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

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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

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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.

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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.

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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 'Aotearoatanga', 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.

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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.

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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 institutions[4] 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

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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 Aotearoatanga – 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.

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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

FROM...	TO...
Platform-specific legislation and policy Somewhat siloed Low budget content Relatively little investment in workforce development Concerns about ability to protect taonga while enabling appropriate access and use Somewhat lacking in agility, for all the reasons above Relatively low audience share	Centred on audience needs Collaborative Well aligned with the broader public media sector Well-resourced and efficient Nurturing of a creative and capable workforce (including in technical skills and journalism) Able to protect taonga while enabling appropriate use Agile Enabling of the revitalisation of te reo Māori me ngā tikanga Māori

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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.

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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.

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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

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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

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Attachment One: Summary of findings from Te Ao Pāpāho ki Tua | Māori Media Sector Shift – An overview of the current state of the sector as at 29 March 2019

The following are initial findings from the overview paper that will provide the foundation for developing the future state of the Māori media sector.

Environment

a. Technology, business models and audience habits have changed rapidly since the key institutions of the Māori media sector were established.

b. Currently, the key drivers for the Māori media sector are promoting te reo Māori and tikanga Māori. To a lesser extent, these goals are shared by the wider public media sector.

c. Māori media organisations face a challenge in delivering these public service-type roles while thriving within a highly deregulated and commercial New Zealand market.

d. There is a growing interest in telling Māori stories as part of Aotearoa New Zealand's national identity and our brand overseas.

Structure and governance

e. Leaders in the Māori media sector and key commentators recognise that there is an ongoing need to break down silos and work towards collaboration in making use of resources and talent.

f. There is untapped opportunity for sharing of resources across the broader public media sector, including Radio New Zealand and NZ On Air.

g. The roles of each agency across the public media sector in the promotion and revitalisation of te reo Māori and tikanga Māori need to be clarified.

h. There is no strategy for workforce and talent development that crosses the Māori media sector, or the broader public media sector.

Funding

i. Budgets for producing each hour of content are significantly lower in the Māori media sector than in the wider public media sector, resulting in the production of cheaper content.

j. Parts of the sector are struggling to resource their current operations, and this may impact on the quality of content produced.

k. Sixty per cent of Te Māngai Pāho funding is currently targeted towards content for fluent audiences, or about 14 per cent of the Māori population or 2 per cent of the total population. Te Māngai Pāho is presently reviewing its funding model.

l. There is currently little funding specifically targeted at workforce training and talent development, including in technical skills and journalism.

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Platforms

m. Linear television and radio services still have a large but declining share of the New Zealand market.

n. The Māori Television Service has a relatively small audience reach compared with other networks, while Iwi radio connects local communities and therefore tends to serve relatively small local audiences.

o. Because of its age, legislation reflects platform-specific provisions. The core operational function of the Māori Television Service is 'the provision… of a television service'.

p. News services are increasingly mutli-media, with many offering an online mix of print, audio and visual journalism.

q. Rangatahi in particular want to access content on non-linear (internet-based) platforms, at times and places of their choosing.

Content

r. Māori audiences want to see and hear their own stories.

s. Māori audiences also want more engaging content that caters for people at a variety of proficiency levels in te reo Māori.

t. The creation of some kinds of engaging content, such as drama, require higher budgets and more appetite for risk than is currently evident.

Rights and retention

u. 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.

v. Māori media organisations and producers find it difficult to access and repurpose archival content, which is also likely to be of interest to audiences.

w. The ownership and rights to use this material are often complex.

x. Māori have a desire to share their stories with the world, while still protecting ngā mātauranga tuku iho from exploitation.

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Te Puni Kōkiri
MINISTRY OF MĀORI DEVELOPMENT

Attachment Two: Te Ao Pāpāho ki Tua | Māori Media Sector Shift – An overview of the current state of the sector as at 29 March 2019

Introduction

Purpose

1. This paper provides an overview of the current state of the Māori media sector – and in particular the institutional arrangements for overseeing, funding, producing, and disseminating Māori media content. The paper will be one of the inputs into the development of policy for the future of the Māori media sector.

Background

2. World-wide, media organisations are being challenged 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. The bones of the legislation governing New Zealand broadcasting is 16 years old or more.

3. The Minister for Māori Development has therefore commissioned an assessment as to what extent the Māori media sector is positioned for the future. This assessment will inform the Government in assisting the sector to identify 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.

4. The scope of this work will be to assess and provide possible options on:

   a. the funding of te reo and tikanga Māori programming/content, including quantum and distribution

   b. the delivery of te reo and tikanga Māori programming/content, including platforms and independent production

   c. the rights, retention and access to te reo and tikanga Māori programming/content, including intellectual property and archiving

   d. governance structures and mechanisms which enable collaboration and innovation.

5. This paper on the current state of the sector was informed by a key document review, ongoing engagement with the sector and 24 focus groups with kaumātua and rangatahi around the country. A public survey and submissions process has recently closed. The 1,046 responses received are presently being analysed and will provide very useful additional information.

The Māori media sector – who's who, and what they do

6. For the purposes of this paper, the Māori media sector agencies are:

   - Te Māngai Pāho, a Crown entity that disburses funds to promote Māori language and culture through television, radio, music and new media.

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- The Māori Television Service, a statutory entity that provides a television service, including an online presence, in te reo Māori and English in order to promote te reo Māori me ngā tikanga Māori and enrich New Zealand society.
- Twenty-one Crown-funded Iwi radio stations, of which 20 are represented by the national representative body, Te Whakaruruhau o Ngā Reo Irirangi Māori.

7. Te Māngai Pāho and the Māori Television Service are both governed by boards. Legislation sets out the roles of Ministers and the statutory entity Te Mātāwai, which is discussed further below, in the appointment of the boards. Te Mātāwai has a number of leadership and oversight roles in the sector, which are discussed in paragraph 24.

Table 1: Governance arrangements of Māori media sector organisations

Organisation	Governance body	Appointment
Te Māngai Pāho	Board (5 members)	Appointed by Minister for Māori Development Three of the five must be from nominations by Te Mātāwai
Māori Television Service	Board of Directors (7 members)	Three appointed by Ministers (Māori Development and Finance) Four appointed by Te Mātāwai
Te Whakaruruhau o Ngā Reo Irirangi Māori	Executive	Appointed by Te Whakaruruhau o Ngā Reo Irirangi Māori according to its own processes

8. There are numerous other organisations and stakeholders that will be affected by the Māori Media Sector Shift. Appendix A illustrates who all the various players are, and the funding relationships between them.

The Māori media sector is a distinct sub-set of the broader public media sector

9. While outside the scope of this paper, the broader public media sector includes several agencies with mandates to promote te reo Māori, Māori culture and New Zealand stories. The key agencies and legislation are as follows.

   a. The Radio New Zealand Act 1995 established Radio New Zealand as 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]

   b. The Television New Zealand Act 2003 established the commercial mandate of TVNZ, while requiring it to reflect Māori perspectives in its content.[2]

   c. The Broadcasting Act 1989 established the New Zealand Broadcasting Commission, known as NZ On Air. One of its several functions is to promote Māori language and Māori culture.[3]

[1] Section 8 (5)(g) Radio New Zealand Act 1995.
[2] Section 12(2)(b) Television New Zealand Act 2003.
[3] Section 36(1)(a)(ii) Broadcasting Act 1989.

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Context

Origins of the Māori Media Sector

10. Iwi, hapū and whānau Māori for many years struggled to get the Crown to act upon its duty to protect te reo Māori, in accordance with the Treaty of Waitangi. Since the 1980s, the Crown has progressively supported initiatives such as kōhanga reo, kura kaupapa Māori, and the recognition of te reo Māori as an official language of Aotearoa New Zealand.

11. Māori have long recognised the importance of broadcasting in revitalising te reo Māori. Litigation brought by the New Zealand Māori Council in 1994 alleged that the Crown had failed to inform itself of the extent of its duty to protect te reo Māori in developing the Broadcasting Act 1989. The High Court partially agreed, noting that te reo Māori needed to be heard on television in prime time, and in a format relevant to youth.

12. For the last three decades, Māori broadcasting has been a key plank in government and Māori efforts to revitalise te reo Māori. In 1993, the Government accordingly amended the Broadcasting Act 1989 to establish Te Māngai Pāho, a funding agency separated out from the 'mainstream' funding agency, NZ On Air. The Māori Television Service followed in 2003. A timeline of key events can be found at Appendix B.

Disruptive influences: Emerging technologies

13. Broadcast media are often described as belonging to one of two platforms:

    - Linear is the 'traditional' model of broadcasting for television and radio where it is real-time broadcasted scheduled programmes over the air or through satellite/cable. Scheduled content is determined by the broadcaster and passively consumed by the viewer.

    - Non-linear media allow audiences to choose what content to watch at a time of their choosing. They are more amenable to the consumer's choices, are more interactive and are often reliant on internet. These include platforms such as on demand television, livestreaming, gaming, music, internet radio, social media (e.g. Facebook, Pinterest, Linked-in) and time-shifted broadcast television.

14. In the current environment, many providers now provide content through a mix of platforms. For example, some traditional 'linear' broadcasters also provide non-linear platforms, such as on-demand and interactive services.

15. More generally, digital convergence – the reduction in barriers between different forms of media – is also changing the landscape. While traditional newspapers are in decline, print media organisations are adapting by developing a multi-media online presence. In the United Kingdom, The Guardian newspaper commissioned an Oscar-nominated film, and one of its columnists wrote that:

    > *the nomination drives home the fact that what used to be considered quite separate media – print, broadcasting and film – are inseparably blended now on digital platforms that audiences can reach anywhere, anytime on handheld devices. With podcasts, the papers, in effect, are radio. They can offer*

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journalism in styles familiar from TV. The broadcasters provide news and commentaries in text and still images, like newspapers do.[4]

16. Emerging non-linear technologies bring significant opportunities for delivering engaging, diverse and distinctive Māori content that reaches a wide range of audiences. Rangatahi in particular are highly attuned to these new means of communication. On the global level, there have perhaps never been more opportunities to showcase Māori stories and talent.

17. Increases in internet connection speeds and accessibility to internet-connected devices allow people to watch high-quality audio-visual content in most locations and at any time. As a result, more global services and providers of content have emerged and the range and form of media content have expanded.[5]

18. Traditional business models and revenue streams are also being challenged. Online advertising, notably through Google and Facebook, is undermining the market for advertising on traditional media. Subscription video on demand is shifting customer willingness to watch content interrupted by advertising.

19. Further game-changing advances in technology are likely. While it is impossible to predict their form, technologies such as artificial intelligence and virtual reality are likely to have some impact on the way people access and consume media content in the future.

20. New players, such as Netflix and YouTube, have over the last ten years transformed the landscape by providing audiences with what they demand in this new environment. Audiences now demand diverse and engaging content on demand, and across a range of delivery platforms.

Competitive and commercial environment

21. Much of the legislation governing Māori media had its genesis in the long struggle by Māori for more and better Māori broadcasting, culminating in the Broadcasting Case outlined above (paragraph 12) and amendments to the Broadcasting Act 1989. The overall scheme of this legislation was designed in the late 1980s, when the prevailing public management ethos emphasised deregulation, competition and commercial performance. Television New Zealand is a Crown Company with an explicitly commercial mandate.

22. While competition may create innovation and agility, the media organisations themselves broadly acknowledge that collaboration is vital in order to tell Māori stories and contribute to the revitalisation of te reo Māori. The current sector has been criticised in some quarters as being siloed and fragmented. While the organisations of the Māori media sector and wider public media sector have some commonality of mandate – which is discussed further below – there is a perception that, given the structure of the sector and pressures of the changing environment, they still sometimes operate as organisations defending separate interests.[6]

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[4] Chadwick, P. (2019). Oscar-nominated Black Sheep is the bellwether of a merging media world. The Guardian, available at: https://www.theguardian.com/commentisfree/2019/jan/27/black-sheep-film-oscars-bellwether-merging-media.

[5] It should be noted, however, that global services are still constrained by international rights agreements, and are provided on a country-by-country basis.

[6] E.g. see Mihingarangi Forbes (2019), 'Our future is in collaboration', E-Tangata, available at https://e-tangata.co.nz/media/our-future-is-in-collaboration/.

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Partnership

23. Te Ture mō te Reo Māori 2016 framed the effort to revitalise te reo Māori as a partnership between Māori and the Crown. This is an overarching piece of legislation that sets the strategic context for Crown policy that affects te reo Māori, including the Māori Media Sector Shift.

Te Mātāwai

24. Te Ture mō te Reo Māori 2016 created the statutory entity Te Mātāwai, which acts on behalf of iwi and Māori to provide leadership in language revitalisation. Te Mātāwai exercises leadership and oversight functions over the sector, including appointing four of the seven members of the Board of the Māori Television Service and making nominations for appointments to the Board of Te Māngai Pāho. Under the legislation, Te Mātāwai also holds the management right for the frequency range 606–622 MHz, which is utilised by the Māori Television Service.

Te Whare o te Reo Mauri Ora

25. Te Ture mō Te Reo Māori 2016 recognised that the Crown and iwi and Māori have distinct but complementary roles in the revitalisation of te reo Māori.

26. The partnership between the Crown and Māori is expressed through the metaphor of Te Whare o Te Reo Mauri Ora. The two sides of the partnership are represented by the maihi (bargeboards) on each side of the whare. The Crown and Māori have equally important roles in achieving the shared vision of 'kia mauriora te reo'. Appendix C includes a more detailed explanation of Te Whare o te Reo Mauri Ora.

27. Te Ture mō te Reo Māori 2016 provides for the development of two complementary Māori language strategies:

    - The Maihi Māori strategy is issued by the statutory entity Te Mātāwai on behalf of iwi and Māori
    - The Maihi Karauna strategy is issued by the Minister for Māori Development on behalf of the Crown.

28. The Maihi Karauna strategy has been agreed by Cabinet [CAB-18-MIN-0643 refers], and is an important strategic document in setting the direction for the Māori Media Sector Shift. This is discussed further in paragraph 113 and following.

Changing audience preferences

Growing consumption of online and on-demand content

29. A marked shift is taking place from watching linear channels according to their scheduled programme. Instead, audiences can now access television or video content on demand and watch it according to their own preferences.

30. Social media has also allowed audiences to engage with and discuss content in real time. Internationally, sports and news talk shows have capitalised on this and many are integrating it into their programming and advertising. Experts call this "second screen" where a second electronic device (e.g. smartphone or tablet) is used by television viewers to connect to a programme they are watching.

31. Advancing technology and digital convergence allow the consumer to access and interact with numerous different media on the same device. Television, radio and print media have been under pressure to evolve their business models in response to these changes.

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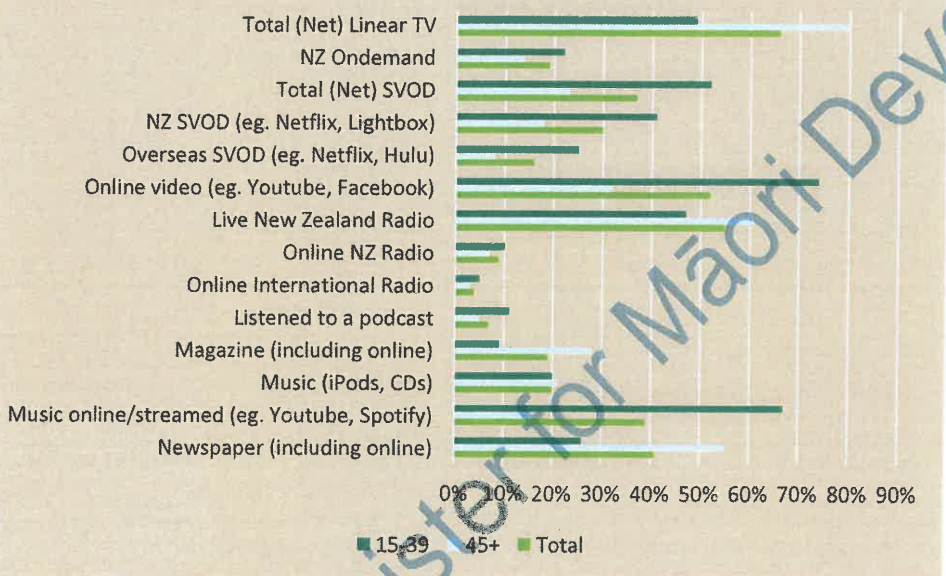
32. Since 2014, online video content (e.g. through YouTube), online and streamed music, subscription video on demand (e.g. Netflix) has grown in popularity. Traditional media sources, such as radio, television and newspapers, have decreased[7], but still retain a strong audience particularly among people aged 45 years and over.

33. The habits of young people (aged 15-39 years) are a major contributing factor in this trend. These younger viewers are streaming music and accessing online video and online television in much greater numbers. This is illustrated in Figure 1.

Figure 1: Daily reach of all media for New Zealanders across Aotearoa New Zealand 2018



Source: NZ On Air (2018). Where are the audiences?

34. Social media 'influencers' create content on platforms such as YouTube, Instagram, Facebook and Twitch and have large numbers of followers. This direct line of communication empowers influencers to generate social conversations, drive engagement, and set trends amongst receptive and socially aware audiences. Social media influencers in New Zealand that have large followings include KJ Apa, Taika Waititi and Willie 'Wairua' Cribb.

The digital divide

35. A note of caution is needed – it would be premature to assume that audiences of the Māori media sector are ready to move to an entirely digital environment. A 2017 report prepared for MBIE and the Department of Internal Affairs identified several groups of New Zealanders who are more at risk of digital exclusion. The report noted that, in 2015, 87 per cent of Māori used the internet, compared with 92 per cent of Pākehā / New Zealand European.[8]

[7] NZ On Air (2018). Where are the audiences? https://www.nzonair.govt.nz/research/where-are-audiences-2018/ accessed 24 January 2019.

[8] Zwimpfer, L., Crothers, C., Smith, P., Craig, B., Cotter, C., Alford, M., & Yeung, S. (2017). Digital New Zealanders: The Pulse of our Nation, a report to MBIE and DIA. Digital Inclusion Research Group, pg 13. Retrieved from http://www.mbie.govt.nz/info-services/science-innovation/digital-economy/digital-new-zealanders-the-pulse-of-our-nation-may-2017.pdf

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36. The digitally excluded are those who lack access or motivation to use the internet, or lack core digital skills or trust in online services. The report identified that this includes the potentially overlapping groups of:

- People living in rural areas
- Families with children in low socio-economic communities
- Māori and Pasifika youth.

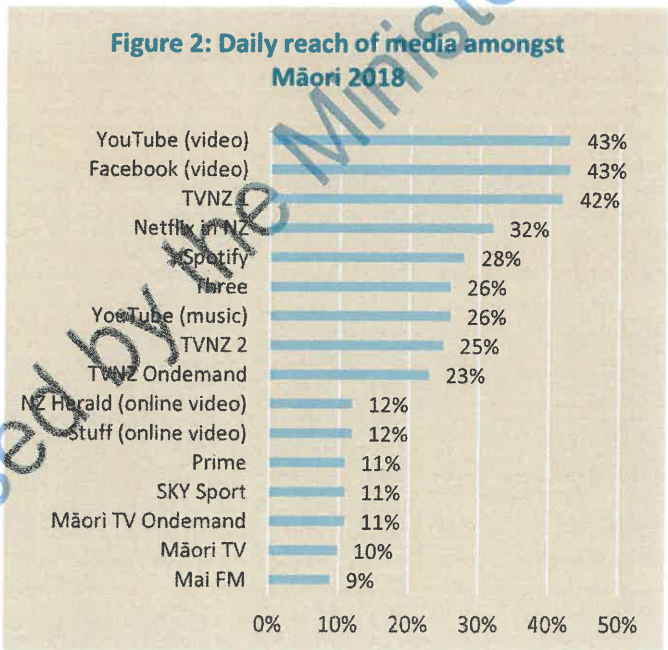
Television viewership

37. The graph above also shows that linear television is still a very powerful platform with potential to reach many viewers. Its reach is somewhat skewed towards older viewers, aged 45 and over.

38. Māori Television has an overall reach on average of three per cent of all media consumers, and ten per cent of Māori media consumers, accessing the channel on a daily basis in 2018.[9] Around 60 per cent of the Māori population and 48 per cent of Māori youth (15-24 years) view at least once a week compared to 20 per cent of the rest of the New Zealand population.[10]

39. In 2017, 52 per cent of the Māori population had viewed Māori language and culture programmes on mainstream television. However, 61 per cent of the overall Māori population thought there was not enough Māori programming in mainstream, compared with 65 per cent of Māori youth.

40. Māori continue to consume 'mainstream' television, as shown in Figure 2. 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.[11]



Source: NZ On Air (2018). Where are the audiences?

[9] NZ On Air (2018). Where are the Audiences?
[10] Te Māngai Pāho (2017). Māori Audience Survey, https://www.tmp.govt.nz/research-documents accessed 25 Jan 2019.
[11] NZ On Air (2018). Where Are the Audiences?

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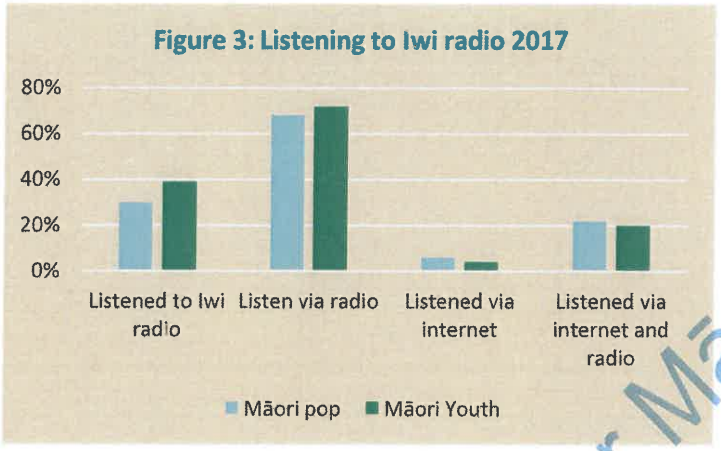
Iwi radio

41. Listening to Iwi radio over the past twelve months has increased for Māori youth (15-24 years) with 37 per cent in 2017 from 27 per cent in 2015. Thirty per cent of the Māori population indicated they had listened to Iwi radio in the last 12 months. Twenty-five per cent of Māori youth and 19 per cent of the Māori population had listened at least fortnightly.

42. The majority of people who listened to Iwi radio did so through live radio (68 per cent) only and around 6 per cent via the internet only.



Source: Te Māngai Pāho (2017). Māori Audience Survey.

43. Iwi radio is most likely to be listened to by fluent speakers of te reo Māori. In 2017, 53 per cent of fluent speakers listened to Iwi radio. There are approximately 64,000 Māori who are fluent speakers.[12]

44. Iwi radio sees one of its core functions as bringing together iwi, hapū, whānau and communities. This community focus stands in contrast to commercial approaches that garner larger audiences. The cumulative weekly audience for the 'Māori radio network' is 63,300, according to the latest quarterly survey run by the Radio Broadcasters' Association.[13]

Gaming and gaming-related content

45. Digital games are evolving beyond being solitary context into a social and collaborative experience. Gaming channels dominate the top 100 channels on YouTube and 144 billion minutes of gaming videos are consumed monthly on the YouTube platform.

46. Gaming is integrated with modern popular culture and virtual reality headsets are becoming more accessible. Gamers are living inside interactive, immersive 3D worlds.

47. E-sports are multi-player, organised video game competitions that are growing in popularity. In 2018, Sky Television and Māori Television broadcast coverage of e-sport competitions. Māori Television has the games available on its OnDemand service.

[12] Statistics New Zealand (2016). New Zealand General Social Survey.
[13] Radio Broadcasters Association (2018). NZ Commercial Radio – Survey 4.

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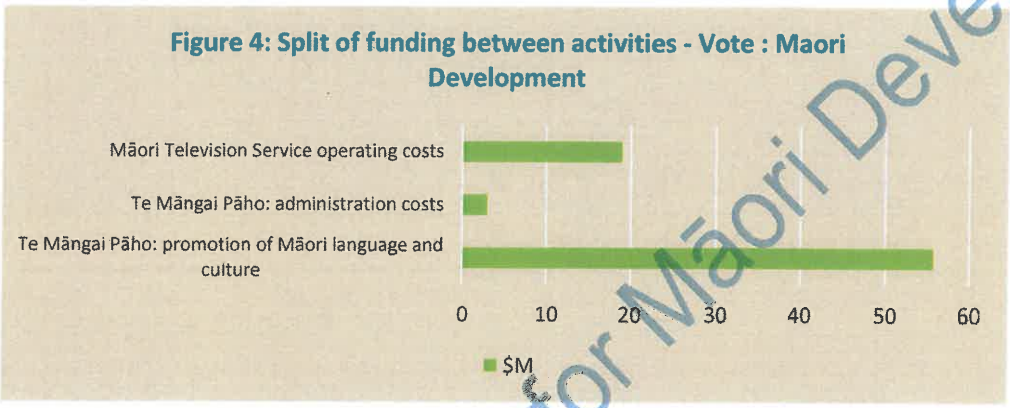
48. The Digital Natives Academy, based in Rotorua, is New Zealand's first e-sports and game development academy. It has a strongly Māori workforce and kaupapa Māori focus. It offers programmes in game development, coding, e-sports and content creation. It is targeted towards young people aged 8-25 years and regularly holds e-sport competitions.

Funding

Direct funding provided through Vote: Māori Development

49. In 2018/19, Parliament provided a total of $78 million for the direct funding of broadcasting entities, Te Māngai Pāho and Māori Television Service.[14] Figure 4 illustrates the distribution of that funding.



Source: Treasury, Vote Māori Development Estimates of Appropriations 2018.

Te Māngai Pāho

50. The Broadcasting Act 1989 created both current funding agencies: NZ On Air and Te Māngai Pāho. The latter has the specific function of promoting Māori language and culture by making funds available for broadcasting, production and archiving of programmes.[15]

51. The legislation sets out matters that Te Māngai Pāho must take into account in relation to funding proposals. Te Māngai Pāho is required to consider the potential size of the audience that is to benefit, the extent to which the intended audience has access to services that promote te reo Māori and culture, and the needs and preferences of children participating in Māori medium immersion education and all persons learning te reo Māori.

Funding allocation of Te Māngai Pāho

52. The largest portion of the funding, which is administered by Te Māngai Pāho for the promotion of Māori Language and Culture, is used to fund:

- $36 million for Māori programmes for television, including $16 million to the Māori Television Service through a direct funding agreement
- $4 million for digital and new media
- $14 million for Māori radio and music, including the funding of 21 Iwi radio stations, with a grant of $500,000 made to each radio station

[14] Treasury, Vote Māori Development Estimates of Appropriations 2018.
[15] Section 53B Broadcasting Act 1989.

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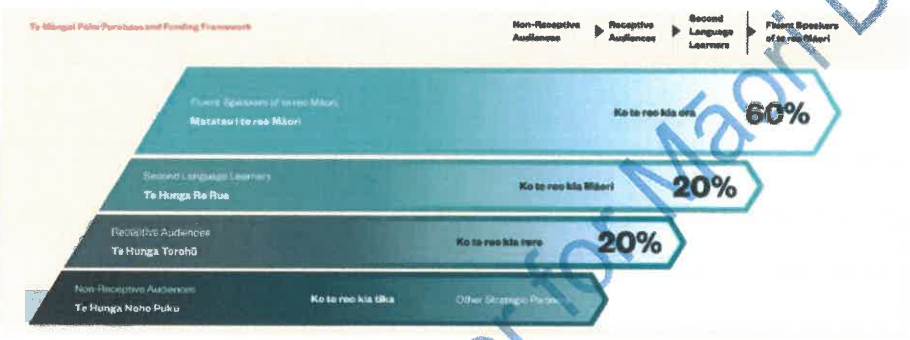
- $1 million for other activities to promote Māori language and culture.

Purchase and Funding Framework and Right-shift Approach

53. Te Māngai Pāho has developed a Purchase and Funding Framework in consultation with its stakeholders that is built around the audiences for Māori language and cultural content. The audiences are categorised in a hierarchy from 'receptive audiences' to fluent speakers of te reo Māori. Māori content producers are invited to develop proposals that respond to the needs of these audiences.

54. Te Māngai Pāho has adopted the ZePA model, and aims to shift the position of its audiences along a spectrum from Zero to Passive to Active. Right-shifting an individual from Zero to Passive can generate increased awareness and support for language revitalisation, and the subsequent right-shift from Passive to Active is then easier to achieve.

Figure 5: Te Poutarāwaho Hoko, Toha Pūtaea a Te Māngai Pāho - Te Māngai Pāho Purchase and Funding Framework



Source: Te Māngai Pāho (2019).

55. As shown in Figure 5, Te Māngai Pāho has overlaid the ZePA model on its Purchase and Funding Framework. Here passive audiences are shown as 'receptive', while active audiences are shown as 'second language learners' and 'fluent speakers'. Te Māngai Pāho focuses its purchasing and funding investments on the audiences which are most likely to realise some appreciable Māori language gains. This includes providing:

- Fluent speakers with an environment that helps the language endure in their everyday lives across all of the domains in which they are active
- Second Language Learners with the programming which supports them in their efforts to extend their Māori language abilities
- Receptive Audiences with access to a mix of opportunities to reinforce their interest and encourage and challenge them to pursue their own Māori language goals"[16].

56. As te reo Māori becomes increasingly accessible in homes throughout New Zealand, the objective is to see audiences moving in a positive direction along the ZePA continuum.[17]

[16] Source: Te Māngai Pāho (2017). Briefing to the Incoming Minister for Māori Development 2017, page. 13.
[17] Source: Te Māngai Pāho (2017). Briefing to the Incoming Minister for Māori Development 2017, page. 13.

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Breakdown of Te Māngai Pāho funding

57. Approximately 70 per cent of Te Māngai Pāho funding is used for television programming. The breakdown of its funding distribution is shown in Table 2.

Table 2: Te Māngai Pāho - Funding Expenditure (breakdown and further information)

Funding expenditure	2018 Actual $000
MĀORI PROGRAMME FOR TELEVISION	
Māori Television Service Direct Funding	$16,120
Other programmes through the Contestable Fund[18]	$23,667
Ngā Aho Whakaari	$70
Total	*$39,857*
MĀORI RADIO	
Iwi station operational funding	$10,500
Radio distribution network	$836
Programmes	$1,285
Music compact discs and videos	$272
Capacity building	$342
Te Whakaruruhau o Ngā Reo Irirangi Māori	$70
Total	*$13,305*
DIGITAL & NEW MEDIA	
Total	*$2,384*
OTHER ACTIVITIES TO PROMOTE MĀORI LANGUAGE & CULTURE	
Archiving	**$575**
Te Wiki o Te Reo Māori	$200
Other	$232
Total	*$1,007*
Total funding expenditure	**$56,553**

Te Māngai Pāho funding of content

58. The 2017/18 Annual Report of Te Māngai Pāho shows that it funded:

- 1,631 hours of television content
- 80,000 hours of Māori language radio and 192 hours of community engagement
- 33 music tracks, 24 music videos, and over 651,000 plays on Iwi radio by New Zealand artists
- 18 initiatives to promote Māori language through digital and new media.

59. The content funded ranged widely – from the continuation of long-running programmes for fluent reo speakers such as *Te Karere* and *Waka Huia* on Television New Zealand – to new programmes such as *Ring Inz* on Māori Television, which targets second language learners. *Moving out with Tamati* and *Casketeers*, which are aimed at 'receptive' viewers rather than te reo Māori speakers, proved highly popular with New Zealand viewers.

Low investment in workforce and talent development

60. Leaders in the sector and independent commentators have expressed concern about insufficient investment in training and talent development – particularly in

[18] The list of programmes funded through the Contestable Fund of Te Māngai Pāho can be found in their Annual Report 2017/2018, page. 69.

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specialised disciplines such as journalism and the technical side of broadcasting.[19] 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.

61. Iwi radio representatives have told Te Puni Kōkiri that young, fluent speakers of te reo Māori often do not see a career pathway in media and broadcasting. Those who enter the sector are often co-opted into reporting roles with no training in journalism. While a number of leading talents within the Māori media sector got their start in this fashion, there is a strong current of opinion that more can be done to increase the opportunities for workforce development.

Funding the broader public media sector

62. The Broadcasting Act 1989 established NZ On Air to manage contestable funding for the broader public media sector of $132.336 million annually. In doing so, one of its functions is to promote Māori language and Māori culture.[20] Over the last six years, NZ On Air funded $3 million annually in content destined for Māori Television[21].

63. In 2017/18, Radio New Zealand received $38.959 million in government funding, including its baseline funding of $35.356 million through NZ On Air.

64. These funding streams recognise the role of mainstream media in reaching key audiences, and in exposing the wider New Zealand public to te reo Māori me ngā tikanga.

Content production and distribution

Television content

Overall satisfaction with programming

65. Twenty-eight per cent of the Māori population are satisfied or very satisfied with the quality of Māori programming, with only 23 per cent dissatisfied or very dissatisfied. For the rest of New Zealand, 29 per cent are satisfied or very satisfied with the quality of Māori programming with only 12 per cent being dissatisfied or very dissatisfied.

The tensions between public service and commercial drivers

66. Television New Zealand, with its large audience share among Māori and the wider New Zealand public, is in a prime position to attract funding from NZ On Air and Te Māngai Pāho. The latter must consider the size of potential audiences in making funding decisions.

67. Television New Zealand has opportunities to put te reo Māori or kaupapa Māori content before large audiences in prime times. However, it is unlikely to take this risk, given its commercial imperatives.

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[19] Atakohu Middleton (2019) 'Māori media revamp: where's the focus on quality journalism?', *E-Tangata*, available at https://e-tangata.co.nz/reo.
[20] Section 36(1)(a)(ii) Broadcasting Act 1989.
[21] The Future of Māori Television, Briefing Paper for Shareholding Ministers. Māori Television Service, Te Aratuku Whakaatu Irirangi Māori, 12 Whiringa-ā-nuku 2018, pg.5.

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Māori Television Service

The Māori Television Service has functions and priority audiences set in legislation

68. The Māori Television Service (Te Aratuku Whakaata Irirangi Maori) Act 2003 established the service as an independent statutory entity with particular public service objectives:

> to contribute to the protection and promotion of te reo Māori me ngā tikanga Māori through the provision, in te reo Māori and English, of a high-quality, cost-effective television service that informs, educates, and entertains viewers, and enriches New Zealand's society, culture, and heritage.

69. The Act also address the amount of te reo Māori content that the service must provide. During prime time, it must broadcast mainly in te reo Māori. At other times it must broadcast a substantial proportion of its programmes in te reo Māori.

70. It faces considerable challenges in delivering these functions while managing to compete with commercial television for a significant audience share.

Māori Television's strategies to reach its core audience groups

71. The Māori Television Service is also required to have regard to the needs and preferences of particular audiences, being:

- young people
- children participating in te reo Māori immersion education
- all persons learning te reo Māori
- persons whose first language is te reo Māori and persons with a high level of proficiency in te reo Māori.

72. The following table illustrates how the Māori Television service is thinking about providing content to meet the needs of those groups.[22]

Table 3: Māori Television Service (MTS) - Core Audience Groups

Key Audience	How Māori Television will attract and retain them?
Fluent Speakers	MTS will continue to produce the majority of its content in te reo Māori and provide shows with a high level of fluency and technical excellence. There will be a greater focus on fluent entertainment shows.
Rangatahi	50 per cent of the Māori population is under 23 years old highlighting the importance of providing for the rangatahi/youth group. MTS note that providing online content will be key to attracting and maintaining this audience.
Tamariki	MTS will focus on providing entertaining, fluent content for tamariki by developing a non-commercial digital first environment both online and on-air.
Language Learners	MTS will continue to provide opportunities for language acquisition for beginners and intermediate level learners.

[22] Māori Television, Pānui Whāinga, Statement of Intent, 2018-2021 pg. 8.

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Māori Television makes use of both linear and non-linear platforms

73. The Māori Television Service currently broadcasts on two linear channels: the Māori Television channel is a bilingual channel targeted at Māori language speakers of all fluency levels as well as non-speakers, and the Te Reo Māori channel which broadcasts exclusively in te reo Māori for medium to high proficiency te reo speakers. Both channels have transmitted in high definition[23] since August 2017.

74. The frequencies that the Māori Television Service use to broadcast its high definition digital service come from Management Right MR369[24], a 16 MHz block of digital UHF[25] television spectrum reserved for the promotion of Māori language and culture.

75. Māori Television also transmit in partnership with Freeview, a collaborative platform also involving TVNZ, Radio New Zealand and New Zealand Media and Entertainment. Freeview Plus is an "on-demand" service that includes the Māori Television channel and te reo Māori channel.

76. Māori Television offers some livestreamed content through its website (dual-language) and has a free smartphone app (Māori TV connect) that is available through iTunes and Google Play store. The website and app features latest news, on demand and through live streaming. Māori Television also have a social media presence on channels such as Facebook, Snapchat, Instagram and Twitter. Additionally, Māori Television launched audio podcasting to a global audience in 2016 and now includes podcasts for its te reo Māori programmes Kawe Kōrero, Ōpaki, Ako and Frenemies.[26]

The Māori Television Service produces some content in-house

77. The Māori Television Service produces in-house content, but has raised concerns about being able to fund programmes of sufficient variety and quality.[27]

78. The Māori Television Service outlines in its Annual Report 2018 some highlights amongst the unique content it created during that year:

- Kapa Haka coverage, including the regional competitions, dominated its online coverage, with live stream numbers approaching 2 million views over the year.
- ANZAC Day coverage attracted 372,000 viewers to Māori Television. It included the production of unique content, including the documentary *In Foreign Fields*.
- *Artefact*, a documentary showcasing the nation's taonga, including the natural environment.
- *Tamariki Hā*, te reo Māori content aimed at young viewers, included popular cartoons translated into te reo Māori.

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[23] "High Definition" provides a high degree of detail in an image or screen.
[24] Te Mātāwai is the Management Rightholder of MR369, the block of digital UHF television spectrum set aside for the promotion of Māori language and culture.
[25] Management rights cover a block of the radio spectrum and Te Mātāwai has the right to issue licences for the use of 16Mhz (606-622 MHz, channels DTV38-DTV39). Digital channels in New Zealand are allocated Freq MHz 502-622 therefore Māori Television has 13 per cent of the frequency available. Ultra High Frequency (UHF) is the band designated for radio frequencies. UHF radio waves are mainly by line of sight, they are blocked by hills and large buildings. https://www.rsm.govt.nz/homepage.
[26] Māori Television Service (2018), The Future of Māori Television, Briefing Paper for Shareholding Ministers, 12 Whiringa-a-nuku 2018, page 8.
[27] Māori Television Service (2018), The Future of Māori Television – Briefing Paper for Shareholding Ministers.

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79. The Māori Television Service announced that it was consolidating its news and current affairs programming into a new single format. This would make use of digital platforms for first screening.

Māori Television Service has some regular income streams

80. Māori Television receives direct funding from three main sources. In 2017/18, this included:

    a. an operating grant from Vote Māori Development which was set at $19.264 million excl. GST, including $1.998 million one-off funding for the Multiplex development and the High Definition upgrade project.

    b. $16.120 million excl. GST for Māori Television's in-house programmes, allocated annually under Māori Television's direct funding agreement with Te Māngai Pāho.

    c. some additional income from advertising and financial management activity (interest etc.)[28].

It also accesses contestable funding

81. Additionally, Māori Television received *Other Production Funding* in 2017/18 through Te Māngai Pāho's Contestable Television Programme Fund and NZ On Air. Māori Television were also recipients of the Māori Development Fund (Te Ao Māori) managed by Te Puni Kōkiri. Under this fund, Māori Television received $200,000 for Matariki in the 2017/18 year[29].

Table 4: Māori Television Statement of Comprehensive Revenue for the year ended 30 June 2018

	Actual 2018 $000s	Budget 2018 $000s
Non-Exchange Revenue		
Revenue from the Crown	19,264	19,264
Te Māngai Pāho Production Funding	16,120	16,120
Other Production Funding	762	-
Exchange Revenue		
Advertising Revenue	998	1,550
Interest Revenue	15	19
Other Revenue	153	-
Total Revenue	**37,312**	**36,953**

Source: Māori Television Annual Report 2018, page. 24.

Iwi radio

82. Cabinet decisions and operational policy, rather than legislation, form the framework within which Iwi radio is supported by the Crown. Cabinet agreed in 1991 to issue licences for the use of spectrum to iwi organisations. This was on the condition that the frequencies concerned were used for promoting Māori language and culture. A series of consultation hui held by the Crown in 1998 confirmed that iwi were the appropriate parties to hold the licences.

[28] The Future of Māori Television, Briefing Paper for Shareholding Ministers. Māori Television Service, Te Aratuku Whakaatu Irirangi Māori, 12 Whiringa-ā-nuku 2018, page.5.
[29] Te Puni Kōkiri Ministers' Report in relation to non-departmental appropriations for the year ended 30 June 2018, page. 75.

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83. Iwi radio stations, with their local and regional reach, play a role in promoting language that reflects reo-ā-iwi, or tribal dialects. The revitalisation of these dialects is a priority for many iwi and hapū.

84. There are 21 Iwi radio stations[30] funded by Te Māngai Pāho, which transmit on six AM frequencies, and 65 FM frequencies, and provide coverage to an estimated 80 per cent of New Zealand. There are seven self-funded iwi and Māori radio stations. There are a further 27 FM frequencies reserved for Māori use that have not been utilised at this stage.

85. Iwi radio stations produce their own content, and in doing so aim to reflect the stories of their own communities and rohe. Some of this content is intended to meet their requirement of 10.5 hours of te reo Māori broadcast each day – a requirement set by the funder, Te Māngai Pāho. Community events covered by Iwi radio include Te Rā o te Raukura (Atiawa-Toa FM) and Koroneihana (Radio Tainui).

Funding for Iwi radio

86. Te Whakaruruhau o Ngā Reo Irirangi Māori – the coordinating and advocating representative body for Crown-funded Iwi radio stations – is mostly funded through Te Māngai Pāho. In 2017/18, Te Whakaruruhau received $70,000 for administration costs including for staff, operating expenses, travel, and accommodation. Executive members do not receive attendance fees. The Administration contract has been increased from $70,000 to $100,000 for 2018/19. In addition, Te Whakaruruhau o Ngā Reo Irirangi Māori received $20,000 to produce Te Wero 2017 which included 16hrs of radio programmes.[31]

87. Te Māngai Pāho funds directly the 21 Iwi radio stations with a grant of $500,000 each. Te Whakaruruhau o Ngā Reo Irirangi Māori argues that this is insufficient for an individual station to cover staffing costs and office rent. This results in staff working for low wages and often performing multiple roles.

The compliance and reporting framework for Iwi radio

88. Whereas most radio stations – including Pacifica and religious stations – hold their own licence agreements, current policy is that licences for Iwi radio are issued to iwi authorities [CEG (91) M 8/9 refers]. Te Puni Kōkiri administers the licences on behalf of the Crown.

89. Licence holders have to report to Te Puni Kōkiri annually with Māori language plans, licence compliance reports and annual reports on their Māori language plans. Additionally, Iwi radio stations must provide compliance reporting about Māori language content to Te Māngai Pāho, based on their Māori language plans.

Possible future digitisation of radio platforms

90. Radio broadcasting is likely to transition from analogue to digital at some stage in the future. The Ministry of Business, Innovation and Employment has set aside suitable spectrum for possible Digital Audio Broadcasting (DAB) services, and it would be expected that a portion of this spectrum would be reserved for the promotion of Māori language and culture. However, it is possible that DAB may be superseded by online or cellular platforms, or by new technologies.

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[30] Twenty of the Iwi radio stations are affiliated to the national representative body, Te Whakaruruhau o Ngā Reo Irirangi Māori. There are seven Māori radio stations that are self-funded.
[31] Te Māngai Pāho Annual Report 2017/2018, page. 72.

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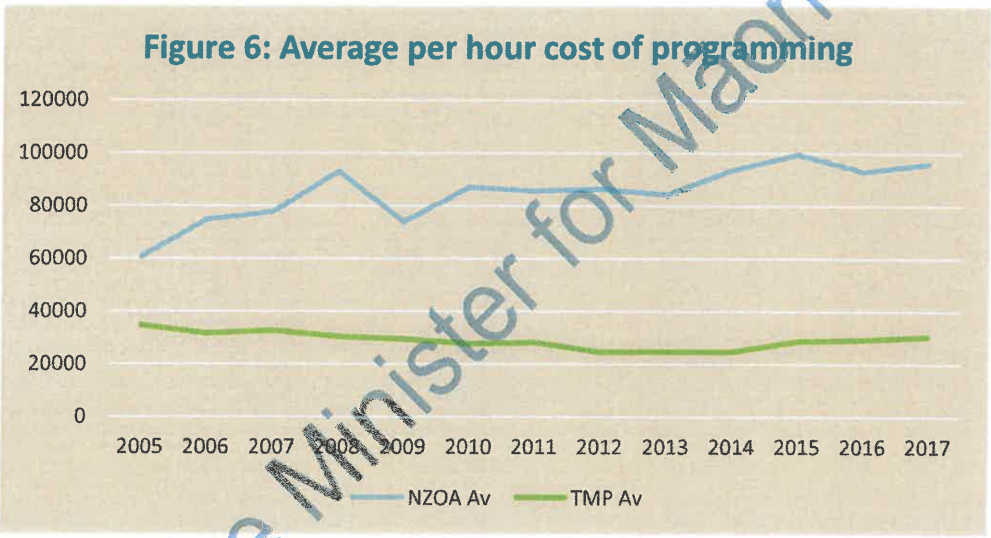
Private production

91. There are numerous privately owned and operated production companies with a strong interest in kaupapa Māori. These receive considerable public funding from Te Māngai Pāho and NZ On Air and produce content for screening on Māori Television or mainstream television services.

92. A healthy Māori production industry is vital to the production of strong Māori content. Examples of these companies include Cinco Cine Film Productions Ltd, Pango Production Ltd, Scottie Productions Ltd and Raukatauri Productions Ltd.

Costs of production

93. Budgets for the production of content in the Māori media sector appear to be lower than in the public media sector, as illustrated in the following chart. Te Māngai Pāho pays for more hours comparative to its overall funding than NZ On Air. For example, the Māori Television Service must fill its schedule with substantial te reo Māori content – and mainly te reo Māori content in prime time. Therefore it tends to produce or repurpose a large amount of material.



Source: Te Māngai Pāho, customised data.

94. The practical effect is that Te Māngai Pāho funding tends to be employed on formats that are cheaper to produce, including reality and 'talking heads' shows. Nevertheless, some of the shows it has funded have been globally successful.

95. Te Māngai Pāho tends to fund very few high-end drama productions. At present there is no equivalent to *Hinterland | Y Gwyll*, a successful bilingual Welsh crime drama. Funding such a high-end production would, in the context of thinly spread funding, require taking a significant risk.

Online and on-demand distribution

96. Māori content can also easily be searched in Online Video forums such as YouTube and Facebook and across social networks such as YouTube, Facebook, Pinterest and Tumblr. Te Māngai Pāho funds some of this content through its investments in new media. More recently *Casketeers*, a successful show funded by Te Māngai Pāho, is now showing on Netflix.

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Rights and retention

Copyright Act

97. The Copyright Act 1994 provides a set of intellectual property rights called 'copyright' to authors and producers of creative works such as recorded music, fine art, digital art, movies, social media posts and software code.[32]

98. Copyright protects original works, the expressions of ideas and a set of rights given to creators of original works. Copyright is provided for a limited period of time. Once copyright expires in a work, people are free to use it as they like. The expiry term for copyright differs depending on the type of creative work. For sound and film recordings, and for musical works, the period of copyright is 50 years after it is created.

Crown ownership

99. The Crown receives copyright in copyright works produced by people employed or contracted by the Crown. This does not apply to Crown entities or State owned enterprises. Copyright in these works is known as 'Crown Copyright'. The term of protection is 100 years from the year in which the work was made (or 25 years for typographical arrangements), even if the copyright is no longer owned by the Crown.

The international context

100. New Zealand is party to a number of international agreements that relate to copyright. These agreements set the framework for countries' copyright settings and set minimum requirements in some areas. New Zealand's copyright regime is therefore broadly similar to most overseas jurisdictions.[33] In areas that are not governed by international obligations, or where flexibility within the international framework exists, different jurisdictions take different approaches.[34]

101. International agreements emerged to guarantee a minimum level of copyright protection in the member countries as works move across national boundaries. They include:

- Berne Convention for the Protection of Literary and Artistic Works (Berne Convention)[35]
- Universal Copyright Convention[36]
- TRIPS Agreement (which incorporates obligations under the 1971 Act of the Berne Convention)[37]

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[32] Issues Paper, Review of the Copyright Act 1994, November 2018.
[33] For example, the minimum terms of copyright protection are set by United Nations-level international agreements (generally 50 years, or life plus 50 years).
[34] Examples include the nature and scope of safe harbour schemes to facilitate the operation of content platforms and ISPs, the framing of exceptions and limitations and the development of new types of remedies and enforcement procedures, like website blocking, to deal with on-line infringement and copyright piracy.
[35] New Zealand is a Party to the Rome Act (1928) of the Berne Convention.
[36] The text of the Universal Copyright Convention can be found here: http://portal.unesco.org/en/ev.php-URL_ID=15241&URL_DO=DO_TOPIC&URL_SECTION=201.html.
[37] The TRIPS Agreement requires New Zealand to comply with Articles 1-21 of the Paris (1971) Act of the Berne Convention.

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- Marakeesh Treaty (government agreed to accede to this in June 2017). This allows 'authorised entities' to make and distribute copies of copyright works that are accessible to persons with a print disability.

Issues with the current regime

102. The Ministry of Business, Innovation and Employment (MBIE) is currently reviewing the Copyright Act 1994. It is still in the issues identification stage.

The Treaty of Waitangi and the Wai 262 report

103. The Waitangi Tribunal's report entitled Ko Aotearoa Tēnei: A Report into Claims Concerning New Zealand Law and Policy Affecting Māori Culture and Identity (the Wai 262 report) examined, among other things, how the intellectual property system protects mātauranga Māori, taonga works and taonga-derived works.

104. In the report, the Waitangi Tribunal recommended that mechanisms be put in place to provide greater protection for the kaitiaki interest in mātauranga Māori, taonga works and taonga-derived works.[38]

105. Given the overlap between copyright and the Wai 262 recommendations, it will be important to consider how and when the Government's policy on the protection of taonga works, taonga-derived works and mātauranga Māori should be developed.

106. The Waitangi Tribunal did not recommend that any changes be made to the Copyright Act 1994 (or any of the relevant intellectual property regimes) with regard to taonga works and mātauranga Māori. The Waitangi Tribunal's view was that the claimants' concerns should be addressed through a new legal regime for taonga works and mātauranga Māori.

107. MBIE will establish a dedicated work stream during the options stage of the Copyright Act 1994 review. In this work stream, MBIE would seek the views of the Crown's Treaty partners and the public on the Waitangi Tribunal's findings and recommendations. This would assist it to develop specific proposals for legislative change to protect the kaitiaki interest in taonga works and mātauranga Māori.

Information, Ownership and Management

Ngā Taonga Sound & Vision

108. Ngā Taonga Sound & Vision cares for films, sound and vision recordings and documents. Guardianship of the Television New Zealand Archive was transferred to Ngā Taonga Sound & Vision. Ngā Taonga Sound & Vision manages this archiving on behalf of the Ministry for Culture and Heritage.

109. Te Māngai Pāho has contracts with Ngā Taonga Sound & Vision to manage the archiving of Māori broadcasting visual and audio material. In the 2017/18 financial year it purchased 610 hours of television archiving and 500 hours of radio archiving.

Management

110. Ngā Taonga Sound & Vision does not own any of its collection or have the rights to authorise its re-use or distribution. While the archive takes custody and care of the physical items, all other rights are retained by the legal rights holders. Therefore access is subject to clearance from rights holders.

111. Existing Television New Zealand Archive relationships and systems have remained in place under the new organisational structure. There has been no change of

[38] The WAI 262 report is available at the Waitangi Tribunal website, Volume 1 and Volume 2.

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physical location or rights ownership for the Television New Zealand Collection. Recently, Television New Zealand entered a partnership agreement with Getty Images for the licencing and distribution of images and video clips. It issued assurances that taonga content will be protected from inappropriate exploitation.

112. Ngā Taonga Sound & Vision has several collections including:
    - Film and Video
        - Includes feature films, short films, newsreels, home movies, documentaries, experimental films, animated films, Cine club productions, promotional films, advertising films, and the Taonga Māori Collection
    - Television
        - Television New Zealand Collection and Māori Television Collection
    - Sound
        - Radio Collection; Irirangi Māori Archiving Project, Ngā Taonga Kōrero Collection, and the New Zealand Broadcasting Service Mobile Unit Collection.

Ownership

113. Ngā Taonga Sound & Vision honours the wishes of the rights holders and owners of the material deposited with it, including the cultural values of iwi and Māori. In general, copyright and other rights pertaining to collection material are unchanged when material is deposited, unless the rights have been expressly transferred to Ngā Taonga Sound & Vision.

114. Material offered to Ngā Taonga Sound & Vision generally remains the property of the owner along with all the rights to that material, unless the owner decides to donate their material outright. At the time of deposit, potential depositors will also be asked for their permission for material to be used online. The material held in the Taonga Māori Collection is only until such time that iwi decide differently.

115. The use and repurposing of material in Ngā Taonga Sound & Vision's archive is subject to clearance by those who have rights in them. Archive consultation with iwi, hapū and/or whānau is required when access is requested to the Taonga Māori collection. Ngā Taonga Sound & Vision quotes an archive management fee of $60 per hour for assistance in viewing items from its archive.

Sharing of content

116. The provisions of the Television New Zealand Act 2003 include the right to grant the Māori Television Service the right to screen an archived work under any agreement reached between the two organisations. This section overrides certain rights that people with an interest in the archived work may have, including under the Copyright Act 1994.

Alignment

Alignment of purpose: what is Māori media attempting to achieve?

Contribution to the Maihi Karauna strategy

117. Te Ture mō te Reo Māori 2016 mandates the preparation of 'Māori language strategies to support the revitalisation of the Māori language, including by promoting an increase in the number of people speaking the Māori language and improving their fluency in that language'.

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118. The Maihi Karauna strategy – the Crown's strategy for te reo Māori revitalisation – sets the direction for the public sector as a whole. It sets three audacious goals for 2040:

a. Audacious Goal 1: Eighty-five per cent of New Zealanders (or more) will value te reo Māori as a key part of national identity

b. 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

c. Audacious Goal 3: One hundred and fifty thousand Māori aged 15 and over will use te reo Māori as much as English.

119. The Maihi Karauna also sets three outcome statements to encapsulate what we should aim to see by the time our next generation is growing up. These are:

a. AOTEAROATANGA – te reo Māori is valued by Aotearoa whānui as a key element of national identity

b. MĀTAURANGA – Aotearoa Whānui has increased levels of knowledge, skill and proficiency in te reo Māori

c. HONONGA – Aotearoa Whānui is able to engage with and use te reo Māori.

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

120. During the broadcasting litigation in the 1990s, Tā Kingi Ihaka summarised the role of media by saying that it offered 'a contemporary framework in which to see and hear Māori being used daily and by conferring prestige on Māori as a language of mass consumption'.[39] A Treasury study in 1998 identified broadcasting as 'one of the most important policy initiatives' in revitalising te reo Māori.[40]

121. It is less likely that many people will learn te reo Māori entirely through watching media content. However, media have a role in supporting those who are learning te reo Māori. For example, a person learning te reo in an educational setting is likely to benefit from watching or listening to engaging content that is either bilingual or in te reo Māori.

122. The Maihi Karauna also sets out a number of priority actions for the Crown to revitalise te reo Māori, to which the Māori media sector makes obvious contributions. These include:

a. More people engaging with quality broadcast and online content in te reo Māori

b. More New Zealanders valuing te reo Māori as part of our national identity

c. More young people excited about te reo Māori.

Common purpose in legislation and agencies' strategic documents

123. The establishing legislation and policy of each organisation varies according to their functions, with a common thread being the 'promotion of te reo Māori and Māori culture'. This aim is also expressed in the legislation of other

124. The key common objectives already evident in the strategic documents of the agencies are as follows:

- A key focus on making te reo Māori and an understanding of tikanga Māori more accessible to all New Zealand

[39] NZ Māori Council v AG (1992), 2 NZLR, page 588.
[40] Francois Grin & Francois Vaillancourt (1998), Treasury Working Paper 98/6 – Language Revitalisation Policy: An Analytical Survey, page 235.

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- Ensuring services are accessible to and engaging for key audiences, including rangatahi and fluent speakers
- A commitment to high quality and relevant content
- Utilising multiple platforms to reach audiences
- Ensuring that services are available where and when the audiences want them
- Working in partnership across the sector, and with others.

Aligning approaches to target audiences – who is Māori media for?

125. At the level of legislation, there is some alignment between target audiences for both the Māori Television Service and Te Māngai Pāho. Both must target learners of te reo Māori and children in Māori immersion education.

126. Iwi radio, according to its nearly 30 year old Cabinet mandate, is intended to target a mostly Māori audience. Māori Television, on the other hand, has a potentially wider purview more akin to a broader public service function, in which it is required to inform, educate and entertain viewers, while enriching New Zealand's society, culture and heritage.

127. As noted previously, the funding framework employed by Te Māngai Pāho is also a key driver of which audiences get targeted, and how. This segments audiences into 'receptive', 'second language learners' and 'fluent'. (See paragraph 50 above).

Alignment with broader public media sector

128. Public media organisations have duties to promote te reo Māori and Māori culture. The various duties of the organisations are summarised in the following table.

Table 5: Mandates of public media organisation with regard to Māori language and culture (others functions excluded)

Organisation	What	Who
Māori Television Service	Protection and promotion of te reo Māori me ngā tikanga Māori	• Rangatahi • Tamariki in immersion education • Learners of te reo Māori • Fluent speakers
Te Māngai Pāho	Promoting Māori language and culture	• Must consider size of audience • Must consider access of potential audience to te reo and culture services • Tamariki in immersion education • Learners of te reo Māori
Iwi radio	Promoting Māori language and culture	• Primarily Māori audience
NZ On Air	Promote Māori language and culture	• Diverse NZ audiences
Radio NZ	Reflect New Zealand's cultural identity, including Māori language and culture	• Serves the public interest
TVNZ	Reflect Māori perspectives as well as international perspectives	• New Zealand audiences • Has a commercial mandate to make a return for the Crown

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129. The commonality between these mandates suggests that there ought to be a high degree of collaboration and coordination, in order to ensure the best outcomes and best use of public resources. Some collaboration presently exists. Te Whakaruruhau o Ngā Reo Irirangi Māori has a memoranda of understanding with Māori Television and Radio New Zealand. However, these documents may not often be invoked.

Alignment of outcomes, data and research

Outcomes measurement

130. Leaders in the sector have identified the need for common data resources to measure success. This concern extends beyond the Māori media sector, and has led to ongoing efforts to develop common measurement frameworks across both the Maihi Karauna and Maihi Māori. This will help all parties involved in te reo Māori revitalisation to use common definitions and have agreed standards for the successful achievement of outcomes.

131. The outcomes frameworks of both the Māori Television Service and Te Māngai Pāho link strongly with the Maihi Karauna and represent those organisations' contributions to implementing the strategy.

Data

132. However, some differences in approach are evident in the intentions underpinning each agency's measurement of outcomes. For example, Te Taura Whiri i te Reo Māori bases its outcomes on language planning theory, which leads it to actions that strengthen the status and corpus of te reo Māori. Te Māngai Pāho uses the ZePA model as the basis for the shift it is seeking, which emphasises the importance of shifting the position of an individual or community on a spectrum from "zero" (no engagement) to "passive" to "active" engagement and use. The Māori Television Service's outcomes reflect its current focus on reviewing and strengthening its operating model.

Research

133. At present, we already have available some valuable audience surveys that tell us about audience preferences, habits and receptivity. The Māori Television Service in late 2018 convened initial discussions across the te reo Māori sector about a combined research agenda, in order to gather mutually useful information and avoid duplication.

Performance measurement

134. Much of the performance measurement data reported is output-based, particularly around numbers of hours broadcast. For the Māori Television Service, this is driven by its legislative requirements to broadcast mainly in te reo Māori during prime time and substantially in te reo Māori at other times.

Alignment of current sector arrangements with changing audience preferences

135. Both Te Māngai Pāho and the Māori Television Service have some flexibility already written into their legislation. The Māori Television Service may 'provide a range of content and services on a choice of delivery platforms'.[41] Likewise, Te Māngai Pāho may also make funds available, 'in a manner consistent with its primary function', for:

- 'transmitting on demand; and

[41] Section 8(d) Māori Television Service (Te Aratuku Whakaata Irirangi Maori) Act 2003.

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- producing content for transmitting on demand; and
- archiving content; and
- other activities to promote the Māori language and Māori culture.'[42]

Findings

136. This paper concludes by positing some initial findings that will provide the foundation for developing the future state of the Māori media sector.

Environment

a. Technology, business models and audience habits have changed rapidly since the key institutions of the Māori media sector were established.

b. Currently, the key drivers for the Māori media sector are promoting te reo Māori and tikanga Māori. To a lesser extent, these goals are shared by the wider public media sector.

c. Māori media organisations face a challenge in delivering these public service-type roles while thriving within a highly deregulated and commercial New Zealand market.

d. There is a growing interest in telling Māori stories as part of Aotearoa New Zealand's national identity and our brand overseas.

Structure and governance

e. Leaders in the Māori media sector and key commentators recognise that there is an ongoing need to break down silos and work towards collaboration in making use of resources and talent.

f. There is untapped opportunity for sharing of resources across the broader public media sector, including Radio New Zealand and NZ On Air.

g. The roles of each agency across the public media sector in the promotion and revitalisation of te reo Māori and tikanga Māori need to be clarified.

h. There is no strategy for workforce and talent development that crosses the Māori media sector, or the broader public media sector.

Funding

i. Budgets for producing each hour of content are significantly lower in the Māori media sector than in the wider public media sector, resulting in the production of cheaper content.

j. Parts of the sector are struggling to resource their current operations, and this may impact on the quality of content produced.

k. Sixty percent of Te Māngai Pāho funding is currently targeted towards content for fluent audiences, or about 14 per cent of the Māori population or 2 per cent of the total population. Te Māngai Pāho is presently reviewing its funding model.

l. There is currently no funding specifically targeted at workforce training and talent development, including in technical skills and journalism.

[42] Section 53B(2) Broadcasting Act 1989.

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Platforms

l. Linear television and radio services still have a large but declining share of the New Zealand market.

m. The Māori Television Service has a relatively small audience reach compared with other networks, while Iwi radio connects local communities and therefore tends to serve relatively small local audiences.

n. Because of its age, legislation reflects platform-specific provisions. The core operational function of the Māori Television Service is 'the provision... of a television service'.

o. News services are increasingly multi-media, with many offering an online mix of print, audio and visual journalism.

p. Rangatahi in particular want to access content on non-linear (internet-based) platforms, at times and places of their choosing.

Content

q. Māori audiences want to see and hear their own stories.

r. Māori audiences also want more engaging content that caters for people at a variety of proficiency levels in te reo Māori.

s. The creation of some kinds of engaging content, such as drama, require higher budgets and more appetite for risk than is currently evident.

Rights and retention

t. 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.

u. Māori media organisations and producers find it difficult to access and repurpose archival content, which is also likely to be of interest to audiences.

v. The ownership and rights to use this material are often complex.

w. Māori have a desire to share their stories with the world, while still protecting ngā mātauranga tuku iho from exploitation.

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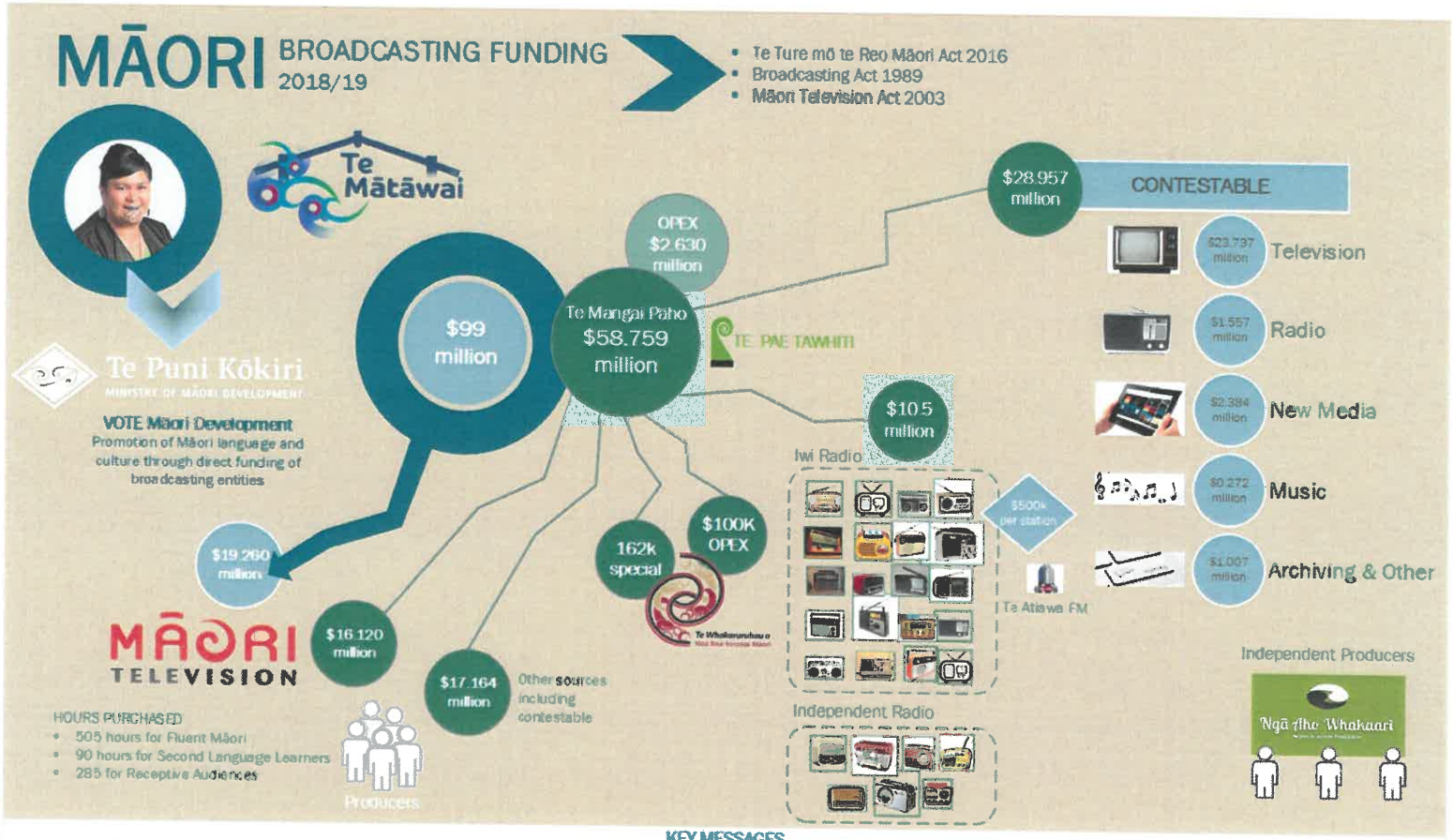
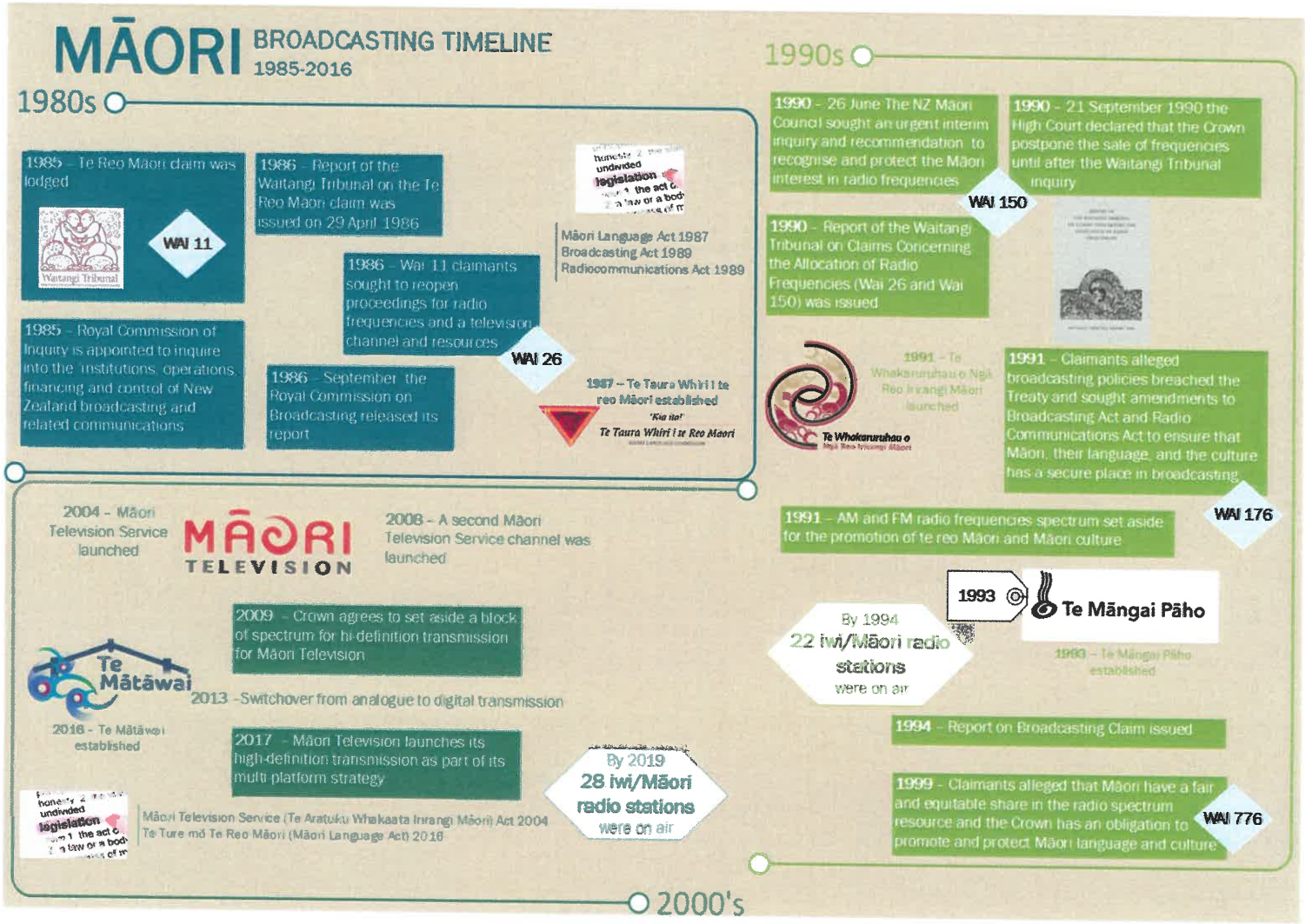
Appendix A – Inter-relationship between organisations in the sector



KEY MESSAGES

▶ENVIRONMENT ■ small market with large number of players ■ rapidly changing technology ■ flexibility is key for future arrangements ■ promoting te reo Māori and tikanga Māori as shared goals with the wider media sector **▶STRUCTURE & GOVERNANCE** ■ policy and legislative functions encourage competition ■ greater need for collaboration ■ untapped opportunity for sharing resources ■ need to clarify revitalisation of te reo Māori and tikanga Māori ■ strategy with funding required for workforce and talent development ■ complex compliance and reporting framework **▶FUNDING** ■ production budgets are lower in the Māori media sector ■ current resourcing affects production quality ■ 60 percent of Te Māngai Pāho funding is targeted towards two per cent of the total population **▶PLATFORMS** ■ legislation reflects platform-specific provisions ■ easy access to engaging content is most important ■ rangatahi want to access content on non-linear (internet-based platforms) **▶CONTENT** ■ Māori want to see and hear their own stories ■ Māori want engaging content for all levels of proficiency **▶RIGHTS AND RETENTION** ■ archival content is stored in a variety of places ■ difficult to access archived content to repurpose ■ complex ownership and rights to use this material ■ desire to share Māori stories with the world without exploitation

Appendix B – Timeline of key events in Māori broadcasting



Appendix C – Te Whare o te Reo Mauri Ora

Te Ture mō te Reo Māori 2016 recognises that iwi and Māori are kaitiaki of te reo Māori, and that the Crown should advance the revitalisation of the Māori language by promoting strategic objectives in its spheres of influence, including wider New Zealand society.

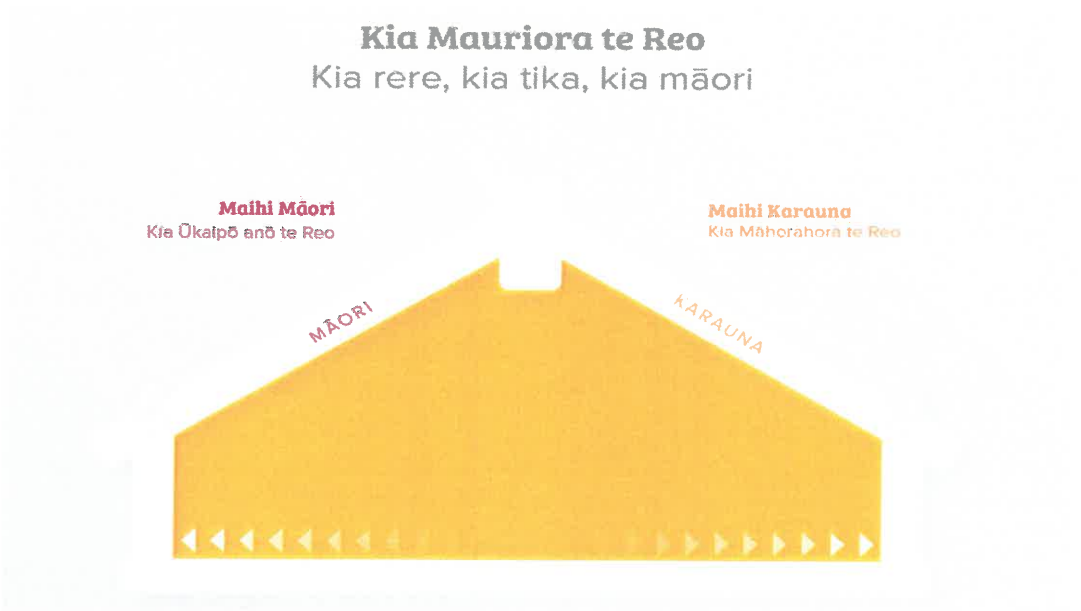
Te Ture mō te Reo Māori 2016 established Te Mātāwai as an independent statutory entity to represent iwi and Māori in this partnership, and to provide leadership on their behalf in their roles as kaitiaki of te reo Māori.

Together iwi and Māori and the Crown must work in active partnership to promote knowledge and use of te reo Māori. This partnership is expressed through the metaphor of Te Whare o Te Reo Mauri Ora – a single house with the two sides of the partnership represented by the place afforded to each – the taraiti (the smaller side of the house, taken up by the host party), and the taranui (the larger side of the house, offered to the visiting party).

Within the whare, there is room for ongoing discussion and debate. Those within the whare may not always agree, but through constructive debate the shared approach to the revitalisation of te reo Māori will be strengthened.

The two strategies, Maihi Māori and Maihi Karauna, are represented by the maihi (bargeboards) on each side of the whare. The point at which they are joined, the kōruru, represents the shared vision for te reo Māori. The shared vision is "**kia mauriora te reo**", reflecting the Māori language is a living language. This state of "mauri ora" will be reached when whānau are acquiring te reo Māori as their first language through intergenerational transmission.

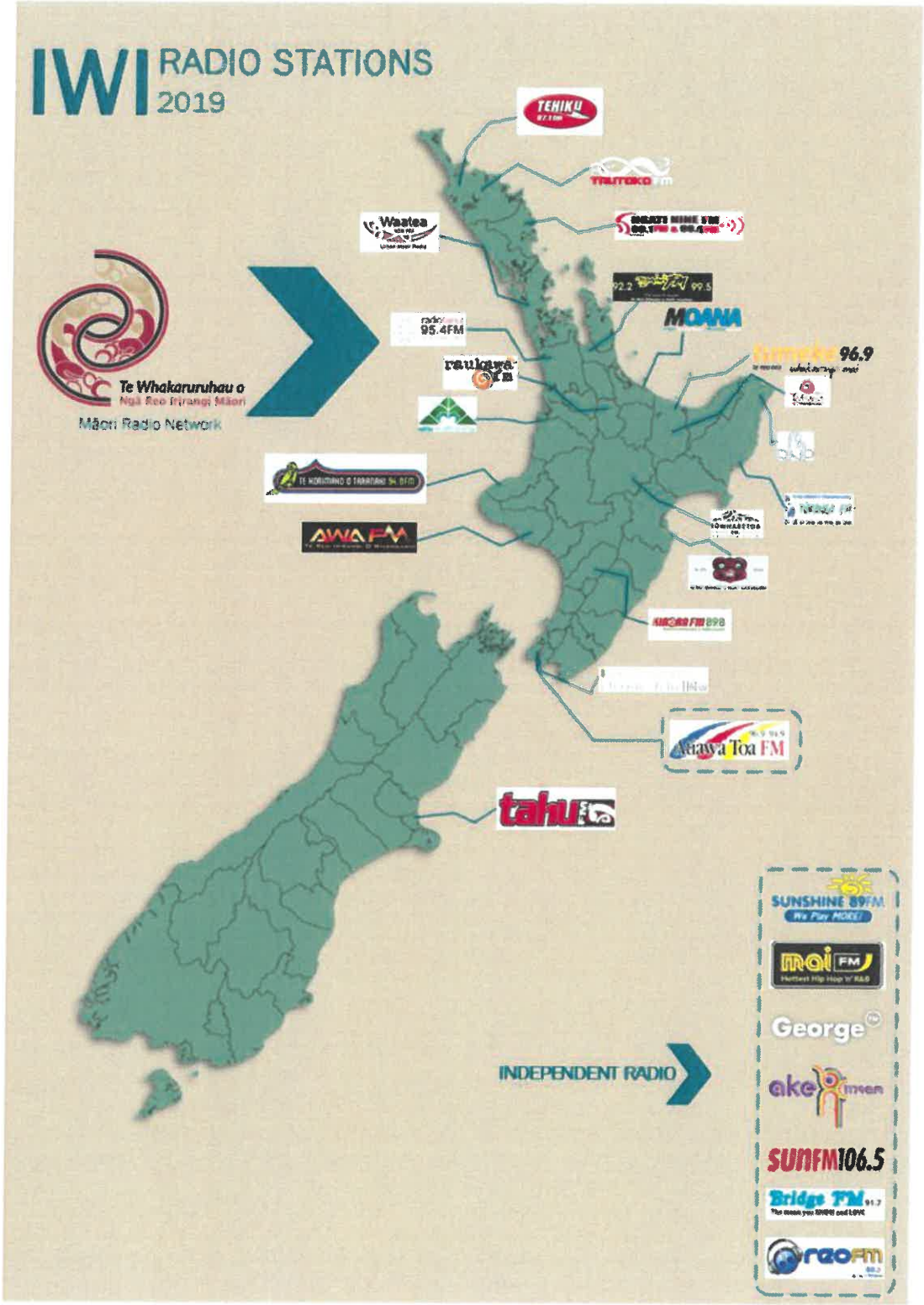
Figure 1: Te Whare o te Reo Mauriora



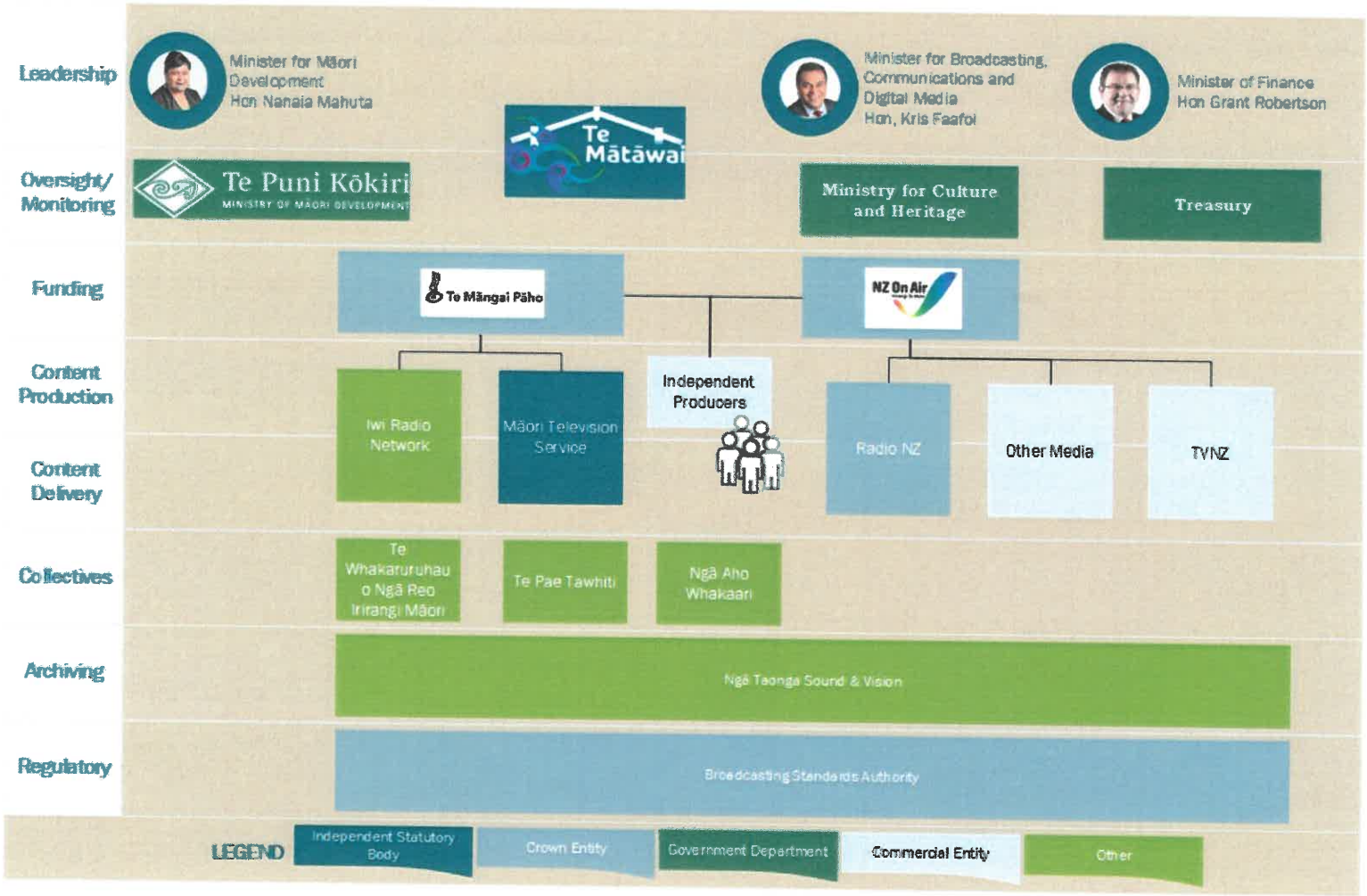
Appendix D – Profile summary of organisations

	Te Māngai Pāho	Te Whakaruruhau o Ngā Reo Irirangi Māori (the Māori Radio Network)	Māori Television Service
Legislation	Broadcasting Act 1989 Crown Entities Act 2004 Te Ture mō te Reo Māori 2016	Radiocommunications Act 1989 Radiocommunications Regulations 2001	Māori Television Service (Te Aratuku Whakaata Irirangi Māori) Act 2003
Establishment	1993	1991	2004
Source of funding	Vote Māori Development	Te Māngai Pāho	Vote Māori Development Te Māngai Pāho Te Puni Kōkiri NZ On Air
Anticipated Funding for 2018/2019 [excl GST]	$58.759m	$262k	$52.428m
Application of funds	• Direct funding of Māori Television • Contestable funding of Television Programmes and Digital Initiatives • Operational funding for Iwi radio ($500k x 21 stations) • Contestable funding of Radio Programmes and Music • Radio Waatea – to produce a network news service	• Te Whakaruruhau o Ngā Reo Irirangi Māori administration and special projects	• Operational funding of Māori Television • Purchase and produce programmes to be broadcast on Māori Television
Strategic Outcomes	Māori language and culture to be embraced by all New Zealanders	That te reo Māori is valued and spoken in our communities	The revitalisation of te reo Māori me ngā tikanga Māori
Focus	To promote Māori language and culture by funding broadcasters and Māori language programmes, Māori cultural programmes and music producers to create cost effective products that can be distributed via a wide range of media To also make funds available for transmitting on demand, producing content for transmitting on demand and archiving content	To support the Iwi radio Network to collaborate on projects and network operations	To contribute to the protection and promotion of te reo Māori me ngā tikanga Māori through provision in te reo Māori and English, of a high quality, cost effective television service
Governance	The Board comprises up to five members and is accountable to the Minister for Māori Development	An incorporated society governed by an Executive of up to seven elected members	The Board comprises up to seven members appointed by shareholding Ministers (three members) and Te Mātāwai (four members), and reports to the Minister for Māori Development, the Minister of Finance and Te Mātāwai

Appendix E – Map showing location of Iwi radio stations



Appendix F – Māori Media Broadcasting Partnerships



Attachment Three: Summary of stakeholder engagement approach used by Te Puni Kōkiri

	Stakeholder	Role	Engagement Approach
Public	Audiences	Consumers of content	Public survey; focus groups and co-design workshops with rangatahi and kaumātua. Provide for public input into future state models.
Māori media organisations	Te Māngai Pāho	Funds promotion of Māori language and culture through television, radio, music and new media	Regular meetings and consultation; design workshops.
	Māori Television Service	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	Regular meetings and consultation; design workshops.
	Iwi radio	21 stations funded by the Crown to promote te reo Māori and Māori culture; 7 self-funding stations	Regular meetings and consultation through Te Whakaruruhau o Ngā Reo Irirangi Māori (see below). Self-funding stations were invited to participate in survey.
Industry groups	Te Whakaruruhau o ngā Reo Irirangi Māori	Coordinates and advocates for 20 of the 21 Crown-funded stations	Meetings with Executive Team. Meetings with all 21 Crown-funded stations.
	Ngā Aho Whakaari	Represents Māori working in screen production including film, television, digital and gaming	Meetings with full membership.
	Te Pae Tawhiti	Māori media industry group that advises Te Māngai Pāho	Meetings upon invitation.
Partnership and oversight	Te Mātāwai	Statutory body that works in partnership with the Crown to revitalise te reo Māori. Has leadership and oversight roles for the Māori media sector.	Te Mātāwai Board has appointed two representatives to work with the Crown on future design.

	Stakeholder	Role	Engagement Approach
Wider public media organisations	Radio New Zealand	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.	Held meetings to seek views as part of consultation on current state. Continue to liaise.
	TVNZ	State owned television network, commercially funded.	
	New Zealand On Air	Broadcast funding agency.	
	New Zealand Film Commission	Supports screen industry in making and promoting films, and supporting careers in the industry.	
	Ngā Taonga Sound & Vision	Archiving of audio and visual footage.	
Tech innovator	Digital Natives Academy (DNA)	Centre of excellence in digital innovation. Offers training to rangatahi.	Completed a design workshop with DNA. Continue to liaise.
Government organisations	Te Taura Whiri i te Reo Māori	Promotes te reo Māori and coordinates the implementation of Maihi Karauna.	Regular meetings and consultation; coordination of advice on relevant work streams.
	Ministry for Culture and Heritage	Secretariat for Ministerial Advisory Group on Public Media; monitoring agency for NZ On Air, Radio New Zealand, NZ Film Commission; and advises on NALI review.	
	MBIE	Policy advice on Copyright Act 1994 review; and involved in 10 year screen sector strategy.	
	Department of Internal Affairs	Advises on NALI review.	
	The Treasury	Supports Minister of Finance as shareholding Minister in TVNZ, and in his functions with regard to Māori Television Service.	
	Te Arawhiti	Fosters strong relationships between Māori and the Crown.	