

In Confidence

Office of Te Minita Whanaketanga Māori
Chair, Cabinet Economic Development Committee

Te Ao Pāpāho – Māori Media Sector Shift: Current state of the sector

Proposal

1. This paper attaches an overview paper on the current state of the Māori media sector, including the challenges it faces and the nature of the shift required to best serve audiences with te reo Māori and tikanga Māori content in a digital environment with changing consumer expectations. With Cabinet's agreement, I will publish the current state overview on the Te Puni Kōkiri website.
2. This paper also proposes some design principles to inform a subsequent report in the second quarter of 2019. That report will provide broad options for shifting the Māori media sector to maintain and enhance its effectiveness in the future, and for enabling greater alignment with the wider public broadcasting sector.

Executive Summary

3. Media organisations across the world face challenges as to their readiness and agility to respond to emerging technologies, the impact of new players on the media scene and rapidly changing audience habits. Government-funded media agencies need modern operating frameworks that allow them to adapt to change.
4. I am therefore undertaking the Māori Media Sector Shift to identify the most effective and efficient way of funding and producing te reo and tikanga Māori content. This requires structuring the Māori media sector to deliver these intentions and connect with domestic and international audiences. This is vital to achieving the goals set out in the Maihi Karauna – the Crown's strategy for the revitalisation of te reo Māori, which calls for a heightened impact from broadcast and online content.
5. The Māori media sector has achieved a number of successes throughout its history. It has provided a quantity of Māori language programming that was not previously available before the existence of institutions such as Te Māngai Pāho, Māori Television and Iwi radio. It has, for example, reached out to New Zealanders through Māori Television's ANZAC day coverage. It has enthused younger te reo Māori speakers with the translation of Moana into te reo Māori. It has funded programming and music that has highlighted te reo Māori and tikanga Māori that has achieved national and international exposure.
6. However, there are also numerous challenges and gaps in the Māori media sector. We need to question whether our platform-specific legislation and policy is still appropriate in the digital age. At present there is a view within the sector that the operations of different organisations are siloed, that the content produced within the

sector is low budget and that it plays to a relatively low audience share. We have been told by the Māori media sector and broader public media sector that there is relatively little investment happening in talent development, including in technical skills and journalism. This is a significant strategic challenge that must be considered.

7. We need to enable the sector to produce compelling te reo Māori and tikanga Māori content. This links with our government's priority to value who we are as a country, which includes telling our stories and reinforcing our core values as a nation – such as aroha, manaakitanga and kaitiakitanga.
8. I am seeking through this work to shift the Māori media sector to being centred on the needs of audiences, collaborative and agile in the digital age. I also want to use this opportunity to nurture a creative and capable workforce. To achieve this, the sector will need to be well resourced and able to use those resources efficiently.
9. I will work closely with the Minister of Broadcasting, Communication and Digital Media to align the Māori Media Sector Shift with the work of the Ministerial Advisory Group on Public Media and any proposals that may emerge from that work. The Māori Media Sector Shift will also be closely coordinated with the review of the Copyright Act 1994 and the work of the National Archival and Library Institutions (NALI) Ministerial Group.

Background

Scope

10. On 8 October 2018, Cabinet noted that I am undertaking work to explore the most effective and efficient way of funding and producing te reo and tikanga Māori content, and structuring the Māori media sector, to achieve the best outcomes (CAB-18-MIN-0479).
11. The scope of this work will be to assess and provide possible options on:
 - 11.1. the funding of te reo and tikanga Māori programming/content, including quantum and distribution
 - 11.2. the delivery of te reo and tikanga Māori programming/content, including platforms and independent production
 - 11.3. the rights, retention and access to te reo and tikanga Māori programming/content, including intellectual property and archiving
 - 11.4. governance structures and mechanisms which enable collaboration and innovation, including the development of workforce capability.
12. For the purposes of this paper, the Māori media sector agencies are the organisations funded by government with the primary purpose of promoting te reo Māori and Māori culture:
 - 12.1. Te Māngai Pāho, a Crown entity that disburses funds to promote Māori language and culture through television, radio, music and new media

- 12.2. The Māori Television Service, a statutory entity that provides a television service in te reo Māori and English in order to promote te reo Māori me ngā tikanga Māori and enrich New Zealand society
- 12.3. Twenty-one Crown-funded iwi radio stations, of which 20 are represented by the national representative body, Te Whakaruruhau o Ngā Reo Irirangi Māori.
13. A healthy independent production industry is also vital to the health of the Māori media sector. There are numerous privately owned and operated production companies with a strong interest in kaupapa Māori. These receive public funding from Te Māngai Pāho, NZ On Air and the New Zealand Film Commission.
14. *Te Ao Pāpāho ki Tua | Māori Media Sector Shift – An overview of the current state of the sector as at 29 March 2019* includes more detailed commentary about the function of each organisation. Its findings are attached at Attachment One. The full overview paper can be found at Attachment Two.

Rationale

15. Media organisations worldwide face the need to adapt to major change in the shape of new technologies, shifting audience behaviours and changing business models. The Māori media sector is no exception and has to respond with agility to these changes.
16. Much of the legislation and some of the key policy decisions that govern the Māori media sector date to an era that pre-dated the explosion in online content and on-demand/subscription video services. They assume the continued pre-eminence of linear platforms. There have been some amendments to legislation to address this, and the agencies in the sector are working hard to adapt. However, I consider that if we were to re-design the Māori media sector for the present and future eras, it would not look the way it does now.
17. ‘Linear’ or traditional broadcast television – and to a lesser extent, radio – still have significant audiences, but these are in decline, especially amongst younger audiences, who prefer media content that can be accessed on any device at a time and place of their choosing. As audiences for linear platforms decline, so do the advertising revenues that can be raised from them.
18. In this changing environment we need to ask how Māori media can reach out and appeal to larger audiences. The daily reach of Māori Television among Māori audiences is 10 per cent, compared with 43 per cent for YouTube and Facebook Video, and 42 per cent for TVNZ 1. Relatively small, localised audiences use iwi radio.
19. Productions funded by Te Māngai Pāho have on average much lower budgets than public media productions funded by NZ On Air. There are several factors that contribute to this, which are outlined in Attachment Two. A common view within the sector is that funding levels are insufficient to create the type of engaging content that will draw in larger audiences. It should also be asked how the sector can act more efficiently and can collaborate for greater scale, including with its partners in the broader public media sector.

The role of the Māori media sector in implementing the Maihi Karauna strategy

20. Cabinet recently approved the publication of the Maihi Karauna – the Crown’s strategy for the revitalisation of te reo Māori [CAB-18-MIN-0643 refers]. The Māori media sector, as well as the broader range of public media agencies, play strong roles in advancing the strategy. It sets three audacious goals for 2040:
 - 20.1. Audacious Goal 1: Eighty-five per cent of New Zealanders (or more) will value te reo Māori as a key part of national identity
 - 20.2. Audacious Goal 2: One million New Zealanders (or more) will have the ability and confidence to talk about at least basic things in te reo Māori
 - 20.3. Audacious Goal 3: One hundred and fifty thousand Māori aged 15 and over will use te reo Māori as much as English.
21. Media content can help to normalise te reo Māori, elevating its status and demonstrating its use. It can support language learning within whānau and in educational settings. It can contribute to the achievement of the three audacious goals in the strategy, particularly Audacious Goal 1. The broader public media sector has an important role in contributing to this, and to this Government’s priority of enhancing our national identity.
22. The Māori media sector needs to contribute strongly to the priority actions set out in the Maihi Karauna, which include:
 - 22.1. More people engaging with quality broadcast and online content in te reo Māori
 - 22.2. More New Zealanders valuing te reo Māori as part of our national identity
 - 22.3. More young people excited about te reo Māori.

Māori media sector within the wider ecosystem

Partnership with iwi and Māori

23. Te Ture mō Te Reo Māori 2016 recognised that the Crown and iwi and Māori have distinct, complementary roles in the revitalisation of te reo Māori. Under this legislation, the Crown has recently issued its Maihi Karauna strategy for te reo Māori revitalisation, which sets the strategic context for Crown policy that affects te reo Māori, including the Māori Media Sector Shift.
24. Under this legislation, iwi and Māori are represented by the statutory entity Te Mātāwai, which is a key stakeholder and partner in the development of future options.

Relationship with public media sector

25. While outside the scope of the overview paper, the broader public media sector includes several agencies with mandates to promote te reo Māori, Māori culture and New Zealand stories.

- 25.1. Radio New Zealand is a public service broadcaster that must give effect to its charter, including a requirement to provide services that reflect New Zealand's cultural identity, including Māori language and culture.¹
 - 25.2. New Zealand On Air has as one of its functions the promotion of Māori language and Māori culture.²
 - 25.3. Television New Zealand has a commercial mandate while requiring it to reflect Māori perspectives in its content.
 - 25.4. The New Zealand Film Commission is a Crown entity that provides financial support for the production and exhibition of film, television and other screen productions with significant New Zealand content.
26. Radio New Zealand and NZ On Air both receive public funding and have some overlapping functions with the Māori media sector. In my view, there should be more collaboration in the deployment of resources and a much clearer understanding of each agency's role in achieving impact that contributes to the shared objectives. I will need to work with the Minister of Broadcasting, Communications and Digital Media and the Minister of Finance, who is a shareholding Minister in TVNZ, to coordinate action on this.

Key points about the current state

Environment

27. New Zealand is a relatively small market with a deregulated and highly commercial media environment. Organisations with public interest functions, including Māori media organisations, face a constant tension between serving the public interest while remaining competitive within this environment.
28. The rapid development of technology will continue, including in areas such as artificial intelligence, virtual reality and augmented reality. Flexibility to adapt to these technologies will be an important factor in designing options for the future of the Māori media sector.
29. Te Puni Kōkiri has undertaken a series of stakeholder engagements over February and March 2019. Rangatahi and Kaumātua focus groups have told Te Puni Kōkiri that they are interested in hearing and seeing Māori stories at a local, regional and national level. A full summary of Te Puni Kōkiri's engagement approach is included at Attachment Three.
30. The Maihi Karauna strategy emphasises the role of media in promoting te reo Māori as part of 'Aotearoa', or an enhanced sense of national identity. There is a growing interest in telling Māori stories as part of Aotearoa New Zealand's national identity and our brand overseas.

¹ Section 8 (5) (g) Radio New Zealand Act 1995.

² Section 36 (1) (a) (ii) Broadcasting Act 1989.

Structure and governance

31. The roles of each agency across the public media sector in the revitalisation of te reo Māori and tikanga Māori are in need of clarification. This includes the roles of broader public media institutions relative to Māori media institutions in implementing the Maihi Karauna.
32. There is untapped opportunity for the sharing of resources across the broader public media sector. These resources include staff development opportunities, possible joint use of equipment and facilities, and the joint use of archived material. People within the sector strongly believe that there is a need for a strategy, backed by sufficient funding, for workforce training and talent development, including in technical skills and journalism.
33. While there is no coordinated strategy for talent development across the sector, there are some examples of particular workforce initiatives. For example, at least one iwi radio station is developing a partnership with its local tertiary education provider to develop a young workforce. Radio New Zealand also runs a Māori internship programme.
34. Iwi radio faces a set of unique issues. Twenty-one Crown-funded stations broadcast a mix of music and local content, connecting local communities and promoting te reo Māori. Amongst all commercial stations, the 'Māori Radio Network' has an approximately one per cent station share, though there are local variations to this.³
35. Iwi radio coverage extends to an estimated 80 per cent of Aotearoa New Zealand. Not every iwi has its own radio station, and there are still 27 iwi frequencies currently unallocated. The next stage of the Māori Media Sector Shift will need to include consideration as to whether the current network has sufficient scale, and whether it is supported and configured in the best way.

Funding

36. Parts of the sector indicated that they are struggling to resource their current operations, and this may impact on the quality of content produced. Each iwi radio station receives \$500K in annual funding, from which it pays for premises, staff and a station manager.
37. I want to ensure that the sector is funded securely to support it in serving its audiences with high quality and engaging content. As the Māori Media Sector Shift moves forward, this will include looking for efficiencies within the system. The Terms of Reference agreed by Cabinet also allows us to look at the overall quantum of funding, if better models for the future state of the sector justify it.

Platforms

38. Platforms are now less important to audiences than having easy access to engaging content. Rangatahi in particular want to access content on non-linear (internet-based) platforms, at times and places of their choosing.

³ Radio Broadcasters Association (2018), Commercial Radio Survey 4.

39. Current legislation and policy have their origins in an era of linear platforms – television and radio. There have been numerous tweaks to these to provide for media organisations to engage with non-linear services. For example, the Māori Television Service was established primarily to provide a television service, but can now also use a variety of platforms to achieve this. Some tidying up of our legislative framework remains a possible means for modernising the sector.

Content

40. In its engagements with rangatahi and kaumātua, Te Puni Kōkiri consistently heard that Māori audiences want to see and hear their own stories. They want more engaging local, regional and national-level content. They would like content that caters for people at a variety of proficiency levels in te reo Māori.
41. There have been numerous overseas examples of highly engaging non-English language content that has been successful enough to cross over into mainstream. Some of this content, such as Welsh language programming, was developed as part of a strategy to show more language content on television. As noted above, our system appears to incentivise the development of low-budget content and allows little room for risk-taking.
42. I want to explore the potential for more international exposure for Māori programming. This includes the active brokering of partnerships with indigenous broadcast networks across the world, where there is mutual advantage.

Rights, retention and access

43. Archival content is currently stored in a variety of places, including in the vaults of the media organisations themselves. Some has been passed to the custodianship of Ngā Taonga Sound & Vision.
44. Māori media organisations and producers find it difficult to access and repurpose archival content, which is also likely to be of interest to audiences. Whānau members can also find it difficult to access footage and images of tupuna and family members for appropriate usage in whānau story-telling.
45. While Māori want to share their stories with the world, this is balanced with a concern to protect the integrity and appropriate use of archival material. This was demonstrated in the recent concern from some Māori over Television New Zealand's partnership deal with Getty Images for the licencing and distribution of video clips.
46. In addressing these issues, officials will need to coordinate the Māori Media Sector Shift with other inextricably linked work programmes. These include the review of the Copyright Act 1994 and the work of the National Archival and Library Institutions (NALI) Ministerial Group to develop policy for the contribution of New Zealand's national archival and library institutions⁴ to democratic and cultural infrastructure. The NALI work programme includes investigating options for kaitiakitanga with iwi and

⁴ The institutions within scope of NALI include Archives New Zealand, the National Library and Ngā Taonga Sound & Vision

Māori for taonga Māori and mātauranga Māori, in accordance with the Treaty of Waitangi, that enables access.

Uniting purpose of the Māori media sector

47. An analysis of the key functions of Māori media organisations, and several organisations in the broader public media, shows that the common thread is the promotion of te reo Māori and Māori culture.
48. As part of the next stage of developing high-level options for the future design of the sector, I want to consider whether this purpose should be broadened to include the telling of Māori stories. One of the initial findings from the Te Puni Kōkiri engagement with rangatahi and kaumātua across the country was the desire of Māori to see and hear their own stories. The Maihi Karauna strategy emphasises the role that Māori media can play in promoting Aotearoa – an enhanced sense of national identity that is based on te reo Māori and Māori culture.

The future state

49. The Māori media sector originated as a response to litigation brought by the New Zealand Māori Council in 1994. The litigation alleged that the Crown had failed to inform itself of the extent of its duty to protect te reo Māori. The High Court partially agreed. Te Māngai Pāho, and subsequently the Māori Television Service, were created to promote te reo Māori and Māori culture.
50. I consider that we need to agree clear statements of where the Māori media sector is headed. This has two elements – what we want the Māori media sector to look like in the future, and what difference we want it to make. These proposed statements are based on engagement with the Māori media sector, engagement with rangatahi and kaumātua, and officials' analysis of the current state of the Māori media sector.
51. In future, we want the Māori media sector to be:

A collaborative Māori media community that promotes the normalisation of te reo Māori, promotes kaupapa Māori, and tells Māori stories to enhance Aotearoa New Zealand's national identity.
52. Once this has been achieved we would expect to see the following outcomes:
 - 52.1. Te reo Māori has status as a means of everyday mass communication.
 - 52.2. Larger and broader audiences engage with Māori perspectives, stories, music and experiences.
 - 52.3. Māori media connects people regionally, nationally and internationally.
53. In order to guide the development and selection of high-level options for the future of the sector, I consider that we need to set out a number of design principles. These will underpin the high-level options that I will put before Cabinet in the second quarter of 2019.

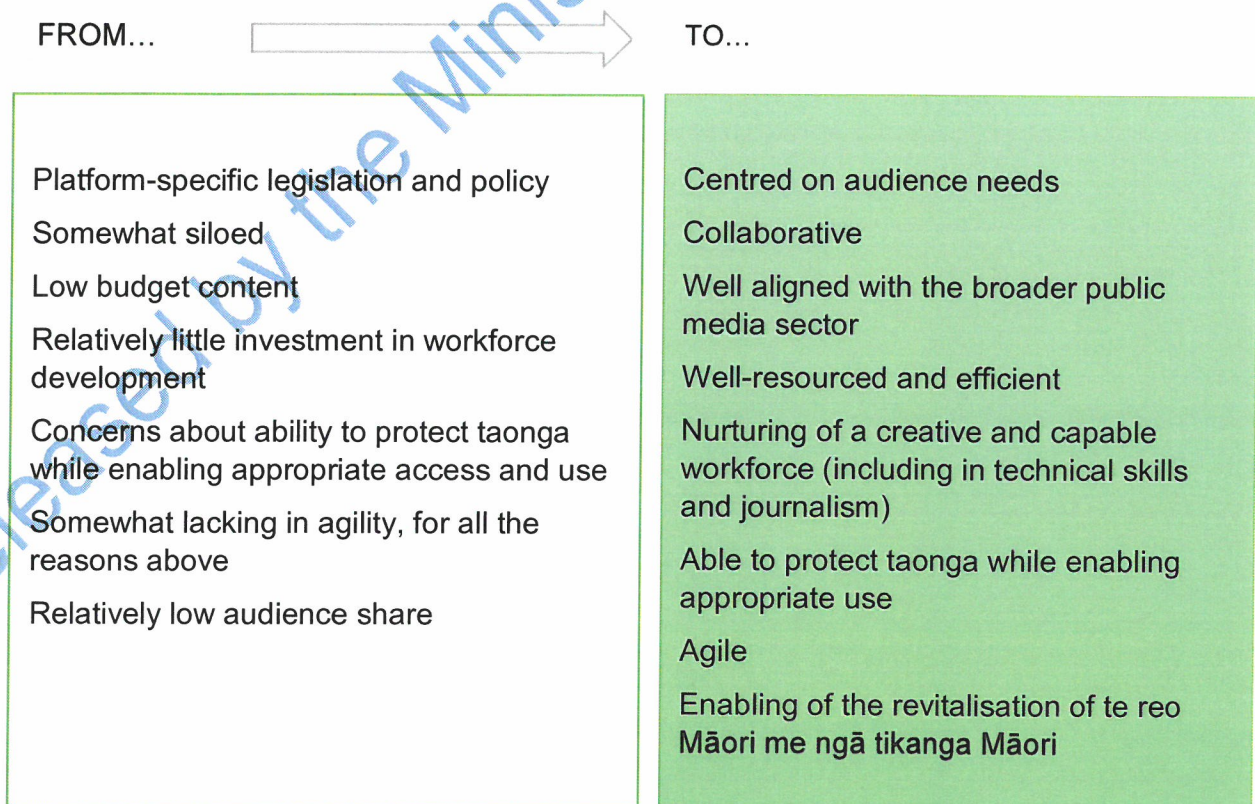
Design principles

- 54. I seek Cabinet's agreement to a set of design principles that will inform the development and assessment of high-level options that I intend to put to Cabinet in the second quarter of 2019.
- 55. These principles are that the Māori media sector should be:
 - 55.1. Centred on audience needs
 - 55.2. Enabling of the revitalisation of te reo Māori me ngā tikanga Māori
 - 55.3. Collaborative
 - 55.4. Agile
 - 55.5. Nurturing of a creative and capable workforce
 - 55.6. Able to protect taonga while enabling appropriate use
 - 55.7. Well aligned with the broader public media sector
 - 55.8. Well resourced and efficient.

The nature of the shift required

- 56. The nature of the shift we are seeking to achieve can therefore be summed up in the following graphic.

Figure 1 – The nature of the shift required



Links to other work streams

57. The Minister of Broadcasting, Communications and Digital Media's Ministerial Advisory Group on Public Media has been looking into the capacity for more effective sharing of resources and collaboration between public media agencies, and the long term relationship between public broadcasters [CAB-18-MIN-0516]. The Minister and I will work together on the aspects of the Advisory Group's advice that relate to the Māori media sector.
58. Officials will continue to work together and support relevant Ministers in coordinating a number of related work streams, including:
 - 58.1. The planned development of a ten year strategy for the screen sector, which is being led by industry with support from government.
 - 58.2. The impending auction of 5G spectrum, which is vital to the positioning of the Māori media sector to be equipped for the opportunities afforded by increasingly advanced media platforms.
 - 58.3. The Vocational Educational Reform work, which may provide opportunities to build capability with the Māori media workforce.
 - 58.4. The review of the Copyright Act 1994, including issues relating to Wai 262 and the protection of mātauranga Māori.
 - 58.5. The work of the NALI Ministerial Group in strengthening the contribution of the national archival and library institutions to the culture and heritage sector, and their contribution to open and transparent government.

Next steps

59. I propose to provide Cabinet with a report on high-level options for the future of the Māori media sector. This will be informed by further engagement by officials across the Māori media sector and the wider public media sector. Te Puni Kōkiri will establish an advisory group to provide support and strategic oversight on matters directly relating to the Māori Media Sector Shift.

Consultation

60. The following agencies have been consulted on this paper: Te Māngai Pāho, the Māori Television Service, Te Taura Whiri i te Reo Māori, The Treasury, Ministry for Culture and Heritage, the Department of Internal Affairs, Te Arawhiti and the Ministry for Business, Innovation and Employment. The Department of the Prime Minister and Cabinet has been informed.
61. Officials' ongoing liaison and consultation with Te Mātāwai and Te Whakaruruhau o Ngā Reo Irirangi Māori has informed this paper.

Financial Implications

62. There are no direct financial implications arising from this paper, which is an assessment of the current state of the Māori media sector. Officials will need to assess financial implications for the detailed development of future options.

Legislative Implications

63. There are no proposals for legislative change in this paper. However, the detailed development of future options may involve such proposals, and this will require officials to undertake impact assessments.

Human Rights

64. This paper makes no proposals that are inconsistent with the New Zealand Bill of Rights Act 1990 and the Human Rights Act 1993.

Disability Perspective

65. The Maihi Karauna strategy provides direction for the future development of content and media platforms. It notes that 'broadcasting, digital and education initiatives will be relevant in engaging those with disabilities, and could link with community initiatives, such as the Māori Deaf community's development of Māori concepts in New Zealand Sign Language'.

Publicity

66. I intend to issue a short media statement when the Cabinet paper and the attached Te Ao Pāpāho ki Tua | Māori Media Sector Shift – An overview of the current state of the sector as at 29 March 2019 are released. I will also ensure there is supporting supplementary information for answering frequently asked questions, and will share this with other relevant Ministers.
67. Proactively releasing this Cabinet Paper and publishing the attached Te Ao Pāpāho ki Tua | Māori Media Sector Shift – An overview of the current state of the sector as at 29 March 2019 may prompt negative commentary from some in the sector about the level of funding it currently receives. However, that will be an issue for future Cabinet consideration of the future state of the sector. The overall intent is to shift the Māori media sector so that Māori broadcasting aspirations thrive in a digital environment, and to strategically position the sector to enable greater advantage for content creation and te reo Māori revitalisation.

Proactive Release

68. Subject to Cabinet approval, I intend to release this Cabinet paper and the attached Te Ao Pāpāho ki Tua | Māori Media Sector Shift – An overview of the current state of the sector as at 29 March 2019 on the Te Puni Kōkiri website within 30 days of Cabinet approval.

Recommendations

69. I recommend that Cabinet Economic Development Committee:
- 69.1. **agree** to the publication of the attached overview paper, Te Ao Pāpāho ki Tua | Māori Media Sector Shift – An overview of the current state of the sector as at 29 March 2019 and the attached summary of its findings
 - 69.2. **agree** that the guiding vision for the design of the Māori media sector should be a shift towards a collaborative Māori media community that promotes the normalisation of te reo Māori, promotes te ao Māori, and tells Māori stories
 - 69.3. **agree** that, by achieving the vision for the future of the Māori media sector, we would expect to see the following outcomes:
 - 69.3.1. Te reo Māori has status as a means of everyday mass communication
 - 69.3.2. Larger and broader audiences engage with Māori perspectives, stories, music and experiences
 - 69.3.3. Māori media connects people regionally, nationally and internationally
 - 69.4. **agree** that the proposed design principles that will inform the future state of the Māori media sector are that the sector should be:
 - 69.4.1. Centred on audience needs
 - 69.4.2. Enabling of the revitalisation of te reo Māori me ngā tikanga Māori
 - 69.4.3. Collaborative
 - 69.4.4. Agile
 - 69.4.5. Nurturing of a creative and capable workforce
 - 69.4.6. Able to protect taonga while enabling appropriate use
 - 69.4.7. Well aligned with the broader public media sector
 - 69.4.8. Well resourced and efficient
 - 69.5. **note** that the Minister for Māori Development and Minister of Broadcasting, Communications and Digital Media will continue to work closely to coordinate the Māori Media Sector Shift with the work of the Ministerial Advisory Group on Public Media
 - 69.6. **note** that the 'rights, retention and access' workstream of the Māori Media Sector Shift will need to align with the review of the Copyright Act 1994 and the work of the National Archival and Library Institutions (NALI) Ministerial Group

69.7. **invite** the Minister for Māori Development to report back in the second quarter of 2019 with high level options for the future of the Māori media sector.

Authorised for lodgement

Hon Nanaia Mahuta

Te Minita Whanaketanga Māori

Released by the Minister for Māori Development