A Discussion Paper

Through the Looking Glass
Corporate Responsibility in the Media and Entertainment Sector

Foreword

Why have WWF-UK and SustainAbility chosen to produce a discussion paper on the media and entertainment (M&E) sector? There are, after all, other industries that are much more damaging to the environment.

While the sector's direct impact on the natural environment may not be great, the role M&E companies play in shaping how society thinks and behaves is becoming increasingly controversial. As a result, the corporate responsibilities of M&E companies extend far beyond the basic 'good housekeeping' activities of recycling and reducing energy use. The spotlight is shifting to content. As one media executive put it, 'the [media's] biggest emission is its programmes'.

WWF seeks to influence decision-makers in politics, business and industry so that our key messages, from species protection and habitat preservation through to business behaviour and consumption patterns, are addressed effectively and incorporated into policy initiatives.

Just as we engage with oil companies about their climate change impacts, we seek to engage with the M&E sector to help them find solutions to sustainability challenges.

The big issue for the 21st century is living space — for humans as well as other species. The latest bi-annual WWF *Living Planet Report* [01] reveals that in developed countries we are currently living as if we had three planets, not one. If we are to move to more sustainable patterns of production and consumption, the M&E sector will need to play a central role — educating, informing and empowering. Without the help of the media, corporations and governments will not receive the signals they need to be able to provide us with more sustainable products, services and policies.

And, of course, there have been plenty of good examples from both the broadcast and print media. *Erin Brockovich*, *The Day After Tomorrow*, *The Blue Planet* and other environmental coverage by the BBC, and coverage of HIV/AIDS by CBS, are excellent examples of the positive role the media can play. But the level of effort remains precariously limited in relation to the challenges.

Through the Looking Glass is intended to help the sector understand what corporate responsibility means specifically for M&E companies, as well as to shed light on what these companies are doing and will need to do next. As a provocation, at the end of the paper we present a short 'Media Manifesto', rooted in emerging best practice.

WWF-UK and SustainAbility offer this short discussion paper as a contribution to an important debate — and as an invitation to M&E companies and organisations to engage on crucial social and environmental issues.

Jules Peck
WWF-UK

Seb Beloe
Francesca Müller
Frances Scott
SustainAbility

'Having taken a close look through the looking glass at the media sector, I am ever more convinced of the valuable contribution the media can make in shaping society's attitudes towards more sustainable lifestyles we so urgently need if we are to reverse the damage being done to the planet. We have only one Earth — it's time we started to live as though we realised that.'
Robert Napier
Chief Executive, WWF-UK

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Executive Summary

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Today even those who loathe the media must use the media. The Taliban, to take an extreme example, banned television, photographs and computers, but now use what they called 'tools of the devil' to refocus world attention on the war in Afghanistan.[02] **A milder form of a double-thinking affects the sustainable development movement's attitude towards the media and entertainment (M&E) sector, which is seen both as a carrier of relevant news and information, and as a barrier which cocoons citizens from reality.**

This short discussion paper by SustainAbility and WWF-UK summarises our latest efforts to push 'through the looking glass', probing the M&E sector, and looking at how M&E companies are responding to demands for corporate responsibility (CR). We define corporate responsibility as having four linked dimensions: open and transparent business practices; ethical behaviour; respect for stakeholder groups; and strong performance on economic, social and environmental issues.

The media's main impact is not environmental, but psychological and intellectual. M&E companies shape public opinion and help frame the terms of public debate. The media is what we read, listen to and watch. In parallel, through its close relationship with advertisers, the media also exerts a powerful influence on the decisions we make, the products we buy, and the sort of questions we ask when we make our everyday choices.

Now, pressure is building for the sector to pay greater heed to its wider corporate responsibilities. Non-governmental organisations (NGOs), the public, governments, socially responsible investors and corporate peers are all expressing concern about the wider influence M&E companies have on society (pages 06–09).

But little of this is acknowledged by companies in the sector itself. Where corporate responsibility reports have been produced, they focus primarily on companies' direct environmental 'footprints' rather than on the far larger 'brain-prints' that they leave on their audiences.

As our benchmark of CR reports indicates (pages 10–14), good practices are emerging that tackle the critical questions concerning the wider indirect impacts of the sector, although our brief analysis of ownership and governance trends (pages 15–20) suggests that much more needs to be done if the sector is to make lasting progress on this agenda.

Our 'Media Manifesto', presented in the final chapter (pages 21–23), is designed to encourage M&E companies to focus on the essential issues that need to be addressed if such progress is to be made.

1 Setting the Scene

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1.1 The Media Web

Sportswear Manufacturers

Commercial Tel

Sporting Events

Public Relations Consultancies

Commercials   Cartoons

Digital Editing Suites

Agents   Current Affairs   Reality   Cinemas

Community Affairs   Film Distributors

onsultancies

Corporate Identities   Advertising Con

Visual Identities   Television   Soap Operas   Reality Television   Proc

n Production Companies   News   Live Broadcasts   Co

Satellite Television Network   Theatre Critics

Programme Guides   Local Correspondents   Weather Forecasts   Mime Artists

yers   Cable Television Networks   Blog

Trade Unions   Actors   Radio Stations   Poetry   Web Desig

Lobbying   Vaudeville   Documentaries   Set Designers   Radio   Phon

Party Political Broadcasts   Flash Mobbing   Theatre   Chat

Auditions

Spin Doctors   Theatre Companies   Drama   Radio Networks

Puppeteers   Choreographers

Jingles

The media sector is just one part of a web of industries that stretch from advertising and marketing through to software and information technology. In many ways, there is more that differentiates businesses in this sector than there is that unites them.

However the central thread running through the web is the fact that they are all businesses that focus on mass communication, whether it be broadcast, print or electronic.

The media and entertainment (M&E) sector is rarely at the forefront of the mind when major social and environmental impacts are considered. When it is mentioned, it is usually in relation to how these issues are covered in news, documentary and entertainment formats, rather than the M&E sector's own corporate responsibilities and accountability. But the idea that the sector is somehow 'low impact' is evaporating.

The main influence these companies have is through the messages and other content they communicate. As Julian Eccles of BSkyB put it, 'Our principal emission is programmes.' [03] In the process, M&E companies shape public opinion and help frame the terms of public debate: they determine what we read, what we listen to and what we watch. In parallel, through their close relationship with advertisers, they also exert a powerful influence on the decisions we make, the products we buy and the sort of questions we ask when we make our everyday choices.

And what an extraordinary influence this has come to be.
— In the US, for example, the average person watches more than four hours of television a day, and sees 25,000 commercials a year.
— At 20,000 advertisements a year, American children see marginally fewer than adults, but are said to have developed brand loyalties by two years of age. [04]
— In the UK the figures are nearly as impressive, with the average person watching approximately 3.5 hours of television a day, which consumes 40 per cent of their leisure time. This means that over an average lifetime, more time is spent watching television than working.

According to one interviewee, it is because of this role that the sector should be held to a higher standard of accountability than others. 'People depend on the media to form their moral frameworks and get most of their brain content. So the standards should be higher.'

In 2002 SustainAbility published *Good News & Bad*, an initial survey of the media world. [05] Since then, a growing range of organisations has expressed interest or begun activities in this area — including Business in the Community, CSR Europe, Forum for the Future, Westminster CSR Media Forum and WWF. The debate, however, has not moved on significantly. The focus is still on the characteristics of media coverage, rather than stepping back to consider what wider notions of corporate responsibility (See panel 1.2) might mean for the media world.

This document does not repeat the 2002 analysis that explored how the media reflects the wider world in the mirror of its coverage (See panel 1.3). Instead, it reports on preliminary research by SustainAbility and WWF-UK, [06] which pushes 'through the looking glass' and considers the corporate responsibility agenda for the M&E sector itself. The research focused on Europe and the US and involved a literature review and consultation with leading figures in industry, government and civil society.
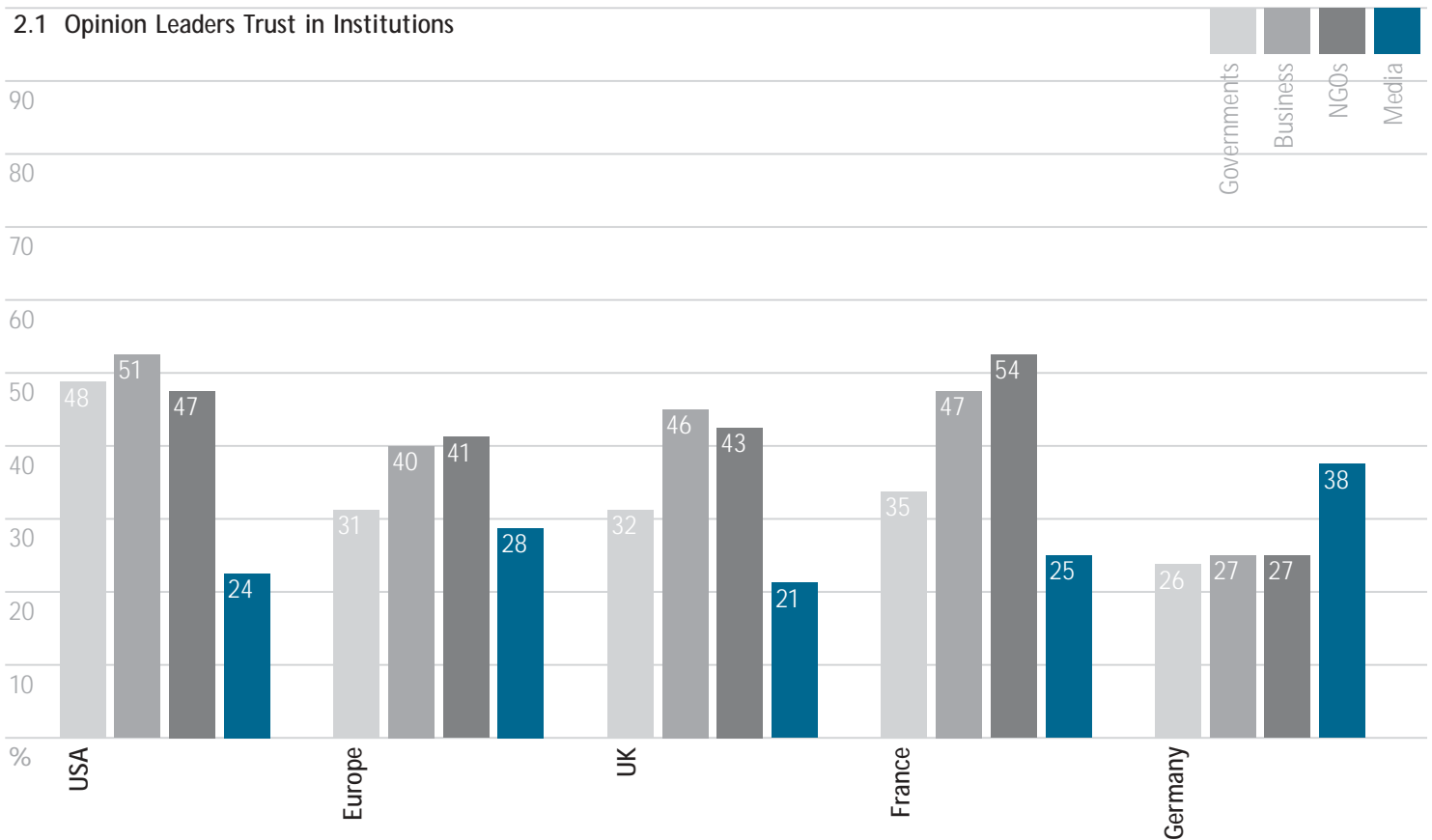
'Having previously explored just what the media reflects in the mirror of its coverage, we now focus on what lies behind the mirror — the policies and performance of the organisations that produce our news and entertainment.'
SustainAbility / WWF-UK

Logotypes
Television Stations
Certification
Video Merchandisers
Trailers
Video Piracy
Pornography
Animations
Disinform
Public Safety Films
Electronics
Reality Television
Videotape
Disc Jockeys
Roadsigns
Feature Films
Tour Sponsorship
Consultancies
Popularity Charts
Concerts
duct Placement
Video Hire Outlets
Maverns
Publicity
Comedy
Subtitles
Test Screenings
Music Television
Recorded
Celebrity Endorsements
Film Studios
Film Production Companies
DVDs
ggers
VHS Video
MP3 Files
Music Publishers
ign Consultancies
Marketing Managers
Sampling
Vinyl
Bootleg C
one-Ins
ScienceFiction
Media Studies
Live Music
t Sh
g Studios
Jukeboxes
Tour Promoters
In
dia Standards Authorities
Live Venues
Film Posters
Record Covers
Roa
Sea
Design Colleges
Nightclubs
Festivals
Groupies
Recording Labels

1.2 Corporate Responsibility

Nobody understands the importance of language better than media people. So it is hardly surprising that loosely-defined terminology such as 'sustainable development' [07] and 'corporate responsibility' have so far failed to make a major impact on the sector.

Stripped to its essence, corporate responsibility requires four things of companies:
— open and transparent business practices;
— ethical behaviour;
— respect for stakeholder groups; and
— strong performance on economic, social and environmental issues.

Why Now?

A basic assumption in our work is that the media plays an enormously important role in holding other parts of society to account and, ultimately, in underpinning an effective democracy. As Claude-Jean Bertrand, Professor Emeritus at the French Institute of the Press, has put it, 'There can be no democracy without informed citizens. There can be no informed citizens without quality news media.' [08]

There is also growing interest in the role of the sector in building public understanding of sustainable development. The United Nations Environment Programme recently called on the media and advertising sectors to promote more sustainable consumption and production patterns [09] and in January 2004 the UN Secretary General, Kofi Annan, called on the media to play a responsible role in the fight against AIDS by using their 'unparalleled power'. Several media groups, including CBS, responded by committing funds and producing editorials on the subject. [10]

But the M&E sector will also be subject to the same corporate responsibility yardsticks as other industries. As one commentator notes, 'McDonald's and Coca-Cola are in the business of putting stuff inside people's bellies, so everyone (especially the media) expects them to take responsibility for their nutritional impact. Equally, Shell and BP are in the business of taking stuff out of the ground, so everyone (especially the media) expects them to take responsibility for their environmental impact. The media are in the business of putting stuff inside people's heads. But does anyone think they take responsibility for their cultural impact?' [11]

An analogy can be found in the financial community, which used to claim not to have major social and environmental impacts. But leading insurers, banks and investors now acknowledge the significant indirect impacts that financial institutions have on social and environmental issues through their policies on lending and other decision-making. [12]

Infomercials
Local Newspapers
Public Literacy Levels   Underground Printers   Market Research
perback Books   Informers   Daily Newspapers   Gossip Columns   Propaganda
Journalists   Pub Quizzes
Telephone Directories   Reporters   T-Shirts   Designer La
Newspapers
Comics   Letterpress Printers   Photographic Retouchers
Lithographic Printers   Fashion Design Consultancies
s Groups   Trade Journals   Sunday Newspapers   Monthly Ma
Books   Folklore   Magazines
Annual Reports   Flyposters
Book Distributor   Photographers   Sunday Nev
Information Design   Poems   Lithographic Printers   Photographs   Paper Manufacturers
ScienceFiction Conventions   Maga
usiness Cards   Paper Manufacturers   Book Publishers   Lifestyle Magazines   Post-
Urban Myths   Edutainment
Billboards   Local Newspapers   Leaflets
Flyposters   Letters to the Editor   Interior Design Consultancy

Similarly, while the M&E sector may not have an enormous direct environmental footprint, its 'brain-print' is colossal. But this aspect of what it would mean to be a 'responsible media company' has not been well articulated.

Still, the need for greater clarity was thrown into sharp relief during 2003. Three of the best known and most respected news organisations in the world — *The New York Times*, *Le Monde* and the BBC — have all faced uncomfortable scrutiny in relation to defects in their governance. The next decade will see growing interest in what goes on 'behind the looking glass'.

1.3 The Media, Corporate Responsibility and Sustainability [13]

Media companies act both as carriers and barriers when it comes to corporate responsibility and sustainable development. As discussed in *Good News & Bad*, media coverage of key environmental and social issues such as climate change and human rights has generally increased both in quantity and quality over the past decade, although some important caveats are attached to this statement.

— Coverage still tends to be highly cyclical, with peaks driven by major international events on the issues (e.g. the World Summit on Sustainable Development) and major controversies (e.g. genetically modified foods, CJD).
— There is enormous regional variation in levels of coverage, with the EU generally leading, North America in second place and coverage of the issues in Latin America and Asia still relatively low.
— A key hot-spot is advertising,(see panel 4.2) the subject of a separate SustainAbility report. [14]

— The nature of the coverage is also slowly evolving. Climate change, for example, originally covered on the science pages and often given unsympathetic treatment, is increasingly moving into the business, financial, lifestyle and news pages.
— But, and climate change is a striking example, the urgency of many of these issues is not reflected in most media.

For more information see
www.sustainability.com/media

CD Burning
International Electronics Standards
Computer Games
Gossip   Paper Suppliers   Investor Relations
EPS Files   Web Hosts   Emails   Mapping   Laptops
Illustrations
abels   Bloggers   Chat Rooms   News Group
Multimedia   Exhibition Venue   Websites   Software Design Consultancies
Catalogues   Design Consultancy   Advertisement Hoardings   The Internet   Virus Software W
Magazines   Dictionaries   PDAs   Banners   Message Boards   Computers
Celebrity Endorsements
ewspapers   PDF Files   Producers   Spam   Product Design Consultancies
Team Sponsorships
azine   Mobile Phones   News Groups
It N   Text Messages   Data Protection
Sports Agents
e Gambling   Broadband Coverage

'Clearly [the media] are complicit in some growth trends in deeply damaging social practices and choices (food, transport, energy, generic consumption of goods, unsatisfied compulsions to consume) — but the nature of their responsibility is difficult to quantify.'
Dr Joe Smith
The Open University

2 Watching the Watchdogs

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2.1 Opinion Leaders Trust in Institutions

Governments
Business
NGOs
Media

	USA	Europe	UK	France	Germany
Governments	48	31	32	35	26
Business	51	40	46	47	27
NGOs	47	41	43	54	27
Media	24	28	21	25	38

Unlike other industry groups, M&E companies have not yet experienced the full force of the corporate responsibility challenge. While the media sector often plays a central role in catalysing change in other sectors, it has not — perhaps understandably — turned the lens on itself.

So where will the pressure to change come from? Most of our interviewees thought it would have to come from outside the sector. 'There is little employee pressure for greater industry responsibility,' said one M&E company representative. [15] Or audience pressure, we might add. So what are the main sources of pressure? And what are the main issues?

Pressure Points

Five key potential sources of pressure include non-governmental organisations (NGOs), the public, governments, socially responsible investors and corporate peers. This discussion paper briefly reviews each below.

NGOs

The M&E sector, particularly in the US, seems to attract an enormous amount of interest from NGOs. Specialist groups such as FAIR and Adbusters work to hold the big M&E companies to account, while campaigns such as 'Take Back the Media' publish lists of who buys advertising time on news networks and then lead boycotts. NGOs can powerfully influence the public and regulators to put pressure on media companies. [16]

The sector also faces a competitive challenge from a growing number of NGOs such as Media Lens, openDemocracy.net, TomPaine.com and IndyMedia that seek to represent views overlooked by the mainstream media.

The Public

If there are two consistent findings from surveys concerning trust in different institutions, they are first that NGOs are generally trusted more than companies, and second, journalists and politicians fight it out for the consolation prize (see Figure 2.1). Time after time the statistics show that people do not trust the media. In the US in 2003, for example, just 25 per cent of people stated that they trusted journalists to be honest. In contrast, the nursing profession scored 83 per cent. [17] Furthermore, the US-based Pew Research Center for People and the Press Poll found in July 2003 that 56 per cent of people questioned said media stories and reports were often inaccurate, and 62 per cent believed the press generally tried to cover up its mistakes rather than admit them. Figure 2.2 below shows the credibility of some of the major broadcasters and publishers. [18]

2.2 Most Credible Daily Media Sources
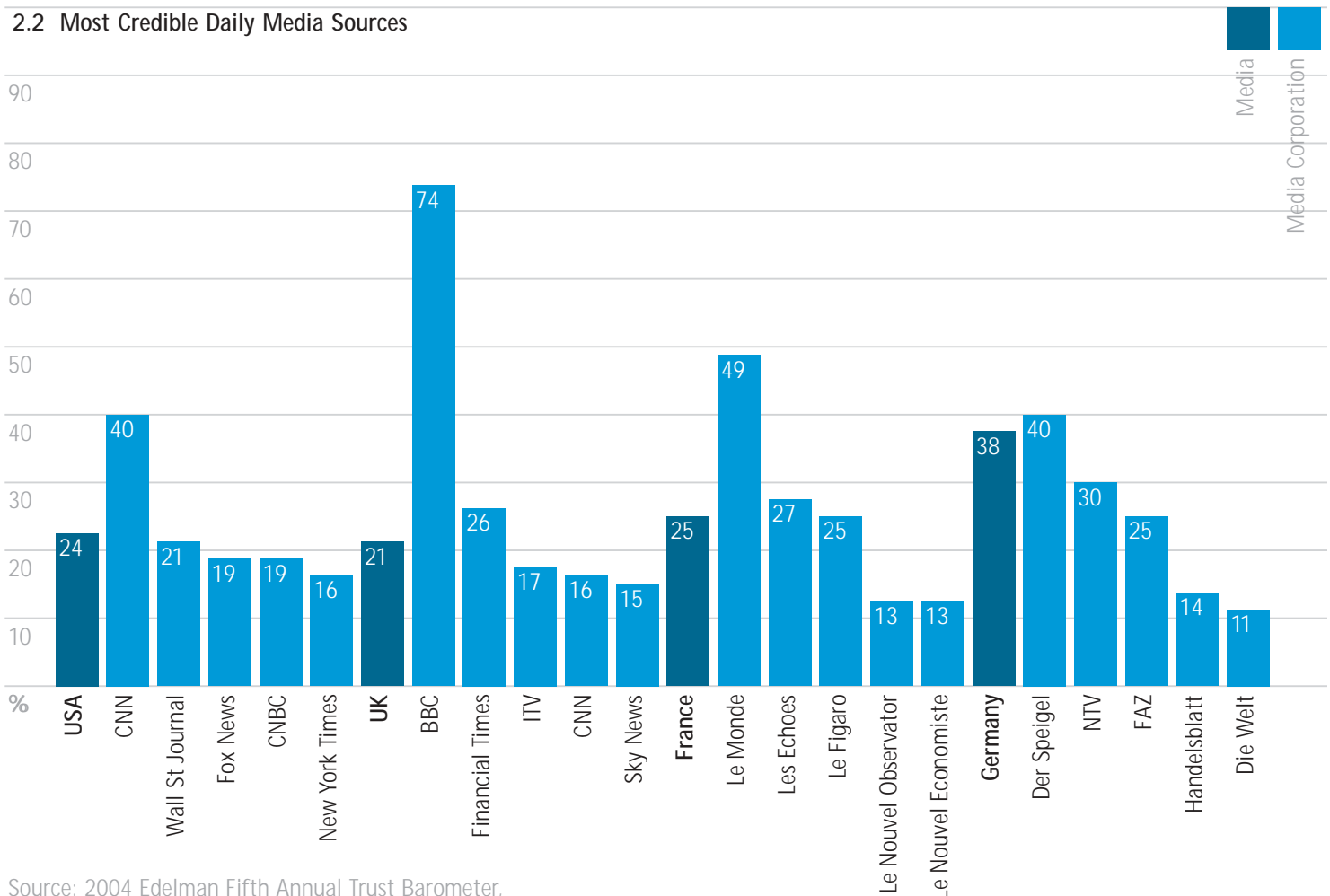
	Media	Media Corporation
USA	24	
CNN		40
Wall St Journal		21
Fox News		19
CNBC		19
New York Times		16
UK	21	
BBC		74
Financial Times		26
ITV		17
CNN		16
Sky News		15
France	25	
Le Monde		49
Les Echoes		27
Le Figaro		25
Le Nouvel Observator		13
Le Nouvel Economiste		13
Germany	38	
Der Speigel		40
NTV		30
FAZ		25
Handelsblatt		14
Die Welt		11

In Italy, disenchantment with the country's television stations has led to a national boycott of primetime broadcasting. A strike in December 2003 was allegedly supported by 400,000 people and a second, planned for June 2004, is expected to involve more than a million people.[19] This campaign has found support in some unlikely places. According to White Dot, Pope John Paul II argued that 'In many families the television seems to substitute, rather than facilitate dialogue among people. A type of 'fast' in this area could also be healthy'. At the same time an international viral campaign, 'Get Out of the Box', orchestrated by White Dot, is building support for TV Turnoff Week.[20]

'Media literacy' — the ability to understand the way the media works, to spot bias in news and to recognise accurate and impartial news coverage [21] — is increasingly recognised as a core skill alongside English, maths and science for people immersed in the media culture. This has become a favourite theme for a number of NGOs. Common Sense Media, for example, an independent US non-profit organisation, aims to provide information to parents so that they can decide for themselves what their children should or should not watch.

Governments

Governments in the US and in some European countries such as the UK and Italy have been reluctant to take the lead in ensuring that media companies understand and address their responsibilities. [22] Appetite for change within government tends to be limited to voluntary initiatives, although things may change if voluntary action fails to deliver greater responsibility. In the UK, for example, Barry Cox, the deputy chairman of Channel 4, has predicted that the government will impose tough controls on the BBC to reverse the process of 'dumbing down' that some critics believe has occurred in recent years. In Sweden, regulators have gone even further in pushing ahead with bans on advertising certain products to children.

Socially Responsible Investors

Morley Fund Management's Media Sector Guidelines note that 'the exploration of the indirect impacts of media companies via the messages they convey . . . is yet to be tackled by the industry on a broad scale'. [23] They also list the criteria used to screen stocks to determine their suitability for investment. Inclusion or exclusion is made on the basis of:

— product sustainability, including use of media channels to promote social and environmental awareness, and levels of exposure to gambling and pornography; and
— management quality, including concentration of ownership, control of media content and distribution, ethical business conduct, and efforts made not only to promote linguistic and cultural diversity, but also to tackle the digital divide.

Just Pensions, part of the UK Social Investment Forum, also highlights for pension fund trustees the key social, ethical and environmental risks that could have a material impact on media companies' shareholder value.[24] It warns investors that shareholder value could be put at risk by media companies dominated by a chief executive or chairman who is also a major shareholder — because strategic decisions may be aligned with the ambitions of the management, rather than those of shareholders. Also, as audiences fragment, 'creative departments must be adaptable to communicating with an ever widening range of cultures and interests' in order to maximise audience figures and advertising revenues.

2.3 Key CSR Issues for the Media Industry

CSR issues

Common to all sectors

With distinct implications for media sector

Unique to media sector

Investing in and supporting staff

Social and environmental issues promoted

Impartial and balanced output

Corporate governance

Data protection

Health, safety and security

Freedom of expression

Charitable issues promoted

Human rights

Transparent ownership

Culturally diverse output

Community investment

Plurality

Privacy

Treatment of freelancers

Digital divide

Informing public opinion

Creative independence

Customer relationships

Education

Citizenship

Entertainment and gaming

Piracy/theft

Integrity of information

Transparent and responsible editorial policy

Supply chain integrity

Intellectual property and copyright

Audience needs reflected in output

Environmental management

Regulatory compliance and self-regulation

Valuing creativity

Media literacy

Source: KPMG LLP (UK) adapted from 'Key CSR Issues for the Media Industry', KPMG and Media CSR Forum, February 2004.

Peer Pressure

The M&E sector, at least in the UK, was recently stung into action to identify its relevant CR issues after scoring poorly in a survey conducted by the business group Business in The Community (BiTC). As rightly recognised by the group, judging the CR performance of an M&E company against the CR performance of an oil company is equivalent to comparing apples with pears. The key issues and relevant indicators are very different.

Partly in response to this, the Media CSR Forum, which includes a range of media companies, was set up to work alongside KPMG [25] to identify what the key CR issues are for the industry. Figure 2.3 shows the initial mapping of the issues.

CEOs within the industry also believe that the sector's role in society [26] is becoming an increasingly pressing issue. The World Economic Forum (WEF) recently found that 'media executives recognise the multi-faceted role of media in business and society as large corporate entities, but also as very influential in political and cultural life across borders.' But the WEF team concluded that this is a set of issues for which the M&E sector currently does not feel fully prepared (see Figure 2.4). [27]

2.1 Does Trust Matter?

Lack of trust — or, indeed, of credibility — is, as one media executive put it, 'the biggest challenge facing the industry'. For *The New York Times*, the issue of trust has become particularly heated following a series of scandals in 2003, leading to an apology from its publisher for what he called 'an abrogation of trust between the newspaper and its readers'. The apology followed revelations about stories made up by one of the paper's journalists. As a result, the newspaper appointed an internal ethics monitor and a public editor (or ombudsman) to critique the paper.

Trust can be seen as an essential characteristic of successful businesses, particularly when operating in a highly competitive landscape. Philip Meyer, Knight Professor of Journalism at the University of North Carolina, frames the challenge this way: 'What the new media forms need to capture is the favoured position in our heads as the trusted source. There isn't much room in all our heads. The battle should be fierce.'

Following disillusionment among Middle Eastern audiences with the western media's news agenda, the emergence of Al Jazeera as an important international news source is an example of the trend. Founded in 1996 by the Qatar government as an independent voice in the Arab world, Al Jazeera is unusual in that part of the world in being free from censorship and government control. The network's European subscribers have doubled since the start of the Iraq war in 2003.

Trust is crucial for entertainment companies as well. Disney is a brand for which this is abundantly clear. Consumer trust — and family trust in particular — is core to what it does. As David Shore, director of the Trust Initiative at the Harvard School of Public Health, points out, 'Disney is not in the attractions or the movie business, it's in the trust business.' [28]

2.4 How Prepared is the M&E Sector?

Preparedness: High / Medium / Low

Magnitude	0	1	2	3	4	5	6
High					Innovation		
						Evolving Role of M&E in Society	
	Creation of Winning Digital Models		Catching Up to Networked Consumers				
Medium		Regulation & Consolidation					
				International-ization			
Low							

Timing (Years)
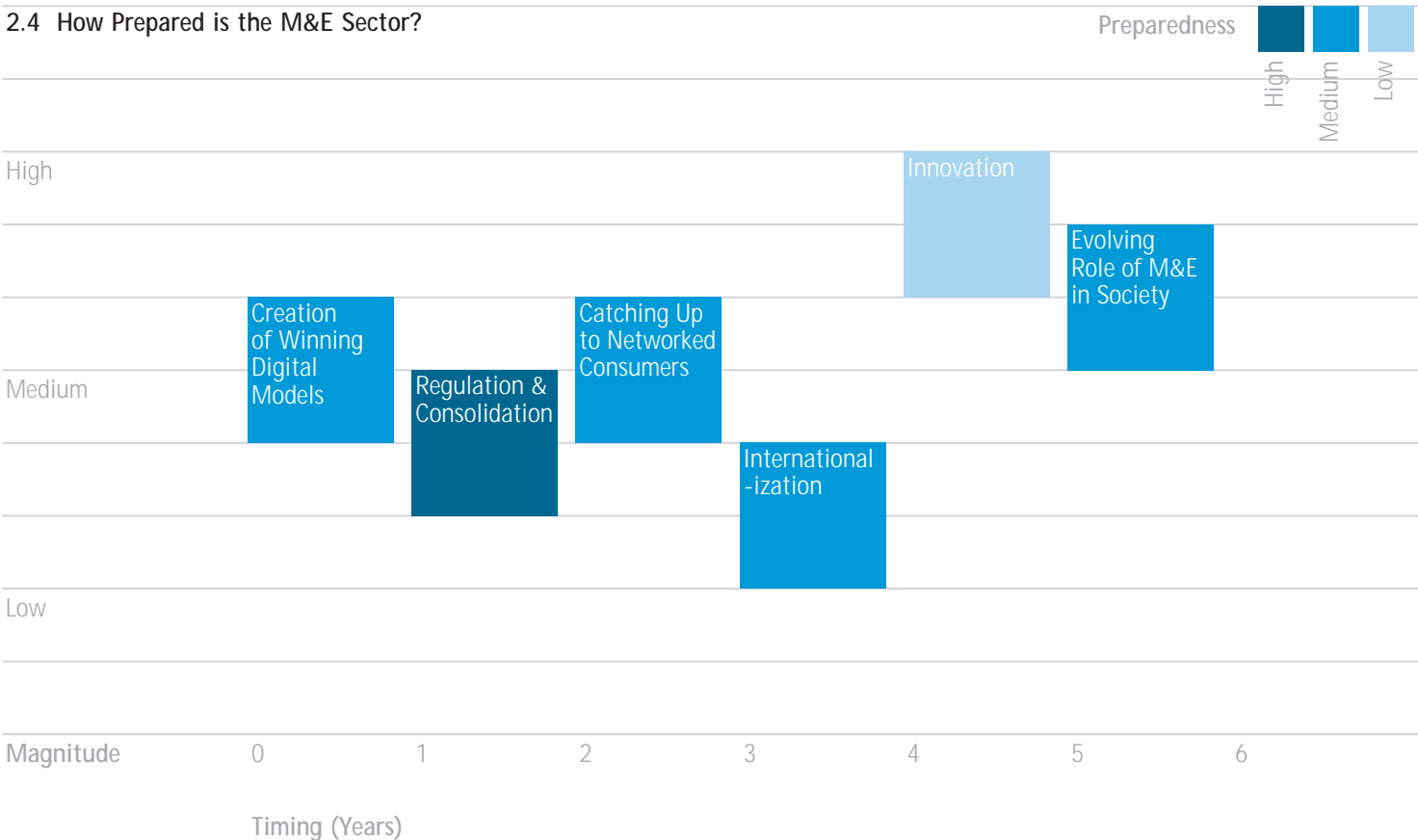
Source: Adapted from World Economic Forum, Media & Entertainment Industry Monitor, 2003.

3 Leaders, Laggards

© Peter Frischmuth / Still Pictures

3.1 Scores for M&E Companies Against Benchmarks

GR02 Average	GR02 Leader	Media Sector Average	Media Corporation

Chart values:

- GR02 Average: 43
- GR02 Leader: 62
- Media Sector Average: 19
- BSkyB UK: 32
- BBC UK: 24
- Pearson UK: 24
- Vivendi Universal FR: 22
- Reuters FR: 13
- Time Warner US: 10
- Walt Disney US: 08
- Viacom US: 00
- Mediaset IT: 00
- News Corporation AUS/US: 00
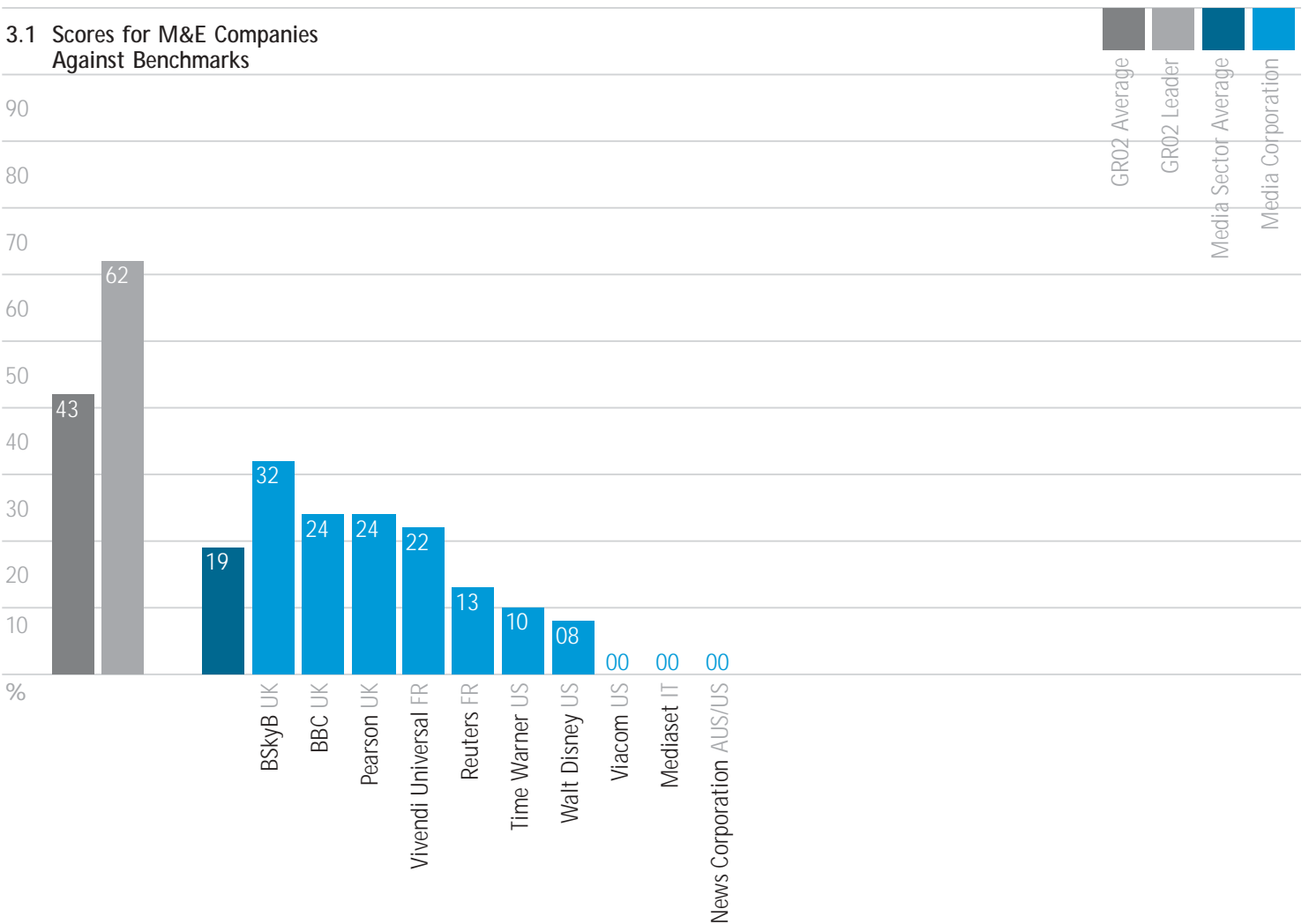
The media plays a crucial role in holding public and private institutions to account. Air time and column inches are a critical factor in the success of many NGO campaigns. But how do media and entertainment companies themselves perform in addressing and reporting on their own impacts?

To better understand how M&E companies see their responsibilities [29] — and what they are doing about them — we reviewed the CR reports of 10 companies in the sector. These are intended to be broadly representative of the M&E sector in Europe and the US, taking into account the size of the companies, geography, ownership structure and core businesses. [30]

These M&E sector reports were assessed using the UNEP/SustainAbility benchmark methodology, first used in 1994 and subsequently refined in close cooperation with large numbers of report producers and users. [31]

Main Findings

A handful of media and entertainment companies have been reporting for some time. **EMI**, for example, although outside the scope of our benchmark, has incorporated what would have been its 11th environmental report into a full social responsibility report. **Time Warner**, highlighted in *Good News & Bad* for having no report, has also now published its first social responsibility report. [32]

However, it is also clear that M&E companies must significantly improve their reporting. To put the scores shown in Figure 3.1 into perspective, we compared them with the results of *Trust Us* [33] Global Reporters 2002 (GR02). This exercise shows clearly that even the best media reporters are well below average across the corporate community as a whole.

BSkyB (owned by **News Corporation**), with 31 per cent, would have just made it into the Top 50 in our *Trust Us* GR02 report. The lowest scoring report, by **The Walt Disney Company** (8 per cent), is some way off. Three companies do not report at group level: **News Corporation**, **Viacom** and **Mediaset**. M&E reports from the US tend to score poorly because they rarely raise their eyes much above the relevant company's philanthropic activity.

The focus for most M&E reports is on the direct effect of their immediate operations, rather than on content and programming. While operational issues clearly need to be addressed, the major impact of the sector is increasingly seen to lie in this second area.

Interestingly, for a sector that typically has a low environmental footprint, many reports score strongest on environmental performance (Figure 3.3). The **BBC** report, for example, is focused almost exclusively on the environment. [34] **BSkyB** also scored strongly in this area, although the report still fails to address impacts associated with its programming. **Vivendi Universal**, however, is planning in its next report to move forward and tackle the tough question of the specific responsibilities of a media company. Vivendi Universal's 2003 *Sustainable Development Report* [35] discusses the social responsibilities of media companies as well as their relationship with the community at large. The report focuses on three key areas of social responsibility:
— responsibility with regard to minors;
— responsibility to reflect diversity; and
— responsibility to education.

3.2 Breakdown of Score / Total Score
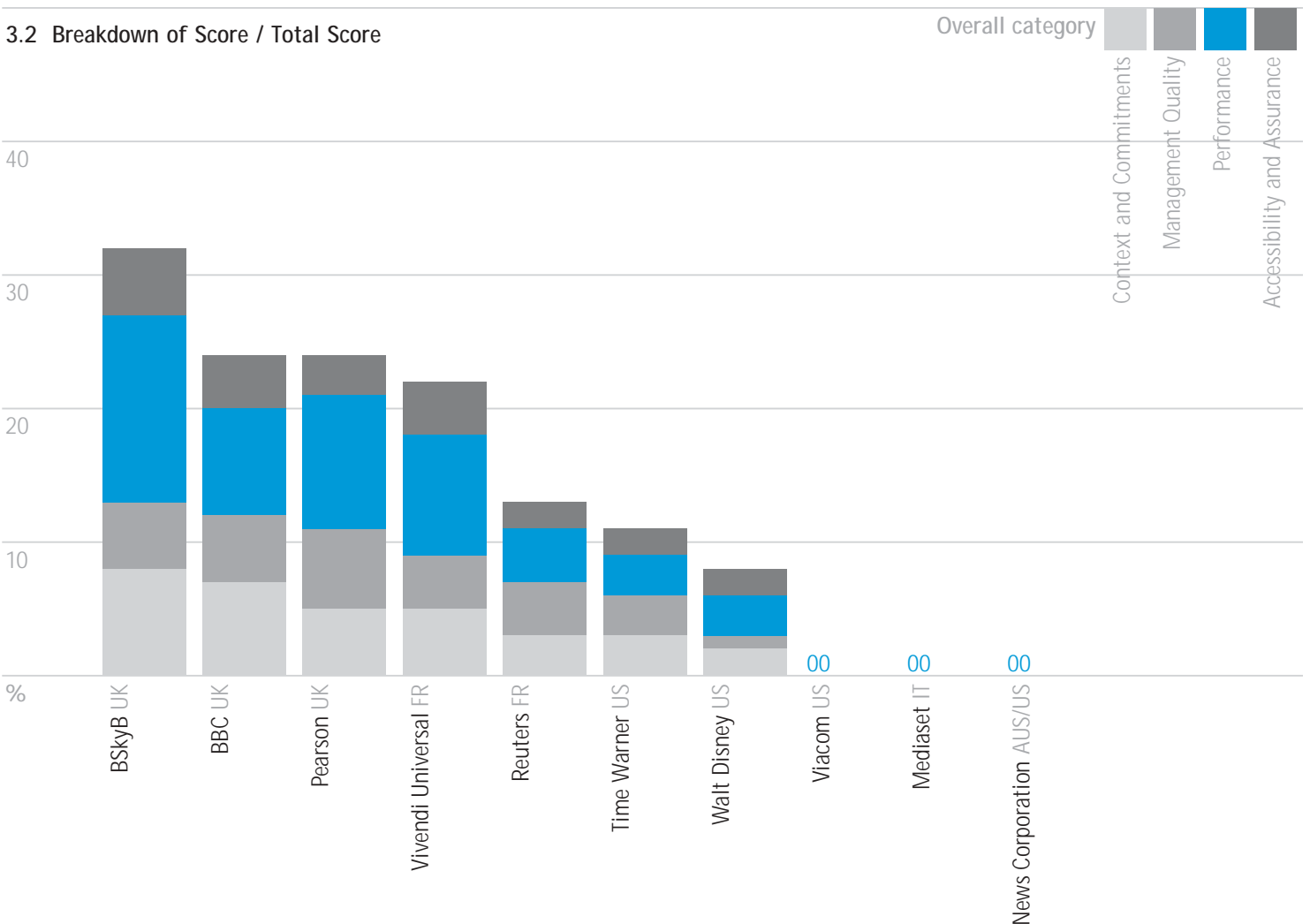
Critical Issues

Governance

Reports are generally weak on measuring how the respective company performs against governance structures, including both regulatory charters or licences and voluntary values, codes or polices (e.g. editorial, environmental or social). For example **Granada** (now merged with **Carlton** to form **ITV plc** and not included in the benchmark survey) has an ethical statement that clearly acknowledges its accountability for potential influence on public perception with regard to the environment. However, in its 2002 social responsibility report, there is no consideration of how it has performed against this management standard.

The reports we reviewed mostly failed to disclose what standards, principles or codes of conduct the reporting companies use to address content or editorial issues (e.g. political bias, violence or adult entertainment). Several reports do acknowledge their 'gatekeeper' respon-sibilities, but discussion of these responsibilities is generally sketchy.

Reuters is the company whose report stands out in this regard. It details how the Reuters Trust Principles are enshrined and applied in the company.

For example, a fundamental part of the job of its editor-in-chief is 'to ensure our editorial output complies with the Trust Principles'. **Guardian Newspapers Ltd** (not included in the benchmark survey) also explicitly states that its *Living Our Values* report is intended to ensure that the company's operations are consistent with the values of the Scott Trust, its ownership company.

Time Warner also reports on performance against a number of internal policies covering freedom of expression, responsible guidance on entertainment and consumer choice, although this coverage is fairly cursory.

Performance

Reports are generally descriptive and qualitative, lacking useful performance indicators. This is perhaps unsurprising given that the CR agenda is relatively new to most media companies. The challenge for the sector is to develop relevant indicators for some of the intangible CR issues, such as the influence companies have on their audience, how they contribute to wider media 'literacy' and how their products help to inform public opinion about key issues, in addition to metrics relevant to their governance, policies and related systems.

BSkyB has at least made some efforts in this direction. For example, it has measured the extent of subtitling on Sky News. It has also set itself future targets to help drive increased levels of subtitling in the company's programmes.

Design and Communication

When exploring a sector whose business is to engage viewers, listeners and readers, we would have expected to see some innovative and creative reporting, with the media being used effectively to communicate positions on corporate responsibility. We were disappointed. The clear challenge for the M&E sector is to lead with their efforts to engage members of the public on corporate responsibility issues.

As Solitaire Townsend of **Futerra Sustainability Communications** puts it, 'the media sector is packed with creative people who might be able to bring these dry reports to life, experiment and do what no company has done before — engage the public with their CSR.'

3.3 Breakdown of Performance Score

Performance category

| Economic | Social | Environmental | Multi-dimensional |

40

30

20

10

%

BSkyB UK · BBC UK · Pearson UK · Vivendi Universal FR · Reuters FR · Time Warner US · Walt Disney US · Viacom US 00 · Mediaset IT 00 · News Corporation AUS/US 00
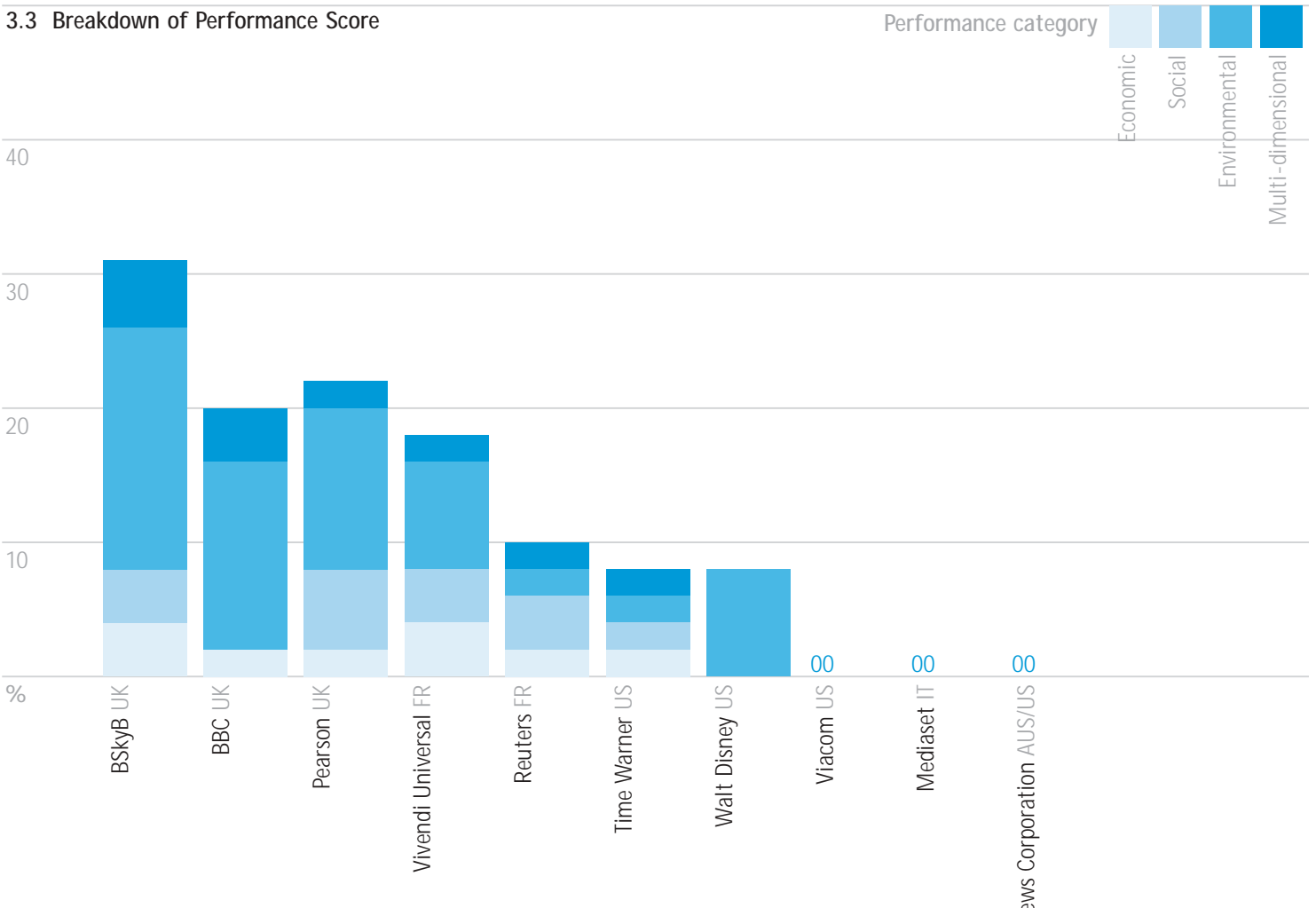
Emerging Good Practice

It is not however all bad news. Listed below are some examples, taken from websites and reports, of how M&E companies are addressing the critical indirect impacts of their activities.

Transparent and Responsible Editorial Policy

The **BBC**'s editorial values cover impartiality, accuracy, fairness, giving a full and fair view of people and cultures, editorial integrity and independence, respect for privacy, respect for standards of taste and decency, avoiding the imitation of antisocial and criminal behaviour, safeguarding the welfare of children, fairness to interviewees, respect for diverse audiences in the UK, and independence from commercial interests.

Reuters' news operations are based on the Trust Principles, which stipulate that integrity, independence and freedom from bias must be upheld at all times. Editorial policy also includes its position on covering wars or conflicts. Directors and employees commit to upholding the Trust Principles when they sign the Reuters Code of Conduct on joining the company.

Time Warner reports that it is dedicated to journalism that is free from outside influence and control, and that respects people's right to know. Journalism is founded upon a tradition of innovation, integrity and independence — values laid down by the co-founder, Henry Luce.

Coverage of Social and Environmental Issues

The **BBC** states that because of its legal obligation to be impartial, it cannot take on the role of environmental campaigner, particularly where there are political issues involved — although what it can do is meet its responsibility to educate, inform and to be factual and accurate in its environmental coverage. It states in its report that it produces a wide range of programmes and media covering diverse aspects of environmental, sustainable development and wildlife protection issues.

BSkyB has a commitment to 'assess how to further our corporate responsibility aspirations in relation to the output of our channels'.

Pearson[36] sees newspapers and online sites as an important channel for helping to shape the debate on key social issues and has published indices of corporate responsibility and environmental management for a number of years. For the past 10 years, the *Financial Times* has supported campaigning organisations such as Business in the Community and the International Business Leaders Forum to bring their work to a wider audience. The FT has also teamed up with Dorling Kindersley to publish *Everybody's Business*, a handbook that helps managers to put corporate responsibility on the mainstream business agenda. Through its **Longman** brand, it has published a range of books which tackle HIV/AIDS and related issues.

Reuters undertakes journalistic training — workshop topics include international, business and environmental news, conflict and post-conflict reporting and health reporting. Reuters also contributes to public awareness and understanding of environmental issues through its reporting and provision of news and pictures to the Planet Ark environmental website.

Walt Disney provides public service announcements dedicated to the reduction of pollution and promoting recycling and waste minimisation for Earth Day.

Diverse Output

The **BBC** has a diversity database to help programme makers find new faces and voices that better reflect the full diversity of UK society. The database lists contributors and experts who have either minority or specialist interests on mainstream issues (e.g. architecture from a multi-cultural perspective) or expertise in minority or specialist fields (e.g. access for people with disabilities). And, following a commitment to provide high-profile mainstream disability coverage, the BBC is developing a 'portrayal policy' and action plan that includes training for staff, encouraging producers to include disabled people in its programming (e.g. in studio audiences and participants in chat shows) and monitoring the treatment of disability issues on screen.

'We produce progressive and enlightened newspapers, as well as writing regularly about corporate social responsibility. [In reporting], we wanted to reassure ourselves — and others — that we measure up to the high standards our editorials expect of other companies.'
'Living Our Values'
The Guardian

'Overall transparency on corporate responsibility activities and performance is poor, with much of the reporting patchy, descriptive, and biased away from performance data. The good news is that this situation seems to be improving.'
My-Linh Ngo
SRI Analyst
Henderson Global Investors Ltd

BSkyB, through the Broadcasting and Creative Industries Disability Network (BCIDN), is committed to increasing the presence of disabled people on air and in its offices. It also reports that it has undertaken awareness training for producers regarding the portrayal of disability.

Time Warner makes brief reference in its report to the 'broad and rich range of [Time Warner] products and services which reflect the diverse races, religions, sexual orientations, backgrounds, interests and cultures' of its customers. One of Time Warner's Values is diversity: 'We attract and develop the world's best talent — seeking to include the broadest range of people and perspectives.'

Entertainment and Gaming

BSkyB is working with GamCare to develop a code of practice on interactive gambling, and is committed to working with all betting partners within the Sky Active service to support them in adopting the Code of Practice for Interactive Gambling.

Vivendi Universal, through its **Canal+ Group**, has been working with the French Ministry of Culture and Communication to protect viewers from broadcasts of X-rated films.

Digital Divide

As part of its Broadcaster's Disability Network Action Plan, the **BBC** aims to increase access to its services, including committing to 100 per cent subtitling by 2008 on digital terrestrial channels.

BSkyB is the only company to have an indicator on subtitling (and audio description). It is committed to increase subtitling on Sky News to 80 per cent. The company also states that it is a member of the VISTA (Virtual Interface for Set-Top box Agent) project, which researches ways disabled people can access broadcast services. The company also has a commitment to ensure the positive portrayal of disability in the media.

Media Literacy

BSkyB recognises that if children are to understand fully and be able to judge what they are watching, they need to develop critical and discerning attitudes. It is involved with Media Smart, established by advertising businesses to help primary school children interpret and understand advertising.

Time Warner, through its Foundation, has a focus on 'building 21st century literacy' which involves 'the ability to manage information, to use new and traditional technology, to communicate effectively'. The Foundation held a summit in collaboration with the Bertelsmann Foundation to examine the new meaning of literacy in the information age.

'Our CSR report comes out daily — although, yes, perhaps we should have more in it about sustainable development issues.'
Robin Esser
Daily Mail

4 Who Pulls the Strings?
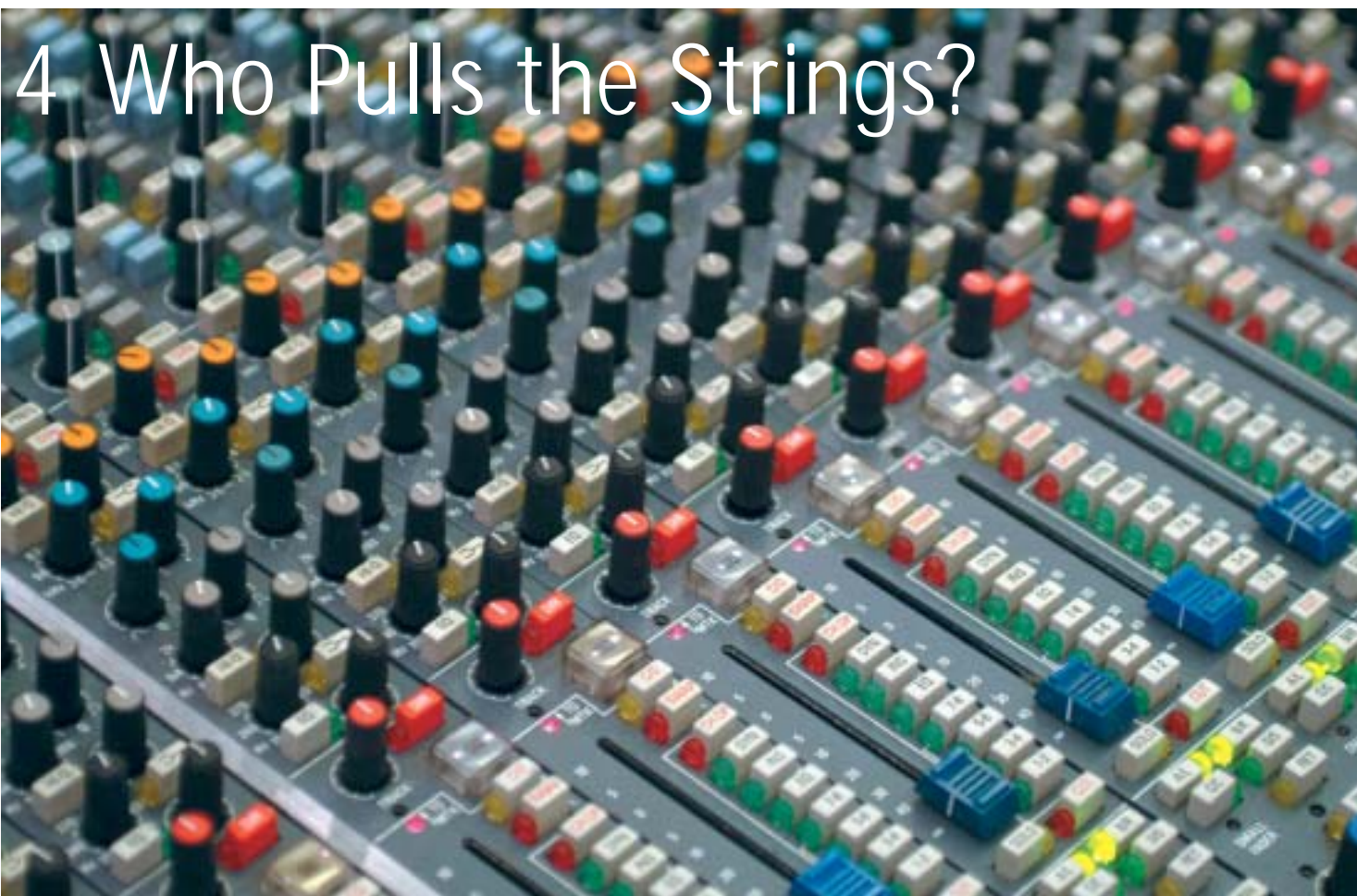
© Hympendahl / Still Pictures

Our survey of M&E sector reporting (Chapter 3) suggests that most M&E companies need to do more, and that their reporting needs to evolve. One reason why the pressures on the sector are likely to grow is that public concern is being fuelled by the wave of consolidation that has created a number of hugely powerful M&E giants. This in turn affords some of these giants considerable political leverage.

The sensitivity of such issues was underscored recently by the controversy around Disney's hesitation to allow its subsidiary Miramax to release *Fahrenheit 9/11*, the latest film by Michael Moore. As the *Financial Times* reported, the political sensitivity of the film, 'exploring alleged links between the family and government of President George W. Bush and prominent Saudis, including relatives of Osama bin Laden,' meant that Disney was concerned about allowing it into cinemas under its brand. [37]

In addition to the sensitivity of any such links in a presidential election year, there were allegations that Disney's decision might have been shaped by concerns about the film's likely effect on relations with Jeb Bush, the president's brother and governor of Disney's home state, Florida. Similarly, there has been a great deal of press coverage recently of the Bush administration's attempts to silence debate about its record on climate change, which has been sparked by the Hollywood blockbuster *The Day After Tomorrow*.

Whatever the facts of the matter, such controversies are guaranteed as the worlds of politics, business and the media increasingly collide and interlace. In this chapter, we look at the issues of consolidation, scale and leverage, before turning to three areas where M&E companies will need to focus: transparency, accountability and governance.

Consolidation and Scale

The growing concentration of the M&E industry is well documented. Around the world, a small number of very large companies dominate news and entertainment. In the US, for example, five companies — Viacom (owner of CBS), Disney (ABC), News Corporation (Fox), General Electric (NBC) and Time Warner — control about 75 per cent of the production of primetime television viewing. Figure 4.1 sketches ownership patterns in the sector.

With this concentration, inevitably, comes influence and power. As activist Jeremy Rifkin argues in *The Age of Access*, [38] 'the old giants of the Industrial Age — Exxon, General Motors, USX and Sears — are giving way to the new giants of cultural capitalism — Viacom, Time Warner, Disney, Sony, Seagram, Microsoft, News Corporation, General Electric, Bertelsmann and PolyGram. [These companies] are locked in an epic struggle to control the communications channels and cultural resources that together will make up much of the commercial sphere in the 21st century.'

One source of influence these companies exert is through their role as 'gatekeepers' in an increasingly networked economy. Sumner Redstone of Viacom has spotlighted the benefits, as he sees them, of mega-media monoliths: 'The crossover benefits among Viacom divisions are almost endless. We can show Paramount movies on thousands of screens around the world, including our own. We can turn our books into movies, our movies into television shows, and we can sell, air and syndicate those television shows on our stations as well as others. We can publish the music of the sound tracks and advertise and merchandise it all over the globe. We can cross-sell across the MTV Network, CBS, Infinity; we can cross-promote, as MTV did for *Survivor* on CBS; we can be the best place for advertisers since we have the best platforms in outdoor advertising, radio, cable and television.' [39]

Is Consolidation a Problem?

For some commentators, this type of consolidation is the problem. As Ben Bagdikian argued in *The Media Monopoly*, 'the deeper social loss of 'giantism' in the media is not in its unfair advantage in profits and power; this is real and it is serious. But the gravest loss is in the self-serving censorship of political and social ideas, in news, magazine articles, books, broadcasting and movies.' [40]

Others, however, argue that such concerns are overblown, that size does not necessarily imply compromised quality. The bottom line, they say, is that owner interference is probably the exception rather than the rule. And the owner of a larger media company may be just as likely — or unlikely — to interfere with content as the owner of a small company.

For many NGOs, a more critical issue is commercial interference in media and entertainment. Indeed, the cross-overs that Redstone described so enthusiastically raise real concerns over the influence such commercial interests can have on what media companies choose to cover and how they do so. More generally, David Edwards, author of *Free to be Human* and editor of *Medialens*, cites research that demonstrates that media projects 'unsuitable for corporate sponsorship tend to die on the vine.' A point that is backed up by the Pew Centre for People and the Press which found in 2000 that more than one third (35%) of nearly 300 US journalists said that news that would hurt the financial interests of a news organisation often or sometimes goes unreported, while slightly fewer (29%) say the same about stories that could adversely affect advertisers. [41]

Barry Diller, chairman and CEO of IAC/InterActiveCorp (formerly of Fox Inc and Paramount Pictures Corporation) argues that consolidation is inevitable, but that regulation is needed to maintain a share of the market as independent. As he put it in a *Newsweek* column, 'At least 30 per cent of all programming by any definition should be independent [that is not owned by the programme distributor].' [42] A point echoed by Andrew Graham, a board member at the UK's Channel 4, who has asserted that the BBC should hold at least 30 per cent of the market in the UK to provide 'critical mass' and act as a quality setter. [43]

My-Linh Ngo, an SRI analyst at Henderson Global Investors Ltd, takes a slightly different tack, suggesting that 'with increasing de-regulation, consolidation is a reality, seen to be necessary for a company's global competitiveness, but [particularly with regard to the broadcasting sector] it is essential that this occurs with the right systems and policies in place to ensure individual companies and their subsidiaries can maintain product and service quality, impartiality and integrity.' That in turn underscores the key role of governments and regulators.

'More than one third (35%) of nearly 300 US journalists said that news that would hurt the financial interests of a news organisation often or sometimes goes unreported.'

TimeWarner

2003 Revenues
$39.6 billion
Chair/CEO
Richard Parsons
Employees
80,000

Film/Television
Theatres
Warner Bros. International Theaters
Network
The WB
Cable Channels
HBO, CNN, TBS, Turner South, TNT, Cartoon Network, Turner Classic Movies, Time Warner Cable
Production/Distribution
Warner Bros, Warner Bros Studios, WB Television, Hanna-Barbera Cartoons, Telepictures Productions, Witt-Thomas Productions, Castle Rock Entertainment, Warner Home Video, New Line Cinema, Fine Line Features, Turner Original Productions

Music
Warner Music Group: Atlantic, Big Beat, Breaking, Igloo, Lava, Mesa / Bluemoon, Modern, Rhino Records, Elektra Entertainment Group, Asylum, Warner Brothers Records, Warner Nashville, Warner Alliance, Warner Resound, Warner Sunset, Reprise, American Recordings, Giant, Qwest, Warner Music International, WEA Telegram

Publishing
Books
Time-Life Books: Time-Life International, Book-of-the-Month Club, Paperback Book Club, History Book Club, HomeStyle Books, Crafter's Choice, One Spirit International, Little Brown and Company, Bulfinch Press, Back Bay Books, Warner Books, Warner Vision, The Mysterious Press, Warner Aspect, Warner Treasures, Leisure Arts, Sunset Books, TW Kids
Magazines
Time, Fortune, Business 2.0, Life, Sports Illustrated, Inside Stuff, Money, People, Who Weekly, Entertainment Weekly, The Ticket, InStyle, Southern Living, Progressive Farmer, The Parent Group, Sunset, The Health Publishing Group, Asiaweek (Japan), Dancyu (Japan), Wallpaper (UK), Field & Stream, Freeze, Golf Magazine, Outdoor Life, Popular Science, Skiing Magazine, Snowboard Life, Ride BMX, Today's Homeowner, Verge, Yachting Magazine

Internet
AOL: America Online, AOL Instant Messenger, AOL.com portal, AOL Europe, AOL MovieFone
Others
Netscape Communications, Winamp, CompuServe Interactive, ICQ, Spinner.com, iAmaze, Amazon.com (partial), Quack.com, DrKoop.com, Legend (Chinese, 49%), Africana.com

Services
Road Runner, Warner Publisher Services, Time Distribution Services, Pathfinder
Retail
Warner Bros. Stores & Products
Theme Parks
Warner Brothers Recreation Enterprises
Sports
Atlanta Braves, Hawks, Thrashers, Goodwill Games, Turner Sports, Philips Arena
Others
Turner Learning, CNN Newsroom (for classrooms), Turner Adventure Learning, Turner Home Satellite

VIVENDI UNIVERSAL

2003 Revenues
$30.1 billion
Chair/CEO
Jean-René Fourtou
Employees
61,815

Film
Production/Distribution
Universal Studios, Universal Pictures, October Films (majority interest), Universal Studios Home Video, United International Pictures (33% international distribution), Cinema International BV (49% video distribution)
Theatres
Cineplex Odeon Corporation (42%), Cinema International Corporation (49%), United Cinemas International (49%)

Television
Production/Distribution
CANAL+ (51%, European pay-TV provider), Universal Television Group (production and distribution), Brillstein-Grey Entertainment (50%, production), Multimedia Entertainment, USA Networks Inc. (43%), Universal Pay Television (international distribution), plus partial ownership of: HBO Asia Telecine (Brazil) Cinecanal (Latin America), Showtime (Australia) Star Channel (Japan), Telepiu (Italian pay television)

Music
Universal Music Group: MCA Records, MCA Records Nashville, Polygram, Motown, Decca Records, Deutsche Grammophon, GRP Recording Company, Geffen/DGC Records, Universal Records, Rising Tide, Interscope Records, Hip-O Records, Universal Music and Video Distribution, Universal Music International, MCA Music Publishing, Interscope Music Publishing, All Nations Catalog, Universal Concerts (concert promotion)

Internet
Production
Universal Studios New Media Group, Universal Studios Online, Universal Interactive Studios (software and video games), Universal Digital Arts, Interplay (majority ownership — video game producer), Vizzavi (European multi-access portal)
Websites
Universal.com, Education.com, Flipside.com, GetMusic (online music retailer), @viso (50% with Softbank), Allocin, Bonjour.fr, Ad2-One, Atmedica, Scoot, EMusic.com, Duet (with Sony), MP3.com

Disney

2003 Revenues
$28.4 billion
Chair/CEO
George Mitchell/Michael Eisner
Employees
112,000

Film
Production/Distribution
Walt Disney Pictures, Touchstone Pictures, Hollywood Pictures, Caravan Pictures, Miramax Films, Buena Vista Home Video, Buena Vista Home Entertainment, Buena Vista International

Television
Networks
ABC
Cable Channels
ABC Family, The Disney Channel, Toon Disney, SoapNet, ESPN Inc. (80%, includes ESPN & ESPN2, ESPN News, ESPN Now, ESPN Extreme, Classic Sports Network, ESPNHD), A&E Television (37.5%, with Hearst and GE), The History Channel (with Hearst and GE), Lifetime Television (50%, with Hearst), Lifetime Movie Network (50% with Hearst), E! Entertain-ment (with Comcast and Liberty Media)
International Channels
The Disney Channel UK, The Disney Channel Taiwan, The Disney Channel Australia, The Disney Channel France, The Disney Channel Malaysia, The Disney Channel Middle East, The Disney Channel Italy, The Disney Channel Spain, ESPN Inc. International Ventures, Sportsvision of Australia (25%), ESPN Brazil (50%) ESPN STAR (50%) — sports programming throughout Asia, Net STAR (33%) owners of The Sports Network of Canada
Production/Distribution
Buena Vista Television, Touchstone Television, Walt Disney Television, Walt Disney Television Animation
Local Stations
10 stations including KABC (Los Angeles), WABC (New York City), WLS (Chicago), WJRT (Flint), KFSN (Fresno), KTRK (Houston), WPVI (Philadelphia), WTVD (Raleigh-Durham), KGO (San Francisco), WTVG (Toledo)

Radio
Radio Disney, ESPN Radio (syndicated programming) and over 60 local US stations.

Music
Buena Vista Music Group, Hollywood Records (popular music and soundtracks for motion pictures), Lyric Street Records (Nashville based country music label), Mammoth Records (popular and alternative music label), Walt Disney Records

Internet
Production/Development
Disney Interactive, ABC Internet Group, ESPN Internet Group
Websites
ABC.com, ABCNews.com, Oscar.com, Disney.com, Family.com, ESPN.com, Soccernet.co (60%), NFL.com, NBA.com, NASCAR.com, Toysmart.com (partial), Go Network

VIACOM

2003 Revenues
$26.6 billion
Chair/CEO
Sumner Redstone
Employees
117,750

Film
Production
Paramount Pictures, MTV Films, Nickelodeon Movies, BET Films, Paramount Home Entertainment
Other
United Cinemas International (50%), Famous Players theatre chain, Blockbuster Video

Television
Networks
CBS, UPN
Cable Channels
MTV, MTV2. Nickelodeon, BET, Nick at Nite, TV Land, NOGGIN, TNN, VH1, Spike TV, CMT, Comedy Central, Showtime, The Movie Channel, Flix, Sundance Channel
Local Stations
Over 35 local TV stations, including WCBS in New York and KCBS in Los Angeles
Production/Distribution
Spelling Television, Big Ticket Television, King World Productions

Radio
Infinity Broadcasting: over 175 AM and FM stations located in 22 states in the nation's largest markets

Publishing
Simon & Schuster: Pocket Books, Scribner, The Free Press, Fireside, Touchstone, Washington Square Press, Archway, Minstrel, Pocket Pulse

Internet
MTVi Group, CBS Internet Group, Nickelodeon Online, BET.com

Theme Parks
Paramount Theme Parks

Others
The Viacom Outdoor Group (TDI Worldwide, Westwood One)

BERTELSMANN

2003 Revenues
$19.8 billion
Chair/CEO
Gunther Thielen
Employees
73,221

Television
Networks
11 across Europe

Radio
Networks
8 across Europe
Production/Distribution
260 programs reaching 250+ million viewers worldwide. Largest non-US TV distributor in the world.

Music
BMG: Arista Records, BMG Ariola, BMG Canada, BMG Japan, BMG Ricordi, BMG UK & Ireland, Jive Records, Milan Records, RCA Records, RCA Label Group — Nashville, RCA Victor Group, Tablao, Windham Hill, Zomba Music Group. Bertelsmann owns copyrights to more than 700,000 songs

Publishing
Books
Random House Publishing: Alfred A. Knopf, Ballantine, Bantam Dell Publishing Group, Broadway, Crown Publishing Group, Doubleday, Pantheon, Random House UK, Transworld, Sudamericana, C. Bertelsmann, Karl Blessing Verlag, Goldmann, Siedler Verlag, Wolf Jobst Siedler Verlag, Plaza & Janes (50%), Grijalbo Mondadori (50%)
Magazines
US: Family Circle, Fast Company, Inc., Fitness Parents, YM. Europe: 20 additional titles.
Newspapers
5 newspapers in Germany and Eastern Europe

Others
Arvato AG: printing, services (incl. logistics, multimedia and IT), calendar publishing, specialty publishing, storage media, and 'knowledge management' DirectGroup: direct-to-consumer media commerce of Bertelsmann AG, such as book clubs, music clubs and eCommerce

News Corporation

2003 Revenues
$17.5 billion
Chair/CEO
Rupert Murdoch
Employees
37,000

Film
20th Century Fox, Fox Searchlight Pictures, Fox Television Studios

Television
Satellite
DirecTV (largest Satellite TV provider in US), BskyB (UK), FOXTel (Australia), Phoenix Television (China), Sky Italia (Italy)
Cable
Fox News Channel, Fox Movie Channel, FX, National Geographic Channel, SPEED Channel, Fox Sports Net, Fox Sports (17 local/regional cable stations), Sunshine Network, Madison Square Garden Network, FOXTEL, SKYPerfecTV, STAR, Stream
Local stations
34 stations including 2 each in NY, LA and Chicago.

Radio
Fox Sports Radio Network

Music
Festival Records, Mushroom Records

Publishing
Newspapers
US: New York Post. UK: News International, News of the World, The Sun, The Sunday Times, The Times of London. Australasia: Daily Telegraph, Fiji Times, Gold Coast Bulletin, Herald Sun, Newsphotos, Newspix, Newstext, NT News, Post-Courier, Sunday Herald Sun, Sunday Mail, Sunday Tasmanian, Sunday Territorian, Sunday Times, The Advertiser, The Australian, The Courier-Mail, The Mercury, The Sunday Telegraph, Weekly Times
Magazines
InsideOut, donna hay, SmartSource, The Weekly Standard, TV Guide (partial)
Books
Harper Collins Publishers, Regan Books, Zondervan

Sports Teams
Los Angeles Dodgers, New York Knicks (partial ownership), New York Rangers (partial ownership), Los Angeles Kings (partial ownership), Los Angeles Lakers (partial ownership)
Others
Dodger Stadium, Staples Center (partial ownership), Madison Square Garden (partial ownership) National Rugby League (Australia), Broadsystem, Fox Interactive, NDS, News Interactive, News Outdoor, Nursery World

4.1 Media Ownership

4.2 Without Fear or Favour: Advertising and its Bearing on Content

Advertising represents an increasingly important feature in the wider media sector. This is not only from the perspective of the impact that advertisers can have on the content and tone of news and entertainment, but also because of the role that advertising plays in promoting consumption more broadly. Among the specific concerns are:

— The dependence of many media on advertising income, which creates a tension between editorial values and the needs of advertisers. As one interviewee put it, 'if GM has a 6 per cent stake in a media company, they are not going to pull the Hummer ads.'[45]

— The boundaries between content and advertisements are becoming blurred. Technologies that allow viewers to fast forward through commercial breaks are forcing advertisers to become more sophisticated in how they reach their target audiences.

This is leading to growth in the amount of 'subversive advertising' such as product placements or newspaper advertorials, sometimes masking as editorial.

— Messages to children is perhaps the most controversial area of advertising. Michael Moore, for example, in his best-selling book *Stupid White Men*, drew attention to Channel One's practice of providing educational material to US schools when 80 per cent of the content comprises advertising and promotions.[46]

In contrast, *The Guardian* in the UK reveals in its *Living Our Values* report that it faced a dilemma over whether to retain adult chatline advertisements which contribute £350,000 in annual revenue but of which more than half of its readership disapproves. Ultimately, the company chose to drop the adverts on account of 'a sense of duty to the reader and the community'.

Checks and Balances: The Media and Government

This is where the issue of political leverage comes to bear. The influence of commerce on media content is obviously a concern, but more troubling is the sometimes unhealthily close relationship between politics and the media. A century ago, historian Thomas Carlyle characterised the press as an additional branch of government — a 'Fourth Estate'.[47] Separating these powers is clearly as essential for media and government as it is for party politics, the legislature and the judiciary.

It is tempting to think that in mature democracies the media and government have achieved a clear separation and independence from each other. But, according to a 2003 Harris poll, 72 per cent of the American public believes that the news media has too much power and influence in Washington DC.[48] And in the UK, the Hutton Report exposed the tactics employed by the government in trying to influence the BBC.

Rupert Murdoch, head of News Corporation, probably provides the most prominent recent example of an uncomfortable closeness between media and government. He has long been criticised for his often overt role in influencing politics and political processes. 'If Murdoch didn't own (at the time) 36 per cent of the newspapers supporting a Conservative government, he would never have got where he is,' claimed Michael Grade, a former member of the BBC Board of Governors and now the new chairman.[49]

'For Berlusconi, TV is exclusively a medium to make money, a large advertising mine to be tapped. Programmes are spaces to fill between ads.'[44]
Furio Colombo
Editor, *L'Unit*

Subsequently, Murdoch switched his support to New Labour — and found the UK's 2002 Communications Bill turned out to suit his interests (suspiciously) well. Bruce Page in *The Murdoch Archipelago* talks of a government head of department explaining why the recommendations of an independent committee on digital television had been ignored: 'The requirements of Downing Street were perfectly clear. Nothing was to be done which might upset Murdoch and his friends.' [50]

'Berlusconismo'

Close relationships between media and government have reached new heights in Italy, where the term *Berlusconismo* has entered the vocabulary. Prime Minister Silvio Berlusconi owns Italy's three main private television channels and its largest publishing house, raising issues about conflicts of interest.

In 2003, for example, the state television company RAI banned a satirical item on Berlusconi following pressure from the Prime Minister. Opposition politicians denounced the move as censorship. More recently, in May 2004, the chairwoman of RAI resigned, citing the 'illegal conditions' under which the board was forced to operate, given Berlusconi's dominant influence. [51] Furio Colombo, editor of *L'Unit*, has argued that RAI's subservience to Berlusconi effectively gives him 90 per cent control of Italian television: '[Berlusconi] controls information so that people think what he wants them to think. Mussolini used tanks, Berlusconi uses his control of the media.' [52]

Resolving such issues is largely a political challenge. But whoever owns a given M&E company, increasing transparency is one key way of ensuring that it is more accountable to stakeholders. As a minimum, such companies should ensure they can demonstrate that the selection and development of key services or products are free from hidden influence. In this regard, transparency would include:
— outlining policies and safeguards for editorial independence;
— providing information on any political orientation;
— declaring sources of funding, biggest advertisers, sponsors and production subsidies;
— communicating information on the company's policies (editorial, code of conduct, ethics, advertising) and on the degree of compliance;
— ensuring that advertisements are clearly identified;
— instituting procedures for complaints and imposing penalties for misleading reporting; and
— making public any lobbying activities, direct and indirect.

That said, holding M&E companies accountable for their wider influence is far from straightforward. Professor Claude-Jean Bertrand of the French Institute of the Press is an advocate of accountability as an essential way of developing the trust that is necessary if the media are to perform their proper function in democratic societies.

He lists 60 'media accountability systems' that provide means for journalists to listen to the public and improve services. Among the examples:
— the use of websites to teach the public how to evaluate the media (e.g. www.gradethenews.org);
— media reporters assigned to keep watch on the industry and give the public full, unprejudiced reports (e.g. David Shaw of *The Los Angeles Times*);
— watchdog agencies set up by media-related industry to filter contents and provide ethical guidelines (e.g. Bureau de Vérification de la Publicité in France); and
— ombudsmen or readers' editors (now common appointments by the UK broadsheets).

But how far should M&E companies go? The authors of *Environmental Change: Communicating the Issues* [53] note that the requirement for the media to adhere to due impartiality 'means the freedom to be impartial about matters of politics or culture within a socially agreed framework'. But the authors also stress that 'a broad-caster is not expected to be impartial about theft or murder, for instance. Being neutral on sustainable development is not exercising due impartiality, it only legitimises an indefensible view way outside the international consensus'. (See panel 4.3)

'I owe a lot to my early years in the advertising world. I just wish we could have put all that energy and imagination into something better than flogging cars and fags.'
Lord Puttnam

4.3 Impartiality and the Media

The BBC's charter requires the corporation to cover 'even-handedly those issues that are generally accepted as being legitimate areas of public debate'.[54] The authors of *Environmental Change: Communicating the Issues* offer wider recommendations for how M&E companies should tackle environmental and other corporate responsibility issues. Among other things, they suggest that companies:
— cover environmental issues across a range of programming, from news to current affairs to entertainment and campaigns;
— find ways of representing complex environmental problems in an accessible, relevant and interesting manner;
— cover global as well as national and local environmental agendas;
— give a balanced view of scientific research;
— examine the economic and political aspects of environmental problems; and
— support the effective regulation of advertising.

Governance

There was little consensus among our interviewees concerning the role corporate governance should play in addressing such issues. For some, editorial independence was sacrosanct. 'The board does not and should not have much control — it's the editors who have control and they should not be influenced,' argued Robin Esser of the UK's *Daily Mail.* Michael Grade (at the time of our discussion a member of the board of governors at the BBC and now appointed chairman) was equally adamant: 'It should not come from the board. This is a 'hearts and minds' business — you need the editors and producers.'

While this is understandable, experience elsewhere suggests that corporate responsibility programmes do not work without high-level support from the CEO and the board. M&E companies may claim 'special status', but they also operate within a social framework. Corporate governance plays a key role in aligning corporate practices with the relevant norms and values.

Various interviewees stressed the constraints imposed by current M&E sector business models. So, for example, Oliver Karius of Zurich-based Sustainable Asset Management notes that companies in this highly competitive sector find it very hard to break out of the 'ratings loop'. If they fail to supply what the audience wants, their ratings go down, triggering potential negative feedback such as reduced advertising revenues.

That said, actions M&E companies can take on their governance include:
— setting up a board-level committee with responsibility for dealing with corporate responsibility issues, including commercial and political independence;
— in parallel, setting up independent advisory groups, with participation from NGOs, audience representatives, the financial community and other stakeholder groups to reinforce such committees;
— articulating the company's core values and putting in place systems that embed these values;
— using external standards of corporate governance to establish best practices (e.g. Higgs Code of Corporate Governance in the UK); and
— declaring the interests of board members, including the nature and extent of interests in other media companies and other market sectors.

The problem often isn't so much that these guidelines and policies don't exist, but that where they do, they are not adequately implemented. According to Steve Rendall, a senior analyst at FAIR,[55] 'in the media industry today you have what companies say about how they behave, how they actually do behave, and how they should behave. The three are entirely different.'

Responsible companies need clear policies, but they also need to report publicly on how they are implemented. Indeed, the sector could take a leaf out of the books of companies such as Johnson & Johnson and Unilever, who have learned to report not just on their values and governance systems, but also on their implementation — and on the impact that these policies have. To give some sense of practical next steps, Chapter 5 builds on current best practice to sketch out a 'manifesto' for M&E companies.

'In the media industry today you have what companies say about how they behave, how they actually do behave, and how they should behave. The three are entirely different.'
Steve Rendall
FAIR

5 The Media Manifesto

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Other sectors of business and industry have found themselves forced to face tougher transparency and accountability demands than the media. This is the risk for the M&E sector, in several senses. True, the societal changes facing these sectors are rated by the World Economic Forum (Figure 2.4) as less urgent than problems such as internationalisation and evolving digital business models, but the level of potential risk is seen to be relatively high and industry preparedness to respond relatively low.

So what should M&E companies do? To encourage discussion, we offer our 'Media Manifesto' (See panel overleaf). The key point is that these sectors currently lag behind many others, not simply because they have less of a direct impact but also because they have been slow to pick up on the importance of their profound indirect impacts.

This is clearly the start of an urgent and important journey for the sector. The route and final destination may still be unclear, but what is guaranteed is that we have very little chance of successfully addressing the major social and environmental issues that confront our planet without the wholehearted and enthusiastic commitment of the M&E sector.

Media Manifesto

For corporate responsibility programmes to engage and work effectively, they need to be aligned and integrated with existing corporate cultures. But to help drive the necessary changes, they must also be long-sighted and creative. Each M&E company or organisation will have its own particular ways of addressing the issues discussed in *Through the Looking Glass* — and will need to define what corporate responsibility means for them and their operations. But some clues have emerged in terms of evolving good practices. Our 'Media Manifesto' contains some key points and questions to facilitate the discussion on what corporate responsibility means for the sector.

5.1 Media Manifesto	**1** Spotlight Impacts	**2** Retune Priorities	**3** Broadcast, Narrowcast
Key Points	Too often, as we have seen, M&E companies think of direct impacts — particularly positive direct impacts — and imagine that the challenge can be adequately addressed with a few recycling schemes and public service announcements. No-one would argue that the sort of special spots that **MTV** has done on HIV/AIDS, for example, should be dropped, but such philanthropy should not blind us to the over-whelming importance of the indirect impact of the M&E companies.	Many M&E companies, perhaps most, have adopted statements of their ethical and/or business principles. **Vivendi Universal** is committed to 'living' its values. To ensure these values are more than just words, it publishes *Programme de Vigilance* which sets out rules of conduct for living its values. **Gannett** (The US's largest newspaper group) has guidelines for the ethical conduct of newsrooms and procedures in place to monitor compliance. However, such statements can lack traction unless constantly reinforced and, even if they have traction, they may be overtaken by events.	A central key benefit provided by the media is transparency in the worlds of government, business and civil society. To play that role credibly and to the best effect, M&E companies themselves need to be transparent. Think of **CBS**, which was criticised when its *60 Minutes* current affairs programme promoted a book published by Simon & Schuster, owned by CBS owner Viacom. As a result, CBS has decided to inform viewers of any potential conflicts of interest. Sometimes such information can be broadcast, but increasingly best practice sees M&E companies narrowcasting, often on digital channels, to particular stakeholder groups.
Questions for the Media	What are the significant indirect impacts of our content in terms of the full spectrum of corporate responsibility issues? How can we measure and manage them better? Where is best practice emerging in the M&E sector and elsewhere?	Do we have an up-to-date set of ethical business principles? Are they endorsed by the board? Are they aligned with the emerging CR agenda? How are staff encouraged to apply these principles in their work? Where is best practice emerging?	Given the priority issues identified under 1 and 2, above, where do we need to be most open and accountable? How do we currently perform? Where does CR reporting fit in? Where is best practice emerging?

4
Engage Audiences and other Stakeholders

5
Communicate Internally

6
Reality Check

7
If the System's Broke, Help Fix It

Transparency can be passive and it can be active. The best companies seek to engage their stakeholders, not just their customers, in active debate about the challenges and desired responses. The Guardian newspaper, for example, surveys readers to assess the relevance of its coverage.

During coverage of environ-mental issues, **Radio TV Hong Kong** provides information on what people can do to drive change [56] — and the evidence suggests that there is an appetite among young people for such information.

A study by ad agency **McCann-Erikson** found that while their initial awareness may be low, young people are interested in sustainable development, and believe that the media should be more proactive in prompting people to act on major issues. [57]

Companies and other organisations are like chains — they are as strong as their weakest link. Given the effect of slip-ups in the global media world, even on the M&E companies that have helped create it, internal communication, education, training and incentives are increasingly important. Corporate responsibility and sustainable development content will increasingly be needed in journalism and editorial courses.

Gannett, the largest US newspaper group, has an online news department providing guidance on where to find information and expert advice on environmental issues. And **BSkyB** produces an internal tabloid newspaper (backed up with intranet pages and e-mails) to communicate its CR priorities and performance to employees.

The M&E industry prides itself on offering us an escape from reality, but reality is still out there. The opportunity to offer successful content addressing issues spotlighted in *Through the Looking Glass* will grow.

Success is not guaranteed, but relevant content is breaking out of the graveyard slots. Target the right audience: if there is a prime-time show that advocates the purchase of a gas-guzzling car then a program about car choice and climate change should also get a prime-time slot.

Experiment: if DIY and archae-ology can be made entertaining, so can sustainable development. Brazil's **TV Globo** covers environmental issues in soap operas, making the issues relevant to people's lives. On climate change, **Discovery Communications** offers *The Great Warming*, and **Twentieth Century Fox** *The Day After Tomorrow*. [58] Other relevant box office hits have included *Erin Brokovich* and *The Insider*. But consider what can be done to make the connections to action for viewers.

Be upbeat: When such coverage is included, provide feedback on progress. As **Futerra** puts it: 'Help us feel good about the things we already do. Pat us on the back. Tell us how things we have already done have made a difference.'

As new issues emerge, public policy regulating the M&E sector must evolve. Take a proactive stance on key issues, helping to develop self-regulatory initiatives where appropriate. Be transparent about such initiatives and about wider lobbying activities. [59] Wherever possible, work with civil society organisations to ensure that public policy proposals win broad support.

In the UK, for example, the **Broadcasters' Disability Network** is an initiative that addresses disability as it relates to the media industry. This is not simply a matter of caring for the disabled, but also of achieving a more accurate representation of people with disabilities in the media.

The UK **Media CSR Forum** has identified what it sees are the key corporate respon-sibility issues for the sector. Individual businesses now have to set the issues in context, identify which are material to their business and develop meaningful indicators against which performance can be measured in the future.

With which stakeholders do we currently engage effectively? Which should we invest more effort in? How might this be done? Where is best practice emerging?

Do we know where the weakest links are likely to be? Do our employees understand the agenda — and the implications? Do key courses cover both risks and opportunities? Where is best practice emerging?

Where is the dramatic interest in emerging CR and SD issues? How does current and planned programming measure up? Where is best practice emerging?
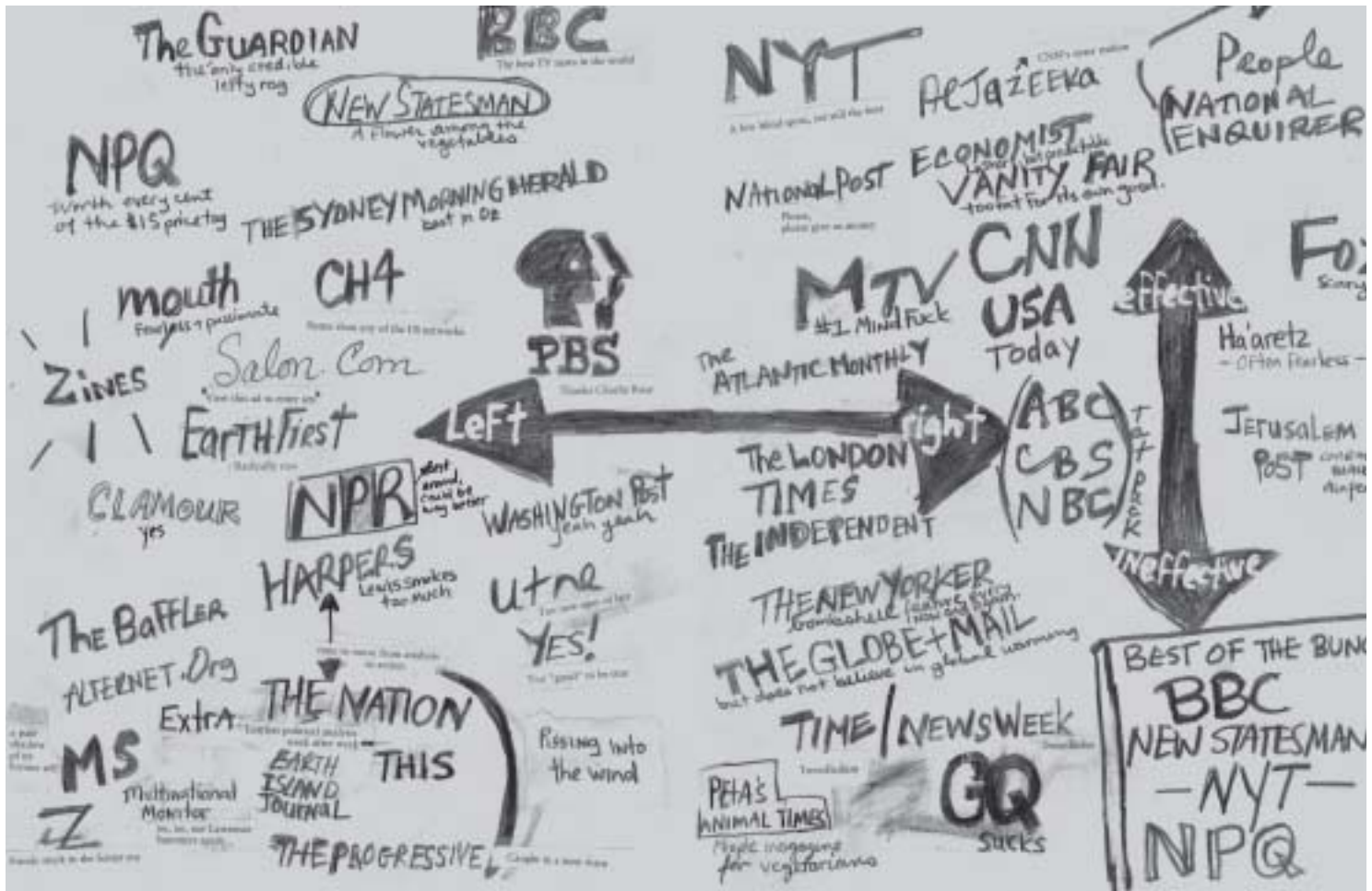
Do our public policy people understand the new agenda? Are they proactively engaging policymakers in helpful ways? What great ideas are not quite making the grade — and how can we give them a following wind? Where is best practice emerging?

Source: Adbusters, Journal of the Mental Environment, March/April 2004. No.52

Centres of Excellence

Adbusters
Canada
www.adbusters.org
A global network of artists, activists, writers, pranksters, students, educators and entrepreneurs who want to advance the new social activist movement of the information age.

Campaign for Press and Broadcasting Freedom
UK
www.cpbf.org.uk
Campaign for a media which is more accountable to the people it is meant to serve; the break-up of media concentration to promote greater media diversity rights of citizens to redress unfair coverage; and the rights of journalists to report freely.

European Institute for the Media
Europe
www.eim.org
Think-tank for research and strategy concerning developments in European media and communications.

Fairness and Accuracy in Reporting
US
www.fair.org
A national media watch group that offers well-documented criticism of media bias and censorship.

The Media Channel
US
www.mediachannel.org
A non-profit, public interest website dedicated to global media issues. It encourages diverse perspectives and aims to inspire debate, collaboration and citizen engagement and action.

Media Smart
UK
www.mediasmart.org.uk
A media literacy programme, initially focused on advertising, the objective is to provide children with the tools to help them understand and interpret advertising. Funded by a number of corporate sponsors.

Media Tenor
Germany
www.mediatenor.com
Founded by journalists to provide an objective resource for information on media content trends.

Reporters sans Frontières
France
www.rsf.org
Works to improve press freedom worldwide, by defending journalists and other media professionals who have been imprisoned or persecuted for doing their work, fighting to reduce the use of censorship, and keeping the public opinion and media informed.

Tocsin
France
www.tocsin.net
French-speaking media watchdog that aims to explain to the public and professionals the issues at stake in media coverage, traditional and electronic.

The Television Trust for the Environment
UK
www.tve.org
An independent production and distribution non-profit company, specialising in environment, development, health and human rights issues. All its films for broadcast are made on a strictly editorially-independent basis.

Endnotes

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www.uksif.org

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29 Although reporting is not a proxy for performance, understanding how companies define and address their responsibilities can be a vital tool to help hold them to account. At the same time, the very process of reporting can aid companies in clarifying their CR ambitions and in measuring and embedding CR within their organisations.

30 We confined our analysis of corporate reporting to Europe and the US mainly because of a lack of resources, but also because most of the major media and entertainment conglomerates are based in these two regions. Many examples are from the UK, which has emerged as a hot-spot for CR activity in this sector. Nevertheless, we acknowledge this as a flaw and encourage others to help fill the gaps.

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diversity; ensuring that the use of renew-
able natural resources is sustainable;
and promoting the reduction of pollution
and wasteful consumption.

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