.
- > **India and Indonesia** are the only countries other than China to have seen an increase in planned new coal capacity since mid-2022.
- > **Indonesia** saw multiple projects cancelled or shelved, assisted by the \$20 billion financing package for its Just Energy Transition Partnership (JETP).<sup>8</sup> However, this progress was offset by a controversial proposal for a (2.2 GW) new “industrial coal” project. The resulting small net increase in new coal pipeline (0.12 GW) brought Indonesia back into the Top 5 countries after China, following the reduction in Viet Nam’s pipeline.
- > **India** reintroduced six previously shelved plants to the project pipeline, leading to a 1.06 GW net increase in capacity under consideration.
- > The government of **Pakistan** announced in February its intention to pursue new coal power projects based on domestic coal reserves. This was an explicit response to high gas prices, caused in part by the EU and other wealthy countries and regions’ dash for gas from non-Russian markets. In Pakistan and in most other cases, coal represents a significant economic risk, with renewable energy and storage a clear alternative.

## OECD / EU: World’s wealthiest countries approach the No New Coal milestone

- > Proposed pre-construction new coal power capacity in the OECD / EU has reduced by 90% since 2015. Meanwhile no new coal projects have entered construction anywhere in the OECD since the end of 2019.
- > For the first time in modern history, **no new coal projects are under active development anywhere in North America and the EU**. This milestone moment was achieved following the re-categorisation as “shelved” of the previously proposed 300 MW CONSOL Energy Mining Complex<sup>9</sup> in the United

---

<sup>8</sup> UK government, November 2022, [Indonesia Just Energy Transition Partnership launched at G20](#)

<sup>9</sup> The CONSOL project was the sole remaining legacy of the Trump administration’s attempts to “bring back coal” via the US Department of Energy’s Coal FIRST (Flexible, Innovative, Resilient, Small, Transformative) programme.



E3G

---

States. The EU previously achieved No New Coal status in the first half of 2022.

- > Only three OECD countries – Japan, Australia, and Turkey – are still considering new coal projects. **Turkey** (10 GW), with 11 projects in total, has the largest number of proposed new coal plants, while **Australia** (1 GW) and **Japan** (0.5 GW) have one each. The total pre-construction capacity in the OECD is 12 GW, accounting for only 3% of global planned plants.
- > **Australia's** last remaining project, in Collinsville, is currently stalled and unlikely to move forward. A change in the federal government in May 2022,<sup>10</sup> ambitious state-level climate action,<sup>11</sup> and the absence of a business case for new coal, have together cast doubts on the project's future.
- > **Japan's** 500 MW GENESIS Matsushima plant is the last remaining pre-construction coal project in the country. The project is intended to replace an existing coal power unit with a new gasification unit, but cost-benefit analysis<sup>12</sup> shows that the marginal reduction in emissions will not justify the high costs. Civil society and local groups have criticised the project, arguing that it contradicts Japan's G7 commitments to phasing out unabated coal power and promoting renewable energy infrastructure.<sup>13</sup> The plan has also drawn criticism<sup>14</sup> from shareholders in the parent power company, J-Power.
- > **Turkey** hosts **87%** of the remaining planned capacity in the OECD. It currently has the **third largest total coal capacity under consideration globally** at more than **10 GW**. According to recently released official projections, only 1.7 GW of this new coal capacity is expected to come online by 2030, followed by an additional 1.5 GW by 2035. Most of the pre-construction projects are unlikely to move forward due to increasing financial risks and decreasing interest in coal power investments.<sup>15</sup> Any new projects will likely become stranded assets and face retirement before their commercial lifetimes, in line with Turkey's 2053 net zero commitment. Current economic headwinds to coal power, coupled with China's decision to end overseas coal finance, were already severely limiting sources of financing for these

---

<sup>10</sup> Reuters, 2022, [Australia ousts conservatives after nine years, Albanese to be prime minister](#)

<sup>11</sup> Australian Renewable Energy Agency, 2022, [New laws to tackle climate change take effect](#)

<sup>12</sup> Transition Zero, 2023, [Coal-de-sac: Advanced Coal in Japan](#)

<sup>13</sup> The Asahi Shimbun, 2022, [Nagasaki isle coal power plant may fall to go green movement](#); Japan Beyond Coal, 2022, [Matsushima \(Nagasaki\)](#)

<sup>14</sup> ACCR Investor Briefing, 2022, [Electric Power Development Co., Ltd. \(J-POWER\)](#)

<sup>15</sup> 350.org Turkey, 2022, [Climate change approaches of Turkish Banks](#)

---



E3G

---

projects.<sup>16</sup> Upcoming elections and the need to prioritise post-earthquake recovery may also further reduce political appetite for these projects during 2023.

- > Collectively, this progress leaves the whole OECD group rapidly **heading towards No New Coal status**. Turkey, Japan, and Australia are now well placed to ensure their remaining pre-construction projects are cancelled, and replaced with clean energy alternatives.

## Non-OECD (outside China): positive progress towards No New Coal

- > Overall planned new coal capacity in the non-OECD (excluding China) has **decreased by 83% since 2015**, led by a significant reduction in South-East Asia.
- > Since 2015, **18** non-OECD countries have moved from considering coal to having no new projects under consideration, with **nine** countries having formally committed to No New Coal through becoming a member of the Powering Past Coal Alliance (PPCA)<sup>17</sup> or No New Coal Power Compact (NNCPC)<sup>18</sup> or signing the COP26 Coal to Clean Power Transition Statement.<sup>19</sup>
- > The following sections look at the most recent dynamics in each region.

### Latin America and the Caribbean: Brazil the last country considering new coal

- > In Latin America and the Caribbean, planned new coal capacity has decreased by 78% and remained **at its lowest level since 2015**.
- > **Brazil** is now the only remaining country still considering new coal projects, with three proposed plants totalling 1.7 GW of new capacity. However, in recent years proposed coal power projects have failed to secure contracts in power auctions,<sup>20</sup> highlighting the absence of a business case. This situation presents an opportunity for President Lula's administration to pursue clean energy alternatives instead. If Brazil were to cancel these planned projects,

---

<sup>16</sup> Sustainable Economics and Finance Association, 2021, [China's stillborn coal investment in Turkey](#)

<sup>17</sup> Powering Past Coal Alliance, [poweringpastcoal.org](http://poweringpastcoal.org) (webpage)

<sup>18</sup> Powering Past Coal Alliance, 2021, [PPCA commends launch of pledge to end new coal](#)

<sup>19</sup> UN Climate Change Conference UK 2021, 2021, [Global coal to clean power transition statement](#)

<sup>20</sup> Recharge News, 2021. [Renewables sweep board as low demand leaves Brazil power auction shadow of former glory.](#)



E3G

the entire **Americas** would reach the milestone of having no new coal under consideration.

- > **Argentina** is the only country in the region with a coal project currently under construction. The Rio Turbio project has faced multiple obstacles, including technical difficulties at both the power plant and the associated coal mine, extended delays, and corruption allegations. These ongoing issues contribute to ongoing concerns about the project’s economic feasibility. Ironically, this project has a high likelihood of going down in history as the last new coal power plant (attempted) in the Americas.<sup>21</sup>

Change in pre-construction capacity since 2015: Latin America and the Caribbean

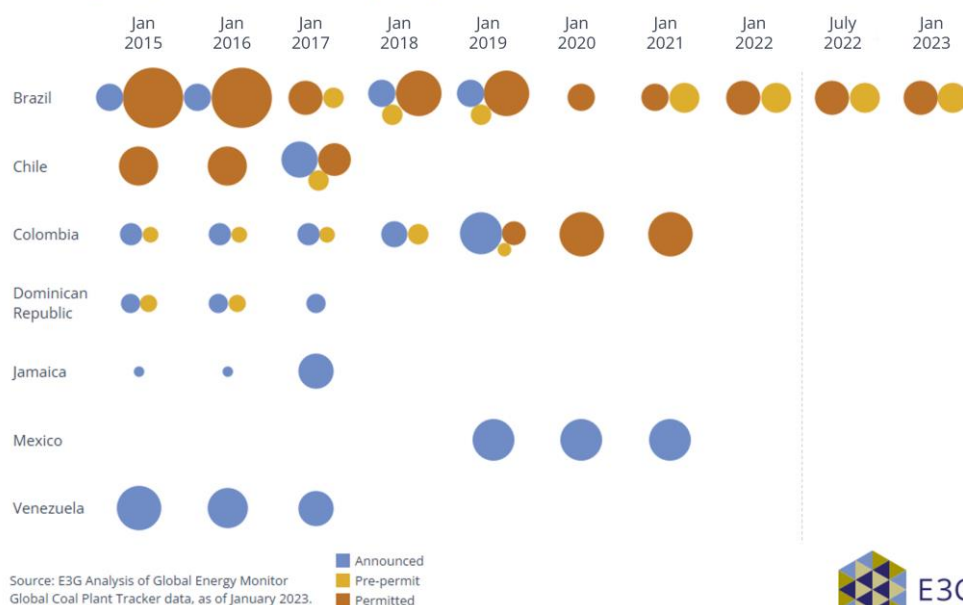


Figure 3: Brazil is the last country in Latin America and the Caribbean to be considering new coal projects.

### Africa: Smaller-scale coal projects are replaceable with renewables

- > Planned coal capacity in **Africa** has decreased by two-thirds since 2015. The continent currently hosts **only 3%** of the global pre-construction capacity (10 GW). This capacity is **spread thinly across eleven countries** and includes many small projects.

<sup>21</sup> EconoJournal, 2022, **The government will allocate almost US\$ 100 million this year to cover the deficit of the state company Yacimientos Río Turbio, despite the fact that it does not produce coal.** (in Spanish)





E3G

- > Six African countries have only one project under consideration: Kenya, Eswatini, Zambia, Madagascar, Niger, and Tanzania. Three of these rely on some sort of Chinese support – in Madagascar, Niger, and Tanzania – and are unlikely to go ahead if China delivers on its commitment to ending overseas coal power financing.<sup>22</sup>

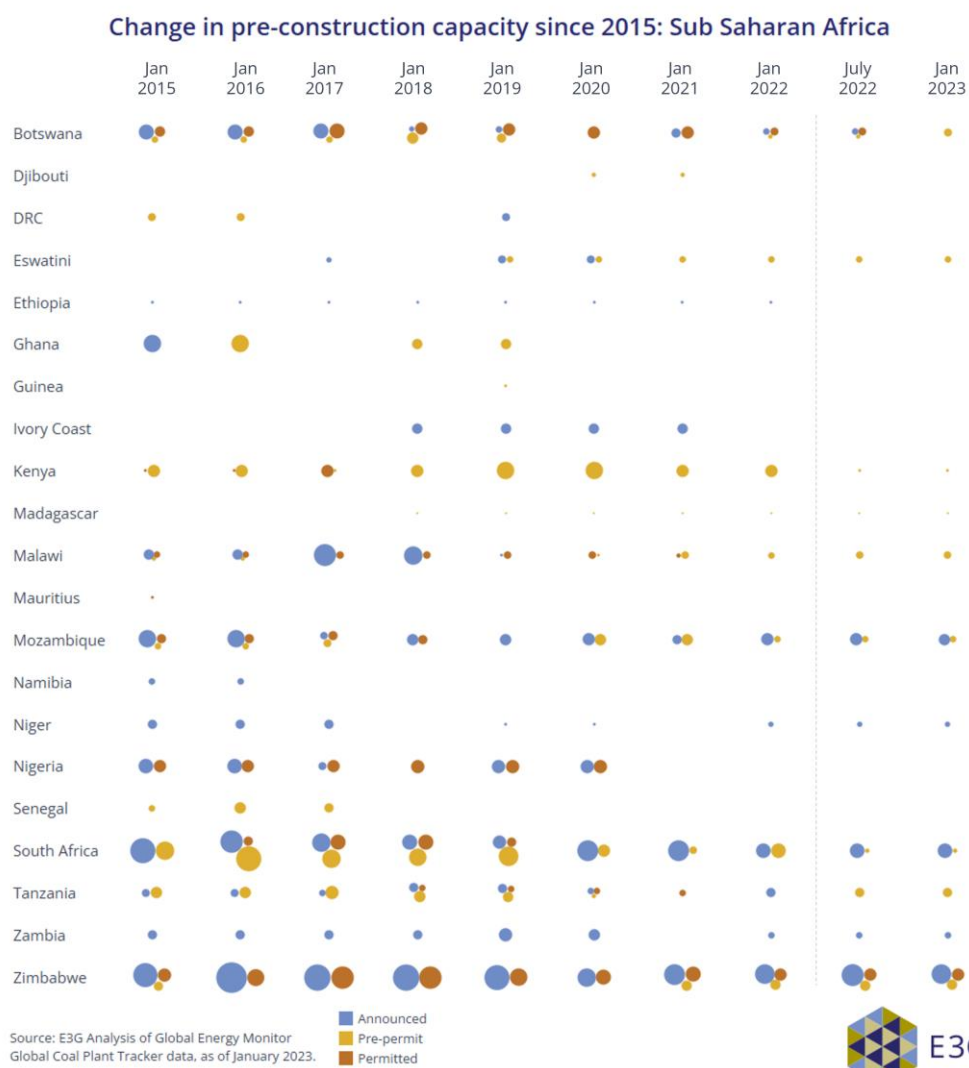


Figure 4: 11 countries in Africa are still considering new coal projects, though many of these are small.

<sup>22</sup> Centre for Research on Energy and Clean Air, 2022, **1-Year Later: China’s Ban on Overseas Coal Power Projects and It’s Global Climate Impacts**



E3G

## Kenya approaches the winning milestone

**Kenya** is unlikely to develop its planned coal power capacity, but there is still high-level political interest in developing a coal industry. A small number of proposed plants remain in government plans but have been effectively stalled for years.<sup>23</sup>

The proposed coal power projects at Pokot (64 MW industrial coal project) and Kitui (1050 MW) have been stalled since proposed in 2015. In 2019, the controversial proposed 1050 MW Lamu coal plant was de facto suspended after courts invalidated its environmental license and financiers withdrew their support. In August 2022, a tiny 25 MW coal plant in Machakos<sup>24</sup> applied for an environmental license. The lack of economic viability makes coal power development in Kenya unlikely. However, Kenya has made no firm commitments to stop its pursuit of coal power, which is still embedded in detail in major policy documents, including the Energy Act of 2019.

Newly elected President William Ruto has crafted a positive profile in international climate change discussions.<sup>25</sup> In parallel, he has also signalled his interest<sup>26</sup> in pursuing coal mining development in Kitui, principally to replace imports for industrial uses of coal. This region would also be home to the site of the proposed 1050 MW Kitui coal plant. Ruto's remarks have been interpreted as a pro-coal signal to investors, prospectors, and government officials. Under the previous administration, then Deputy President Ruto was Kenya's most vocal proponent of coal power.<sup>27</sup>

President Ruto has positively reaffirmed Kenya's commitment to achieving 100% renewable electricity (up from the current 92%). His 2030 commitment moves the date back from the 2020 goal announced by his predecessor Uhuru Kenyatta. Given Kenya is already close to meeting its existing and future energy needs with renewable electricity generation, further investment in clean power would confirm that there is no business case for new coal projects.

---

<sup>23</sup> Coal in Kenya, 2023, **Kenya's coal industry prospects in 2023**

<sup>24</sup> Not listed in the Global Energy Monitor Global Coal Plant Tracker dataset, as below the size threshold.

<sup>25</sup> William Ruto for the Guardian, 2022, **We are at a crossroads in history: Africa can and must be a leader in clean energy**

<sup>26</sup> Daily Nation, 2022, **Ruto's U-turn on coal could herald new era of cheaper electricity**

<sup>27</sup> Coal in Kenya, 2023, **Pro-coal arguments from developers and government officials**



E3G

### South-East Asia: 86% collapse in new coal projects since 2015

> South-East Asia, which has traditionally been viewed as a major hub for new coal construction outside China, has experienced a particularly dramatic shift away from new coal. Total planned capacity in the region has contracted by **86% since 2015**, including a 5% decline in the second half of 2022. Over the past seven years, 2.4 GW of coal power has been cancelled for every 1 GW that has entered into operation, turning off the tap of anticipated further growth. This contraction has been led by significant reductions in the amount of new coal included in national energy plans such as **Viet Nam’s PDP8**.<sup>28</sup>

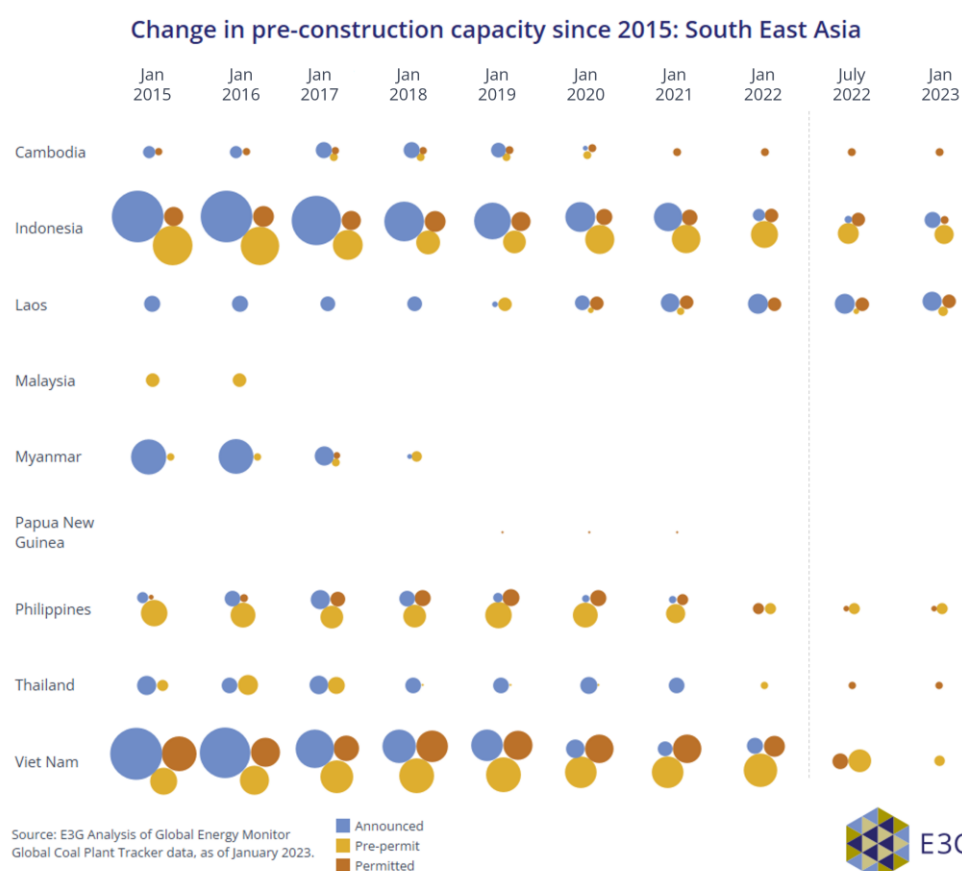


Figure 5: Pre-construction capacity in South-East Asia has reduced by 86% since 2015.

> **Viet Nam** has significantly reduced the scale of new coal under consideration, removing 7 GW from the project pipeline since July 2022. As a result, it has moved out of the Top 5 countries for planned pre-construction projects outside China for the first time since 2015, replaced by Indonesia.

<sup>28</sup> Mayer Brown, 2022, Vietnam's Energy Market – **Power Development Plan 8 Update**



E3G

---

This is due to significant cancellations of new capacity in PDP8 and Viet Nam’s development of a Just Energy Transition Partnership<sup>29</sup> with finance-provider countries. This creates further opportunity for the country to end the pursuit of new coal power, following on from signing the COP26 coal-to-clean power sector transition statement in 2021. It will be important that Vietnam’s JETP Resource Mobilisation Plan, due November 2023, provides as promised practical steps towards reducing its project pipeline from the current planned capacity peak of 37 GW, towards a peak of 30.2 GW.

- > Over a third of **Indonesia’s planned coal capacity (4 GW) has been removed from the project pipeline over the course of 2022**, even despite the announcement of 2.2 GW of new coal capacity in the second half of the year. The overall reduction includes two recently cancelled coal projects, Tanjung Jati A and Nanshan Industrial Park power stations, that had previously sought support from China. Like Viet Nam, India and South Africa, Indonesia announced a Just Energy Transition Partnership with G7 donor nations, which aims to facilitate the transition from coal to clean power, including a reduction of the country’s coal project pipeline amid exploration of the potential for mutual cancellation of coal Power Purchase Agreements (PPAs). Indonesia is also currently collaborating with the Asian Development Bank to deploy an Energy Transition Mechanism to accelerate the retirement of existing coal power plants. The one major newly-proposed coal power plant is Adaro Energy’s controversial<sup>30</sup> aluminium industrial complex in North Kalimantan which includes a 2.2 GW coal project.
- > **Laos** now has the second largest pre-construction capacity in the region after Indonesia and an unwanted international prominence among the top five countries with largest new coal development pipelines (after China). The relatively consistent scale of its new coal plans over recent years bucks the trend away from new coal demonstrated by its neighbour Viet Nam and other regional peers (Figure 5). As of January 2023, total capacity under consideration in Laos is 7 GW. This level of planned capacity is historically small but is now large enough to put Laos at risk of being one of the last countries still pursuing new coal, endangering its ability to attract inward investment from supply chains seeking coal-free electricity.<sup>31</sup> However, Laos is well placed to cancel its existing coal pipeline, with high potential for

---

<sup>29</sup> European Commission, 2022, **Political Declaration on establishing the Just Energy Transition Partnership with Viet Nam**

<sup>30</sup> Financial Times, 2023, **Indonesia’s Adaro struggles to secure funding for \$2bn aluminium project.**

<sup>31</sup> **H&M** are one of a number of major corporations with a commitment to power their operations entirely on renewable energy and away from coal power generation.



E3G

development of the country's abundant renewable energy resources. These could provide a backbone for an affordable, low-carbon energy system, with potential for export to its power-hungry neighbours. Moreover in 2022, Laos made progress on its Net Zero 2050 commitment by updating its National Power Development Plan and Renewable Energy Strategy.

### South Asia: 86% reduction in projects under development since 2015

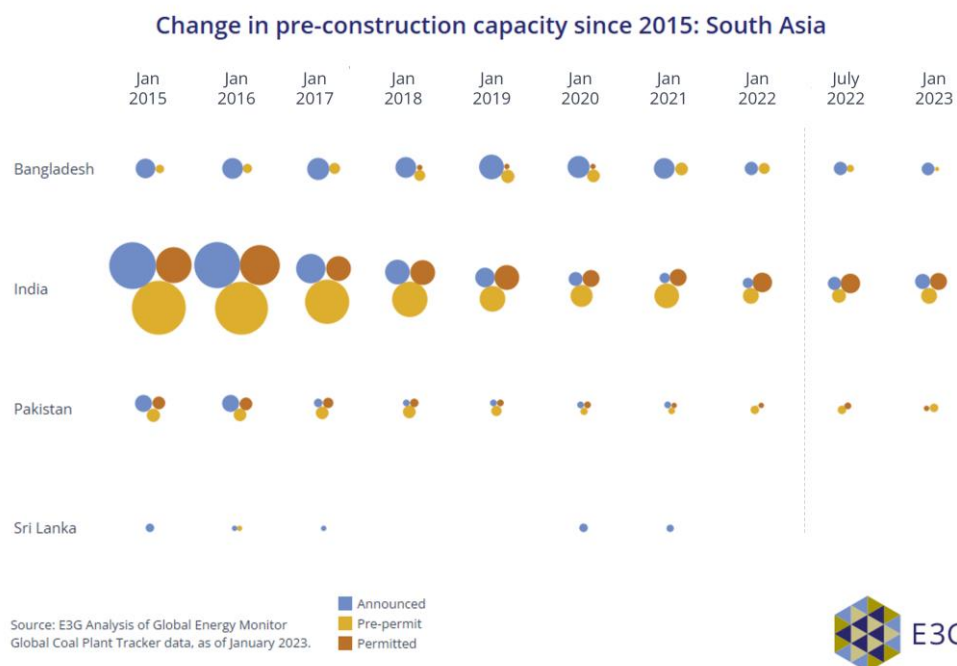


Figure 6: Pre-construction capacity in South Asia has reduced by 86% since 2015.

- > South Asia (39 GW) accounts for **more than a third of all planned new coal** outside China. This is principally due to India's remaining planned projects. Overall, the region has seen the total amount of pre-construction capacity **collapse by 86%** since 2015, confirming that new coal is increasingly recognised as a risky investment. The region saw a net decrease in pre-construction capacity during the second half of 2022, as the total amount of shelved and cancelled capacity in Bangladesh and India was greater than new projects proposed in India.
- > **India** saw a net increase of 3 GW of planned new coal over the course of 2022. Of this, 1.02 GW came in the second half of the year, including from the reintroduction of six projects that had previously been shelved. Over recent years multiple projects have been paused due to unfavourable business conditions and the heightened risk of stranded investments, including some projects halted mid-construction. As the current G20 Presidency, India has a



E3G

---

significant opportunity to demonstrate climate leadership by accelerating clean energy growth and fulfilling its existing targets.<sup>32</sup> India is also exploring a Just Energy Transition Partnership approach with G7 countries, highlighting the increasing opportunities to pivot to a clean future.

- > **Bangladesh** has reduced its total pre-construction capacity by 39% (4.2 GW) since last year, but still technically has 6.7 GW under consideration, despite electricity system overcapacity. Bangladesh had also announced the cancellation of ten coal power plants in 2020,<sup>33</sup> while a letter from the Chinese embassy in Dhaka to the government of Bangladesh confirmed<sup>34</sup> that China would “no longer consider [...] coal-fired power stations”, a commitment reflected later that year in China’s international coal finance exit announcement. Ongoing updates to the 2016 Integrated Power Sector Master Plan could increase Bangladesh’s clean energy ambitions and shelve further pre-construction coal capacity.
- > **Pakistan** has not introduced any new coal projects in the last six months and its total pre-construction capacity remains stable at 4 GW. Two small coal projects in Punjab, Pakistan, have moved into construction since July 2022 with negligible impact on the scale of the overall project pipeline. The Pakistan government has recently<sup>35</sup> announced an intention to increase domestic energy supplies, including through a desire to build further new coal power plants. This stated aim is a result of increased international prices for gas imports, primarily due to the EU increasing non-Russian gas imports following the invasion of Ukraine. However, accessing finance for potential new coal power projects represents a considerable challenge for Pakistan, including from China which previously supported new coal projects in the country. The decision to pursue domestic rather than imported energy sources is understandable, however renewable energy affords economic, social, energy security and environmental advantages over coal power. Pakistan’s recent approval of the National Solar Initiative to implement 10 GW of solar power projects demonstrates a pathway for growing renewable generation instead of pursuing new coal power plants.

---

<sup>32</sup> IEA, 2022, [India’s clean energy transition is rapidly underway, benefiting the entire world](#); Climate Home News, 2022, [India approves climate plan with increased ambition, clarifying energy goals](#)

<sup>33</sup> Reuters, 2021, [Bangladesh scraps plans to build 10 coal-fired power plants](#)

<sup>34</sup> Business and Human Rights Resource Centre, 2021, [Bangladesh: China refuses to invest in high pollution coal projects under Belt and Road](#)

<sup>35</sup> Reuters, 2023, [Exclusive: Pakistan plans to quadruple domestic coal-fired power, move away from gas](#)

---



E3G

- > **Sri Lanka** emerged as a leader in the push for No New Coal by shelving its last remaining planned projects in 2021 and committing to No New Coal in its UNFCCC Nationally Determined Contribution (NDC) submission. The country subsequently became one of the founding members of the No New Coal Power Compact, which was launched in September 2021 at the UN High Level Dialogue on Energy.

### Central Asia: 22% reduction in planned coal capacity since 2015

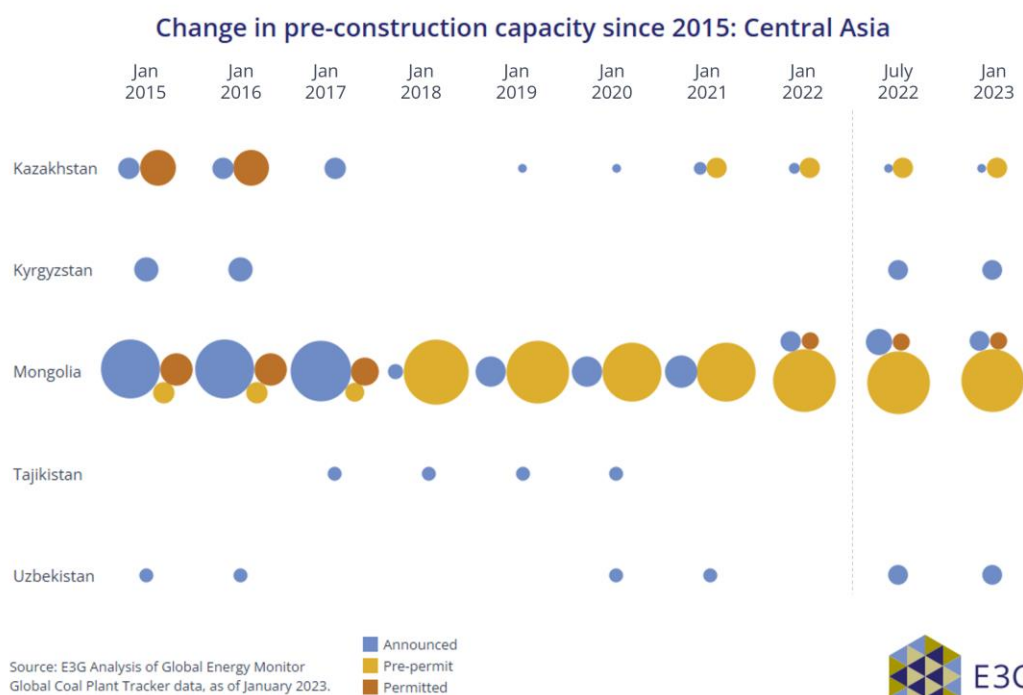


Figure 7: Pre-construction capacity in Central Asia has reduced by 22% since 2015.

- > Central Asia was the only region in the world outside China that saw its planned coal capacity grow over the first half of 2022, however this declined slightly in the second half of the year as a result of changes in Mongolia’s new coal plans.
- > **Mongolia** has 7 GW of pre-construction capacity under consideration, resulting in it now having the unwelcome status of one of the five countries with the largest project pipelines outside China. The scale of Mongolia’s proposed pre-construction capacity has stayed at a similar scale in recent years (Figure 7) despite experiencing a turnover of projects: some planned projects have been cancelled; new projects have been added; and previously shelved projects reconsidered. This was the case in 2022, with a new proposal for a 0.4 GW addition to the Ulaanbaatar-3 Combined Heat and





E3G

---

Power station. Almost in parallel, the three-unit (0.45 GW) Ulaanbaatar-5 Combined Heat and Power expansion proposal was cancelled, with both projects located at the same site.

- > The number of planned pre-construction plants in other Central Asian countries (**Kyrgyzstan**, **Uzbekistan** and **Kazakhstan**) have remained stable since mid-2022. Kazakhstan has two proposed coal projects that have been stalled for the last few years. These projects are unlikely to enter the construction stage. During 2022, Kyrgyzstan and Uzbekistan each reconsidered a previously shelved coal project. Energy security, coal reserve exploration, and coal market dynamics remain key issues for the region, although there are emerging opportunities to substantially invest in renewable energy.
- > Seven out of the nine proposed coal plants in Central Asia are purely for electricity generation, rather than combined heat and power (CHP). Grid-connected power plants may be more straightforward to replace with clean power given Central Asia's complex heating needs.

## About E3G

E3G is an independent climate change think tank with a global outlook. We work on the frontier of the climate landscape, tackling the barriers and advancing the solutions to a safe climate. Our goal is to translate climate politics, economics and policies into action.

E3G builds broad-based coalitions to deliver a safe climate, working closely with like-minded partners in government, politics, civil society, science, the media, public interest foundations and elsewhere to leverage change.

More information is available at [www.e3g.org](http://www.e3g.org)

### Copyright

This work is licensed under the Creative Commons Attribution-NonCommercial-ShareAlike 4.0 License. © E3G 2023





E3G

## Annex I: Countries with only one proposed new coal power plant under consideration

Country	Capacity (MW)								Chinese support
	Operating	Construction	Permitted	Pre-permit	Announced	Pipeline Total	Shelved	Cancelled (since 2010)	
Madagascar	120			30		30			Yes
Kenya				64		64	960	1,716	
Niger					200	200		500	Yes
Eswatini				300		300	500	1,600	
Zambia	330				300	300		1,940	
Japan	52,978	2,450		500		500		12,177	
Kyrgyzstan	826				600	600			
Tanzania				600		600	390	1,375	Yes
Thailand	6,138		600			600	2,000	8,726	
Uzbekistan	2,493				600	600		300	
Ukraine	9,320			660		660		2,060	Yes
Cambodia	1,405	315	700			700		4,880	Yes
Australia	23,977			1,000		1,000	4,720	8,716	

This table features data analysis from E3G’s ongoing No New Coal Progress Tracker.<sup>36</sup>

<sup>36</sup> E3G, 2023, **No New Coal Progress Tracker**



## E3G Annex II: Progress towards No New Coal

65 COUNTRIES ALREADY COMMITTED TO NO NEW COAL	33 COUNTRIES WITHOUT COAL PROJECTS UNDER CONSIDERATION	33 COUNTRIES WITH PROPOSED COAL PROJECTS
<p><b>OECD &amp; EU:</b> Austria, Belgium, Canada, Chile, Costa Rica, Croatia, Cyprus, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Israel, Italy, Latvia, Lithuania, Luxembourg, Mexico, Netherlands, New Zealand, Poland, Portugal, Slovakia, Slovenia, South Korea, Spain, Sweden, Switzerland, United Kingdom</p>	<p><b>OECD &amp; EU:</b> Bulgaria, Colombia, Czech Republic, Norway, Romania, United States</p> <p><b>Non-OECD:</b> Argentina, Belarus, Democratic Republic of Congo, Djibouti, Dominican Republic, Georgia, Ghana, Guatemala, Guinea, Honduras, Iran, Jamaica, Kosovo, Moldova, Myanmar, Namibia, Nigeria, North Korea, Oman, Panama, Papua New Guinea, Sudan, Syria, Taiwan, Tajikistan, United Arab Emirates, Venezuela</p>	<p><b>OECD &amp; EU:</b> Australia, Japan, Turkey</p> <p><b>Non-OECD:</b> Bangladesh, Bosnia and Herzegovina, Botswana, Brazil, Cambodia, China, Eswatini, India, Indonesia, Kazakhstan, Kenya, Kyrgyzstan, Laos, Madagascar, Malawi, Mongolia, Mozambique, Niger, Pakistan, Philippines, Russia, Serbia, South Africa, Tanzania, Thailand, Ukraine, Uzbekistan, Viet Nam, Zambia, Zimbabwe</p>
<p><b>Non-OECD:</b> Albania, Angola, Azerbaijan, Brunei, Ecuador, Egypt, El Salvador, Ethiopia, Fiji, Grenada, Ivory Coast, Liechtenstein, Malaysia, Maldives, Marshall Islands, Mauritania, Mauritius, Montenegro, Morocco, Nepal, Niue, North Macedonia, Peru, Senegal, Singapore, Somalia, Sri Lanka, Tuvalu, Ukraine, Uruguay, Vanuatu, Viet Nam, Zambia</p>		<p style="text-align: center;"><b>TOP 6 COUNTRIES (90% OF THE GLOBAL PLANNED COAL CAPACITY)</b></p>
		<p style="text-align: center;">Next 5 countries (18%): India, Indonesia, Laos, Mongolia, Turkey</p> <p style="text-align: center;">China (72%)</p>