

HARMONY LABS

# ENERGY TRANSITION MATERIALS NARRATIVE LANDSCAPE

ACROSS NEWS, INDUSTRY, AND  
POLICY INFORMATION DOMAINS

IN CANADA, CHILE, DRC, GERMANY, INDONESIA,  
MEXICO, PERU, PORTUGAL, USA

FINDINGS SUMMARY

August 2025



# INTRODUCTION

Energy transition materials, or ETM—materials like lithium, nickel, copper—have joined fossil fuels as important centerpieces for how people imagine energy, present and future.

IN ITS 2022 report, the International Energy Agency observed that, “Minerals are increasingly recognized as essential to the good functioning of an evolving energy system, moving into a realm where oil has traditionally occupied a central role.”

ETM have long been consequential for the places and peoples closest to where they are prospected, mined, processed, traded, transported, and turned into products. But not until recently have they come to explicitly drive all manner of policy in all manner of places, and to fascinate and preoccupy the people who shape our public discourses, through discussions of topics as far ranging as clean energy, climate mitigation, artificial intelligence, consumer innovation, and military expansion, to name a few.

In this moment, we sense the formation of deep, public stories that will govern what is acceptable and desirable with respect to ETM in the decades to come. And therefore we feel a gravity and a responsibility, as the next struggle for energy hegemony unfolds, to contribute to these deep stories in ways that ensure equitable and sustainable management of natural resources and a just energy transition, one that addresses both environmental and climate crises and long-standing development harms and inequities.

Harmony Labs and our partners set out to map ETM narratives, across 9 nations (Canada, Chile, DRC, Germany, Indonesia, Mexico, Peru, Portugal, USA) and 3 information domains (news media, industry, and policy communications, including from trade, advocacy, and audit organizations), and also experiment with communications that build support for a just energy transition.

The narrative landscape report we produced provides a detailed depiction of this complex, changing narrative terrain, which we share key findings from here, also translated into French, Indonesian, Portuguese, and Spanish, along with a review of relevant secondary literature.



# KEY FINDINGS

The current narrative environment appears unfavorable to the goal of a just energy transition.

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*Significant narrative shifts occurred in 2025, as ETM became salient not just for policy experts and frontline communities, but for publics worldwide.*

*Currently, geopolitical rivalry dominates ETM narratives emerging from news media, with climate change used to justify urgent calls for systems reforms that favor a wide range of actions, including unchecked extraction.*

*And the environmental impacts of mining diminish in volume, along with the voices, perspectives, and needs of those most affected by it, including Indigenous peoples.*

*Insofar as traditional environmental advocacy and narratives marrying geopolitical threats with business imperatives both rely on stoking a sense of fear and urgency in the public, each may reinforce the other, exacerbating a narrative environment that is hostile to regulation, standards setting, multilateralism, cross-sector collaboration, long-term perspectives, and expansive conceptions of rights and responsibilities.*



# NARRATIVE BASELINE: 2022-2024

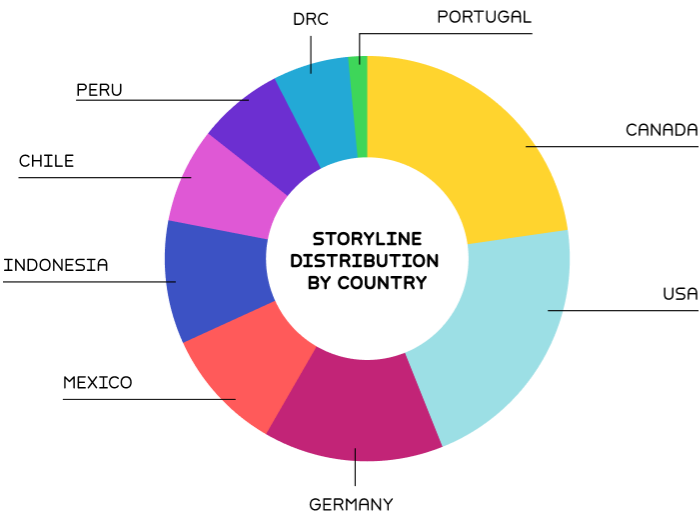
In our national news analysis, from 2022 to 2024, we observe the formation of the baseline for our current narrative moment, a set of interlocking geopolitical pressures and national and regional imperatives that demand urgent action.

EACH COUNTRY DISPLAYS DISTINCTIVENESS in its ETM news coverage, even when topics recur across countries. The U.S., for example, shows up as a topic in Canada in the context of its thirst for ETM. In Germany, critique of the U.S.'s environmental record and the volatility of its national politics feature. And Mexico thematizes ongoing trade, border, and energy tensions.

The top ten most mentioned people are Joe Biden, Andrés Manuel López Obrador, Gabriel Boric, Félix-Antoine Tshisekedi, Joko Widodo, Justin Trudeau, Elon Musk, Olaf Schultz, Juan Carlos Jobet, and Xi Jinping—all national political leaders, except for Musk, nearly 90% men.

## China as a theme dominates ETM coverage

CHINA IS THE MOST CENTRAL and frequently recurring ETM actor, appearing in over 15% of storylines. China's characterization is highly variable, ranging from global competitor with unfair advantages to local savior with low-cost green tech. This divergence in characterization, from good to bad partner, roughly tracks to news coverage in the Global North and South. But there is divergence even inside of some countries' news. DRC news balances the critical and the congratulatory, for example. Indonesia and Peru are two more Global South countries with mixed characterizations. The U.S. leads China concern, as it strives to maintain economic advantages, and is the most frequently occurring pendant to China inside the national news. Russia and Ukraine follow, connected to supply chain worries.

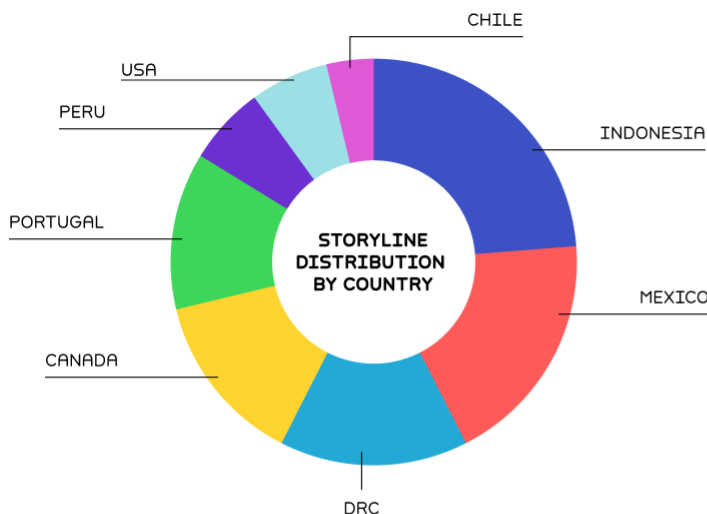


## *Pro-mining producer countries look to capture more value.*

GENERALLY, WE OBSERVE IN STORYLINES from ETM producing nations a drive to move from mining further up the value chain, with a couple notable exceptions. Portugal shares this drive, despite its Global North positioning, which may reflect its peripherality within Europe. In Peru—with its large mining sector, deeply entrenched in notions of development and progress and in national political, economic, and civic life—moving up the value chain rarely features. In general, the preponderance of mined materials in a country's economy and export basket correlates to favorable treatment, or even outright promotion, of mining in the news. This correlation is on display in Chile, DRC, and Indonesia.

## *Climate change can be a convenient truth and justification.*

CLIMATE CHANGE OCCURS IN 8% OF STORYLINES, marshaled to legitimate large-scale resource extraction, de-growing the economy, defunding fossil fuels, and everything in between. The most frequent use for climate change in national media is to justify national energy plans. The U.S. stands out as the only country where climate science and the desirability of an energy transition away from fossil fuels remain topics of political debate and bases for political polarization.



### STORYLINE VOLUME BY CLUSTER

"CLEAN" ENERGY

NATIONAL PLANS

GLOBAL COLLABS

BUSINESS PLEDGES

NEW MINING

ANTI ETM

ACTION URGENCY

ANTI FOSSIL FUEL

EXPAND INDUSTRY

REDUCE DEMAND

PR PLOTTING

## *The most mentioned ETM environmental impact is water.*

WATER GARNERS WITH MOST MENTIONS—in 14% of our national news article sample—of all environmental impacts from ETM activities. The next most mentioned impacts are biodiversity, air, and forests, with average mention rates of 5% across study countries.

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## *Indigenous voices are systematically marginalized.*

INDIGENOUS LANDS, PEOPLES, PLACES, AND ORGANIZATIONS feature in only 2% of storylines, despite the empirical centrality of Indigenous rights to ETM development projects and conflicts worldwide. (Owen et al.'s [2022 study](#) estimates that 54% of ETM mining projects worldwide are on or near Indigenous lands.) Most prevalent in Canada, these rare storylines range from pushback against violations of territories or contracts, to reports of damage, and promises by politicians to uphold Indigenous rights.

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# BRAVE NEW WORLD: 2025

From our analysis of industry, policy, trade, advocacy, and auditing websites in the first quarter of 2025, we derive 3 narrative frames.

Narrative frames are like moods or vibes that structure and give rise to 3 - 4 individual narratives each, which, in turn, structure and give rise to a wide range of content and stories. We describe these narrative frames and illustrate how they show up by organization and country within our analysis. We also share the individual narratives they contain and their relative occurrence volume.



# NARRATIVE FRAMES AND DISTRIBUTION

## ONE GREEN WORLD

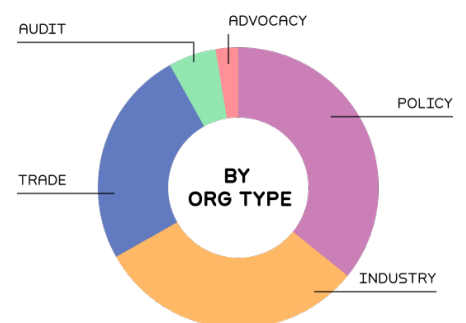
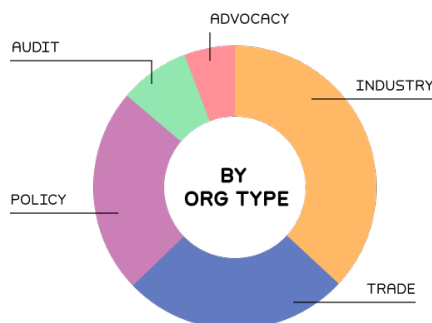
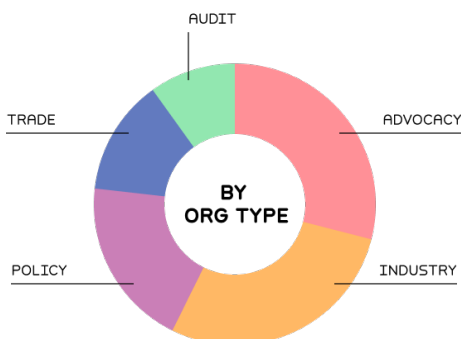
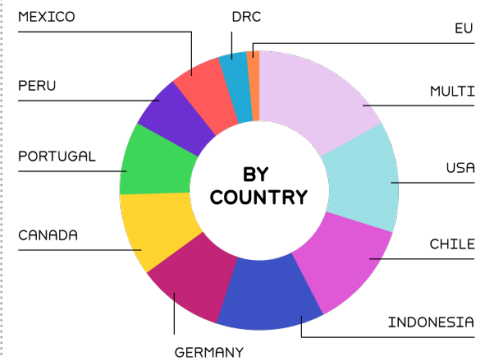
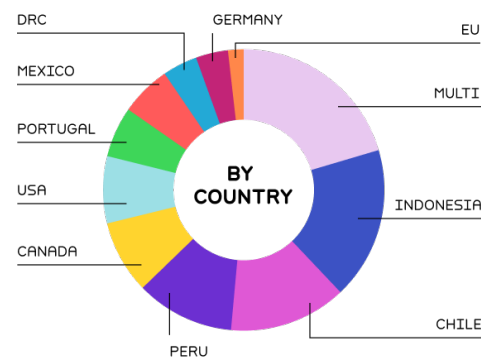
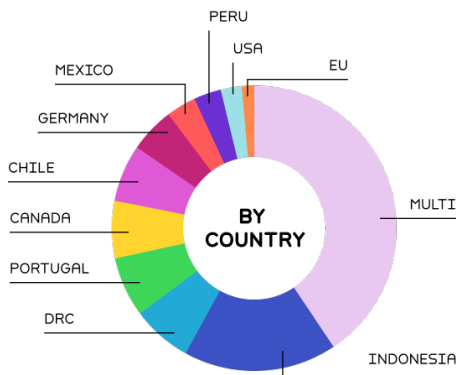
Human activity needs right sizing, relative to the natural world that is its host and only home. Variations on universalist themes from traditional environmental advocacy, taken up by industry, this narrative frame is a mirror image of Real World Remake, though with urgency driven by narratives of critique, around climate change, community justice, and ecosystem collapse, promoting a range of systemic changes and mitigations.

## BY, WITH, FOR THE PEOPLE

Everyday folk work hard and happily, side by side in the mines, “brothers and sisters” in the age-old struggle to improve their lot and take care of all they’ve been given. Stewardship and material culture predominate this feel-good, people-first, industry-driven narrative frame, comprising three narratives that move from a celebration of mining, through benefits sharing, to an emergent narrative seeking to rehabilitate fossil fuel.

## REAL WORLD REMAKE

Unstable times drive a break up of long-standing norms and systems and a search for shelter from geopolitical, economic, environmental, and/or neo-colonialist pressures. This cold, concrete, policy and industry-driven narrative frame comprises four narratives, grounded in urgency, scarcity, energy, and threat, tacked onto industry adages to “move fast, break things” and preserve prosperity through growth.







THE EARTH IS ALL WE'VE GOT.  
IF IT GOES, SO DO WE.  
WE NEED TO COME TOGETHER  
TO CARE AND PROTECT ALL OF IT.  
EVEN FAR AWAY PEOPLES AND PLACES.  
IT'S ALL CONNECTED.  
TIME'S RUNNING OUT.

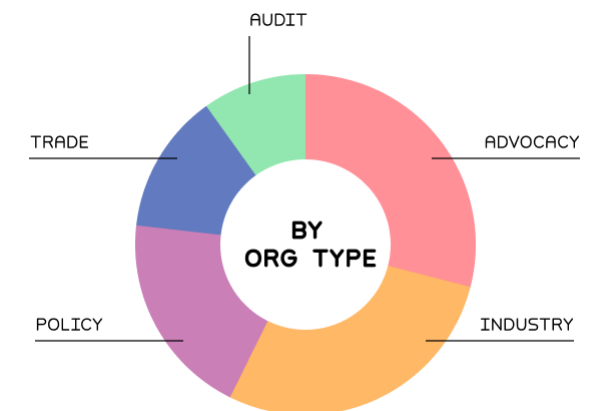
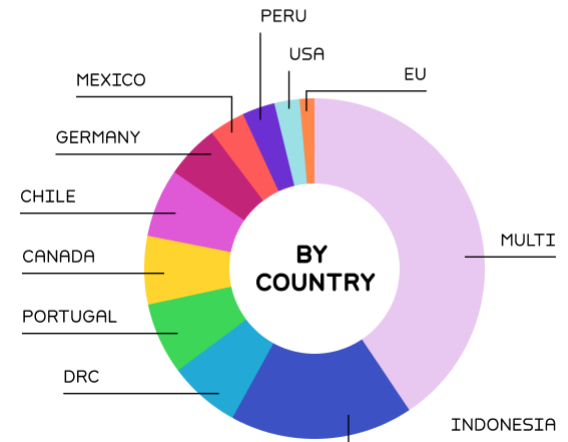
## NARRATIVE VOLUME

**53%** QUANTIFIED FOR CLIMATE

**33%** COMMUNITY JUSTICE

**14%** EMBODIED EARTH

## NARRATIVE FRAMES & DISTRIBUTION



## Quantified for Climate

By integrating environmental impact counts and quotas into the economic order, we can overcome climate change and save what society needs.

- Climate reductions and targets: growth, demand, carbon, pollution
- Circular economy, recycling
- Green new deals and development

## Community Justice

No more sacrificing the people and places most vulnerable to humanity's relentless quest for growth—we must actively repair our wrongdoings.

- No sacrifice zones, rights: Indigenous, human, species
- Community consultation, FPIC, cultural heritage
- Colonial pasts and presents

## Embodied Earth

As humanity's only habitat, which provides for all our needs—material and spiritual—the earth demands our care and protection.

- Land and forests as organs of Earth, connected to human being + body
- Indigenous wisdom
- Biodiversity and other natural resources





## Mining Lovefest

Mining goes hand in hand with human development, and we’ve figured out how to do it well, as an integral part of communities worldwide.

- Formalizing mining
- Lifestyle job, tech toys, “brothers and sisters” in Earth, adventure, outdoors, education
- Reciprocal care: mining and people

## Shared Prosperity

By bringing more people, investors, economic sectors, and more of the value chain into our ETM work, we can increase benefits for all.

- Added value, products from minerals
- Economic inclusivity: women, Indigenous peoples, knowledge workers, researchers

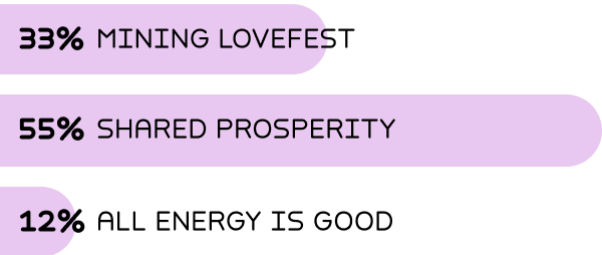
## All Energy Is Good

We have the means to get the materials we need to meet ever rising energy demands only if we pursue the full range of energy options.

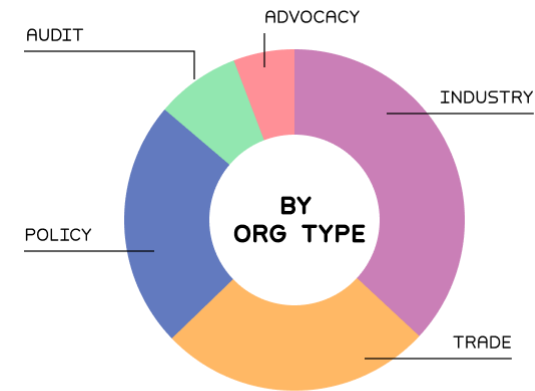
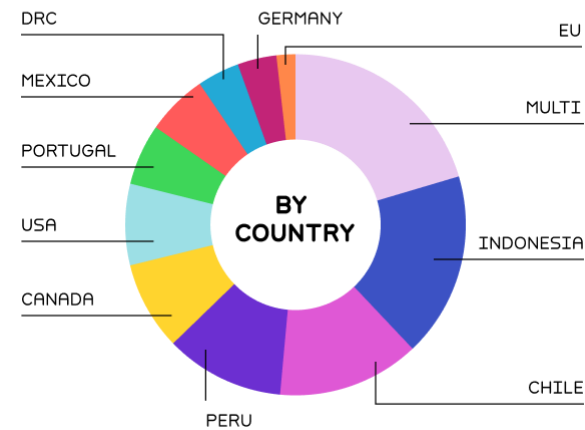
- Energy affordability, reliability, diversity
- Grid resilience
- Coal resurgence

WITH MINING THERE’S NO EITHER-OR.  
WE’VE GOT EACH OTHER’S BACK.  
WE LIVE HERE.  
WE DRINK THE WATER.  
IT’S SAFE. IT’S HEALTHY.  
IT’S A FANTASTIC CAREER.  
WE LEAVE IT BETTER THAN WE FOUND IT.

### NARRATIVE VOLUME



### NARRATIVE FRAMES & DISTRIBUTION







## Security + Nationalism

We will protect what's ours by any means, minimizing dependence on adversaries, and hardening alliances and national capacity.

- Geopolitics, China
- Urgency: more mining, more production
- National identity for minerals and mining
- Alliances, supply chain weaponization

## Innovation Forever

We can drive prosperity for the entire economy, with technological innovation to capture more ETM quickly, efficiently, and cleanly.

- Circular economy, demand reduction
- AI, data, digitization, EVs, consumer goods
- Green mining, deep sea mining, ETM products with other materials

## Red Tape Reduction

By battling bureaucracy and slashing red tape, we can meet the urgent need for more ETM materials and create more benefits too.

- Deregulation
- Fast-track permitting
- Less: community consult and review, transparency specs

## Military Will

We must prioritize the military's superior material demands, in order to police and protect the security of everything else.

- Life and death as clarifying priorities
- Military and mining as kindred self-contained, purposeful, fraternal orders

WE'RE AT WAR.  
CLIMATE'S ON FIRE.  
THEY'RE TAKING TOO MUCH.  
IT'LL GET WORSE BEFORE IT GETS BETTER.  
NO MORE FEEL-GOOD PIPE DREAMS.  
TIME TO GET REAL. NO MORE RULES.  
WHATEVER IT TAKES.

### NARRATIVE VOLUME

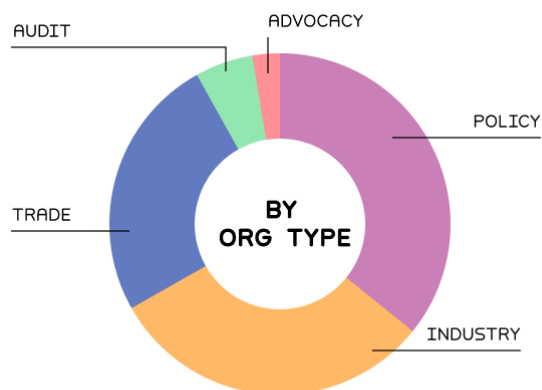
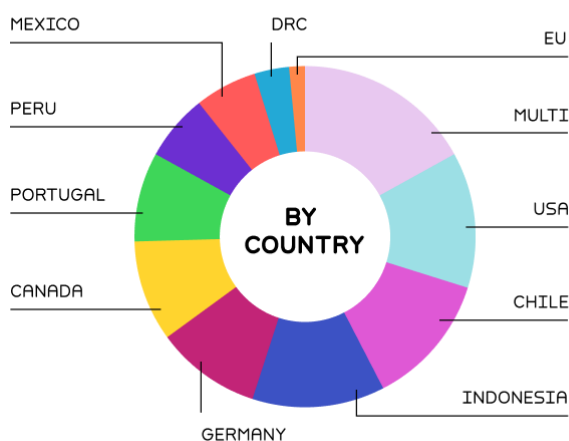
29% SECURITY + NATIONALISM

47% INNOVATION FOREVER

17% RED TAPE REDUCTION

7% MILITARY WILL

### NARRATIVE FRAMES & DISTRIBUTION





# 2025 NARRATIVE SHIFT

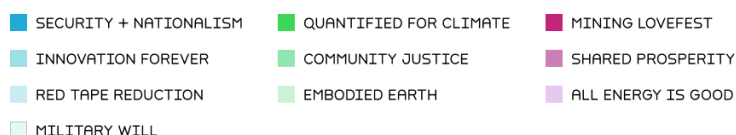
2025 saw a stark narrative shift toward content that combines urgency, scarcity, energy demand, and military threat with industry adages to “move fast, break things” and preserve prosperity through growth at any cost, the Real World Remake narrative frame.



WE OBSERVE THIS STARK SHIFT in our analysis of ETM-relevant news articles sampled from 4 wire services (Agencia EFE, Associated Press, France24, Reuters) in the first quarters of 2024 and 2025:

- 30% MORE **REAL WORLD REMAKE** ARTICLE VOLUME
- 20% LESS **ONE GREEN WORLD** ARTICLE VOLUME
- 9% LESS **BY, WITH, FOR THE PEOPLE** ARTICLE VOLUME,  
driven largely by losses in the Shared Prosperity narrative.

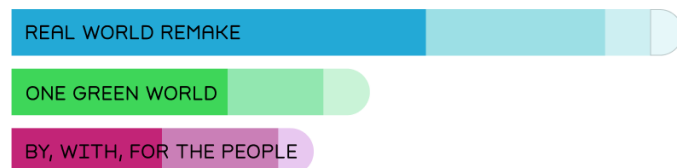
#### TIME × NARRATIVE VOLUME × ALL 4 NEWS WIRES



#### 2024 Q1



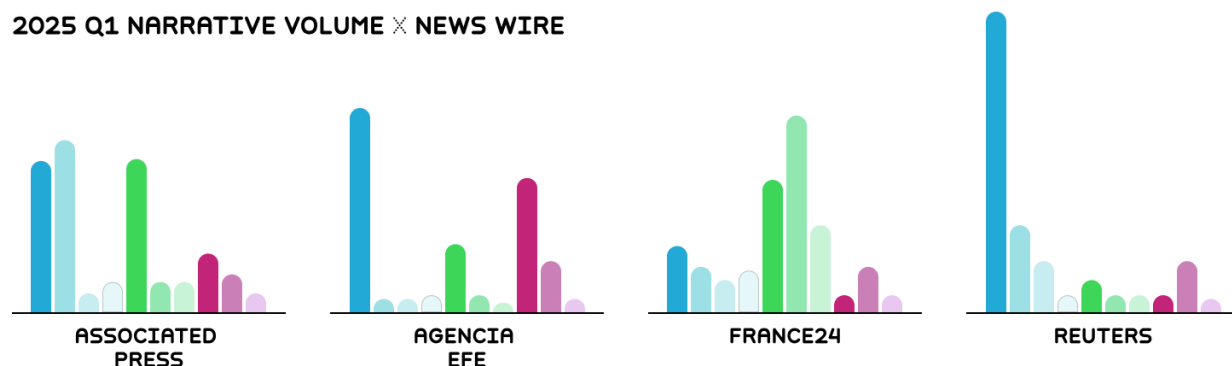
#### 2025 Q1



We observe this shift across all analyzed wire services. It is most pronounced in Associated Press and Reuters, suggesting that the U.S. may be leading:

- **REAL WORLD REMAKE** INCREASES 40% IN U.S. WIRE SERVICES, with an average 19% increase in France24 and Agencia EFE;
- **BY, WITH, FOR THE PEOPLE** DECREASES 21% IN U.S. WIRE SERVICES, with an average 9% increase in France24 and Agencia EFE.

#### 2025 Q1 NARRATIVE VOLUME × NEWS WIRE



Indeed, as we worked, we observed the replacement of One Green World content with Real World Remake content on U.S. policy web pages. Meanwhile, Donald Trump becomes the most mentioned person, with a 10x increase in mentions over the most mentioned person in 2024 Q1, followed by Volodymyr Zelenskyy, with a 2x increase in mentions. Also, the Military Will narrative emerges in the Associated Press and France24, centering security threats.

We interpret these shifts as indicators of larger discourse trends. Although One Green World narratives remain prevalent in many advocacy and industry sources, the Quantified for Climate narrative especially, wire service mentions of “climate” decrease between 2024 and 2025 from 48% of articles in our sample to 22%. Such changes seem likely to bolster and intensify business and governance practices favoring industrial and energy policy status quo or unchecked resource extraction. More generally, they highlight how changing geopolitics drives ETM narratives, especially in the news.



# CONCLUSION

THIS ETM NARRATIVE LANDSCAPE can serve as a map or a tool to establish a shared perspective and a common vocabulary for understanding the world that ETM advocacy work must reckon with. This is the first step in narrative strategy.

Narrative strategy is the practice of reaching the right audiences with the right stories at a scale that can shift public narratives. It is slow, patient, sometimes generational work, which ultimately structures how people see themselves and the world we share: what is possible, practical, and how we organize ourselves to achieve it.

Narrative strategy can accommodate and help coordinate among many different kinds of stakeholders, goals, approaches, and cultural contexts, insofar as it is not about agreeing on a single unified message, script, campaign, media format, nor audience. Rather, it is about identifying a broad set of narrative goals, which we can all agree to work toward, each in our own way, whether that means elevating ETM awareness and salience inside our own communities or evolving an entire national discourse.

In the next phase of our work, we experiment with communications that move people toward more favorable narrative terrain. Insights from these experiments will further equip our partners and, we hope, serve as seeds, as inspiration, to continue the work of growing stories that will ensure the equitable and sustainable management of our natural resources and a just energy transition.

In the meantime, here are some preliminary recommendations to consider:

- **MAINSTREAM MORE PERSPECTIVES AND VOICES.**  
Indigenous leaders, youth organizers, scientists, and others can make just energy transition narratives culturally resonant for diverse audiences.
- **ADDRESS THE URGENCY HEAD ON, THEN REDIRECT IT.**  
Acknowledging and redirecting the urgency of the moment to what actually needs tackling in the energy transition uses existing narrative features to advantage.
- **COUNTER EMERGING NARRATIVES EARLY.**  
Diffusing, redirecting, or redefining small, emerging narratives in the media can be an efficient way to prevent their entrenchment.
- **FINANCIAL MEDIA FOR NEW GEOPOLITICS NARRATIVES.**  
Promoting transition frameworks that account for rights, consultation, and nature protection inside of value addition and industry policy media.



# ABOUT HARMONY LABS

HARMONY LABS IS A NONPROFIT MEDIA RESEARCH LAB on a mission to research and reshape society's relationship with media, using science, data, and creativity. For more than a decade, we have helped storytellers and strategists, decision makers and dreamers, harness the immense power of media to shape a positive, pluralistic future. With the Narrative Observatory, for the first time ever, we're harnessing industry relationships to deliver one-of-a-kind data infrastructure that empowers partners to find, reach, and resonate with the right audience in today's media minefield. The Narrative Observatory delivers audience-based insights, narrative and network analysis, and empirical validation of cultural strategy and content-all derived from the actual behavior of real people and true audiences, not survey results, demographic groups, or inauthentic online activity.

We work with a wide range of partners on issues of existential importance, like climate, democracy, equity, immigration, political violence, public education, identity, artificial intelligence, and more, using an approach to research that is rigorous, participatory, and public. One of the first papers we co-authored looked at tracking narratives in documentary film. The outputs we've created with our partners include websites, presentations, peer-reviewed publications, toolkits, blogposts, curriculum, interactives, white papers, and media. And our work has been covered in the press, like in this New York Times article.

Founded by John S. Johnson in 2008, Harmony Labs is a 501 (c)3 incorporated in New York State. Funders include Atlantic Foundation, Gates Foundation, Robert Wood Johnson Foundation, John D. and Catherine T. MacArthur Foundation, Mellon Foundation, Omidyar Network, Open Society Foundations, Meliore Foundation, Nathan Cummings Foundation, Google, and more.