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The unfinished restructuring of the coal industry in Poland

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Konrad Szpak*

THE UNFINISHED RESTRUCTURING OF THE COAL INDUSTRY IN POLAND

Thesis

Poland's energy security depends on coal and this will not change in the nearest future (at least until 2030). However, because of technological development, growing popularity of other energy carriers and international factors (incl. prices, EU's climate and energy policy), coal's significance will diminish. This makes it even more pertinent to reform the uncompetitive coal industry in Poland whose situation is exacerbating. Especially that, despite many attempts made after 1989, the coal industry in Poland has never been fully restructured.

Keywords

energy, Poland, coal, restructuring

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Coal and Poland's energy security

Coal and lignite constitute the cornerstone of Poland's energy security¹. They provide 56% of the total primary energy supply (PAIiZ 2012: 1). Coal's significance is even better exemplified by its participation in electricity production (secondary energy), which is ca. 89%

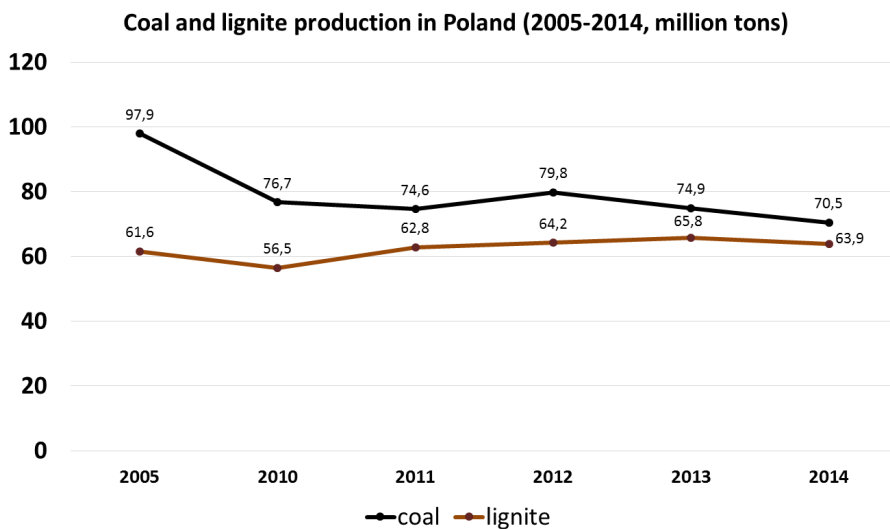
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¹ The article does not define the term „energy security”. As it has been explained “when defining energy security one must notice that there exists no universal definition and that it should be considered in terms of other security aspects””, Młynarski T. (2011), *Bezpieczeństwo energetyczne w pierwszej dekadzie XXI wieku. Mozaika interesów i geostrategii*, Kraków: Wydawnictwo Uniwersytetu Jagiellońskiego, p. 29. For instance Ustawa *Prawo energetyczne* (Dz.U. 2012 poz. 1059) defines the terms as „a state of the economy that enables to meet the current and perspective demand for fuel and energy in a technically and economically justifiable way that ensures environmental protection”.

(89.03% in 2013 and 90.44% in 2012, *Raport Krajowy Prezesa Urzędu Regulacji Energetyki 2014*, URE 2014, p. 12); however, it has been showing a slightly decreasing tendency.

Poland has 48.226 billion tons of proven coal reserves in 146 deposits, including 19.131 billion tons in 51 functional mines (39.67%) and 22.584 billion tons of lignite in 90 deposits, including 1.591 billion tons in 12 mines (7.04%), (GUS 2014: 39). Currently coal production is at ca. 70.5 billion tons (Ministry of Economy 2015: 6). However, it should be pointed that the production of coal in Poland significantly dropped after 1989 and it is still showing a slightly decreasing tendency, while the production of lignite remains stable (Fig. 1).

Figure 1. Coal and lignite production in Poland (2005–2014, million tons)



Source: own illustration, data acquired from Central Statistical Office of Poland (GUS, 2014) and Ministry of Economy (2014–2015).

It needs to be said that in 2008 for the first time Poland has become a net importer of coal. The export fell from 19.369 m tons in 2005 to 7.77 million tons in 2014, whereas import increased from 3,371 m to 10.6 m tons (2013 data).

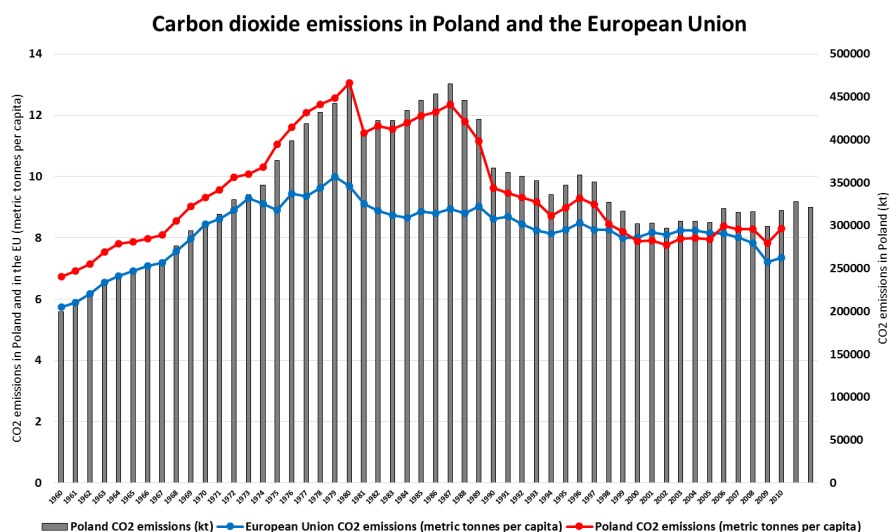
It is worth noticing that just the coal mining industry employs ca. 100 thousand people (100 675 employees² as at 31.12.2014, Ministry

² Out of which 76.49% work underground. In comparison to 31.12.2013 employment decreased by 6.018 people from 106 693 (ca. 5.64%).

of Economy 2015: 12) and is quite a significant tax payer. In 2014 coal companies paid 6.379 billion PLN (7.125 billion PLN in 2013) in the form of various public payments and fees (Ministry of Economy 2015: 19).

However, coal is considered a high emission fuel, which is important in terms of the EU climate and energy policy and carbon dioxide emission in Poland is still relatively high (Fig. 2).

Figure 2. Carbon dioxide emissions in Poland and the European Union



Source: own illustration, data acquired from World Bank (<http://data.worldbank.org/>) and Central Statistical Office of Poland (GUS, 2014: total CO₂ emissions in Poland from 2010 to 2012).

In 2012 the total CO₂ emission in Poland was 321.194 m tons (GUS 2015: 48). This means the per capita total is almost 8.31 tons, which is ca. 13.02% higher than the EU average (7.35 t). However, it should be noted that historical data show that only between 1975 and 1989 per capita CO₂ emission in Poland was significantly higher than in EU countries (by 20–38%).

Despite the fact that the Polish coal industry is formally only a small part of the economy (coal mining and production was only 1.9% of Poland’s GDP in 2013, GUS 2014), it should still be considered a strategic sector to Poland’s energy security. However, it has been struggling with problems which have not been solved for years and threatened its competitiveness.

Problems and challenges of the Polish coal industry

The difficult situation of the Polish coal sector is exacerbated by exogenous (outside, international) and endogenous (inside, national) factors. The most important exogenous determinants include:

- EU climate and energy policy and the *European Union Emissions Trading System* (EU ETS)³,
- power coal prices on international markets⁴.

The condition of the Polish coal industry is directly determined by the EU climate and energy policy, which after the decisions made by the European Council between 23 and 24 October 2014⁵ became even more strict. The EU's main 2030 targets aim to: reduce greenhouse gas emissions by 40%⁶ in comparison to 1990, increase to 27% the share of renewable energy in EU energy consumption (EU-level target)⁷ and decrease energy consumption by 27% "compared to projections of future energy consumption based on the current criteria" (European Council: 2014).

Additionally, the EU ETS will be reformed to decrease the surplus of permissions on the market and stabilize the prices on a desired level and "the annual factor to reduce the cap on the maximum permitted emissions will be changed from 1.74% to 2.2% from 2021 onwards" (European Council: 2014). It can be said that the EU climate and energy policy is oriented towards low-carbon sources (e.g. renewables, nuclear) and energy efficiency, which has a detrimental impact on the development of the coal industry. Furthermore, the costs of transformation to a low-carbon EU economy will put a disproportion-

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³ See also: The EU Emissions Trading System (EU ETS), information document prepared by the Directorate-General for Climate Action (DG CLIMA), http://ec.europa.eu/clima/policies/ets/index_en.htm (20.09.2014).

⁴ Because of economic and technical reasons lignite is not transported long distance – power plants fuelled by it are usually opened in close proximity to the mine. In case of bituminous coal there is no single price level – important international markets include RB (Richards Bay Coal Terminal, South Africa, one of the biggest export terminals in the world – its capacity is 91 mt of coal annually; <http://www.rbct.co.za/>), ARA (the benchmark price reference for coal imported into northwest Europe: Amsterdam/Rotterdam/Antwerp; calculated as an average, or markets related to Australia, Columbia, Russia and the Asia-Pacific).

⁵ The conclusions on the 2030 EU climate and energy policy are available on the Council's website: <http://www.consilium.europa.eu/pl/meetings/european-council/2014/10/23-24/> (21.11.2014).

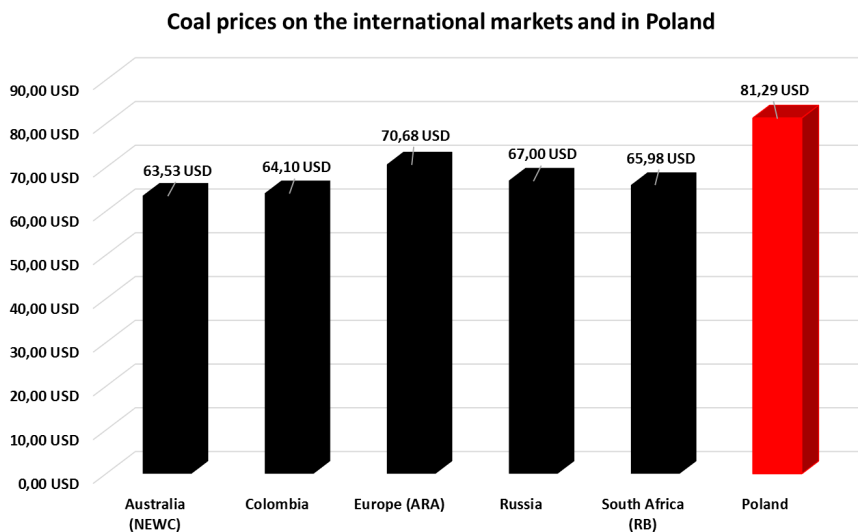
⁶ It should be pointed that the energy sector is subject to the Emissions Trading System which means its target is even higher – 43%; whereas other industries, e.g. construction, transport, agriculture (so-called non-ETS) should limit their emissions by 30%.

⁷ It should be noted that, e.g. in road transport the possibility to use renewable energy sources is limited, which means the energy sector's target will need to increase.

ate burden on the coal industry, intensified by the EU ETS (incl. the necessity to buy CO₂ emission permits). What is more, the European Council conclusions from 19–20 March 2015 included a controversial regulation, which said that the EU wants to create an energy union based on the future climate policy that includes decarbonization of the economy (European Council 2015: 1).

The price of coal on international markets has an adverse impact on the Polish coal industry as well. Currently the prices are relatively low, which makes Polish export less competitive and presents state-owned energy concerns with a dilemma on whether to buy cheaper fuel (which would be problematic because of socio-political reasons). This also makes coal import more profitable for various entities in Poland. Figure 3 presents the energy coal prices in December 2014.

Figure 3. Coal prices on the international markets and in Poland



Source: Own illustration, data acquired from Ministry of Economy (*Informacja o funkcjonowaniu górnictwa węgla kamiennego w grudniu oraz w 2014 r.*, 2015), Warszawa: Ministerstwo Gospodarki 2015) and Index Mundi (<http://www.indexmundi.com/>). Australia: Newcastle, Free On Board – FOB; Colombia: Puerto Boliwar, FOB, 6000 kcal/kg; Europe: ARA, Delivered Ex Ship – DES, 6000 kcal/kg; Russia: Baltic ports, FOB, 6000 kcal/kg; South Africa: RB, FOB, 6000 kcal/kg; Poland: net prices (loco mine + excise + accounting adjustments), 2014 average, 278.74 PLN, exchange rate – NBP, December, monthly average, 3.4287.

It should be pointed that the European coal market is supplied by producers from, e.g. Columbia, Russia, South Africa and the United

States (Ministry of Economy 2014: 3–4), whereas low prices are also caused by other factors⁸.

Furthermore, the energy transition in Germany⁹ may have a negative impact on the Polish coal sector. In Germany between January and September 2014 electricity production based on coal dropped by 15% in comparison to the same period in 2013. (Ministry of Economy 2014: 3).

Yet, it seems that the internal factors have a key influence on the situation in the coal industry in Poland. The most significant ones include:

- lack of a cohesive state energy policy,
- lack of political will and popular support¹⁰ for introducing reforms,
- underinvestment; lack of in depth knowledge on investment needs and their profitability,
- inefficient capital structure of coal companies (too many subsidiaries),
- inefficient work regulations for coal miners and their excessive privileges;
- excessive unionization of coal companies and substantial trade unions privileges;
- mismanagement of coal companies and inefficiency of coal mines;
- processes that restrict coal demand (increased energy efficiency, limiting losses in transmitting and distributing energy, development of renewable energy sources, development of a consumer friendly market in Poland and others)

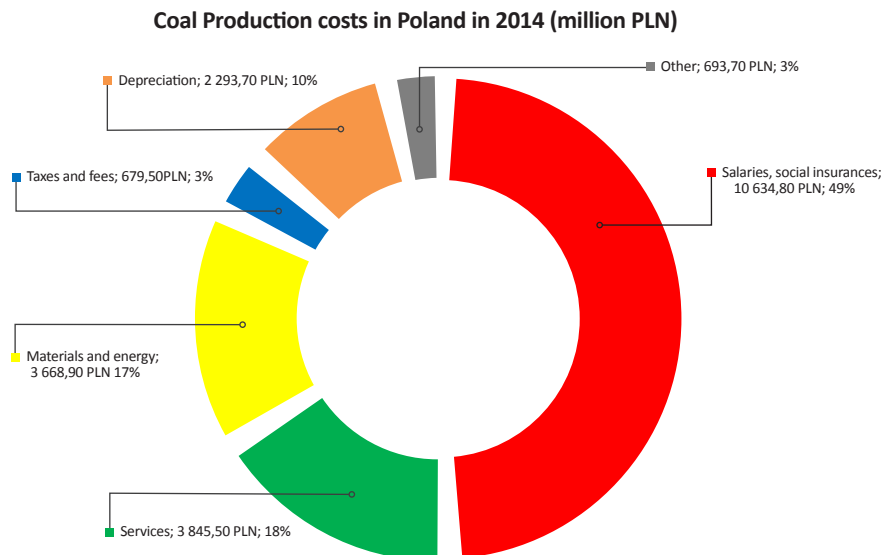
The above factors translate into, e.g. high operating costs generated by the sector. In 2014 the costs of producing coal amounted to 21 816.1 m PLN and were lower than in 2013 by 865.3 m PLN (3.8%), at the same time production dropped by 5.8% (Ministry of Economy 2015: 20). Whereas the total costs of coal production, without salaries and employee benefits were higher in 2014 than in 2013 by 117 m PLN (1.1%), including production drop by 5.8% (Ministry of Economy 2015: 21). The breakdown of coal production costs is presented in figure 4.

⁸ Those may include, e.g. coal reserves in ARA harbors, freight rates drop, stronger USD against EUR and significant changes in ruble exchange price, decreased oil and gas prices, general lack of perspective for energy increase in Europe. See more: Ministry of Economy 2015: 3–5.

⁹ The so called *Energiewende*, see more: <http://eergytransition.de>.

¹⁰ Especially considering the trade union's opposition to recovery plans.

Figure 4. Coal production costs in Poland in 2014 (million PLN)



Source: own illustration, data acquired from Ministry of Economy 2015: 20–21.

Importantly, even 49% of the mining cost in the coal sector is constituted by salaries. An analysis of the so called non-standard deviations of average monthly gross pay in comparison to an average pay in a national economy shows that in the coal and mining industry, the deviations exceed 80% (GUS 2014: 179). For instance, in Jastrzębska Spółka Węglowa (JSW SA) which employs 26 thousand people, the average gross monthly pay in 2014 was 8249.28 PLN (including benefits, excluding top management), whereas the average for the enterprise sector was only 3980.24 PLN (Jastrzębska Spółka Węglowa: 2015). In JSW SA, the coal allowance costs 196.3 m PLN a year, the 14th salary is 255 m PLN, beneficial calculation of annual leave buy-back is 24.1 m PLN, allowances for sickness leave and sickness benefit cost 14.3 m PLN, contributions to the Employee Benefit Fund for retirement – 6.3 m PLN, allowance for school accessories – 4.1 m PLN and tickets guaranteed by the Miner’s Charter cost 3.4 m PLN (Jastrzębska Spółka Węglowa: 2015).

Another issue is the heavy unionization of mining companies. There are 49 trade unions at JSW SA and 88 employees are exempt from regular work because of their union responsibilities, including 82 who are employed full time (Jastrzębska Spółka Węglowa: 2014).

At Kompania Węglowa SA (KW) there are 218 unions and the level of unionization is at 101.86%¹¹ (Kompania Węglowa 2014, 31.01.2014 r.).

It should also be noted that the average coal production cost per unit in Poland is high. In 2014 it was 309.42 PLN/t¹², which means it grew by 6.53 PLN/t (2.2%) in comparison to 2013. This was caused by a 5.8% drop in coal production and a decrease in production cost by 3.8% (Ministry of Economy 2015: 21). More importantly, this is much more than the general net¹³ price of coal, which in 2014 was only 278.74 PLN/t (5.5% lower than in 2013). This explains the permanent unprofitability of the coal sector in Poland further corroborated by its financial results.

In 2014 the industry lost 2.278 billion PLN in coal sales, which is a significant change as the loss in 2013 was 0.484 billion PLN. The losses in the operating expenses were at 0.592 billion PLN (0.85 billion PLN profit in 2013), and the net financial result was lower by 1.343 billion PLN (0.293 billion PLN loss in 2013).

It is worth pointing out that while Poland's influence on the international environment is limited, the internal obstacles depend solely on Polish decision makers (political will + popular acceptance). In addition, it seems that overcoming internal difficulties would be sufficient to reform the coal sector and restore its competitiveness.

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Restructuring of the Polish coal sector

After 1989 limited attempts at reforming the Polish coal sector did take place. Their aim was to “adjust the functioning of the industry to market economy and increase the competitiveness of the Polish coal mining on international markets” (Paszczka 2010: 63).

As it was pointed out, the restructuring could be divided into a few stages whose end dates could correspond with the duration of governmental programs, restructuring acts, or with the date of a thorough organizational restructuring of the entire sector (Paszczka 2010: 64). Considering this, the reform history could be divided into the following periods (Paszczka 2010: 65–75):

1. 1989–1992 – mines' empowerment,
2. 1993–1995 – consolidation of mines,

¹¹ Employees can join more than one trade union.

¹² NBP average annual exchange rate in 2014 was USD (3.1551) and EUR (4.1852), which gives 98.07 USD/t and 73.93 EUR respectively.

¹³ Net prices: loco mine+ excise +accounting adjustments.

3. 1996–1997 – technical restructuring,
4. 1998–2002 – adaptation to market economy rules,
5. 2003–2006 – becoming profitable and economically efficient,
6. 2007–2015¹⁴ – further restructuring activities

The first steps were taken in 1989 when five Coal Exploitation Companies (Przedsiębiorstwa Eksploatacji Węgla) were closed down, and in 1990 when mines were remodeled into individual state companies (Czerwińska 2002: 1). The employment in the sector was excessive and there was no demand for the coal that was mined. Therefore, exporting Polish coal in the early 90s *de facto* meant subsidizing foreign buyers (Czerwińska 2002: 1). As Paszcza (2010: 67) pointed out “leaving the process of restructuring to ostensible market mechanisms without the possibility to freely impact the selling price, meant uncontrolled liquidation of the entire sector”.

The first governmental mining industry restructuring program was introduced on 15 March 1993. An important change whose aim was to consolidate the mines, was the introduction of the *Act on ownership changes of selected companies*. The bill incorporated 49 mines into 6 coal partnerships that were sole shareholder companies of the State Treasury (Czerwińska 2002: 1). The debt cancellation of the sector between 1994 and 1995 failed as the obligations grew to 6.7 billion PLN at the end of 1994 and to 8.3 billion PLN at the end of 1995 (Paszcza 2010: 69).

Between 1996 and 1997 the government focused on technical restructuring, but did not provide stable financial resources to support this endeavor (Paszcza 2010: 70). These attempts did not lead to meaningful changes within the sector that was still recording significant financial net losses -1.8 billion PLN in 1996 and -2.6 billion PLN in 1997 (Paszcza 2010: 71).

On 30 June 1998 it was decided to adopt the biggest restructuring program to date in the coal industry. The reform was undertaken because of the industry’s permanent unprofitability. The program aimed to limit production capabilities by 36 million tons a year before 2002 and reduce employment by 102 thousand people to 141.4 thousand in 2002 (Ministry of Economy 2003: 3). The government’s postulates shifted, but generally between 1990 and 2000 employment in the coal industry dropped from 415 to 155 thousand employees. At the same time labor productivity increased by 69.3% (Czerwińska 2002: 7). However, the debts were not fully cancelled and so the sector did not adapt to market economy rules (Ministry of Economy 2003: 4).

¹⁴ It should be acknowledged that recovery programs were subject to numerous changes and updates, e.g. a program was adopted for 2003–2006 and then 2004–2006.

Further programs concentrated on introducing organizational changes to achieve profitability. In 2003 coal partnerships were consolidated into Kompania Węglowa (KW), which was the biggest coal company in Europe. In addition, the government conducted a substantial debt cancelling process – in 2003 it forfeited 18.1 billion PLN of public liabilities. A successful financial restructuring enabled the industry to increase its net financial result to ca. 1 billion PLN (Paszcza 2010: 74).

Other programs worth mentioning include the reduction in force in Kompania Węglowa, which in 2003 employed 84 975 people (as at 1 February 2003) and in 2014 decreased that number to 54 853 (as at 31 January 2014). Further decisions concerned the privatization of coal companies, new investments and adherence to environmental regulations. The latest and current plan is called *Polish coal industry program for 2007–2015 (Program działalności górnictwa węgla kamiennego w Polsce w latach 2007–2015)*, last updated in 2011¹⁵.

Despite their numbers, the initiatives and decisions frequently ended with very limited success. This is exemplified by the recovery plan drafted for Kompania Węglowa (KW), which employs almost half of the industry's staff and has a production capacity of 31 million tons of coal a year (Kompania Węglowa: 2014). The plan was accepted by the Council of Ministers on 7 January 2015 and cost 2.3 billion PLN¹⁶. It provided for a relocation of up to 6 thousand employees and an introduction of a 6-day working week, which aimed to fully utilize the resources in a situation where the participation of stable costs was at 80%. The document also proposed redundancy payments for 3.1 thousand employees (even up to 24 monthly pays), mining leave for 2.1 thousand employees and other protective measures (Ministry of Economy 2015: 15). Closing down the most unprofitable coal mines was the most controversial issue (only 3 out of 14 KW mines are profitable). It was decided to incorporate 4 of them into Mine Restructuring Companies (Spółki Restrukturyzacji Kopalń) to shut them down and 1 was to be sold to Węglokoks SA (Ministry of Economy 2015: 12). However, as a result of social protests the government withdrew the plan to close down the mines¹⁷. The company itself generates losses to

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¹⁵ The document is available on the Ministry of Economy's website <http://www.mg.gov.pl/Bezpieczenstwo+gospodarcze/Gornictwo/Realizacja+Programu+dzialalnosci+gornictwa+w+gla+kamiennego+w+Polsce> (2.09.2014).

¹⁶ See: Minister of economy's announcement, <http://www.mg.gov.pl/node/22518> (08.01.2014 r.).

¹⁷ It should be pointed that the government did not discuss the issue with the opposition, which promised to cancel the recovery plan if it won the elections. Additionally, there were no in-depth analyses about the entities that were supposed to be sold. A good example was KW

the tune of ca. 200 m PLN a month in its operational activities (Ministry of Economy 2015).

In 2014 the government devoted 402.472 m PLN as a budget subsidy to restructure the coal industry (Ministry of Economy 2015: 26). This sum financed the liquidation of mines (217.701 m PLN), coal allowances (129.054 m PLN)¹⁸ and employee claims (46.434 m PLN)¹⁹. To a some extent the government also tried to limit the burden related to employment costs.

Despite the fact that some recovery steps have been undertaken, the coal industry remains unprofitable and has not become more competitive. Further restructuring decisions are necessary to achieve that goal.

Suggested recovery measures for the Polish coal sector

The restructuring of the coal sector in Poland should not be based on attempts to artificially belittle its importance to the country's energy supply. Instead its aim should be to improve management, work organization and modernization. The reform should constitute a comprehensive recovery process, which responds to problems on two levels that deal with: 1. political and social issues (strategic) and 2. coal companies management (operational).

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Recovery at the strategic level

The starting point of a discussion on the restructuring of the coal sector should be Poland's energy policy. The existing document (*Poland's 2030 energy policy*) is to be replaced with a new one with a longer time perspective (*Poland's 2050 energy policy*²⁰). The report is currently being drafted by the Ministry of Economy. However, there is no

Brzeszcze whose supposed economic resources are 312.7 m, economic reserves in place are 112.7 m including recoverable reserves at 66.2 m t. The supposed economic resources of methane are 2.845 bcm, including economic reserves in place 0.995 mcm. Assuming the annual coal production was 2 m t, the resources would last for 33 years (Kompania Węglowa: 2014).

¹⁸ Allowances for free coal for pensioners who worked at closed mines, covered by the Social Insurance Institution (ZUS) including servicing costs.

¹⁹ Entitlement to free coal for pensioners from mines, including those put into liquidation before 1 January 2007 and compensatory pension for employees of mines that were shut down.

²⁰ The draft version is available on the Ministry of Economy's webpage <http://www.mg.gov.pl/node/8134> (20.10.2014).

completion deadline²¹ and social consultations²² about it lasted only about 15 days and took place during the summer holiday period (14 August – 1 September 2014). Meanwhile, a strategic document about the energy sector should be created as a result of a political consensus and involve all main political players and public administration in the process. It should be widely accepted and should not be subject to major changes because of election results. The EU climate and energy policy also requires a deeper analysis and political agreement on possible decisions. Polish politicians often point to its negative impact on the Polish industry, especially the coal sector; whereas others argue that it will not entail major implications. At the same time, there is no debate in Poland on the policy's positive sides. As it was rightly pointed out "the introduction of the energy and climate targets in Poland (...) may create a positive impulse for the economy and strengthen our country's development potential in the long run" (Bukowski, Karaczun 2014: 1). Even coal itself, thanks to investments in the production of liquid and gas synthetic fuels can become an alternative to oil and natural gas imported by Poland (Sienkiewicz 2010: 241).

Apart from formulating and pursuing a suitable energy policy, the most important decisions which require political will must:

- thoroughly review the situation in the sector, including coal companies' finances, e.g. costs, tax burdens and investment needs; realize necessary investments and/or close permanently unprofitable coal mines;
- modernize the sector, including state of the art production methods, more efficient usage of methane (ca. 800 mcm a year is released into the air in the process of coal production²³), and the so-called underground coal gasification (experiments in KWK Wieczorek in Katowice owned by KHW were successful²⁴),
- repeal the Miner's Charter and start regulating the miners' labor through the Labor Code or a single act on public employees,

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²¹ Vice minister of economy Tomasz Tomczykiewicz predicted that the dokument would be completed by the end of 2014 (http://gornictwo.wnp.pl/tomczykiewicz-polityka-energetyczna-2050-jeszcze-w-tym-roku,234540_1_0_0.html, 20.10.2014), whereas Włodzimierz Karpiński, the minister of state treasury stated that this would happen at the end of 2017, early 2018 http://energetyka.wnp.pl/karpinski-decyzja-ws-programu-polityki-energetycznej-na-przelomie-2017-2018,241994_1_0_0.html (20.10.2014).

²² Ministry of Economy explained that those were only preliminary consultations and further talks with interested parties will take place. The summary of the consultations is available on the ministry's webpage: <http://www.mg.gov.pl/node/21864> (20.10.2014).

²³ Ministry of Economy, <http://www.mg.gov.pl/node/16252> (20.09.2014).

²⁴ See also: Press release on the pilot trial of underground coal gasification in KHW SA KWK Wieczorek, <http://www.gig.eu/pl/newsy/komunikat-prasowy-dotyczacy-pilotowej-proby-podziemnego-zgazowania-wegla-w-khw-sa-kwk> (21.09.2014).

- limit privileges (incl. coal allowance for miners and pensioners, cash allowance for annual leave transportation, allowance for school accessories, allowance for the miner's day, additional annual prize and others),
- limit trade unions' privileges (e.g. exemption from performing regular work duties, approval to have one's own business, right to select employees who cannot be terminated; having access to rooms and appliances that facilitate union activities, low limits of representation)²⁵,
- increase popular support for the necessary reforms²⁶, educate miners about the necessity of changes (high labor costs, relatively low efficiency²⁷, limited use of imported coal, energy trends in Poland, the EU and around the world, etc.),
- mitigate social consequences of the reforms.

Recovery at the operational level

The most important recovery steps at the operational level should be taken both in coal partnerships as well as in individual mines. The key activities of such recovery plans should²⁸:

- review how coal partnerships function and what is their financial situation; limit the number of subsidiaries and members of their management and supervisory boards, limit all the operations not related to production or the main activities of the company, use outsourcing services,
- simplify the structure of pay (expanded by a few or more than a dozen additional benefits and allowances) to one basic salary with an incentive bonus based on results,
- extend the working time from 5 to 7 days²⁹, what will ensure better utilization of resources (equipment, employees), as well as might have a positive impact on rock mass (predictability, gas levels, etc.),

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²⁵ The trade union rights are regulated by the Trade Union Act (Dz.U. z 2014 poz. 167.)

²⁶ According to a study „Poles about the mining industry” conducted by CEM Instytut Badań Rynku i Opinii Publicznej for the European Climate Foundation, 59% of Poles support closing unprofitable mines, see also http://gornictwo.wnp.pl/59-proc-proc-polakow-chce-zamknienia-nierentownych-kopaln,248288_1_0_0.html.

²⁷ In 2014 the efficiency in the sector was 706 tons per employee per year (increase by 2 tons in comparison to 2013 and drop by 4 in comparison to 2012).

²⁸ Compare.: Szpak, Konrad (2014), *Coal and a pile of dirt* [PL, online], Portal jagiellonski24.pl, <http://jagiellonski24.pl/2014/11/03/szpak-wegiel-i-kamieni-kupa/> (3.11.2014).

²⁹ This is mostly about extending the real working time at mines to 7 days a week. Currently mines usually operate 5–6 days a week, just like miners who receive extra pay for working on Saturdays, which increases the mine's costs. It is also worth to consider the introduction of a 6-day working week for miners, which in the majority of cases would require renegotiations of collective bargaining agreements.

- extend the daily working time for miners who work below the surface from 7.5 to 8 hours a day and from 37.5 to 40 hours a week; which should not be controversial because of the long time it takes to arrive at the actual work place, a miner's real working time can shrink to even 3 hours³⁰ during his shift because of that,

- observe labor and health and safety regulations (e.g. not obeying the so-called 24 hours rest period, failure to monitor working time, etc.).

In order to successfully restructure the coal sector in Poland, all or at least the majority of these postulates need to be fulfilled, on the political, social and also the company level.

Summary

The coal industry in Poland is indeed subject to reforms, albeit to a limited extent. The number of employees is decreasing, and so is the amount of produced coal and the coal industry issues are entering public debates. Despite the major (e.g. in 1993–1995, 1998–2002) and less significant recovery plans, the coal sector in Poland still requires comprehensive restructuring. The reforms should transform the public sector, the unions as well as coal companies and individual mines. This does not have to entail shutting down any entities or artificially limiting the importance of the sector. On the contrary, after conducting the necessary analyses, the Polish state should invest in coal whenever it will be profitable in a given time perspective. Additional investments into clean coal technologies with the support from the EU should be also encouraged. This is imperative considering the unfavorable international environment, lack of sufficient investments in the sector and its diminishing production potential.

Between 2015 and 2016, the National Audit Chamber will audit the bituminous³¹ coal industry in Poland. The results will be published in 2016 after the presidential and parliamentary elections. This will be a good opportunity to conduct the necessary restructuring of the sector.

Poland needs a widely accepted energy policy, a recovery plan for the coal industry and social acceptance for this difficult process. Without these elements the reforms will never be completed.

³⁰ Conveyor belts for employees could be an interesting solution that would allow to shorten the travelling time around the mine and thus increase work and employee efficiency. See also: <http://www.khw.pl/aktualnosci/aktualnosci2/Przenosniki-tasmowe-specjalnie-dla-jazdy-ludzi/idn:690.html> (02.04.2015).

³¹ Audit entitled „Functioning of coal industry between 2007 and 2015 against the assumptions of the government's program”, see *Plan pracy Najwyższej Izby Kontroli na 2015 rok*, Warszawa: National Audit Chamber 2014, <http://www.nik.gov.pl/plik/id,7642.pdf> (21.11.2014).

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Abstrakt

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Bezpieczeństwo energetyczne Polski opiera się na węglu i stan ten nie zmieni się co najmniej w średnim okresie (perspektywa 2030). Ze względu na postępujące procesy modernizacyjne, tendencje do wykorzystywania innych nośników energii oraz uwarunkowania międzynarodowe, znaczenie węgla w energetyce będzie się jednak zmniejszać. Tym bardziej niezbędne jest wprowadzenie działań naprawczych w niekonkurencyjnym sektorze węgla w Polsce, którego sytuacja jest coraz trudniejsza. Tymczasem po 1989 r., pomimo licznych prób, nie udało się w pełni zrestrukturyzować branży górniczej w Polsce.

Niekorzystną sytuację sektora węglowego w Polsce pogarszają zarówno czynniki egzogeniczne (zewnętrzne, międzynarodowe), jak i endogeniczne (wewnętrzne, krajowe). Do najważniejszych determinantów egzogenicznych należy zaliczyć: politykę energetyczno-klimatyczną Unii Europejskiej, wraz z systemem EU ETS oraz poziom cen węgla (energetycznego) na rynkach międzynarodowych. Wydaje się jednak, że to determinanty endogeniczne mają kluczowy wpływ na sytuację sektora węglowego w Polsce. Do najważniejszych z nich zaliczają się m.in.: brak spójnej polityki energetycznej państwa, brak woli politycznej i akceptacji społecznej do wdrożenia planów naprawczych, niedoinwestowanie; brak szczególowej wiedzy nt. potrzeb inwestycyjnych oraz ich opłacalności, nieoptymalna struktura kapitałowa przedsiębiorstw górniczych, nieoptymalne regulowanie pracy górników oraz ich nadmierne przywileje, nadmierne uzwiązkowienie przedsiębiorstw górniczych oraz znaczne przywileje związków zawodowych, złe zarządzanie spółkami węglowymi i nieoptymalne funkcjonowanie kopalni, czy też procesy ograniczające zapotrzebowanie na węgiel. Co istotne, nawet 49% kosztów wydobycia w sektorze węglowym stanowią płace, a w 2014 r. na samej sprzedaży węgla poniesiono stratę na poziomie 2,278 mld PLN. Choć pewne inicjatywy i decyzje były podejmowane wielokrotnie, to często charakteryzowały się ograniczoną skutecznością. Reforma branży węglowej powinna być kompleksowym procesem naprawczym odnoszącym się do działań realizowanych na kilku poziomach 1) politycznym i społecznym (strategiczny), oraz 2) zarządzania spółkami węglowymi

(operacyjny). Restrukturyzacja sektora węglowego w Polsce, aby była skuteczna, wymaga zaangażowania wszystkich lub przynajmniej większości elementów, zarówno na poziomie politycznym, społecznym, czy też funkcjonowania spółek węglowych w Polsce.

Słowa kluczowe

energetyka, Polska, węgiel, restrukturyzacja