

COAL AND RENEWABLE ENERGY REPORTING IN SOUTHEAST ASIA: A MULTICOUNTRY COMPARATIVE ANALYSIS

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Executive Summary

Southeast Asia is a fast-developing region, and its energy decisions are critical to the next decade's global effort to reduce carbon-emitting fossil fuels. Yet little is known about the specific media narratives that shape the national debates on an energy transition in each country. For stakeholders wishing to influence such narratives and increase the quality of energy reporting, lessons from the past are crucial for future success. This knowledge gap is what Climate Tracker and the Stanley Center for Peace and Security wished to fill with an analysis of energy-related media coverage in five countries across Southeast Asia.

Each of the countries in our study—the five “tiger cub” countries of Indonesia, Thailand, Vietnam, Malaysia, and the Philippines—has a unique media landscape with different challenges and opportunities for energy reporting. However, some trends proved to be universal in our analysis. Media attitudes toward coal in each country closely correlated with how much the energy mix and the economy relied on coal; in coal-exporting Indonesia, 67 percent of articles about coal portrayed it positively, while in Thailand, where coal barely makes up a fifth of the energy mix, 80 percent of articles advocated for a gradual phase-out. The other three countries, Malaysia, the Philippines, and Vietnam, are in more of a transition phase, where coal is starting to lose its previously strong grip on the energy narrative as the new decade begins. The Philippines announced a moratorium on all new coal projects in October 2020, two months after the end of our analysis time frame, and **Vietnam is expected to follow suit with its upcoming Power Development Plan**. More articles framed coal negatively than positively in those two countries, although a significant number of stories still argued that new technology, such as ultra-supercritical boilers, can make coal “clean.”

Meanwhile, renewable energy (RE) was more frequently framed as a lucrative, booming market with much profit-making potential rather than a long-term replacement for fossil fuel as baseload energy. Although there were more positive stories about renewables than coal across all five countries' media, these narratives rarely made connections between renewables lowering emissions to curb climate change.

Overall, energy stories were mostly told from an economic-development perspective, sometimes at the expense of environment and human-impact stories. This is difficult to counter in a region developing so rapidly. As part of the **biannual Association of Southeast Asian Nations (ASEAN) summit**, the five tiger cub countries signed onto the Regional Comprehensive Economic Partnership (RCEP), a trade deal with the rest of ASEAN and Australia, China, Japan, New Zealand, and South Korea. Though hailed as “**the world's largest trade pact**,” RCEP did not **account for long-term environmental concerns and sustainable development in the signatory countries**. This is typical of trade deals that the tiger cub economies enter into, and their energy deals as well. On November 20, 2020, the energy ministers of ASEAN+3 (i.e. Japan, China, and South Korea) met to discuss energy collaborations in the next five years, emphasizing the “**strengthening of trade promotions with the new role**” of clean coal technology. Sustainability was broadly considered, but specific environmental concerns were neutralized by the economic-development imperative.

To what extent this narrative was reflected in energy reporting across the region served as the focus of our media analysis. Overall, our ten researchers from Indonesia, Malaysia, the Philippines, Thailand, and Vietnam studied more than 2,700 articles from leading media outlets in their countries to answer the question, “How do Southeast Asia's leading news outlets frame coal and renewable energy development, and why?” A cross-country comparative analysis of their individual findings yielded the following trends:

In terms of thematic framing:

- **Coal.** The media's narrative on coal highly correlated with a country's coal dependency. This is apparent when comparing the number of procoal stories as a percentage of total coal stories versus coal capacity as a percentage of total energy capacity for each country.
 - Sixty-two percent of Indonesia's energy capacity depends on coal and 67 percent of its coal articles framed the energy source positively, the most of all the tiger cub countries. Any environmental concern related to coal was often neutralized by technological developments such as **ultra-supercritical boilers** that will allegedly make coal "clean."
 - At the other end of the spectrum, only 18 percent of Thailand's energy mix comes from coal, and only 19 percent of its coal articles were procoal. For this gas-based country, coal was framed as dirty, harmful to surrounding communities, and generally regressive for national development.
 - In the middle are Malaysia and Vietnam. Forty-four percent of Malaysia's energy comes from coal and 44 percent of its coal narratives were positive; for Vietnam, the percentages are 33 and 32 percent respectively.
 - Only the Philippines stands out for not closely following this trend, as 44 percent of its electricity relies on coal but only 34 percent of articles painted this fossil fuel in a positive light. Factors that potentially contributed to coal being framed more negatively in the Philippines are the country's **frequent climate disasters** and a strong civic movement against coal.
- **Renewable energy.** Meanwhile, renewable energy was predominantly framed as a lucrative industry for potential investors. The more renewable energy contributed to a country's energy mix, the more in-depth local reporting on this topic became. However, not all renewable energy types were treated alike:
 - **Wind:** Across Southeast Asia, wind presents the largest missed opportunity in renewable energy reporting. Although improving technology and the region's vast wind potential mean that wind could be the cheapest energy form in Southeast Asia, inadequate Feed-in-Tariff (FiT) policy has failed to attract investment. Reporters write about wind less often as there is not a strong business case for it, without examining why this is the case. In all countries examined, wind is among the renewable energy technologies that receive the least coverage, at less than ten percent the total article sample.
 - **Solar:** In the tiger cub countries, the term "renewable energy" was most often used to refer to solar power. Solar took up the largest portion of renewable energy articles, and in four countries except for Indonesia, the largest portion of all energy articles as well.
 - Vietnam, as the country with the most solar power installations in the region, stands out for having the most articles that provided specific policy critiques for solar development. Articles differentiate between photovoltaic farms and rooftop solar of various scales, identifying specific barriers for each.
 - In the Philippines, solar was mostly framed as a good investment by the mainstream media, though regional outlets in Visayas and Mindanao provided specific criticisms of how certain projects did not meet local communities' needs.
 - In Thailand, Malaysia, and Indonesia, journalists overwhelmingly reported on solar through the business lens, focusing on specific companies and projects.
 - **Geothermal:** Southeast Asia represents a fourth of the world's geothermal potential, though this energy type is also under-represented in media coverage as well.
 - In the Philippines, geothermal most often receives attention from the state-owned Philippines News Agency, whose focus on "development journalism" aligns with the government's geothermal goals.
 - In Indonesia, the world's third-largest geothermal producer, our researcher only found four articles about geothermal over the course of 18 months, all of which were simple hard news pieces.
 - **Biomass:** There was a negligible number of articles on biomass in all countries except for Thailand, where the Energy for All community-based biomass scheme received positive coverage from mainstream media but more mixed coverage from independent and regional ones. The latter highlighted problems with project execution that led to community dissatisfaction.
 - **Biodiesel:** Among the Southeast Asian countries studied, Indonesia stood out for its high coverage of biodiesel. In the country's leading outlets, biodiesel receives universally positive coverage after the government introduced a law mandating 20 percent biodiesel mix. While portraying biodiesel as environmentally friendly, these articles turn a blind eye to the fact that Indonesia's bio-fuel is generated from palm plantations which replaced previously carbon-absorbing rainforest ecosystems.
 - **Hydropower:** Hydro was not seen as a renewable energy in all the five countries studied. Reporters cited dams' ecological damages and hydropower's status as a traditional energy source in classifying it separately from other renewables.

- Small-scale hydropower, however, received more positive coverage in Malaysia, where journalists distinguished it from medium and large hydro-power projects.
- More often than not, energy articles were simplistic, hard-news pieces that only quoted from one source without providing in-depth analysis of relevant data. Although journalists viewed energy as a complex topic, they did not channel this complexity into their writing.

In terms of journalistic practices:

- Most journalists framed energy as an economic story. Across all the countries analyzed, more than half of energy articles sampled were published in the economy/business section and exclusively quoted from government or business sources.
 - Energy reporters were typically assigned to the economy desk and developed a small group of government and business sources that they went to for every article. In some news outlets, notably in Indonesia, financial ties to coal companies led to one-sided advertorial stories and prevented more-critical reporting.
 - Few energy stories adopted a human-impact frame. Community leaders and members were quoted in less than a fifth of the articles in all countries analyzed.
 - As a result, energy reporting through the business lens is mostly non-confrontational, published after the fact of a project's launch or a policy's implementation. Lacking are stories that provide multiple perspectives and policy recommendations for future developments in the energy sector.
- Despite these predominant trends, the analysis also revealed evidence of a shift in narratives and attempts by individual media practitioners and outlets to scrutinize their countries energy choices. There were some early successes, such as Thai news outlets' emphasis on opposition from community members, which led to a coal moratorium in northern provinces. Independent media outlets that serve a niche or regional audience generally stood out as being more innovative and inclusive in their approach.

Yet despite the rare outliers, overall, there is a long way to go before clean energy receives the type of comprehensive and diverse reporting this complex and consequential topic deserves in Southeast Asia. Remaining barriers, however, differ from country to country. A more nuanced analysis of how coal and renewables are covered in all the tiger cub nations can aid stakeholders—including journalists, newsrooms, media support organizations, funders, and clean energy advocates—in looking for constructive ways to shift and strengthen media coverage that aligns with climate goals in the region.

While this report does not offer specific recommendations for improving clean energy media narratives in Southeast Asia, the research can be used to inform the development of effective interventions and actions.

Research for the information in this report was carried out under the guidance of Climate Tracker, a network of 12,000+ young climate journalists around the globe. Research methods included sampling, content analysis, framing analysis, and interviews with reporters and editors, and the time frame examined was January 2019 to August 2020.

This report is part of a regional media analysis commissioned by the Stanley Center for Peace and Security and produced by Climate Tracker.



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