



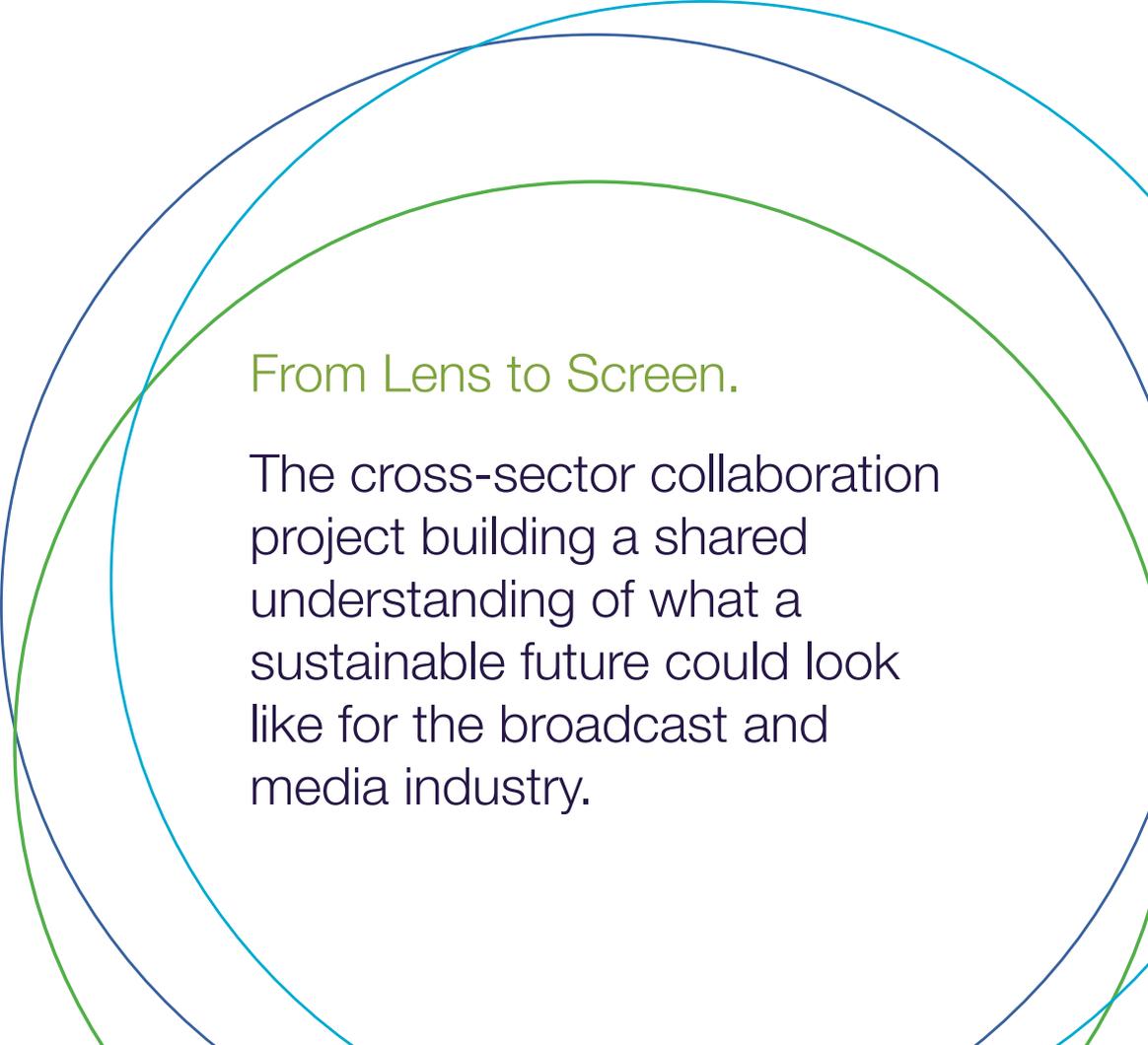
from lens
to screen



in partnership with



What is the From Lens to Screen project

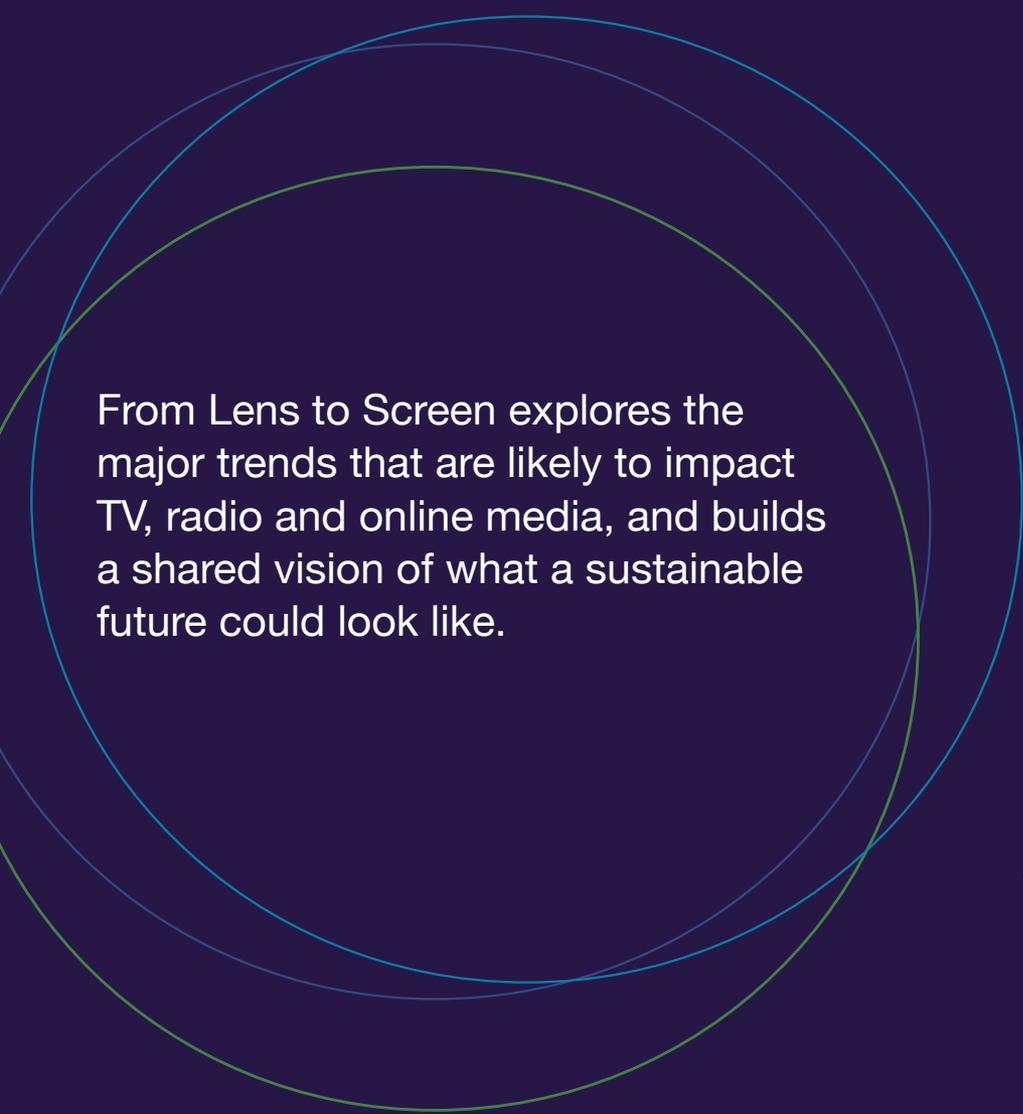


From Lens to Screen.

The cross-sector collaboration project building a shared understanding of what a sustainable future could look like for the broadcast and media industry.

The broadcasting industry is at a crossroads. Digitisation, and a fast-moving, complex set of sustainability challenges are impacting the existing business models.

There's a huge opportunity to exploit the transformational nature of digitisation for a sustainable future, but there's an urgent need for greater alignment and purposeful collaboration across the industry.



From Lens to Screen explores the major trends that are likely to impact TV, radio and online media, and builds a shared vision of what a sustainable future could look like.

Our ambition is to build a long-term foundation for a sustainable broadcasting industry and inspire and inform beyond the industry.

Who is involved?

BBC, BT, and the IABM are the initiators and funding partners of the From Lens to Screen collaboration, convened by sustainable non-profit Forum for the Future.

We believe the shift we want to see can only be created through continuous collaboration, and by inviting others to join the project.

Our sustainable future starts now.



Introducing Forum for the Future



Forum for the Future is an independent non-profit working globally with business, government and others to solve complex sustainability challenges.

We are passionate about creating a brighter, more sustainable future for everyone. We share what we've learned so that others can benefit – and act. We realise that leading organisations can only go so far alone and that tackling these complex, global challenges through small or isolated initiatives just won't deliver change at a speed or on a scale we need.

We have convened From Lens to Screen to help the broadcasting industry create a better understanding of the impacts of digitisation and fast-track industry-scale change for a sustainable future – for everyone.

Introducing the initial partners

“BT supports this project because we want to contribute to a sustainable media and broadcast industry, aligning with our purpose to use the power of communications to make a better world.” Mark Wilson-Dunn, VP BT Media & Broadcast.



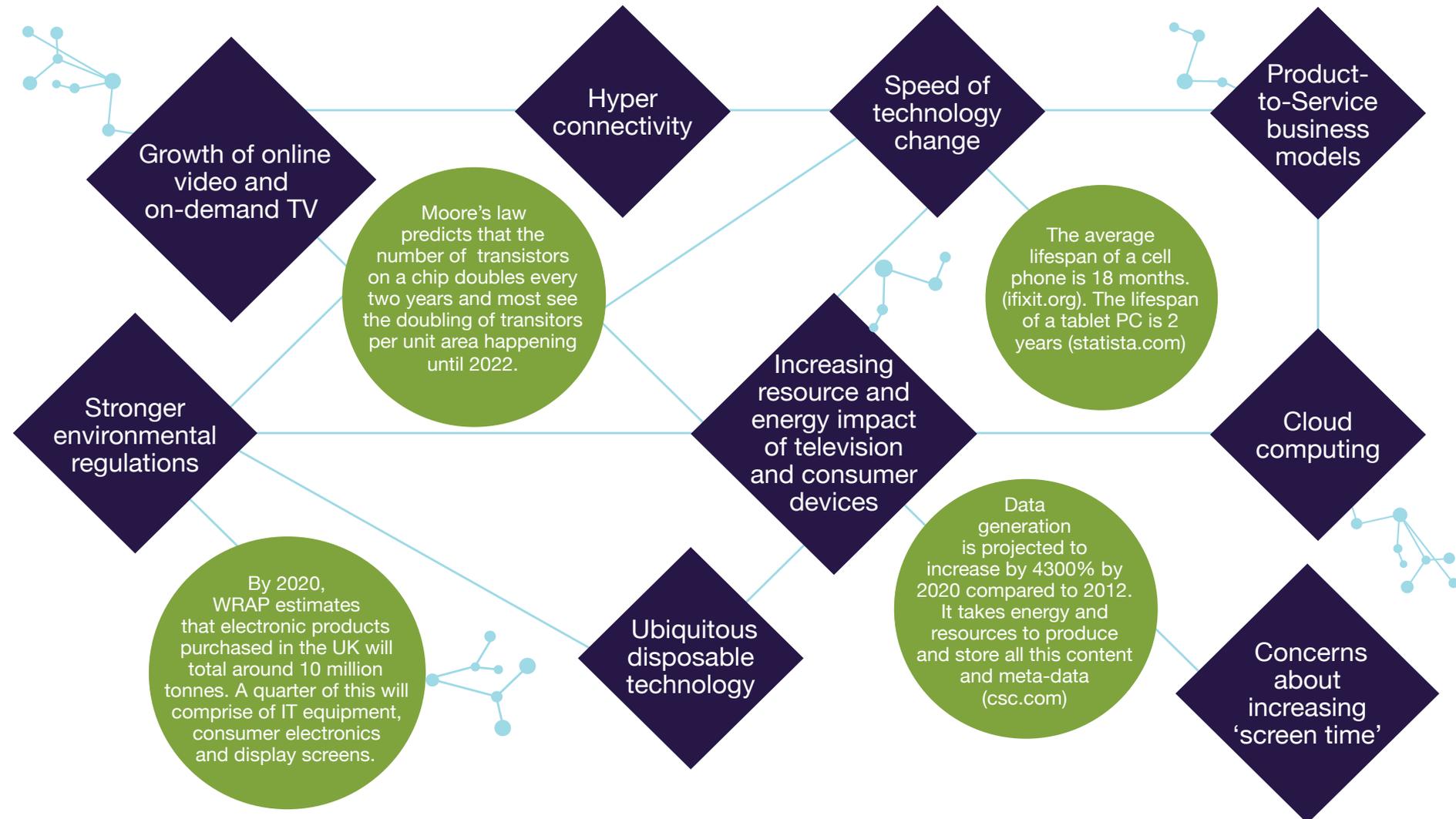
“The IABM believes that conducting business in an ethical manner and demonstrating integrity are good for sustainability and good for business. This project will help to marry the two.” John Ive, Director of Technology & Strategic Insight



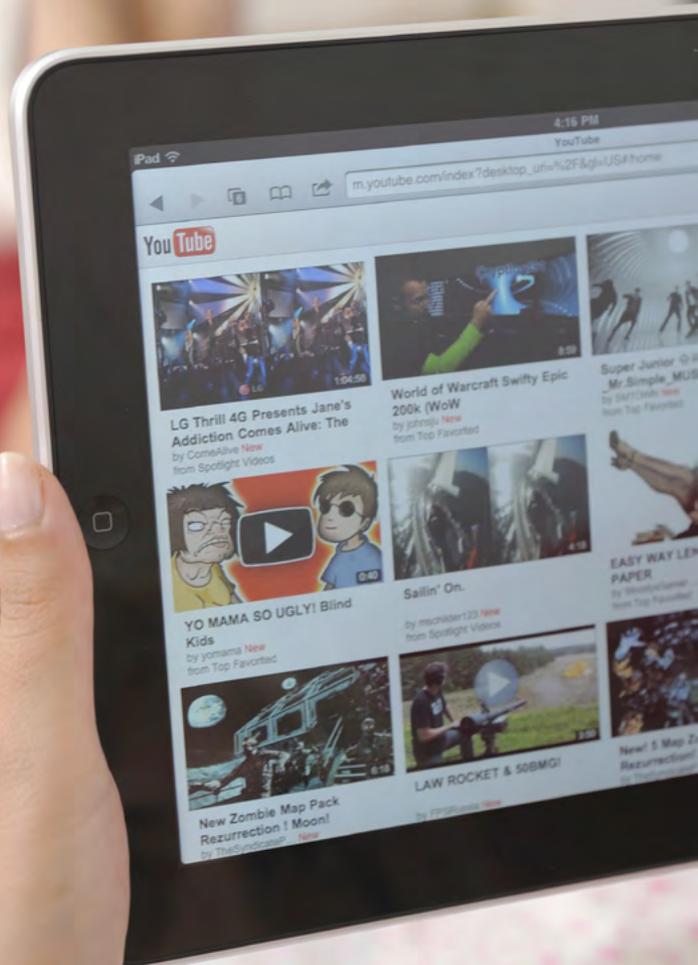
“For the BBC, From Lens To Screen is about preparing the business for future challenges. In common with many others, we’re making good progress but the complexity of some of the issues we face means that we need to take collective action. That’s why we’re keen to collaborate with other organisations right across our industry and work together to solve them.”

Jigna Chandaria, Lead Technologist,
BBC R&D

Future trends impacting the industry



What happens if you don't act now?



The traditional broadcasting business model is challenged. As audiences fragment and strong digital competition increases, both advertising and licence fee funded businesses are vulnerable to falling revenues

The business risk:

- Businesses are no longer financially sustainable
- Reputational risk as industry perceived as being slow to respond
- Knowledge and skill shortage leave businesses unable to ride future challenges

According to Tomorrow Calling survey by Red Bee Media, 64% of respondents from the broadcasting industry felt that the influence of the likes of Apple, Google, Amazon and Facebook is the 'most important challenge' facing their business through to 2020

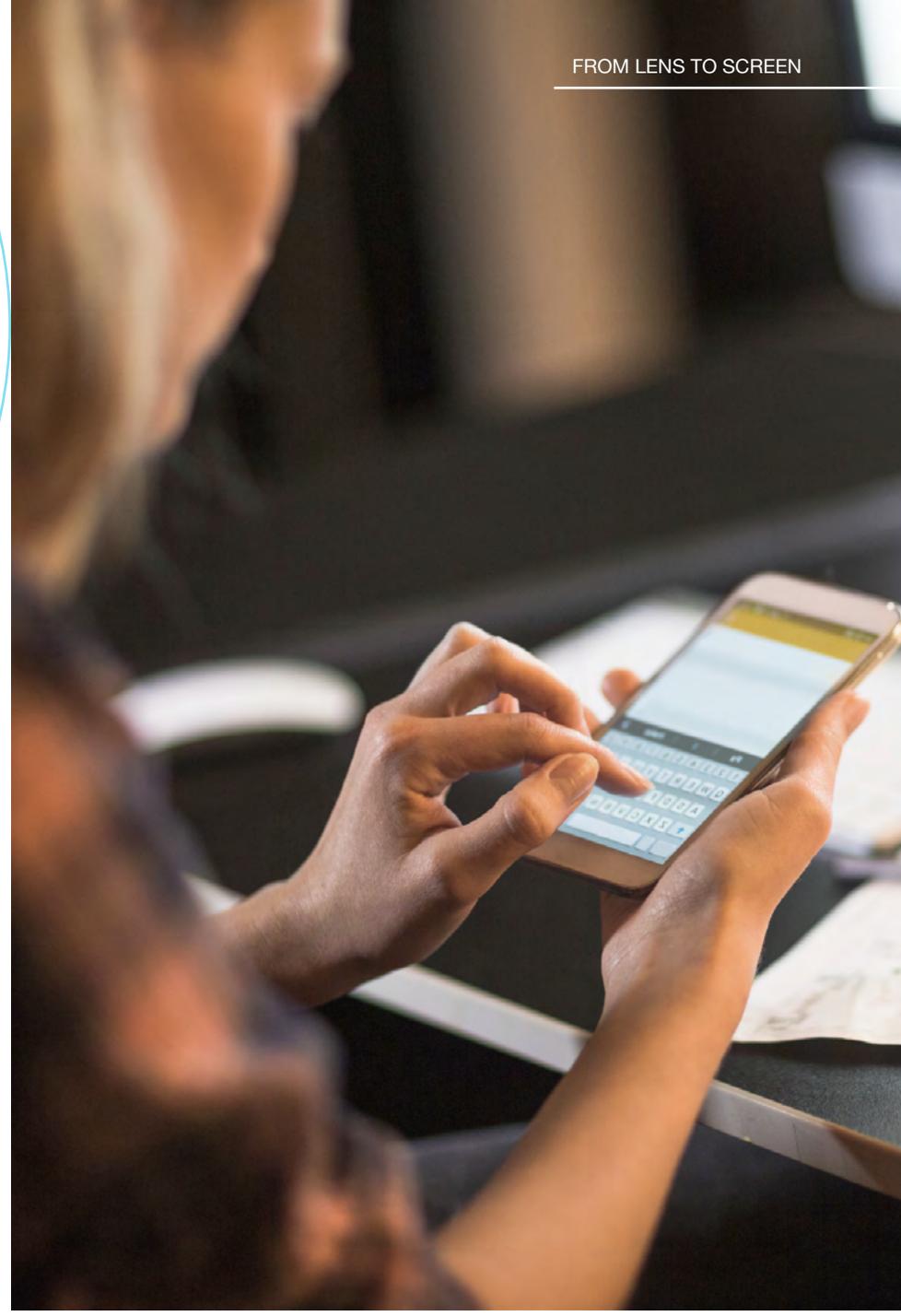
Energy impacts from media distribution and viewing are set to increase sharply with further connectivity

The business risk:

- Increasing energy consumption outweighs energy efficiency savings of new technologies
- Increased carbon footprint
- Increased cost of energy throughout value chain

The average time spent consuming media per day for the average UK adult consumer reached 9 hours and 6 minutes in 2014, up from 8 hours and 35 minutes in 2013.

emarketer.com, 2014





Adoption of new technologies that reinforce consumerism, increased energy impacts and disposable technology

The business risk:

- Risk of financial losses in chasing technology trends
- Reputational risk, industry perceived as a driver of overconsumption and built-in obsolescence
- Unknown environmental impacts lead to poor decision-making

Studies suggest that 2% of global GHG emissions result from Information and Communication Technology (ICT) (Smart 2020), plus a further 2% from broadcast and media (Ofcom 2009).

Resource and cost of devices and equipment are set to increase

The business risk:

- Reputational risk, as a driver of over-consumption and built-in obsolescence
- Reduced value of devices as mass production increases
- Cost of metals and rare earth elements increasing with soaring global demand

Commodity prices increased by nearly 150% from 2002 to 2010 and continued volatility increases uncertainty for investment (World Economic Forum, Towards a Circular Economy 2014)





Chronic e-waste problems are set to increase

The business risk:

- Lost opportunity of value recreation from e-waste
- Reputational risk
- Cost of compliance

A UN University report revealed almost 42 million tonnes of electronic and electrical equipment was thrown out in 2014, wasting \$52bn in materials that could have been profitably recovered and reused.

From risk to opportunity

The risks present real challenges but also huge opportunities for the broadcasting industry.

From Lens to Screen has identified three areas that are ripe for powerful collaborations, to effectively mitigate these risks.

- Create a better understanding of the impacts of the digitisation
- Create an energy and resource efficient broadcasting industry
- Redefine the business model for the 21st Century

Create a better understanding of digitisation

The environmental and social impacts of digitisation are still unclear and under-researched. To know where we need to focus, we need to research the implications of digitisation and its environmental impacts on the broadcasting value chain in more detail. This lack of clarity hinders good decision making and acting. Many stakeholders do not know where to focus best their efforts for maximum impact. From Lens to Screen wants to create a better understanding to fast-track industry-scale change.

How we can do this:

- Assess the end-to-end environmental cost of service
- Develop a common platform for measuring impact

Create an energy and resource efficient broadcasting industry

By creating a better understanding of the impacts of digitisation on the industry, we will be able to make better decisions about how to create an energy and resource efficient broadcasting system.

How we might do this:

- Outline how to optimise energy and resources required to create and deliver content to audiences
- Investigate opportunities to influence behaviour change

Redefine the business model for the 21st Century

The traditional broadcasting business model must be challenged and redefined if it is to survive and flourish in the 21st Century. Creating sustainable foundations, mindful of planetary boundaries, will future-proof businesses.

How we can do this:

- Develop a planning tool to understand technology changes such as from products to services and from specialist hardware to IT and cloud-based technology

The opportunity

From Lens to Screen has identified the urgent risks and the exciting opportunities for collaborative action to create a sustainable and successful broadcasting industry.

To use these opportunities and turn them into reality, we need to join forces and collaborate beyond our industry.



The digital transition is shaping our whole economy and we can harness these opportunities by building sustainability into our business models, today.

The invitation

What comes next?

In the next phase of From Lens to Screen, we want to build a clearer picture of how the broadcasting industry can drive system-level change for a sustainable future.

We want to develop tools to enable more energy and resource efficient business models that support the entire broadcast value chain in a transition to a sustainable broadcasting industry.

We can only build the sustainable future we want, together. To join From Lens to Screen, get in touch with Michaela Rose at Forum for the Future:
m.rose@forumforthefuture.org