

AOTEAROA MUSIC INDUSTRY TE PAE AHUMAHU PUORO O AOTEAROA MANIFESTO 2023

Our music makes a unique contribution to Aotearoa.

Music is a driver of economic growth. In 2022, the New Zealand music industry contributed \$720 million to GDP (both direct and indirect) and directly employed around 2,250 full time equivalent roles.

Music is the soundtrack to our lives. From the latest trending video to the nostalgia of an old record, diverse audiences across the country connect with music and turn to it for community, comfort and enjoyment.

Music from Aotearoa reflects our unique culture and national identity and is a source of pride and inspiration for New Zealanders young and old.

OUR STORY

The music industry in New Zealand is vibrant, diverse and resilient. Over the past three years, industry organisations have collaborated to support artists, songwriters, composers, musicians, and other industry workers through COVID lockdowns and border closures.

Despite the global challenges presented by COVID, in 2022 the music industry recorded \$43 million in overseas earnings.

As an industry we recognise the power of music to develop our national identity, and to revitalise, promote and share te reo Māori with Aotearoa and the world by investing in the creation of waiata and a range of initiatives supporting those waiata, in the development of a bilingual music industry.

We have also taken steps to address the safety and wellbeing of artists and workers with our own industry-driven initiatives MusicHelps and SoundCheck Aotearoa.

We have achieved all of this with modest government investment. Less than 5% of the funding allocated to the screen sector is provided to support contemporary music each year: \$212.5 million to screen vs \$9.5 million for music creation, export and development via NZ On Air, NZ Music Commission and Te Māngai Pāho.

Although we have built a strong foundation, there are challenges to overcome. Music from Aotearoa can more easily reach a global audience via streaming and video services, however there is intense competition for audience and it is challenging for music to break through. Our limited market size means artists need to export to grow a sustainable career – and we need the right market settings to ensure that, when our artists take their music to the world, Aotearoa remains their home base. Domestic audiences are discovering and enjoying music via global platforms that have a limited physical presence in New Zealand and that remain outside mainstream regulation. Music continues to be at the forefront of tech innovation but also disruption – with generative AI challenging our concept of human artistry and how our creators' rights should be protected.

The landscape has never been more complex for artists and music from Aotearoa.

Continued overleaf

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MANIFESTO 2023

THE POTENTIAL

Despite the challenges, there is huge potential for New Zealand music to grow and enhance its international presence and economic potential, and to increase its revenue contribution to the local economy.

We aspire to continue to establish Aotearoa as a “net exporter” of music: a world class music creation hub that can serve as both a base for established professionals to conduct international work, and a springboard from which our talent can succeed overseas.

WHAT WE ARE SEEKING FROM THE NEXT GOVERNMENT

We are calling on the next government to partner with us in a multi-year, appropriately resourced strategy to grow the industry and strengthen pathways for export and international success for our artists, and with an ongoing commitment to safe and equitable workplaces. To do this we are focused on three key areas:

DEVELOPMENT

INVESTING IN THE TALENT

PIPELINE. To foster the next generation of musical talent, and to support current artists to reach their potential, we need investment in creative and professional development all along the pipeline, from music education through to career pathways

MARKET SETTINGS

CREATING THE CONDITIONS

FOR MUSIC TO THRIVE: It is critical that New Zealand prioritises robust copyright law that recognises the value of human artistry. Government also has a role in setting policy around funding, and encouraging global platforms to actively invest in New Zealand’s culture and economy

EXPORT

GROWING AND STRENGTHENING

THE PATHWAYS FOR INTERNATIONAL

SUCCESS: There are numerous examples of talented New Zealand artists succeeding internationally. From Lorde, Bence and Jawsh 685 to The Beths and lilbubblemum, their pathways may not all be the same, but there is huge potential to grow the global audience for New Zealand music – and therefore export earnings – through a coordinated partnership with government

Australia has recently embedded a four-year coordinated strategy to grow the music industry alongside increased investment in contemporary music at both the federal and state level. A new entity, Music Australia has been created to support the Australian music industry to grow, including through strategic initiatives and industry partnerships, research, skills development and export promotion.

It is crucial for the New Zealand government to act now to ensure New Zealand’s music industry remains competitive, by creating the conditions that will enable our country’s music and talent to thrive on the world stage.

The music industry stands ready to work with the next government to achieve these goals.

Our specific policy proposals to support the key pillars of development, market settings and export are laid out in the remainder of this document.

THIS MANIFESTO IS PRESENTED BY



To foster the next generation of musical talent, and to support current artists to reach their potential, we need investment in creative and professional development all along the pipeline – from music education through to career pathways. In developing the artists of the future, we also need to continue to make space for Māori leadership, and invest in upskilling emerging music professionals and industry practitioners and creating safe workplaces.

Education

In addition to supporting the next generation of musical talent, music education complements all learning and enhances the potential of young people through increasing their social, academic and creative skills. It also contributes to audience development by growing the music fans of the future. We ask that the next government prioritise music education and:

- Retain music as a core curriculum subject and investigate ways for New Zealand music to be integrated throughout other areas of the primary and secondary school curricula
- Enhance teacher capacity to meaningfully deliver the music curriculum
- Appoint a Contemporary Music Development Specialist within the Ministry of Education
- Ensure appropriate funding for the teaching of te reo Māori and kapa haka in schools, and the development of waiata and haka resources for schools and early childhood centres

Professional development and career support

Our industry relies on skilled professionals – including producers, managers, venue operators and promoters – to support artists as they navigate pathways to build their careers and establish an audience locally and overseas. We ask that the next government:

- Invest in a coordinated partnership with industry and government entities to drive development and pathways for artists and industry professionals
- Meaningfully increase, or at least maintain in line with inflation, funding for existing development initiatives via NZ On Air, Te Māngai Pāho and the NZ Music Commission
- Introduce meaningful support options for artists to maintain and develop their creative careers, for example via a PACE-type career support scheme, or adjusting existing content funding to support longer term artist development

Māori leadership and a bilingual music industry

- We have invested in programmes and practices to make te reo Māori visible and accessible by creating sustainable development pathways for Māori music creators, advocating for both the traditional and evolving interests of puoro Māori, and supporting the development of kaupapa Māori music industry infrastructure and leadership, but these initiatives require acknowledgment, funding and support to ensure they remain a priority
- We ask the next government to support entities and industry bodies to develop their cultural capability, develop Māori leadership positions and support the creation and recording, promotion and export of waiata in a way that is sustainable for the future

Local touring as a platform for artist development

Performing live is an important part of developing both artists and audiences, by bringing live music experiences to a variety of regions across Aotearoa. The live music sector equates to over half the employment contribution of the music industry to New Zealand's economy, providing jobs for musicians, crew, technicians, booking agents and promoters, as well as venue and hospitality staff. It provides support and stability for live music venues. We are seeking modest but stable annual investment in the form of a fund to support local touring, to enable us to:

- Reinstate the Aotearoa Touring Programme for the domestic live performance of New Zealand music to support artist careers, audience development and ensure opportunities for New Zealanders to experience live, local music across Aotearoa
- Investigate mechanisms for supporting local live music venues and spaces for New Zealand artists to perform
- Enable live music to thrive, and encourage a regulatory framework that acknowledges the importance of live music and a standardisation of sound control policy and enforcement across all local councils for clarity and consistency

Safe workplaces

Artists and workers in the music industry are usually self-employed and work in a variety of settings with little or no access to the usual rights and protections available to employees. The music industry has developed its own initiatives to support artists' wellbeing and to foster safe workplaces, but we ask government to support this work, especially when government itself is funding and enabling music projects. We ask the government to:

- Require all recipients of government funding to adopt minimum requirements for the safety of artists and workers including following WorkSafe guidance to prevent bullying and sexual harassment
- Ensure that all artists and workers on government-funded projects are paid at least a living wage
- Provide meaningful and stable funding for SoundCheck Aotearoa – the industry-led initiative which is building capability in the music industry to comply with health and safety legislation and WorkSafe guidance on harassment, bullying and sexual harassment
- Provide an ongoing contribution to music industry charity MusicHelps, which supports musicians in need via its benevolent fund and counselling and support services

While the music industry is not dependent on government support or funding, there are key areas where government can ensure that the market settings provide the best possible chance for artists and music to succeed both here and overseas.

Legal and regulatory framework – responsible use of AI

The music industry is dynamic, digital and at the forefront of tech innovation, but also disruption. From streaming to mobile to short-form video, the music industry has embraced and worked with technological change over the years and the same is proving true of generative artificial intelligence tools (AI). Artists and musicians may choose to use aspects of AI in their creative process, and right holders are striking deals to support the responsible use and development of AI.

However, there are also risks as the recent exponential development of generative AI has shown. The ‘data’ used to train certain AI models, including generative AI models, includes works and recordings created by human artists as well as their voices and other traits. AI can also be abused to create misleading deep-fakes or clones, where imitations of an artist’s works are produced by training machine-learning models on previous recordings by that artist. As well as infringing rights, these practices can damage an artist’s identity and reputation and erode consumer trust in what is authentic and original.

As governments around the world look to study and consider regulating the use of generative AI, it is crucial that New Zealand is proactive in this area and is not left behind. We ask the next government to:

- Ensure the music sector has representation in any process for policy development around AI, including working groups, educational reviews, and Parliamentary select committees
- Take note of global developments including the Campaign for Human Artistry and the statement issued by the G7 on generative AI
- Recognise and embed in law the principle of human artistry, by ensuring works and sound recordings solely generated by AI that involve no human creativity do not receive copyright protection
- Recognise and protect creative rights as technology develops. There is no basis for artists and musicians to subsidise AI developers. If AI processes seek to use music as an “input”, artists and right holders must be given the choice whether to permit this and if so on what terms
- In order to enable artists and right holders to enforce their rights and/or to licence where they choose to do so, ensure that AI developers are required to keep meaningful, accurate and transparent records of the music content they have used

Copyright law

The music industry depends on a robust copyright framework to incentivise investment, creation and rewards to artists, creators and creative businesses. We ask the next government to:

- Properly resource MBIE to complete its review of the Copyright Act (started in 2017)
- Act now to extend the copyright term from 50 to 70 years as required by the EU Free Trade Agreement. In the case of sound recordings, the extended term should be put in place immediately. The ongoing delay to implement this agreed commitment is causing harm to those New Zealand artists whose recordings will lose copyright protection over the coming years, for no justifiable reason

Incentives for business to support New Zealand music

There are several areas where government can intervene to encourage support for New Zealand music, which can help to maximise the returns from government investment, while also boosting the success of music from Aotearoa. We ask the next government to:

- Incentivise use of NZ music in screen productions, including via funded screen content
- Require at least one local music support act to be booked on all international music tours in Aotearoa
- Encourage or require council and government institutions and entities to utilise NZ music in public spaces, as hold music for callers to businesses, and through other public performance opportunities
- Recognise the legislated requirement to promote the cultural wellbeing of communities in the present and for the future as a mandatory inclusion in local council activities

Engaging with global platforms

New Zealand audiences predominantly use global platforms based overseas to enjoy music and screen content. Local media regulation and funding for content creation is struggling to keep up. We urge the government to adapt its approach and develop interventions to encourage streaming platforms to participate and invest in the New Zealand market. The current government has introduced legislation to require global platforms to bargain with New Zealand media companies, and in Australia local content quotas are being considered for video streaming services. We ask the next government to expand its engagement with global platforms to include meaningful commitments to supporting and showcasing New Zealand music, and to look to overseas examples of regulation.

POLICY PROPOSALS

EXPORT

STRENGTHENING PATHWAYS TO INTERNATIONAL SUCCESS

**AOTEAROA MUSIC
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TE PAE AHUMAHU
PUORO O
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There is huge potential for New Zealand music to grow and enhance its international presence and potential, and to increase its revenue contribution to the local economy. The music industry can drive overseas earnings via a number of diversified sources: income from artists physically touring overseas, income from participating in international media productions, and the simple, weightless export of music via streaming platforms. There are many pathways to international success that can be unlocked as part of a coordinated strategy. We can seek inspiration from markets such as Sweden and South Korea, which have taken coordinated steps to grow their music exports, and Australia, which has recently committed to a four-year strategy for export growth.

We ask the next government to partner with industry on a coordinated strategy to grow music exports, which could include acting to:

- Strengthen funding and support for music export and integrated market development, for both artists and music businesses, at key trade events, recognising the opportunity to showcase puoro Māori, and our unique cultural identity, on the world stage
- Engage MFAT to be part of the New Zealand music export strategy, including music as part of inter-governmental cultural diplomacy, trade missions and cultural exchanges
- Bring MBIE knowledge and expertise into the equation and appoint a music expert within MBIE to help New Zealand artists and music companies increase export revenues and feature music export as a priority topic in bilateral discussions with key international partners
- Support Arts and Culture Ministers to join a broader Australia-NZ-Pacific arts and culture forum to identify cooperation opportunities
- Support initiatives to increase the opportunities for composers to participate in international screen projects, and for New Zealand music to be licensed into film, television and gaming projects