

Hon Kris Faafoi

Minister for Broadcasting and Media

AIDE MEMOIRE: Update on targeted stakeholder engagement process to inform a draft charter

Date:	10 August 2021	Priority:	Medium
Security classification:	In Confidence	Reference:	AM2021/450-BCG
Contact	Liz Stewart, Programme Director, Strong Public Media (on behalf of BCG), s9(2)(a)		

Purpose

- 1 The purpose of the aide memoire is to provide you with a progress update from the BCG governance group on the targeted engagement process to inform a draft charter for a new public media entity (noting that targeted engagement with Māori and key audience stakeholder groups is still underway).

Progress update

- 2 Over July and August, the Strong Media Programme team has been undertaking targeted engagement on BCG's behalf to inform the development of a charter for a new public media entity.
- 3 Three core stakeholder groups were identified for targeted engagement:
 - media organisations including current public media, private media, community media, industry bodies, advertisers, content producers
 - Māori media and Māori representative entities
 - key audiences for a new public entity including those who are currently 'under-served' or 'under-engaged'.
- 4 Specialist services were procured to assist with the design and facilitation of engagement activities with media organisations (KPMG) and Māori stakeholder groups (Hourua Pae Rau, Deloitte Māori Services). Engagement with key audience groups is being undertaken by the Programme Team.
- 5 The workshops with the first stakeholder group (media sector stakeholders) are now complete, and the feedback from these workshops is captured below. KPMG's full summary of the feedback and a list of those who participated in the workshops is attached as **Annex 1**.

- 6 A series of virtual hui with Māori groups and several workshops with key audience groups are running between 3 August and 12 August. BCG will update you on findings from these hui and workshops in its next briefing to you.

Feedback from media sector stakeholders

- 7 The media sector workshops canvassed a wide range of issues related to what a new public media entity should look like, and how it should operate. Broad themes across the workshops included the following:
- *What 'public media' means* - Participants raised the need to identify what "public media" means – for instance whether it is a function of ownership, provision or funding. There was general comfort with a definition encompassing both publicly owned institutions plus publicly funded content/platforms.
 - *What impact a new entity might have on other players* - A key point of focus for all the sessions was on how a new public media entity would impact on the broader media sector and commercial providers in particular. There was general acceptance that there should be 'plurality' (though not increased fragmentation) in the market, with a diverse range of strong commercial and semi-commercial providers in addition to a new public media entity; and that a public entity should work collaboratively rather than in competition with other providers. However, there was concern about the potential impacts of a stronger, bigger public media entity funded partly by commercial revenue on the viability and sustainability of other providers - particularly in relation to competition for audiences and advertising dollars.
 - *How a new entity would be funded* - Participants discussed the tensions and difficulties inherent in a new entity being publicly funded while also pursuing commercial revenue – noting that funding would drive behaviour, regardless of what is in a charter. Participants discussed the need for sustainable, transparent public funding and for high levels of that funding (e.g. at least 50 per cent). Some participants thought that content that is publicly funded should be separated out to ensure it doesn't carry advertising in order to avoid distorting the market. Other participants thought there should be a cap on advertising.
 - *How the entity's focus should differ from commercial media entities* - Related directly to the above, there was some disparity of views on what a public media entity should focus on relative to commercial media entities, with views ranging from doing only what a public media entity would do (e.g. solely focusing on under-served audiences) to a view that a public media entity should be looking to appeal to all New Zealand audiences (on the basis that all taxpayers should benefit from the content the entity provides). There was general but not unanimous agreement that a new public media entity should not create new platforms or start up new services in direct competition to existing providers. There was some discussion of the potential role of quotas in terms of ensuring a certain proportion of New Zealand content. There was also a view from several participants that entertainment/drama was just as important a focus for a public entity as news/current affairs or more factual-based programming.

- *What elements beyond a charter would be central to a new entity's success* – Participants noted that, while a charter would provide some high-level guidance and principles, the detailed operational and funding arrangements will be critical in setting the direction of the new entity and ensuring its success. In particular, participants noted the importance of good governance and management to ensure the entity can deliver in line with a charter and balance competing commercial/public incentives as well as the need for sufficient funding.
- *How tensions between a commercial and a public media focus could be managed* – Participants noted the likely difficulty for the entity of reconciling commercial imperatives with a public media focus on under-served audiences, collaboration and access e.g. the incentive to produce 'safe' programming that a broad range of people would watch (and that would therefore attract significant advertising revenue) versus producing the riskier or niche content expected of a public media entity. There were also concerns raised about the market impacts of allowing a publicly-funded entity to compete with private sector media for revenue or audiences.
- *How a new entity would use existing/new platforms* - While there was general agreement that public media content should be hosted on a variety of platforms, the point was raised that the focus shouldn't be completely 'platform-agnostic' - for instance, publicly funded content shouldn't end up on YouTube. However, participants also saw the value of public media content being accessible via a range of access points. Most participants thought that, as a content producer, the new entity would need its own robust, quality platform(s), although there was acknowledgement that sometimes collaboration with other platforms (particularly existing community media assets) would be the best way to deliver content. A few participants thought that a public entity should focus solely on funding or content rather than on retaining its own platforms.
- *What obligations would be placed on a public media entity in terms of ensuring access* – Some participants questioned the extent to which a new entity would need to continue to deliver content on platforms that are becoming obsolete (e.g. terrestrial television and AM radio) as part of a public media responsibility to ensure access, and how that would be balanced against other areas of focus such as concentrating resources on platforms that give broader reach, targeting under-served audiences, and being innovative/responsive to technological and other changes.
- *How the operational independence of the entity should be protected* - There was general agreement that the public media entity should have a strong degree of operational/editorial independence from government and, where appropriate, from commercial interests. There was some discussion of how this could be enshrined beyond the provisions of a charter, including through funding being decided by/channelled through an independent body, bulk funding/multi-year funding that is protected against election cycles, and whether there is a need for some sort of monitoring entity to stand in between the new entity and Parliament.

- *How ongoing access to public content can be ensured* - Ongoing access to publicly funded content was raised with a view that, if the public funds content, it should be made freely available to New Zealanders at least at the end of its commercial life. Participants noted that complex intellectual property rights complicate this situation.
- 8 There were also issues raised that are outside the scope of the SPM Programme, or that relate to the merits or the conduct of the programme itself:
- *How government should be regulating/shaping the broader media eco-system* - The sessions also raised government's role in regulating and helping shape the broader media eco-system. Issues raised here included the role of taxation/regulation of big international media companies as well as the need to better understand the current economic and social contributions of the wider media sector and the challenges they are facing.
 - *Whether the current contestable funding model needs to be amended* – Some participants expressed a view that the lack of vertical integration between the funding agency, content producer and distributor, coupled with NZ on Air's mandate relating to demonstrable audience reach, advantages larger producers and means commercial platforms can act as gatekeepers. In addition, NZ On Air is likely to come under greater pressure in the future as declining commercial revenues mean greater demand to fund or subsidise all forms of local content, including those previously viable on a commercial basis.
 - *Whether government should create a new public media entity* – a small number of participants raised concerns with the broader proposal to create a new public media entity for reasons including a loss of plurality in the combining of TVNZ and RNZ news operations; potential for the new entity to crowd out private sector media (with the example cited of RNZ's provision of content to private providers on non-commercial terms); a loss of talent/skills (particularly commercial ones); and a long lead time for a new entity to be fully functional. There were also concerns that the proposed changes to TVNZ would reduce reach and therefore exacerbate a decline in TVNZ audience and revenues, potentially to the advantage of global platforms.
 - *How the work programme including engagement processes has been run*- Some participants noted the difficulty in considering the charter separately from the business case and felt that there should have been broader consultation on the business case.

Components of a charter

- 9 Workshop participants were asked about the specific components of a charter, and provided feedback on what the purpose, objectives, functions and operating principles of a charter for a new public media entity should be. Their views are summarised in **Annex 1**.
- 10 There was significant commonality in participants' views about what should be covered in a charter, although participants identified tensions between some proposed areas of

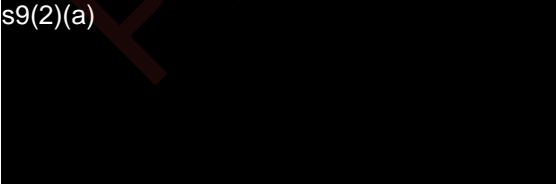
focus for the entity, as outlined in the discussion of broad themes above – in particular between:

- a requirement on the entity to pursue commercial revenue (and viewership/listenership), and a pure public media focus
 - associated with the above, competition versus collaboration with commercial providers
 - engaging a broad range of New Zealanders while also catering to diverse and under-served audiences
 - ensuring broad access to public media services by continuing to maintain increasingly obsolete technology/platforms while also planning for and responding to technological and other change
 - supporting plurality in the media eco-system without encouraging further fragmentation and losing the benefits of scale.
- 11 A further area of tension related to a possible focus on international audiences (for instance, showcasing New Zealand to the world) versus a focus on New Zealanders. However, consistent with the Cabinet decisions and business case, it is likely that the entity would focus primarily on delivery to New Zealand audiences, alongside delivery of some specific functions associated with New Zealand’s responsibilities in the Pacific.

Next steps

- 12 Once the findings from the targeted engagement, including from engagement with Māori and key audience stakeholder groups, have been collated and analysed, BCG will provide you with:
- a final summary of hui and workshop participants’ views
 - advice on the themes that could be considered when developing a draft charter, based on feedback from the targeted engagement.
- 13 Following discussion with you on the BCG findings, the SPM Programme team will provide you with further advice and next steps on the drafting of a charter.

s9(2)(a)



Liz Stewart
Programme Director, Strong Public Media
(on behalf of BCG)

Noted by Hon Kris Faafoi
Minister for Broadcasting
and Media

Date:

Annex 1: KPMG’s summary of feedback from the media sector workshops

Proactively released



Strong Public Media Charter Media ecosystem - Stakeholder engagement report

Ministry for Culture and Heritage

August 2021

[kpmg.com/nz](https://www.kpmg.com/nz)



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We passionately believe that the flow-on effect from focusing on helping **fuel the prosperity** of our clients significantly contributes to ensuring that our communities, and ultimately our country and all New Zealanders, will enjoy a more prosperous future.



KPMG Centre
10 Customhouse Quay
PO Box 1996
Wellington
New Zealand
T: +64 4 816 4500



Gill Coltart
Stakeholder Engagement Manager
Ministry for Culture and Heritage
131 Lambton Quay
Wellington Central
Wellington 6001

5 August 2021

Dear Gill,

Media Ecosystem Stakeholder Engagement

Thank you for the opportunity to assist the Ministry for Culture and Heritage, and the Strong Public Media programme. Given the important role public media plays in New Zealand's society and prosperity, KPMG appreciates the opportunity to be involved.

Our role has been to support you to discover the perspectives of a cross section of organisations within the current media ecosystem on the content of a 'charter' that could help guide a potential public media entity. The basis of this engagement was to design and independently facilitate a series of workshops with the objective of generating and capturing the views of participants and report them back to you.

Please find enclosed the report which summarises the themes that were raised in these workshops. We note that you will use this as an input, alongside other stakeholder engagement workstreams, and subsequent stakeholder engagement processes. In that sense, this represents a portion of the themes that could be incorporated into the charter. Further, we have not sought to prioritise or assess these views, nor to eliminate any, but rather to report to you what we heard, such that you may assess them.

We would be happy to discuss this report with you in more detail. Please do not hesitate to contact us if you wish to do so.

Kind regards

Sven Pannell
Director, KPMG

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Scope of our work

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Defining the scope: stakeholder engagement with the New Zealand media ecosystem

Strong Public Media – Charter stakeholder engagement

KPMG has been engaged by the Ministry for Culture and Heritage (Manatu Taonga) to support the Strong Public Media (“SPM”) programme. Part of this programme relates to the development of a ‘charter’ that would guide a public media entity, which is currently being considered by the Minister for Broadcasting, supported by the Ministry and the Business Case Governance group (“BCG”), a group of specialist advisors to the Minister.

As a preliminary step in developing advice relating to a charter, the SPM programme is undertaking stakeholder engagement with three main objectives:

1. to generate views and perspectives that ensure Ministers are informed and ultimately the charter is fit for purpose;
2. to improve visibility and transparency of the SPM Programme process with New Zealanders; and
3. to provide an early opportunity for engagement that eases and streamlines decision-making on the charter.

There were three main stakeholder groups identified for preliminary engagement relating to the charter, including:

1. the New Zealand media ecosystem;
2. Māori media, groups and audiences; and
3. key audiences for public media.

KPMG has been engaged to work with the first of these groups - the New Zealand media ecosystem – as an independent facilitator to gather and report on their perspectives.

At the same time as the ‘charter’ engagement process, the SPM programme is developing a Business Case for a potential new public media entity. KPMG has not been involved with that part of the programme.

The scope of involvement

The SPM programme, guided by the BCG, determined an approach of running a series of workshops with a cross-section of organisations from the New Zealand media landscape. Approximately 45 organisations were invited including:

- public media entities;
- private media businesses;
- community media organisations;
- industry bodies;
- advertisers; and
- content producers.

BCG members and the SPM programme team were invited to attend all workshops to listen to stakeholder perspectives, ask questions and make comments, in order to supplement their own thinking and support their advice to the Minister.

The scope of discussion

To support its objectives, the engagement workshops explored the views and perspectives of all invited stakeholders on the following four core areas:

- What the purpose of a public media entity should be;
- What an entity must achieve;

- What activities or functions it should undertake; and
- What principles should guide the operation of the entity.

The delivery approach

To deliver on the objectives of Manatu Taonga, KPMG completed the following activities:

- Designed content and questionnaires to prepare stakeholders ahead of workshops;
- Facilitated four face-to-face workshops in Auckland and Wellington with a total of 33 stakeholders attending;
- Generated four specific ‘discussion playback’ documents recording and attributing stakeholder perspectives shared in each workshop. These playbacks were circulated with individual participants, enabling them to clarify their comments, which KPMG integrated into the final ‘discussion playback’ documents; and
- Organised these stakeholder perspectives into a summary of the key themes generated by the discussion (this document).

We note that the SPM team and the BCG intend to use this summary as an input, alongside other stakeholder engagement workstreams, and subsequent stakeholder engagement processes. In that sense, this report represents just part of the themes that could be incorporated into the charter.

Further, we have not sought to add to, prioritise or assess these views, nor to eliminate any. Rather, our role was to report what we heard, such that the SPM team and the BCG may assess and incorporate them as it sees fit.

Contributors

Workshop	Date	Location	Media Participants		BCG and MCH participants
1	30 June 2021	Auckland	<ul style="list-style-type: none"> — Jana Rangooni (RBA) — Sharon Menzies (SPADA) — Cate Slater (TVNZ) — Lindsay Mouat (ANZA) — Caitlin McIlhagga (Student Radio Network) 	<ul style="list-style-type: none"> — Jo Holsted (CAMA) — Myles Thomas (Better Public Media) — Paul Head (Commercial Communications Council) — Richard Sutherland (RNZ) 	<ul style="list-style-type: none"> — Gill Coltart (MCH) — Elisa Eckford (MCH) — Trisha Dunleavy (BCG) — William Earl (BCG)
2	1 July 2021	Auckland	<ul style="list-style-type: none"> — Dan Buckingham (Attitude) — Paul Yurisich (TVNZ) — Brook Cameron (News Publishers Association) — Don Mann (Pacific Media Network) 	<ul style="list-style-type: none"> — Stephen Stehlin (SunPix) — Imraan Hussein (Apna) — Young-Rie Rho (Korea Post) — Genevieve O'Halloran (Stuff) — Stephen Smith (RNZ) 	<ul style="list-style-type: none"> — Gill Coltart (MCH) — Ryan Mclean (MCH) — Trisha Dunleavy (BCG) — William Earl (BCG) — Sandra Kailahi (BCG)
3	7 July 2021	Wellington	<ul style="list-style-type: none"> — Robert Khan (Radio Tarana) — Afamasaga Tealu Moresi (Samoa Capital Radio) — John Barr (RNZ) 	<ul style="list-style-type: none"> — Glen Kyne (Discovery) — Samson Samasoni (Oriana TV) — Cam Harland (NZ On Air) 	<ul style="list-style-type: none"> — Gill Coltart (MCH) — Rebekah Mourits (MCH) — Glen Scanlon (BCG) — Sandra Kailahi (BCG)
4	9 July 2021	Wellington	<ul style="list-style-type: none"> — Peter Newport (Crux) — Michael Boggs (NZME) — Brent McAnulty (TVNZ) — Jeanette Bullen (Ngā Taonga Sound and Vision) — Mary Major (Media Council) 	<ul style="list-style-type: none"> — Peter Thompson (Better Public Media) — Paul Thompson (RNZ) — Stephanie Hopkins (NZ On Screen) — Hilary Souter (ASA) — Philly de Lacey (WITF) 	<ul style="list-style-type: none"> — Gill Coltart (MCH) — Elisa Eckford (MCH) — Trisha Dunleavy (BCG) — Glen Scanlon (BCG)

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Structure of the charter themes

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Summary of key themes

The following themes were raised in the workshops and have not been ordered in any way.

'Charter'

PURPOSE

Fostering New Zealand's identity

National building and social cohesion

Health of the nation

Democracy

New Zealand values and culture

Media ecosystem support

Te Tiriti o Waitangi

OBJECTIVES

Reflect and drive New Zealand national identity

Innovation and creative stewardship

Civic duty and public good

Access

Build trust and develop independence

Preserve our history

Build media capacity

Inform

Educate and enlighten

Entertain

Promote Te Reo Māori

Uphold quality

Serve all audiences

Enable democratic participation

FUNCTIONS

Audience reach

Content generation

News

Sector capacity and capability building

Global participation

Monitoring and standards

Secure advertising

Create Te Reo content

Archive

Core shared services

Lifeline function

Infrastructure provision

OPERATING PRINCIPLES

Enduring nature

Serving all

Diverse representation

Independence

Good governance

Neutrality and balance

Prudence

Treaty of Waitangi

Uniquely kiwi

Plurality

Innovation and creativity

Transparency

3

A) The **purpose** of an entity

The entity's purpose, as expressed in a charter, could involve a high-level statement of the overarching impact the potential new public media entity seeks to deliver for New Zealand, and its 'reason for being'. It may reflect its statutory mandate to promote the public good and establish at the highest level entity's contribution to New Zealand.

Any named outcomes could reflect the unique aspirations New Zealanders have for their public media entity.

Purpose of an entity (1/3)

After discussing the context and current state of New Zealand public media, participants were asked to think broadly about the benefit of public media to New Zealand, the role played by public media and what a purpose statement for a future public media entity could look like.

To encourage future focused thinking, we asked questions such as “In what ways could a public media entity better contribute to the media sector and to New Zealand society?”

Theme	Explanation	Workshop Commentary	Summary Contributions
New Zealand's identity	Reflecting, expressing, building and understanding our national identity.	Across all workshops, the role public media takes in both reflecting and curating New Zealand's identity was made strongly and clearly. This theme emerged early in all conversations. A degree of divergence lay in the scale of accepting or including international culture into our own, better explored later in this report.	<ul style="list-style-type: none"> — Reflect our identity (and our identities) — We know who we are — Richer nation because we understand ourselves — Fostering distinctly New Zealand identity, character, culture — National identity — Guide and reflect how we see ourselves in the world — Purpose statement should be uniquely New Zealand's — Foster national identity
Nation-building and social cohesion	<p>Developing and reinforcing positive societal values such as tolerance to enable understanding and empathy between cultures and communities.</p> <p>Connecting people and building a better nation through shared experience.</p>	<p>Varying views were expressed articulating the role of public media to balance differing ideologies while still enabling free speech, expression and choice.</p> <p>General sense that a balance between domestic voice and global connectivity should be struck, but where that balance lies was debated.</p>	<ul style="list-style-type: none"> — More than just a 'mirror', but a vehicle for improving ourselves — Drive social cohesion — Develop culture and values — Nation building role — A key ingredient for a civilised society — Social system - media effect on the relationship between state, society and the market — Connected nation — Countering foreign interference — Counter foreign ideology — Connecting people - especially around major events — Forms domestic connectivity — Bring people together through shared experience

Purpose of an entity (2/3)

Theme	Theme Explanation	Workshop Commentary	Summary Contributions
Health of the nation	Contribute to the good health of the nation through impacting and improving New Zealanders' wellbeing.	<p>Wellbeing and serving the public good were sometimes discussed hand-in-hand.</p> <p>The commercial sector noted that this role isn't a responsibility exclusive to public media, but is also a purpose pursued by them.</p>	<ul style="list-style-type: none"> — Wellbeing — Family whānau group connection — Healthy nation — Healthy, vibrant, connected communities — Tolerance of differences — Serving the public interest — Drive ways Kiwis can improve themselves
Democracy	Protect and foster democracy and democratic participation.	Democracy, defined here in its broadest sense, was generally not taken for granted among stakeholders. They viewed the media and public media's role in holding power to account and facilitating the democratic process as critical and fundamental to a potential public media entity.	<ul style="list-style-type: none"> — Hold power to account — Promote democracy — All citizens can partake — Social justice — Counter to coercive oppression — Facilitating a functioning democratic process — Democratic strength — Reliable information — Counter foreign commercial interest — Serve the public interest – democratic — Functioning liberal democracy

Purpose of an entity (3/3)

Theme	Theme Explanation	Workshop Commentary	Summary Contributions
New Zealand values and cultures	Recognise and celebrate New Zealand values and diverse cultures domestically and abroad.	Participants expressed a range of views about how the entity could best serve the diverse communities of New Zealand through the recognition of our values and cultures.	<ul style="list-style-type: none"> — Foster fairness and tolerance — Reflect culture and values — Freedom of thought, freedom of expression — Underpinning New Zealand's independence — Tell New Zealand stories with New Zealand representation — Representation: audiences need to feel their view is being shared. Needs to look, feel, sound like 'me' — Serving all audiences — Diverse, trusted content for all New Zealanders — Reliable, independent, freely accessible to ensure all audiences hear multiple perspectives on many issues
Support wider media ecosystem	<p>Nurture and foster a diverse media ecosystem through collaboration and amplification of all its participants.</p> <p>A role for an entity as a 'sector-wide' media industry capacity builder – a steward of a healthy sector.</p>	Acknowledgement that there is strength in a diversity of mandates across the wider media ecosystem, but also weakness if this means a lack of unified purpose, fragmentation, wasted effort and duplication. Strong overall consensus to support and strengthen the ecosystem.	<ul style="list-style-type: none"> — Plurality (media) — Build a better media ecosystem as a key player in it — Don't collapse private business
Te Reo Māori and Te Tiriti o Waitangi	Promote use and value of Te Reo and Tikanga Māori through upholding treaty obligations.	Strong belief across all workshops that the Treaty principles should be entrenched in the purpose from the outset, but less clarity expressed about how best to do that.	<ul style="list-style-type: none"> — Treaty must be embedded from the top from the start — Don't design to accommodate the Treaty later down the journey — Commitment to the Treaty of Waitangi — Take the opportunity this represents to establish a true partnership

4

B) The **objectives** of an entity

These themes relate to stakeholder views of what the entity must achieve, its contribution to support Government priorities and society's goals and aspirations.

To ensure the entity can respond to future change, the objectives need to be at a high level rather than prescriptive.

Objectives of an entity (1/5)

In order to direct discussion towards stakeholder views on objectives, we asked questions including:

- What could be some specific objectives (outcomes it might seek to achieve) that would drive a public media entity's focus? For the media sector? For New Zealand society?
- What could some specific goals of a public media entity be that would indicate its success?

There is overlap between responses relating to an entity's overarching 'purpose' and its 'specific objectives'

Theme	Theme Explanation	Workshop Commentary	Summary Contributions
Reflect and drive New Zealand identity/ identities	An entity could play a key role not only in reflecting our culture, but also developing and enhancing it.	<p>This objective was widely endorsed amongst stakeholders.</p> <p>Stakeholders acknowledge the challenge involved in amplifying a large variety of voices and cultures affordably and with quality to a relatively small population, and the need to recognise and value them all equitably.</p>	<ul style="list-style-type: none"> — Inclusive - look and sound like all New Zealand — Amplifying unheard voices — Minority groups — Regional groups — Pass on values (New Zealand values) — Reflect New Zealand cultural identity — Predominantly and distinctly New Zealand — Limit international influence on New Zealand media — Promote "New Zealand Inc." objectives — Connect to the New Zealand diaspora — Reduce foreign external influence — Reflect culture. Content includes music, drama, creative and performing arts
Agility, innovation and creative stewardship	These themes indicate the desire for a public media entity to be leading edge and foster a forward thinking attitude to innovation and 'set the benchmark' for distinctly New Zealand creativity.	<p>Some tension in workshops about the agility of current public media to evolve with pace.</p> <p>Overall consensus that the future entity must be innovative and enable the wider ecosystem to benefit from this innovation focus and resource. Should have limited bureaucratic burden.</p>	<ul style="list-style-type: none"> — Foster innovation — Creativity — Be the benchmark of quality and standards — Need to bake in agility, audience focus, innovation and reach — Innovate — Noting government organisations are not necessarily risk-taking or effective innovators

Objectives of an entity (2/5)

Theme	Theme Explanation	Workshop Commentary	Summary Contributions
Civic duties for the public good	Work to public good outcomes and create a better society as a result.	To what degree this objective could be measured was debated, however, was considered important to seek to measure the impact of public media on New Zealand society.	<ul style="list-style-type: none"> — (Public media) as a lever to solve societal issues e.g. health issues, reduction in obesity, reduction in youth suicide, reduction in domestic violence, etc — Giving voice to non-mainstream perspectives — To protect New Zealand in crisis — Role to positively impact on key societal issues — Public good outcomes (not just revenue, eyeballs, ratings scores) could drive an entity
Access	Provide access for all New Zealanders to public media content, noting the public's 'rights' (or opportunities) to access content and platforms it funds.	<p>Some tension noted relating to the need of public to access content and the need for the sector to generate commercial outcomes from that content.</p> <p>Discussion also relating to government's role in access through centralizing through a portal.</p>	<ul style="list-style-type: none"> — Universally available and accessible content and stories — Public media could own a more accessible digital platform — Risks exist that centralized, dominant public media has homogenizing effect to the detriment of diverse perspectives and access. — Both content and reach — 'One platform to rule them all' such as through a portal to media sources. Some see risk in homogeneity and lost identity in having one central space. Lack of diversity of access
Trusted and independent	Be independent, reliable and trustworthy.	Agreement among all that the public need to trust in the entity, and for it to be independent from influencers (commercial, political or otherwise). This enables trust.	<ul style="list-style-type: none"> — Accuracy, fairness and impartiality of news or information presentation — Trust — Trust does not equal consumption. The public might trust the media without consuming it
Preserve history	Archive and preserve accurate accounts of history in an enduring quality.	General agreement on this objective.	<ul style="list-style-type: none"> — Preservation of history and recording ourselves and our interpretations of history at the time — Not only 'storing' but enabling access

Objectives of an entity (3/5)

Theme	Theme Explanation	Workshop Commentary	Summary Contributions
Build media sector capacity	(As above) a public media entity has to have regard to its wider impact – to support the ecosystem and/or to ensure it does not harm it.	<p>Tension amongst stakeholders between how a public media entity can achieve its own objectives without encroaching on private sector performance.</p> <p>Noted stakeholder challenges on the process alignment of charter outcomes and goals vs the structural mandate likely to come about from the business case.</p> <p>While the entity should acknowledge other entities, if the commercial imperatives undermine collaborative behaviour then the objective may not be possible to achieve.</p>	<ul style="list-style-type: none"> — Diverse media ecosystem driving healthier New Zealand — Positively sustaining the sector — Create industry capacity — Support and sustain a healthy media ecosystem — Supporting creative sector — Ensure richness of media ecosystem beyond public media — Foster talent — E.g. endorsing RNZ's 'radical sharing' model - shared beyond platform — Capacity building for the ecosystem — Create a stable media environment — Healthy production sector — Could share services across public media organisations, and with private media
Inform the public	<p>Public media entity has an objective to inform, as well as to entertain, educate, enlighten, etc.</p> <p>Media not only reflects but directs attention and 'sets the agenda' of public interest.</p>	<p>Noted that this theme plays a consistent role in charters internationally, reasonably widely accepted in New Zealand and internationally.</p>	<ul style="list-style-type: none"> — Broadcast — Informed nation — Inform thinking — Well informed public — Relevance — Reach audiences with relevant content — Tell New Zealand stories through broad content and diverse ways and angles

Objectives of an entity (4/5)

Theme	Theme Explanation	Workshop Commentary	Summary Contributions
Educate the public	To educate, enlighten and drive a better discussion on key societal issues.	Widely accepted as a key objective.	<ul style="list-style-type: none"> — Foster critical thought and debate — Give a platform to thought leaders and differing views — Factual information - not just at the 6pm news — Create new interests for the public to shift the discourse
Entertain the public	The public media entity takes a key role in entertaining all Kiwis through its content.	There was discussion about whether the entertainment objective was a valid objective in and of itself (most agreed it was) or whether it was a 'means to an end' for other objectives by generating reach to audiences.	<ul style="list-style-type: none"> — Content made, shared and accessed — Wellbeing and company to people - individual and community — Entertainment content is valid in and of itself — Link to social cohesion – an avenue to build relationships with audiences and then lead them to enlightening content — Need to give audiences what they want — Questions about whether public media should replicate international formats already commercially viable (crowding out the private market)
Promote use of Te Reo Māori	Propel New Zealand further on its journey with Te Reo Māori for Māori and for mainstream audiences.	Only tensions expressed relate to the extent to which this should be a priority, given there are a variety of audiences that the entity needs to serve	<ul style="list-style-type: none"> — Opportunity to develop our unique language — Opportunity to deliver content specific to Māori audiences — Opportunity to bring more Te Reo and tikanga Māori to the mainstream — Noting the existing Māori media organisations and an entity's responsibility not to subsume them
Uphold media sector quality through exemplary leadership behaviour	Noting that a public media entity should 'set the bar' on media behavior, ethics, standards, etc.	Discussion related to the need for an entity not to control this but remain accountable to other monitoring agencies in the public media landscape.	<ul style="list-style-type: none"> — Role model to sector — Counter to inauthentic channels / the counter to fake — Evolve the system — Expanding mainstream agenda — Leadership role across the media ecosystem

Objectives of an entity (5/5)

Theme	Theme Explanation	Workshop Commentary	Summary Contributions
Serve underserved and underrepresented communities	<p>A public media entity needs to reach audiences with relevant content where others may consider it uneconomic to do so.</p> <p>It also needs to represent those audiences in the mainstream.</p>	Tension between supporting an entity to reach smaller audiences, without crowding out those already seeking to do so. who serve these communities and serving them directly.	<ul style="list-style-type: none"> — Public media should reach across the digital divide — Audience engagement should remain a priority — There is a difference between reaching niche audiences and representing niche audiences in the mainstream media – both are priorities — Amplify those already serving and reaching ‘underserved audiences’ — Better engagement with diverse audiences — "I see people who look like me" — National and regional content — Create space to share more content more broadly e.g. Asian content to Māori audiences and so on)
Enable democratic participation	Drive citizens into debate and greater uptake of exercising their democratic rights.	Some attendees surmised whether the entity could more actively drive civic participation, noting, for example, voting engagement has been falling.	<ul style="list-style-type: none"> — Hold the right people to account — Civic participation could be a KPI

5

C) The **functions** of an entity

This sets out the main activities the entity is authorised to undertake to meet its objectives and achieve its purpose.

It was noted that if a charter is overly prescriptive in mandating function, it may constrain, rather than enable, an entity in the future as media ecosystem conditions change.

Functions of an entity (1/4)

During workshops, a 'do/ don't do' exercise was run to capture which activities participants believed the entity should prioritise or avoid. The following questions were positioned in the questionnaire to prepare stakeholders thinking:

1. What could be the primary functions of a public media entity? i.e. what activities could an entity be responsible for delivering?
2. Are there any examples of activities you think should not be within a public media entity's operating scope? And why?

Theme	Theme Explanation	Workshop Commentary	Summary Contributions
Reach audiences through owned channels and through those of others	An entity distributes content to audiences via channels it owns, and those owned by others.	<p>There were divergent views on whether public media entity should 'own' platforms with exclusivity.</p> <p>There were views that 'traditional' broadcasting channels would play a key role in audience reach for many years, and public media may have a continuing duty to support them.</p>	<ul style="list-style-type: none"> — Developing and sharing digital portal — Facilitate sharing of publicly funded content — Accessibility e.g. disabled access — Acknowledge and serve those differently abled (greater access) — Create lifelong relationships with all audiences, including youth, Māori and Pacific and Asian — Make content widely available and promoted — Providing platforms to independent content producers and linking them with audiences — Do not override, but sit alongside — Deliver content to New Zealanders through whatever means make sense — Support delivery of local and regional information — Radical content sharing model — Amplify the content, resources, services and organisations which are in existence
Local, regional and multilingual content generation	A primary function of a public media entity is to generate New Zealand's content for its citizens.	<p>Universally accepted as a key role for public media.</p> <p>It was noted that an entity itself has a role to generate content, and to fund content.</p> <p>There was discussion relating to the value of NZOA's role as an independent content funder for a public media entity and other media entities.</p>	<ul style="list-style-type: none"> — Produce reliable information — Create valuable IP — Content production across many genres — Not replicate popular content — Recording, curation and archive of events (content library) — Tell the New Zealand story — Create content about culture (modern and heritage) — Embrace, nurture many languages — New Zealand story telling to the world

Functions of an entity (2/4)

Theme	Theme Explanation	Workshop Commentary	Summary Contributions
News	This is a primary function of public media in delivering its objectives.	<p>Universal agreement that news should be a function of the public media entity.</p> <p>There were mixed views on whether portions of news gathering could become a 'shared service' and the effect this may have on the private market.</p>	<ul style="list-style-type: none"> — Breaking news — 24/7 News — Cover significant moments and major events — News — Core news service
Sector capacity and capability building	An entity could take a more active role in developing New Zealand's media and creative sector talent base.	All noted the benefits of public media attracting and developing talent that the entire sector would benefit from.	<ul style="list-style-type: none"> — Capacity building in the sector - including talent development — Develop industry training content and/ or approach — Provide a direct line to audience — Maintaining and developing distribution infrastructure and platforms — Not become a monopoly — Funds content — Talent development — Give choice — Research and development to support innovation. Foster and accelerate innovation — Training development and skills - share tools with the wider ecosystem — Training ground: foster, incubate, nurture talent and skills
Global reach and responsibilities	Projecting New Zealand values into the global media ecosystem.	Many see New Zealand as playing a more active role in participating in the global response to key media threats and opportunities.	<ul style="list-style-type: none"> — International responsibility to support global media freedom — Be aware of the wider ecosystem (not just self looking)

Functions of an entity (3/4)

Theme	Theme Explanation	Workshop Commentary	Summary Contributions
Monitoring and standards	An entity will need to comply with a variety of existing obligations, requirements and standards.	It was noted that there were already vehicles for monitoring, and a charter may need to acknowledge these.	<ul style="list-style-type: none"> — Transparent and reliable complaints process — Maintaining technical standards — Combat misinformation — Oversight and standards — Correction of misinformation
Secure advertising	An entity with a commercial imperative to generate advertising revenue.	<p>Debate as to the extent to which a commercial imperative had an impact on content and independence.</p> <p>Debate relating to how a public media entity with strong audience reach creates significant opportunity for New Zealand businesses to communicate with customers.</p> <p>Debate relating to 'crowding out' effects on the private market.</p>	<ul style="list-style-type: none"> — Do not take more advertising money out of an already shrinking market — Leave New Zealand businesses with key channels to reach their Kiwi customers — Don't crowd out the private market through public subsidised services — The need to promote New Zealand to itself and internationally risks reducing national self critique implicit in holding ourselves to account though our news and current affairs services. — Without strong New Zealand channels to New Zealand audiences, New Zealand advertising revenue increasingly flows offshore to global digital platforms.
Create, support and distribute Te Reo content	Supports the objective of developing our unique culture and heritage.	This was called out as a specific function of focus.	<ul style="list-style-type: none"> — Te Reo function
Archive	Supports the objective of preserving our history.	Noted complexities relating to private commercial rights exploitation and accessibility of archive material.	<ul style="list-style-type: none"> — Archive content (and make available at a reasonable price). Tension: between protecting IP and giving the public access to content they funded — Archive function is a record of our identity

Functions of an entity (4/4)

Theme	Theme Explanation	Workshop Commentary	Summary Contributions
Core shared services, operational services	Could a public media entity take complexity and unnecessary duplication out of the ecosystem by providing services to others.	There was considerable debate about this, especially related to core news recoding functions in a small market.	<ul style="list-style-type: none"> — News gathering service currently inefficient — Need to be clear where an entity is competing, where it is supplying, where it is collaborating and where it is not playing at all — Perhaps it could support smaller entities with shared services
Lifeline and emergency function	A specific function supporting an entity's objectives in time of crisis.	Noted benefits especially since COVID19 and other recent natural disasters.	<ul style="list-style-type: none"> — Lifeline services — Not the sole responsibility of public media, also private — Risks in not having available channels for communication in New Zealand control
Infrastructure provision and ownership	Owning the broadcast infrastructure for today and tomorrow.	Some noted that the entity itself needed to invest responsibly in development of portals.	<ul style="list-style-type: none"> — Broadcast infrastructure for all New Zealanders — An entity needs to maintain control of infrastructure to avoid levers of interference in its independence

6

D) The **Operating Principles** of an entity

These provide guidance on how the entity undertakes its function and ensures that it operates in ways that are consistent with its mandate as a public media entity. They could also provide guidance on the way in which the entity takes account of the other entities within the wider media eco-system.

Operating Principles of an entity (1/5)

During workshops, we asked how the entity should be guided as it carries out its functions and makes decisions. The following questions were positioned in the questionnaire to prepare stakeholders thinking:

1. What principles could govern the behavior of the entity?
2. How could that entity best relate to others in the ecosystem?

Theme	Theme Explanation	Workshop Commentary	Summary Contributions
Enduring nature	The charter needs to acknowledge the entity's need to play an enduring role.	It was noted that the charter should establish an entity with the principles that allow it to endure beyond the undue influence of the considerations and political influences of that time.	<ul style="list-style-type: none"> — Transcend the government of the day — Freedom to adapt — Resilience to undue influence (e.g. FANGS) — Enduring entity — Look through the government of the day
Serving all audiences	The entity needs to be universally accessible for all New Zealanders.	<p>This was broadly agreed as a key principle to guide operations.</p> <p>The tension between delivering what audiences want and what gets 'eyeballs' vs delivering content that an entity felt New Zealand 'needed' to counter majoritarianism or to develop public discourse and enlighten was noted.</p>	<ul style="list-style-type: none"> — For all New Zealanders — Able to be accessed by all New Zealanders — Universal service (accessible + being enabled) — Balance relevance for mainstream audiences and reach into special interest groups — Balance of hours: across genres and audiences — Responsibility to New Zealand and Pacific audiences. Acknowledge skillset challenges of Pacific partners and seek to support — Equitable access
Diverse representation and organizational structure	The entity needs to be staffed with a mixture of perspective, producing content for a mixture of perspectives.	This was universally held and positively discussed for the future.	<ul style="list-style-type: none"> — Entity staff, talent, content, audiences represent New Zealand — Diversity of perspective and offsetting risk of homogeneity — Add to Pacific content and languages. Many languages are endangered — Taonga - more than just employing more diverse people, but also embedding diverse ways of doing business in operating models — Language diversity. Integrate diverse languages into mainstream, such as through subtitles — Organisation represents the community it seeks to serve — Culture of the entity needs to discover and strike appropriate balances

Operating Principles of an entity (2/5)

Theme	Theme Explanation	Workshop Commentary	Summary Contributions
Independence	The role of public media requires freedom from undue influence.	There was strong debate about enshrining the freedom to operate without political or commercial interference, and the extent to which conventions and rules already established this imperative.	<ul style="list-style-type: none"> — Independence — Resilience to undue influence (FANGS) — Be an exemplar of good behaviour and good practice — Editorial control — Role model decent behaviour — Enshrine editorial independence. From political and special interest groups — "Do no harm"
Appropriate governance to hold themselves to account	It needs to operate with independence, but not without oversight.	Debate about the extent to which governance mechanisms need to be enshrined in the charter itself, or elsewhere.	<ul style="list-style-type: none"> — Needs oversight mechanism — Caution for use of independent governance bodies — Arms length relationship with government
Neutrality and balance	The need to operate without pushing a singular agenda.	There was discussion about a singular entity reducing multiplicity of voice, and having too great an influence without safeguarding balanced perspectives.	<ul style="list-style-type: none"> — Support plurality — Neutrality in presentation of information — Public good services — Counter to public relations machine — Obligation to act with integrity and to give balanced views
Prudence	The need to spend public money wisely.	There was discussion about the inevitable challenges and potentially competing objectives of reaching 'uneconomic' audiences and yet to spend public money responsibly.	<ul style="list-style-type: none"> — Existing charters place requirements on organisations to spend public money wisely — Take advantage of the most effective means of delivery, including achieving efficiencies — Efficiency and effectiveness with public funds - not doubling up on what the commercial sector is serving — Funding: risks of cross-subsidization between parts of the organisation — Value generated by the entity should have that funding reinvested in public media (rather than dividends to Treasury)

Operating Principles of an entity (3/5)

Theme	Theme Explanation	Workshop Commentary	Summary Statements
Collaboration	The charter represents a major opportunity to reset the collaborative nature of the sector, and guide how an entity interacts with others.	<p>This was a major part of the workshop discussions.</p> <p>Competing views were expressed about whether the entity needs to not replicate what others do well. This was particularly apparent when discussing the smaller organisations focussing on niche audiences, who serve their communities well but struggle to bring their profile into mainstream media.</p> <p>It was also a major part of the discussion about how an entity relates to other larger private media entities in a context of declining sector revenues.</p>	<ul style="list-style-type: none"> — Be a good partner — There is a need for transparency e.g. in not driving up content acquisition costs — Default should be partnership; not a single dominant player in the market — Collaboration is key — Not aggressively seeking audiences and revenue — Positively influencing media ecosystem — Do not compete with commercial sector (tension) through offering the same services — Does what isn't done by private. Tension: as a result of being a mixed funding model and the need to generate revenue (which is where the popular content lies) — Inclusivity — Be an enabler — Synchronise, not duplicate, take account of other media — Content sharing strategies important
Embed the principles of the Treaty of Waitangi	The charter represents a fresh opportunity to deliver better to the Treaty of Waitangi.	It was noted that the particular stakeholders engaged with didn't fully appreciate how to bring the Treaty to life in the operating principles of a new entity, but were excited by the chance.	<ul style="list-style-type: none"> — Reflection of Article II of the Treaty of Waitangi — Preservation of language and taonga — Preservation of partnership with Māori media and evolution of it — Do not undermine Treaty efforts already underway (such as Māori TV)
Uniquely kiwi	The entity needs to reflect the uniqueness of New Zealand.	There was discussion that an entity should operate in a way that reinforced the distinctiveness of our culture.	<ul style="list-style-type: none"> — Celebrate the industry in New Zealand

Operating Principles of an entity (4/5)

Theme	Theme Explanation	Workshop Commentary	Summary Statements
Plurality	The entity needs to preserve New Zealand's democracy.	<p>This was widely accepted as critical principle to be guiding decision-making as the leaders of the entity carry out their role.</p> <p>It was noted that there are multiple definitions of what 'plurality' really means, which may deserve greater scrutiny in order to bring clarity.</p>	<ul style="list-style-type: none"> — Presentation of range of information — Sustained plurality — Support plurality — Address conflict and enable positive debate
Innovation	The entity should be a beacon for fostering creativity.	The extent to which it should take risk with public money was debated.	<ul style="list-style-type: none"> — Allowing start-up and new business model — Agile — Fast-mover
Transparency	The entity should be open in aspects of its decision-making to reduce competitive impact.	The tension between allowing the organisation to compete and requiring it to communicate was noted.	<ul style="list-style-type: none"> — Transparent acquisition behaviours — Transparency (e.g. of procurement, and subsidising activities). Do not want public funds to subsidise commercial. Public interest test

Appendices

Other Workshop outputs

During the workshop series, a range of additional comments emerged that don't directly related to the objectives or the scope of work. We have sought to include these in an abridged form, so they can be used by the SPM team in its preparation of advice.

A.

Funding Principles of an entity

Operating principles were further split into funding principles in order to delineate stakeholder observations on the implications of the funding model and this impact on the relative sustainability of the media ecosystem.

Funding Principles of an entity (1/2)

During workshops, a variety of statements were made relating to the entity's funding.

Theme	Theme Explanation	Workshop Commentary	Summary Statements
Sustainability	The entity requires a sustainable funding model.	There was agreement that the entity needed a sustainable funding scenario, but that balancing the pressures that come with a mixed funding model was a challenge.	<ul style="list-style-type: none"> — Sustainable levels of funding — Funding levels safeguarded from political influence — Sustainable resourcing — Whether entity should provide treasury dividend vs reinvestment — Legitimate levels of funding on legitimate time horizons that enable long-term thinking — Reinvest funds back into the entity and ecosystem — Certainty of funding. Creates sector stability — Ensure and improve sustainability of public funding to the ecosystem — The entity creating value should have the value circulated back to itself for reinvestment
Public-private balance of competition	The entity must strike a balance between supporting itself and supporting the ecosystem, given its size in the market.	<p>This was a major topic of divergence throughout all workshops. While some argued that outright competition may drive better public good outcomes, others were adamant that the entity should not compete.</p> <p>A concern was how the public media entity could achieve public interest objectives when the commercial imperative may be counter to that outcome. Many viewed commercial imperatives as having a negative effect on pursuing the public good.</p>	<ul style="list-style-type: none"> — Issue: cross-subsidisation of crown funding to non-public media work — Don't aggressively acquire to maximise profit or audience share — Public media entity doing some commercial work — Level of public funding must offset commercial pressure — Should not prohibited from entering commercial arrangements — Needs to balance transparency with commercial competitiveness — Queried the extent of crown funding vs commercial funding and how that level will influence it — Play to strengths across the ecosystem through partnership model — Competition lies in the channels, not in the production of content — Commercial imperative: do more to 'grow the pie' of available revenue, don't shrink the pie. — Tension: issue of commercial return and public interest. Scrutiny associated with public funds — Commercial interest overlaid over public content

Funding Principles (2/2)

Theme	Theme Explanation	Workshop Commentary	Summary Statements
Funding mechanisms	There was some openness to different funding models and sources of funds that were more directly linked to the user e.g. levy.	<p>There was considerable debate around funding mechanisms, while acknowledging that it wasn't the primary scope of the discussion.</p> <p>It was also noted that other workstreams were examining funding mechanisms more directly.</p> <p>It was considered a very important element relating to the future of public media.</p>	<ul style="list-style-type: none"> — Should there be a cap on the level of advertising as a portion of its revenue — Quotas for streamers to drive New Zealand content levels — Openness to FANGS national tax response — Openness to levy funding models — Funding: user pays? Tension of the willingness of audiences to pay — Caution: non-crown revenue as more than "selling to eyeballs" — Not be driven by advertising — Don't drive profit expectation with dividend to treasury — Do not do advertising. Tension: some agree, some disagree – largely relates to the funding model — Do not let advertising affect funding decisions. Tension: if advertising is funded, then this will impact decision making

B

Charter Commentary

Workshop participants made numerous observations and suggestions on the nature of a charter and its enduring role in governing a potential public media entity. This section of the report is a summary of these comments.

Proactively released

Charter Commentary

During workshops, a variety of statements were made relating to general purpose and enduring nature of a charter.

Competing priorities were noted

- It will be important that the charter does not place an entity in an 'impossible' position between competing priorities.
- It was noted that the charter workstream could be a place for acknowledging the impact of global streamers on the New Zealand ecosystem, but was also noted that the government has other levers for addressing the issues presented by this.

Engagement process was discussed

- Some expressed a need for greater public and formal consultation and process alignment with the entity business case.

Governance and accountability

- Consideration needs to be given to where the mechanism sits to defend public media's freedom.
- Caution was noted on the challenges of selecting metrics and the risks of using quantitative metrics (i.e. volume of viewers) rather than objectives-led metrics, such as the impact to society.
- A charter review mechanism was discussed, noting the need for a regular, periodic review function
- It was noted that some of the entity's guidance will be set by legislation and in a charter, while other guidance may exist in other mechanisms such as statements of intent or strategic plans.
- The tension was noted between the need for the charter to be prescriptive and the risk of putting so much detail in the charter that it inhibits future decision making.
- Governance was discussed, including the need to decide who assesses performance against the objectives, noting this has risks if it becomes an internal function of the entity and risks to political independence should it involve the government of the day.
- The charter could be positioned as a decision-making framework for future governors.

Nature of a charter

- Any eventual charter content should be uniquely New Zealand (i.e. not a copy or composition of parts of other charters).
- By some, the Australian SBS charter was noted as being simple and clear which serves diverse media well in what they do and for whom.
- The charter should be flexible enough to enable adaptation to the changing future conditions.
- The charter could dictate more fully how public media relates to other key partners e.g. Māori media and private media.
- The charter could be principles-based in order to be more enduring.
- A charter could guide the ethics of news information presentation i.e. the ethics of expression, although it is noted that this is not the only guide for the ethical delivery of such an important role in public media in New Zealand.

C

Key relationships for an entity

The two domains of the responsibilities of a mainstream public entity in respect of Te Tiriti O Waitangi and the relationship between the public media and other participants in the ecosystem have been highlighted through this process as 'key relationships'. This reinforces the need to collaborate with these players in order to understand complementary and competing needs.

During workshops, a variety of statements were made relating to the entity's relationships with Māori and with the private media.

Themes	Summary Statements
The Treaty should be a high strategic priority	<ul style="list-style-type: none"> — Importance of positioning Treaty of Waitangi at the top of the pyramid (i.e. in the purpose) — How to include Treaty of Waitangi in charter e.g. protected in principles. E.g. specific objectives. E.g. fundamental to purpose?
Correcting past errors	<ul style="list-style-type: none"> — Treaty of Waitangi is not fully reflected in existing media mandates — Poorly addressed the Treaty in charters and legislation in the past and want to correct this going forward
Sector reaction to lack of Māori content	<ul style="list-style-type: none"> — e.g. Ngai Tahu developing their own platform
Charter role with Māori content	<ul style="list-style-type: none"> — Charter defines what 'Māori content' is and how that can be shared among many audiences (not just Māori)

Themes	Summary Statements
Competitive balance	<ul style="list-style-type: none"> — Monopoly vs free competition balance
Collaboration	<ul style="list-style-type: none"> — Not to undercut, but to support and amplify
Opportunity for sharing	<ul style="list-style-type: none"> — Major events are commercially viable? Public media's role
The objectives of public media are not its alone	<ul style="list-style-type: none"> — When objectives are stated for public media, this does not imply they are not for private media too. These are not exclusive objectives to public media

D

Key roles for the entity across the **value chain**

The role an entity plays in the media value chain were grouped as relating to **content, platform** and **audiences**. While most of the views concerning these three areas are captured in the broader structure, some specific comments have been extracted to further characterise the nature of the conversations held on these topics.

Content, Platform & Audience

During workshops, a variety of statements were made relating to the entity's role and participation at varying points on the value chain.

Audience

New Zealand Inc. Opportunities

- Device optionality and agnosticism.

Access

- Questioned how the public accesses publicly funded content and archives. Balancing the opportunity to commercialise with the desire for stories to be shared and accessed. A recommendation for timeframes on the commercialisation window.
- Ease of access, not just access.
- All New Zealanders, including the underserved.
- Acknowledge the digital divide and continue to serve all audiences.

Fragmentation and platform migration

- Distinct audiences are linked to platforms. Counter point: distinct audiences are attached to content regardless of platform.

Content

Social good imperative

- Public media does not need to be solely 'audience demand-led' because it has social good objectives.
- Public media can 'break the bubble' of recommendation engines to expose consumers to a wider variety.
- Can't tell audiences where to consume.

Audiences abroad

- Pacific audiences (MFAT funding).
- New Zealanders abroad.

Platform

Central digital platform

- Portal could be owned and developed.
- Tension: between the requirement to own a public media platform, thus spending public money to develop and trial platforms, or whether existing platforms are better used or leveraged for New Zealand outcomes.

Multiple platforms

- Multi platform.
- Does public media need to own platforms. Tension between stakeholders on this point.
- Emphasis on sharing content. E.g. RNZ use most efficient means of distribution (may not be their own).

Closing the digital divide

- Device optionality.
- Device agnostic.

Collaboration with commercial

- Streamers: potential vehicle for supporting local content e.g. with quotas.

Discovery architecture

- Content discovery architecture e.g. discovery algorithm control.

E

Stakeholder perspectives on the **Current State** of public media

It is useful to understand the current state in order to position thinking for a better potential future state. Workshops started with a discussion of the current state strengths and weaknesses, with the purpose of ensuring stakeholders felt heard and that their current pains and gains were captured and could be taken into future planning. The following pages summarise these views.

Strengths of Current New Zealand Public Media (1/3)

During workshops, a variety of statements were made relating to the current strengths and weaknesses of New Zealand's public media. Inevitably, what some viewed as strengths were sometimes viewed as weaknesses by others. Further, the extent to which an issue presents as a strength or a weakness is not drawn out below, but did form part of the discussions.

Themes	Summary Contributions
Sector Support	<ul style="list-style-type: none">— Talent - quality people— Support for local content— Model promotes multiple ways of generating content e.g. strong role for independent production— Allows for hyper-local and regional voice— Nurturing talent ecosystem— Support for creative sector— Collaborative behaviours are increasing— Delivers the New Zealand content which private media cannot provide— Large number of players in the media ecosystem contribute to a functioning ecosystem
Independence	<ul style="list-style-type: none">— Limited state encroachment— Independence from its state owner— News independence from management and commercial interests— RNZ clarity of vision. Because they know who they are they are unencumbered, this is in contrast to TVNZ who must manage competing commercial and public good objectives— Being not fully reliant on advertising for revenue reduces culture of organisation being in the hands of ad funders. Counter point is that advertising revenue gives clients and agencies access to New Zealanders through economic value, creative value etc— Public ownership of audience and platform— Impartial news— Ad-free experiences are available

Strengths of Current New Zealand Public Media (2/3)

Themes	Summary Contributions
Diversity	<ul style="list-style-type: none">— Breadth and range of content— Diversity in the model gives flex e.g. NZ on Air funding, Māori TV unique mandate, RNZ pure broadcaster, TVNZ mixed model.— Normalisation of Te Reo and Treaty of Waitangi obligations— Broad church— No longer monopsonistic single broadcasting entity— Diversity of platforms— Diversity of voice - particularly with Radio— System creates room for community media, however community media seek more funding to carry out their activities

Strengths of Current New Zealand Public Media (3/3)

Themes	Summary Contributions
Public trust	<ul style="list-style-type: none"> — Trusted brand — Brand legacy – have grown up with New Zealanders and built a relationship with them — Complies with standards and disciplines — When society is under threat, people go to trusted public media. (NB this also holds true for some private media) — Corrects misinformation spread on social media — Complaints management is robust — Ethics and capabilities
Resilience	<ul style="list-style-type: none"> — Two dedicated entities reduces risk. With multiple media entities, enables resilience in the system to withstand entity specific shocks – ‘healthy reef’ analogy. Wider agendas. Reduced independence challenges — Power in multiple voices, as opposed to a single voice for public media — Relative (large) size strength — Funding security — Delivers plurality
Audience centric	<ul style="list-style-type: none"> — Audience understanding, reach and content creation — Produces content for New Zealanders — Broadcasters know audiences well - what they want — Entertainment creation — Public media good at asking audiences what they want

Weaknesses of Current New Zealand Public Media (1/2)

Themes	Summary Contributions
Funding limitations	<ul style="list-style-type: none">— Lack of sustainable funding— Small funding pool available to a large number of diverse media providers who serve audiences which are underserved by public media means they 'fight over crumbs' of funding available to them— Multiple entities thins available investment— Funding not kept up— Sinking lid of commercial funding— High cost of New Zealand's digital distribution structure at odds with public media objectives
Fragmented mandates	<ul style="list-style-type: none">— Needs to be out of the hands of politicians and commercial reach— Fragmented and uncoordinated response to digital infrastructure causes inequity— Multiple entities lack of alignment— Fragmented mandates— Potentially stronger as one
Vulnerability to global and commercial competition	<ul style="list-style-type: none">— Digital offering (beyond news) needs to be developed— Risk to local content from streamers— Not agile, focussed, collaborative to solve those issues together— New Zealand voice is missing from content accessed by New Zealanders— Vulnerable to global competition— Audiences in decline— Local media under particular threat

Weaknesses of Current New Zealand Public Media (2/2)

Themes	Summary Contributions
Lack of agility and responsiveness	<ul style="list-style-type: none"> — Lack of agility and responsiveness - slow decision making — Conservative shareholders constrain execution of ideas — Limited access to funding constrains innovation — Lack of national response to FANGS, for example
Access	<ul style="list-style-type: none"> — Production village and audience access — Digital connectivity is the infrastructure of the future but the population has limited access
Diversity	<ul style="list-style-type: none"> — Lack of capacity to represent diverse audiences, cultures and languages — Limited willingness to work with niche and hardest to reach audiences given commercial imperatives — Not clear on reflecting the demographics of New Zealand — Lack of genres; particularly in TV. e.g. documentaries, children’s tv, science, drama, children's drama etc — Underserving some groups, such as youth and Pacific peoples — Under-representative to audiences — Not reflective of regions - diversity challenges within and projected through media — Media as an employer, is skewed to privilege due to lack of job security. This results in under representation across cultural groups — Skewed to older audiences

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Thematic synthesis method

Proactively released

Method for thematic analysis

Summary Statements

We organized workshop material and discussion records into summary statements, labelled 'summary statements' in the tables throughout this report. These statements represent a synthesized version of each of the conversations held in each workshop. Where duplication of concepts occurred, the subtleties of the difference in conversation were captured.

Themes

Statements were organised under broader themes (labelled 'theme'), to succinctly capture the core of the discussion raised. Some themes blend across the structure.

Theme Explanations

Following theme generation and an initial review, KPMG worked with the Manatu Taonga Strong Public Media programme team to clarify and test the themes. This collaboration enabled KPMG to clarify the structure of this report and to further define the themes, as headed in the 'theme explanations' section of the tables.

Workshop Commentary

Where tension or agreement occurred during workshops, the dynamics of the conversation are captured in the workshop commentary.

Sources

The following sources were used in generating summary statements and initial themes:

1. Questionnaire responses from attendees
2. Workshop playback material
3. Workshop playback stakeholder feedback
4. Additional materials provided by stakeholders
5. Workshop materials, such as flipchart paper and presentation slides

The sources are deliberately limited to the views of the stakeholders in order to accurately reflect their voices.

Opinion

The views of the BCG and KPMG are not represented in this report.

Contact us

Sven Pannell

Director
KPMG
Wellington

T: +64 4 816 4829
E: spannell@kpmg.co.nz

Jessica Shaw

Senior Advisor
KPMG
Wellington

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