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SUBMISSION TO MANATŪ TAONGA - LONG TERM INSIGHTS BRIEFING
'The Components of an Impactful and Sustainable Cultural Sector into the Future'
September 2021

Tēna koutou,

Thank you for the opportunity to submit on this important Briefing.

WeCreate is the alliance of forty of Aotearoa's major creative and cultural sector associations and organisations – representing 30,000+ Kiwi creators, support people and creative businesses – which was founded in 2014 to propel growth in the sector and increase its contribution to New Zealand's social, cultural and economic wellbeing.

A number of forward-thinking strategic imperatives have been undertaken across the sector in recent years, but these are yet to be actioned by government.
In 2019's *From the Knowledge Wave to the Digital Age,* government stated that it would partner with WeCreate on the key recommendations of its **Action Plan** (www.wecreate.org.nz), and also identified the **Review of the Copyright Act** and the **Screen Sector Strategy** (which has since incorporated a COVID-19 update, delivered in August 2020), as building blocks for a **Creative Industries Transformation Plan**. Prior to an indefinite delay of the Creative Industries Transformation Plan in June 2020, government (via MBIE) began to engage with the work of the **Interactive Aotearoa** initiative, and this work continues.

WeCreate's comprehensive two-year consultation process for its Action Plan identified **seven enduring pillars** (or components) required to grow the contribution of the sector to Aotearoa's wellbeing, and these remain widely supported across the sector:

Connection & Collaboration
Measurement & Research
Regulation
Education
Skills, Talent & Capability
Capacity & Investment
Export

A set of recommendations was developed by industry Working Groups for each pillar and these discussions included input from a range of officials from MCH, MBIE, MFAT, NZTE, MoE, TEC, Callaghan Innovation and Stats NZ.

We are delighted to see Manatū Taonga seek insights into how our sector might contribute more to the long-term wellbeing of Aotearoa, and we would urge the Ministry to give proper consideration to the insights already gathered by and recommended in the sector strategies mentioned above; and to the wide range of perceptive international research and forecasting that is available. There is also a substantial research project focussing on the future workforce needs of the Creative, Cultural, Recreation & Technology sectors which has been funded by TEC to inform the Toi Mai Workforce Development Council, and this is due to be completed in early 2022.

In making this submission WeCreate has drawn on feedback to the Briefing Paper from our member organisations - we would be happy to discuss any questions you might have and look forward to collaborating with you throughout the process. We also look forward to facilitating direct conversations between Manatū Taonga and our membership soon – allowing the sector to share their deeper insights and stretching the frontiers of the korero beyond the possible and plausible.

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FEEDBACK ON THE APPROACH TO THE TOPIC

- **Strategic Vision:**
  What is the sector's and the Ministry's shared strategic vision for 'an Impactful and Sustainable Cultural Sector into the Future'?
  The Seven Questions Method referred to in the consultation document takes this approach. A shared strategic vision (starting with the 'Why') prevents futures-thinking from being too grounded in the present, allowing participants to work back from the desired future state. What are the critical issues and environmental factors that will enable or prevent the desired future (the 'What')? What are the components, including human components, needed to address the 'What' (ie the 'How' and the 'Who')?

  The creative and cultural sector offers a range of wellbeing benefits like no other, is at the forefront of innovation, and is among Aotearoa's largest economic contributors[1], yet only that part of the sector deemed 'culture' currently has a home within government at Manatū Taonga, and there is no sector-wide government strategy to guide and amplify its value.

  As Minister Sepuloni stated in September 2021:

  'The cultural and creative sector is critically important to the economy, and at an individual and community level plays a significant role in enhancing our wellbeing.'

  'The sector is an engine of growth and innovation for our economy. In recent years, it has either matched or outpaced other sectors of the economy in terms of income, employment and value added.'

  In practice however, there appears to be a tendency by the Ministry, and wider government, to disregard the economic benefits of the sector at a strategic level. Economic and other wellbeing benefits are not mutually exclusive but are mutually advantageous. Fully recognising the value of these synergies would be more in keeping with the 'real world' ecosystem of the sector, the lives and livelihoods of the people who work and participate in it, and with the approach of many governments around the world who are leveraging economic growth from their creative and cultural sectors to support all aspects of wellbeing.

  The consultation document appears system(rather than human)-centric - when culture and creativity is fundamentally the human expression of ideas and emotions, and the sector requires mainly 'human capital'. The systems required to sustain the wellbeing of this 'human capital' - who are often self-employed, may have no security of income, and receive little support and protection compared to those operating in an employee environment – seem to have less emphasis in the document than the systems to support the access and participation of those enjoy our creatives' output.

[1] $17.5bn contribution to GDP and 131,000 jobs – NZIER for WeCreate 2016

The co-design (with the sector and with Māori) of a strategy for our creative ecosystem, which includes **a vision and a plan to achieve that vision** – such as that which would be delivered by a Creative Industry Transformation Plan - is being called for across the sector and would give the sector, government, and local government shared agency over the blueprint for their futures, and boost our sector's contribution to a more sustainable, productive and inclusive Aotearoa.

- **Accessibility of the consultation process:**
  The consultation document appears mono-cultural and lacks a Te Tiriti-based framework. How does Manatū Taonga intend to address this?

  The language used seems to be the language of government rather than stakeholders, and therefore may not elicit a broad and diverse range of insights that reflect the true make-up of the sector. It may be difficult to relate to for the diversity of individuals who comprise the majority of the sector, especially for our young people. How might the process be collaboratively designed with Māori, and with the sector (including a diverse range of youth perspectives), to ensure that it encompasses the breadth and depth of foresight required?

- **Definition of the 'cultural sector':**
  As it is impossible and unrepresentative to draw lines between 'culture' and the other parts of the creative ecosystem, this is not a term that is generally used today - with most using either 'creative', 'arts, culture and creative' or 'creative and cultural' to describe the sector.

  We appreciate the document's reference to a holistic system and note the below definition provided on the Ministry's website:
  New Zealand's cultural sector encompasses a broad range of cultural and creative industries and activities: film, music, broadcasting, design and digital technologies, our built heritage, libraries, literature, museums and galleries, performing and visual arts.

  This definition differs from those which are widely used around the world which include architecture, advertising, games, mixed reality (aka interactive), photography and fashion. It uses the highly subjective term 'literature' rather than 'publishing', and the out-dated 'broadcasting' rather than 'media' - please see WeCreate's 'ecosystem' graphic at the end of this submission, although this does not include heritage or the GLAM segment who are not currently represented in our membership.

  In looking to an increasingly global future for our creative and cultural sector, it would seem prudent for the Briefing to encompass a definition of the sector that is internationally aligned.

- **Other considerations**
  The creative and cultural ecosystem of 2040 is likely to look very different to that of 2021 – as it looks radically different from the ecosystem of 2000. Several of the creative industries have been at the forefront of technological innovation for some decades now, and will inevitably produce new sub-sectors and occupations; and creative technologies are having an increasing impact on the futures of all sectors in the economy. *Symbiotic relationships between segments are likely to mean advances in one part will stimulate growth in other parts of the creative economy, an ecosystem which – in many ways – thrives (or not) in a virtuous circle together.*[2]

[2] The Future of the Creative Economy – Deloitte (for Netflix) 2021

The recent PwC *Global Entertainment & Media Outlook 2021-25* report gives a short-medium term perspective on change precipitated by the pandemic for a large, and influential, part of the sector internationally.

- The past two years have seen the rapid acceleration in the need for digital capability and capacity to sustain and develop both society and business across Aotearoa, with many parts of the cultural and creative sector leading the way in making and distributing their work digitally.

  The government has prioritised the digital evolution of New Zealand via the Digital Ministers' Group, Digital Strategy and Digital Industry Transformation Plan, recognising that digital is a vital and inherent component of the future of all New Zealanders. How might this Briefing, and the role and scope of Manatū Taonga, align with the government's digital priorities and what role might the creative and cultural sector play in achieving them?

- The Briefing approach seems predicated on the current scope of the Ministry (ie. the government-funded system rather than the wider 'creative economy' ecosystem incorporating creative businesses and ventures of all types). This only serves to 'silo' the desired insights into existing structures, rather than taking a truly future-focussed approach where the future is the starting point. Economic sustainability is vital to the future of the creative and cultural ecosystem and it is creative businesses who drive the creative economy.

- It seems largely New Zealand-focussed when a large proportion of the sector increasingly rely on global markets for their sustainability, with many growth opportunities lying offshore and some industries (notably Screen) relying on a high level of international investment.

FEEDBACK ON THE COMPONENTS & DRIVERS OF CHANGE

We strongly recommend that this Briefing process **establish a shared vision and purpose before considering the components and drivers of change** that might impact our future. We would also propose what we consider might be a more effective alternative way of approaching the topic as:

DESIRED OUTCOME **DRIVERS OF CHANGE** **INFRASTRUCTURE COMPONENTS**

We have however sought insights from our membership on the approach outlined in the consultation document, and have given our feedback in red in the table as follows:

COMPONENT	DESCRIPTION	EXAMPLE DRIVERS OF CHANGE
ACCESSIBILITY	All New Zealanders having access to cultural and artistic forms, barriers to participation for traditionally and emerging underserved populations	Changing and emerging delivery mechanisms eg. virtual reality, personalised streaming and apps, 3D printing, Artificial Intelligence (including 'AI artists'); Internet of Things; cybersecurity Demographic changes eg. ethnicity, age structure, aging population, urban growth;

		New accessibility technologies and skills Changing business and media models eg. subscriptions, micro-transactions, blockchain, freemium Mobility (see below) and the ability to gather
ASSETS	Physical and digital infrastructure Human capital (this is our sector's most vital asset) Education (see below) Data and Information Intellectual Property Rights	Investment in fit-for-purpose skills, talent and capability and healthy work environments Climate change; ageing assets; fit for purpose assets; new participation preferences and constraints eg. in-person vs digital; short shelf life for skills? Changing and emerging digital creation and distribution mechanisms and business models
CONNECTION	Recognition and understanding of the value and potential of our creative & cultural ecosystem, including mātauranga Māori Strong relationships within and across the broader sector, and sub-sectors, and to non-cultural sectors (eg. education, health, justice, technology, economic development, trade, commerce and consumer affairs, social development, housing and the built environment) Exports and international reputation	Cross government approach to growing the sector's contribution to all aspects of wellbeing in partnership with the sector and Māori Funding partnerships; new collaborative tools; gig economy (note that this term does not adequately encompass creatives who are not contractors but are generators of their own IP and those who have portfolio careers); global collaboration Mobility (see below) Strong global outlook, infrastructure and networks
EDUCATION	The creatives and creative businesses of the future Audiences and markets Positive impact of creative education on all aspects of wellbeing	Arts education – please see Appendix Creative and critical thinking, empathy and collaboration Creative environments
EQUITY	Specific infrastructure that enables equitable and safe access and career outcomes, particularly those from underserved groups; diversity supported and valued	Increased diversity-hiring, governance; pay equity; changing migration patterns; harm prevention Driven by those communities it seeks to enable – they must be at the table from the start
INNOVATION	Impact of creativity and creative technologies on all sectors	Cross government approach to growing the sector's contribution to all aspects of wellbeing in partnership with the sector

	'The gamification of everything' – increased demand for interactive and immersive creative applications, content and experiences for entertainment, educational, cultural, health and multiple other purposes.	Technology – including the control of markets by multi-national Digital Service Providers, automation, Artificial Intelligence, and the value of and security of data and IP assets Skills and talent development – including immigration as required to upskill Investment in and incentives for creative and cultural R&D
INTERNATIONALISATION	Export growth Career and skills development Enhancing New Zealand's international reputation	Paradoxes of growing globalisation, cross-border phenomena (eg. K Pop) and increased localism Climate change impacting markets and mobility Social and political upheavals Mobility (see below) The growing power of global platforms (Digital Service Providers) in controlling channels to market and data ('the new oil') Non-tariff barriers eg. censorship, restrictions on the consumption of creative products Rules-based international trade frameworks Data and measurement of creative and cultural exports Improved access to international trade support (NZTE) for creative businesses Embedding creativity and culture as core NZ brand values
INVESTMENT	Funding pathways, government investment Private sector investment in creative businesses and talent Legal framework (see below)	New philanthropic giving patterns; strategic philanthropy; digitally enabled revenue streams; new investment and business models eg. NFTs, blockchain; private and government investment in creative IP R&D; tax and other incentives to support the development and commercialisation of NZ IP; fit for purpose and enforceable legal framework; 'business' over 'project' investment and infrastructure approach to grow scale, productivity and longevity; incentives for investment in cross-sector collaboration
LEADERSHIP	Vision, strategy, stewardship, governance and management, support organisations, information, insights and evaluation.	Cross-government approach to valuing and growing the sector's contribution to all aspects of wellbeing in partnership with the sector Increased diversity; networked project-based organisational structures – we would argue that 'business' based structures would improve productivity and sustainability Data and insights

LEARNING PATHWAYS (would suggest a broader focus to reflect real needs - SKILLS, TALENT & CAPABILITY)	Comprehensive, agile, and flexible career pathways from early learning, workforce development, workplace learning, upskilling; multiple entry points to become a professional creative; the importance of creative skills in the Future of Work Learning pathways also develop audience engagement, participation and appreciation	New skills requirements; new learning platforms; embed digital and business skills; healthy working environments Connected and ongoing approach by government to the skills and work potential, and requirements, of the sector – across education, social and economic development (including the Future of Work* Ministerial Group and the MoE/MSD/MBIE Youth at Risk of Limited Employment LTIB), workforce relations, pay parity, health and safety – and the growing impact of creative skills and workers on other sectors Greater recognition by the tertiary education and workplace learning system of the highly self-employed nature of roles in the sector; prevalence of 'portfolio careers' and 'side hustles'; volunteers Reliable, robust, and on-going data that adapts and moves with changing and emerging roles, occupations and skills needs in the sector The Reform of Vocational Education and the Toi Mai Workforce Development Council are likely to be highly influential in determining learning pathways for the next 25 years Workplace learning opportunities that meet the needs of the sector and the people who want to work in it - creative apprenticeships, interns and mentoring *Despite employing approximately 130,000 New Zealanders, and international evidence supporting the growing importance of creative skills in the Future of Work, the sector is currently poorly represented in government's Future of Work Forum as the interests and potential of creative workers and businesses are largely not represented by the tripartite partners Business NZ and the Council of Trade Unions.
LEGAL FRAMEWORK	Safeguarding and respecting our artists, creatives, and creative businesses' rights to earn from their work as a major source of revenue, employment, and ongoing investment in the sector	Clear, certain, timely, and enforceable regulation – including regulation of Digital Service Providers - that values the contribution of our creators and the creative economy and keeps pace with the changing environment, business models and technologies

	Enabling mobility and the ability to gather	
MĀORI	Infrastructure enabling protection, promotion and transmission of arts and cultural practices (including the protection of Māori intellectual property – as in Legal Framework above); equitable access to Māori cultural and artistic forms; equity in opportunities for Māori creatives; Māori governance and partnership; sustainability	Te Tiriti o Waitangi – Te Tiriti based approaches; growing Māori economy; revitalised Mātauranga Māori; measurement of the economic contribution of the Māori creative economy, including exports To genuinely reflect Te Tiriti partnership Māori must co-design strategy and policy from the outset
MOBILITY	Creatives, creative businesses, and audiences have freedom and capacity to travel locally and internationally to pursue their work and business NZ attracts international talent, investment, markets, and audiences	Climate change Political change (eg. immigration, visas) Restrictions of movement – including access to any future MIQ-type arrangements - and gathering locally and internationally due to COVID-19 and future global health crises Economics (cost of travel)
PRODUCTIVITY	Enabling greater economic diversity Confidently facing the Future of Work Growing the knowledge economy Reducing New Zealand's economic dependence on physical goods Creative outputs are able to be scaled fast without the use of additional natural resources – the capital inputs are usually human	Investment in Intellectual Property Requires business growth over project approach – difficult to build scale project by project Digital and business skills
PUBLIC SUPPORT	Public value of the arts and creative and cultural ecosystem; strong and connected government support, value of the cultural and creative sector to all aspects of wellbeing (including economic) is clearly articulated and understood, the arts, creativity, creative thinking and creative environments are an important part of the education system, strong philanthropic support and private sector investment.	Strategic and enduring government-sector commitment to conveying the value of the sector to all aspects of wellbeing (including economic) Including the value of creative skills and careers in the Future of Work, Supporting mātauranga Māori Increased access/participation; fragmented consumption of cultural content (note that this also represents an opportunity for more targeted communications)
SUSTAINABILITY	Weightless products and services	Investment Carbon targets

	Reduce carbon emissions via energy efficiency, renewables, environmentally friendly built infrastructure	Incentives

What do you consider are the most fundamental components?

- **Connected (sector-government and across government) strategic approach which grows the value and impact of the sector on all aspects of wellbeing**
- **Flexibility, adaptability, and evidence-based strategy and policy**
- **Timeliness of government responses to rapidly evolving situations e.g. regulation keeping pace with digital developments**
- **Prioritising creative education**
- **Supporting Māori to realise their aspirations – what's good for Māori is good for everyone**
- **Skills, talent, and capability including digital and business skills embedded, and healthy working environments**
- **Fit for purpose and enforceable legal framework**
- **Robust data and insights**
- **Investment in creative R&D**
- **Internationalisation - global outlook, infrastructure, and networks**
- **Mobility and the ability to gather**

What do you think will act as significant drivers of change?

- **Technology – invention, adoption and access; the control of markets by multi-national Digital Service Providers, automation, Artificial Intelligence, and the value and security of data and IP assets**
- **Climate change**
- **Social and political upheavals**
- **Ongoing and future health crises**
- **Shifts in audience and market demand**

What are the key risks, opportunities, and challenges?

RISKS

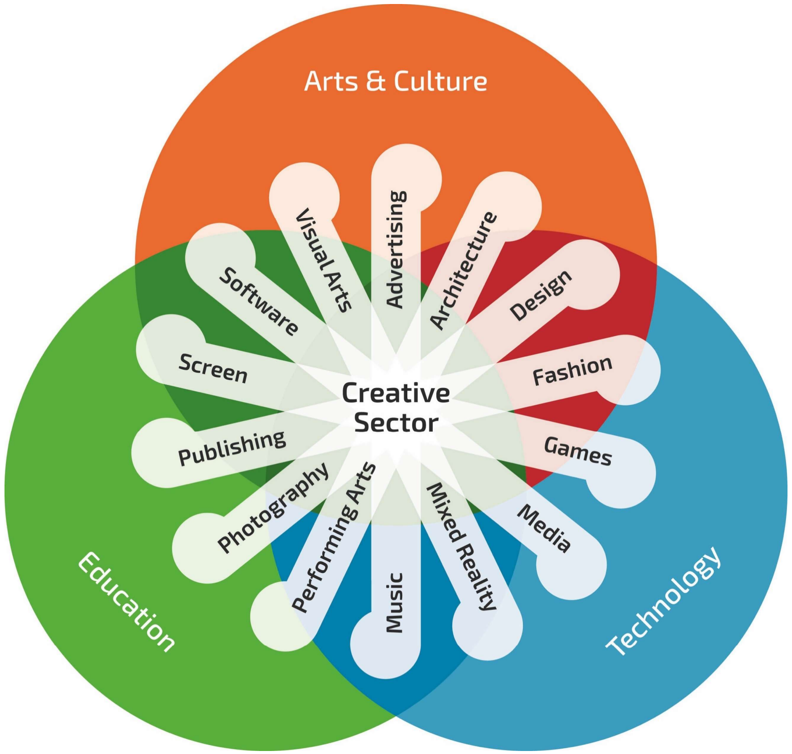
- **Failure to leverage the sector's full potential value**
- **Technology – invention, adoption and access**
- **Regulation and enforcement that fails to keep pace with change**
- **Cybersecurity – as more value is held in digital assets, the risks from cyber-attacks increase exponentially**
- **Social and economic inequity and upheavals**
- **Climate change – economic and mobility**
- **Health crises – restrictions on mobility and gatherings, access to any MIQ-type arrangements**

OPPORTUNITIES

- **Growing the impact of creativity and culture on all aspects of wellbeing**
- **Economic growth and diversification**
- **Creative skills for everyone to build resilience in the Future of Work**
- **Creativity as a driver of innovation across multiple sectors**
- **Genuine bi-culturalism (unleashing the potential of Māori) - systems, processes, organisations, and ways of thinking**
- **New technologies – invention, adoption and access**
- **Diversity and inclusion**
- **Enhancing Aotearoa’s international reputation**

CHALLENGES

- **Cross-government recognition, understanding and investment – especially regarding the economic contribution of the sector to overall wellbeing**
- **Exponential rate of change and unexpected events**
- **Flexibility and adaptation**
- **Measurement and evaluation**
- **Further consolidation of power in the hands of unregulated multi-national DSPs, cybersecurity**
- **Regulation and enforcement that keeps pace with change**
- **Climate change – economic and mobility**
- **Health crises – restrictions on mobility (including immigration/MIQ) and gatherings**
- **Bi-culturalism**
- **Diversity and inclusion, gender equity, harm prevention**



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Music Managers Forum Aotearoa
NZ Game Developers Association
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NZ Writers Guild
Publishers Association of NZ
Screen Industry Guild Aotearoa NZ
Sky Network Television
TVNZ

APPENDIX

Arts Education and the Arts Ecosystem - Professor Peter O'Connor

Numerous international and national studies confirm that the strength and diversity of the ecosystem depend upon a broad and balanced education which develops a wide range of creative professional pathways and introduces or reinforces the arts as part of and central to a rich and flourishing everyday life. In other words, the strength of a cultural sector infrastructure is directly linked to the strength of arts education in schools. The foundation block of the sector is a coherent and equitable arts education that provides multiple opportunities for young people to experience and learn in, through, and about the arts. This is evidenced by numerous studies.

One of the largest and most thorough of these studies into the nature of the arts ecosystem, The Warwick Commission (2015), argues that guaranteeing a broad cultural education for all through skills acquisition, participation in arts and cultural events, and enhanced appreciation, is vital to sustaining a vibrant arts ecosystem and maximising a nation's full creative and cultural potential. The report argues for a curriculum infused with multi-disciplinarity, creativity, and enterprise that identifies, nurtures, and trains tomorrow's creative and cultural talent.
The report speaks directly to the worldwide contraction in arts education occasioned by national testing and focusing on literacy and numeracy, a privileging of STEM subjects and a dearth of training in the arts in Initial Teacher Education. The collapse of arts provision in compulsory education systems is matched by a similar decline internationally in arts and humanities in tertiary provision.
As the evidence in the Warwick Commission demonstrates, children born into low-income families with low levels of educational qualifications are the least likely to:

- be employed and succeed in the Cultural and Creative Industries;
- engage with and appreciate the arts, culture, and heritage in the curriculum;
- have parents who value and identify with the cultural experiences on offer from publicly funded arts, culture, and heritage. (2015, p.15)

The New Zealand historical context

Although studies of a similar scale have not been undertaken in New Zealand, smaller studies confirm that arts education in New Zealand impacts not just on the future of the creative industries but on our capacity to produce creative, world-leading scientists, engineers, and technologists (O'Connor, 2020, 2021). From our remarkable history in arts education in schools, we know that investment in arts education has significantly impacted the development of the arts sector. New Zealand invested heavily in arts education in the 1950s and 60s. The programme led by Peter Fraser, Clarence Beeby, and Gordon Tovey was based on understanding arts education's clear connection to well-being, national identity, and cultural infrastructure development. The generous funding model saw an explosion of arts in New Zealand, with artists such as Cliff Whiting, Sandy Adsett, Ralph Hotere, and Marilynn Webb using their work in schools and communities as springboards into long and sustained careers as artists of deep meaning in the cultural history of New Zealand (Henderson, 1998, p.20) The Arts and Crafts Department in the Department of Education built at the time, one of the most admired and successful public education systems in the world and the beginnings of a genuine arts industry in New Zealand.

Arts Education in New Zealand Now

Since those halcyon days and despite a short but brief flurry in the early 2000s when the arts were made a compulsory Learning Area in the New Zealand Curriculum, the arts have contracted significantly with this accelerating at the Primary level with the introduction of national standards. The 2016 NZCER National survey of primary and intermediate schools found that over two-thirds of teachers reported a narrowing of the curriculum they teach, associated with National Standards; 32% of principals reported that National Standards drives what the school does; and 40% indicated the focus on literacy and mathematics has taken their attention away from other aspects of The New Zealand Curriculum (NZC), which schools started to work with in draft form in 2007. (Bonne, 2016, p. 1). The 2015 National Monitoring Study of Student Achievement reports only half of the children in their final year of primary or intermediate school were achieving at the expected level of the curriculum in music and drama, while the figures for dance and visual arts were 68 and 66 percent respectively (National Monitoring Study of Student Achievement, 2015, p.40).

The flow-on effect into arts at the secondary level is revealed in Ministry of Education figures showing that the number of secondary school enrolments in arts subjects fell by over a quarter from 201,432 in 2008 to 163,915 in 2020, even though the number of school students had risen in that time. The data is particularly noticeable in music, a decline from 52,296 in 2008 to 34,795 in 2020 (a decline of 33.47% percent) and the visual arts from 64,528 to 36, 705 (a decline of 43.12% percent.

This is compounded by Initial Teacher education courses in the arts being effectively shuttered. For example, at the University of Auckland, preservice provision in the arts has been

decimated. A thriving music department that once housed 12 staff is reduced to two lecturers who deliver ever decreasing hours of music education to students. With no arts advisory support in the country, even if you wanted to teach the arts, new teachers have little or no knowledge or training to do so. (O'Connor & McTaggart, 2017, p.68)

As everywhere else in the world, we also know that the stark inequalities in New Zealand society are replicated and reinforced by our schooling system so that children from wealthier families get the arts in abundance through after school classes and attendance at Eurocentric arts events (O'Connor, 2016, p. 2) perpetuating an infrastructure centred on white privilege. The National Monitoring Study of Student Achievement report on the arts in schools (Ministry of Education, 2015) noted that "school decile was strongly associated with student achievement on the Nature of the Arts (NoTA) scale at both Year 4 and Year 8. Students from low decile schools (deciles 1, 2 and 3) scored lower, on average than those who attended high decile schools (deciles 8, 9 and 10) by about 16–17 NoTA units". (p.68)

To ensure a more balanced, equitable cultural arts ecosystem, recognising the central importance of arts education is vital. The lack of investment in arts education atrophies the sector; it traps it in a self-perpetuating cycle where particular types of art are privileged for already privileged subgroups of the population. It denies the full potential for all New Zealanders to see themselves in the arts we make, and to imagine themselves as producers, not just consumers of the arts.

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