Te Ara Pounamu ki te Kotahitanga

The enduring pathway toward unity

A report on cohesion in the Aotearoa New Zealand Screen Sector

November 2026

Author – Lisa Chatfield

Kotahi te kohao o te ngira e kuhuna ai te miro ma, te miro pango, te miro whero.

Through the eye of the needle pass the white thread, the black thread, and the red thread.

Contents

Executive Summary 2

Author's note 3

Introduction 5

Reading the report 6

Screen sector cohesion currently 7

Sector Feedback 7

Industry Views 9

External Views 10

Industry Views Thematic Summary 11

External Views Thematic Summary 12

Industry organisations and sector cohesion 13

A more cohesive future 16

Conclusion 17

Recommendations 18

Appendix A – Industry Views 19

Appendix A.1: Ideas raised for further exploration 25

Appendix B – External Views 26

Appendix C – International References 28

Executive Summary

This report was researched and written by Lisa Chatfield, a senior industry practitioner, for the New Zealand Film Commission Te Tumu Whakaata Taonga (NZFC). It considers many factors of screen sector cohesion: how effectively industry practitioners, businesses and organisations work together and engage with funding agencies and government ministries.

The observations, analysis and recommendations in this report are the author's own and do not represent NZFC's view, agreed position or endorsement.

In this report, "industry" means the practitioners, businesses and organisations working in film, television and online content for local and international audiences. "Screen sector" means the wider ecosystem: the industry, together with businesses, organisations and ministries that work alongside it, provide funding or investment, or oversee screen-related government policy and legislation.

The report draws on confidential meetings held in mid-2026 with 59 participants, reviews of sector and NZFC reports and funding information, and international examples of industry coordination.

The consultation describes a highly capable and committed industry operating under sustained financial, market and technological pressure, while fragmentation, competition for scarce resources, uneven trust, inconsistent engagement with government, and limited shared data weaken its collective influence.

These pressures can obscure the interdependence of domestic and international production, film and television, crafts and businesses.

The central finding is that the industry can improve cohesion and strengthen its position in the screen sector by demonstrating greater unity.

There is an opportunity for the industry to explore a new approach to partnership and collaboration, moving from the current situation of many entities advocating separately to one industry designing the pathway to a stronger screen sector.

This report recommends beginning with connection: rebuilding common ground within the industry; re-examining relationships with screen agencies; and establishing regular, structured engagement with government on a small number of shared priorities and a clearer, consistent account of the sector's public, cultural and economic value.

Any long-term approach to strengthening screen sector cohesion should be shaped by the industry itself, with shared goals backed consistently in practice.

As the NZFC approaches its 50th anniversary in 2028, the sector has an opportunity to set a confident direction for the decades ahead - one that supports enduring careers, strengthens Aotearoa New Zealand stories and connects them with audiences at home and internationally.

Author's note

In this opening note, I offer my own perspective informed by engagement with the screen sector, historical research and my lived experience across the screen sector.

My career in screen spans more than 30 years and includes being a crew member, a producer, an NZFC Board member, an NZFC executive and, briefly, a principal advisor at Manatū Taonga Ministry for Culture and Heritage. My recent work includes time in Australia, but primarily I work in Aotearoa on projects that are creatively led by New Zealanders. This range of life experience informs my views and this report.

It has been a privilege through this work to connect with a wide range of people working across and alongside the screen sector. It has been humbling to be reminded again of the breadth of our sector and the passion and commitment shown across the board, most particularly by the industry practitioners, organisations and businesses who are the heart and soul of the sector. These are the people who have chosen to make a career in a sector that can be extremely rewarding but is always extremely demanding. Screen does not tend towards half measures or comfortable middle ground.

The pressures we face now are significant, and they aren't only ours. Audiences are fragmented, the economics of screen are being reinvented, production levels are falling as budgets rise, public funding is under real pressure, and governments change.

Here in Aotearoa, that pressure has pushed many of us into short-term survival, and that leaves less room for a shared view of the future.

This isn't new. In 1985, when David Gascoigne an advocate for our industry who sadly passed away recently, was the NZFC Deputy Chair, the annual report described the central tension of a film industry then, and the screen sector now.

> *"A film industry is about culture and money. It involves an endless tug of war between finance, investment and economic returns on the one hand and art, culture and national identity on the other."*
>
> – NZFC Report Year ended 31 March 1985

Despite these challenges, the local industry has an incredible presence in the global screen business, driven by a history of creative and technical excellence. The international impact of strong cultural stories, as well as the recognition of creative ingenuity, elevates our industry worldwide, while reflecting to local audiences a view of themselves, their communities and homes that can only come through homegrown storytelling.

> *"Few – if any – sectors in New Zealand generate the breadth of economic, cultural and social benefits in the way the screen sector does for both the country as a whole and for regions."*
>
> — **Screen Sector Strategy 2030**

However, what became clear to me during this process was that, through the pressures on the industry, we have lost sight of each other across divides that appear bigger than they actually are - domestic and international production, film and television, crafts and businesses - when we clearly all need each other to thrive.

I believe we've let ourselves be pushed apart unintentionally through settings outside our control, through busy times, through desperate times, through the binary approach that says, "when you get funding, I don't".

We know nothing gets made unless many people pull in the same direction. Yet the pressure of survival can push people to defend their own space, focusing on what separates us rather than working together on the issues that unite us.

My central observation through this work is that the industry cannot strengthen its position in the screen sector without demonstrating more unity. The capability and delivery that the industry demonstrates project after project, year after year, needs to be demonstrated in its representation of itself.

This report offers a candid account of the pressures preventing a capable and committed screen industry from working as well as it could, along with local ideas and international references for different ways of working. I found a willingness within the industry to collaborate on strengthening the sector, although there is not yet agreement on a single way forward.

As an industry we have work to do to improve equity and our accountability to the local audiences who, as taxpayers, support our sector through rebates and direct funding. We have work to do to demonstrate our capacity for partnership with each other and with government entities that will strengthen our sector for the people working in it now and in the future.

We are creative people who can imagine the future and collectively build a strong path towards something more than we have right now, because doing more of the same won't make meaningful and impactful change.

The screen industry is strategically and economically significant to Aotearoa New Zealand for its cultural and economic impact at home and abroad. We are part of the international screen business, and it is our responsibility to nurture and grow our connections to the wider world in every way possible – through successful local stories that connect with audiences here and international stories choosing to be made here.

In my view, the benefit of improving screen sector cohesion within Aotearoa New Zealand is empowering ourselves to evolve our history of screen creative success into a future as a creative and economic powerhouse.

I encourage everyone reading this report to consider this the start of a conversation, an invitation to engage with the challenges and opportunities we face today.

As screen sector members and screen audiences, please consider how this account reflects your experience, where it does not and what future you want for the screen sector, the people it serves and the stories we tell.



Introduction

The NZFC Act of 1978 includes a function **to encourage and promote cohesion** within the film industry through the exchange of information, the efficient use of available resources and in co-operation with other bodies and organisations to encourage and promote employment and productivity.

In February 2026, the NZFC Board approved a programme of work be undertaken to develop a strategy to advance screen sector cohesion that:

- supports a more cohesive and strategic sector voice to government, including effective advocacy and contribution to policy
- considers our funding of guilds and organisations
- considers the intersection of screen related education and industry
- reflects our unique cultural perspective
- supports excellence, creativity and innovation.

The work was prompted by concerns about the sector's ability to engage strategically with government, the growing number of representative organisations and the need to ensure NZFC investment in sector infrastructure is delivering the outcomes intended under the NZFC Act.

The pressure of change in the screen sector over the last decade has been significant and includes, amongst other factors, Covid-19, the rise of streaming and digital technologies such as AI and their impact on the established screen industries and audiences, the pressures on linear broadcasting, work on the Screen Industry Workers Act (SIWA) and changes due to increasing pressure on every aspect of public funding. Interview participants linked these pressures directly to cohesion.

> *"Disruption is significant, it makes cohesion difficult"*
>
> – **Industry organisation**

In a funding environment that continues to be pressured, NZFC wanted to look at cohesion more broadly and consider if there is an opportunity to build a new approach to sector cohesion that not only addresses some of these key issues but is driven by what makes our industry unique. To consider if cultural specificity can be a driving force not only of our stories, but also of the approach to sector infrastructure, practices and cohesion.

The planned programme of work included retaining a senior industry practitioner to consult with industry stakeholders and the tertiary and vocational sector, review existing sector strategy and research, research international trends for organisational support and funding best practice and take the opportunity to consider what might be a world-leading framework.

It has been decided the intersection between education and industry could not be considered meaningfully within the initial timeframe, so this element of the work has been paused.

This report is the result of the work undertaken for NZFC to provide a picture of the current state of cohesion in the screen sector and consider what could positively influence future cohesion.

Reading the report

The main report sets out the project's context, draws together the author's observations on the sector and considers opportunities to strengthen cohesion.

Appendices A–C contain in-depth information gathered as Industry Views, External Views and International References respectively.

Meeting accounts describe diverse, sometimes conflicting perceptions; many views recorded have not been independently tested and should not be treated as established fact. Participant ideas are presented for further exploration, not as agreed sector positions or recommendations. International references are offered for consideration, not as endorsed models.

The report process

The sector engagement consisted of confidential meetings across the sector, reviews of previous sector reports and NZFC annual reports, as well as looking at international screen sectors to consider ideas that might be useful to explore locally.

Meetings were held in mid-2026 and were in two parts: Industry and External. Industry Views drew on meetings with 45 people across 24 organisations, businesses and individual practitioners. External Views drew on 12 meetings with 14 participants across government ministries, funding agencies, strategy contributors, adjacent creative sector and international perspectives.

From the meetings, consistent themes raised by participants were summarised, including ideas offered for ways to strengthen the sector moving forward.

Defining "screen sector"

This work considers "screen sector" encompassing everyone working in, funding or investing in film, television and online content. This includes but isn't limited to: NZFC, NZ On Air, Te Māngai Pāho, the Ministry of Culture and Heritage (MCH) and the Ministry of Business, Innovation and Employment (MBIE).

This report has not reached into a broader view of screen which could include game development and creative technology.

Defining "industry"

This work considers "industry" as the practitioners, businesses and organisations who make the bulk of their living from working on screen content, both local and international.

Defining "cohesion"

Simply put - working well together.

In this report encouraging and promoting screen sector cohesion means seeing the whole system working well together.

Cohesion doesn't mean everyone agrees on everything. As the screen industry knows, a production relies on many different departments and views to successfully move each day forward and deliver a project from the page to the screen.

Teamwork is the screen industry's strength: it depends on a shared vision and collective problem-solving, not identical opinions.

Screen sector cohesion currently

The consultation for this report indicates that while there is positive collaboration happening across the industry with a focus on capability and community building – overall a collective and strategic long view on the sector is missing which indicates that cohesion across the screen sector can be improved.

This report identifies that work is needed to strengthen relationships within the industry and that the industry would benefit from collectively identifying how to deepen the quality of its relationship with government.

These two elements are critical to strengthening the sector and stand out as places where the sector is not working as well together as it could.

Meetings undertaken for this report suggest industry engagement with government, including consultation on policy or legislation changes, is likely to be more effective when the industry presents common goals and aspirations with a clear voice.

These goals need to be established and shared across the industry – by practitioners, businesses and organisations – and consistently backed in practice, not agreed to and then set aside in favour of individual priorities.

This is a significant challenge. Being in production is the way the industry puts food on the table and pays the bills. In the current market, it would be extremely difficult to put a goal for the wider industry above the goal of securing a production.

However, the industry needs to resolve how to do both, securing short term work which uplifts the industry in the long term, rather than short-changing the future. Similarly, industry wide goals should not exclude the importance of needs specific to a business, a community, a worker group or others – they need to be integrated and support each other.

If the industry approach focuses on individual priorities, then building trust and collaboration is unlikely to progress.

Just like a screen production is the sum of many parts that contribute to a successful outcome - a cohesive screen sector requires each part to connect with and support the whole. Everyone has a role and a responsibility.

Alongside industry considering how they work together, government bodies can consider change. International references and comparable local engagement practice with other sectors suggest ways government bodies could structure their relationship with the industry more effectively and communicate more efficiently with each other, to strengthen the screen sector overall.

The three screen agencies could consider deeper partnership with the industry to maximise the impact of policies, strategies and investment that strengthen the sector's delivery to New Zealanders – its primary stakeholders and audience.

> *"We will be a mature and productive industry when the agency works mutually as partners."*
>
> – **Senior practitioner**

Sector Feedback

Confidential meetings were held in mid-2026 with 59 participants across the screen sector and the full thematic accounts of industry and external interview perspectives are included in Appendices A – Industry Views; and B – External Views respectively.

These indicative counts reflect my thematic reading of interview notes. Quotes in the summaries that follow are anonymised and included to show the range of views heard, rather than representing every participant.

Industry Views

Who I heard from

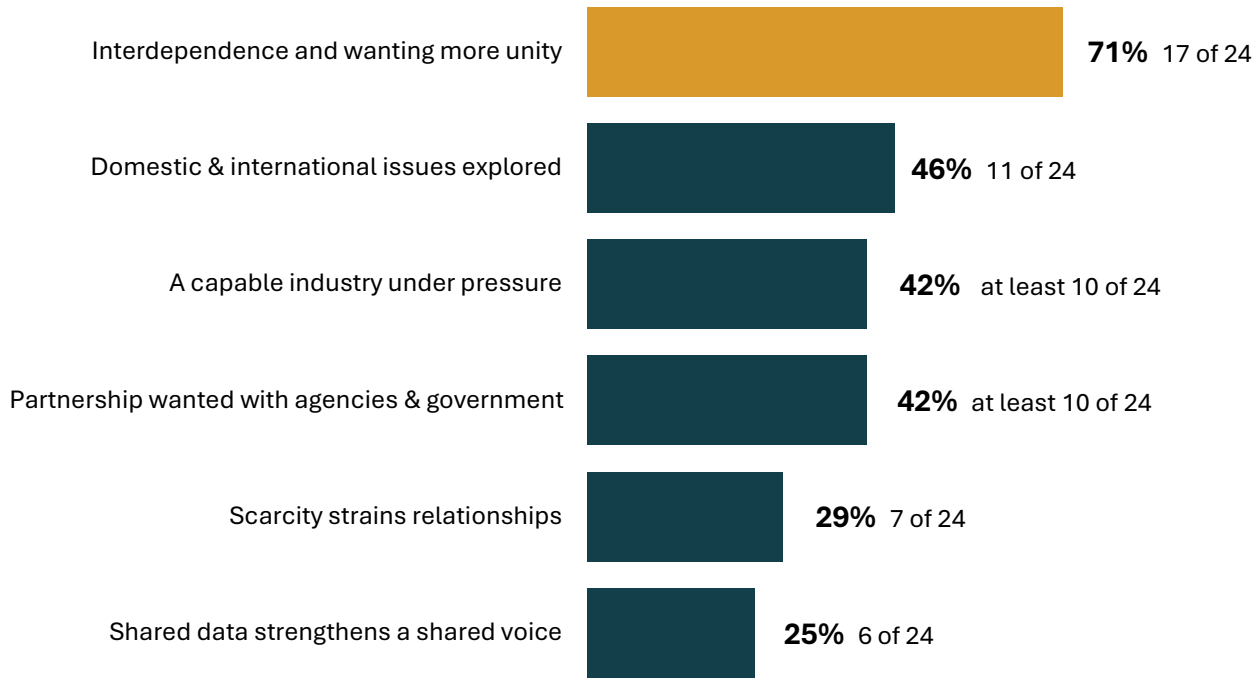
Industry organisations, businesses, senior practitioners and early-career voices.

24	45	3,000+
interviews	participants	industry members represented

What I heard

Unity was the strongest recurring theme, raised in around seven in ten industry interviews. Discussions also reflected pressure on the industry and a desire for stronger partnership with agencies and government.

Figure 1. Themes raised in industry interviews



Source: *Screen Sector Cohesion research interviews. Industry interviews, n=24. Themes coded qualitatively; multiple themes may occur within each interview.*

In their words

> *"Find the commonalities" / "value agreeing to agreeing to disagree agreeably"*
>
> *"Overall, the general state of the industry is incredibly tough."*
>
> *"We want to be IN the conversations about the sector, not outside because we're not funded."*
>
> *"Thin resource means a thin application of skills"*

External Views

Who I heard from

Government ministries, funding agencies, strategy contributors, adjacent creative-sector and international perspectives.

12	14	10
interviews	participants	organisations

What I heard

Coordination and clearer strategic direction were the strongest recurring themes, each raised in two-thirds of external interviews. Business sustainability, international opportunities and capability development were also prominent.

Figure 2. Themes raised in external stakeholder interviews



Source: *Screen Sector Cohesion research interviews. External stakeholder interviews, n=12. Themes coded qualitatively; multiple themes may occur within each interview.*

In their words

> *"The screen sector suffers from fragmentism and overlap"*
>
> *"The screen sector needs to coalesce around one strategy and three–five actions"*
>
> *"Need to join the dots – refine and connect programmes, projects and people"*

Many of these views will be familiar to members of the screen sector and this is part of the challenge we need to embrace - how to collectively move beyond familiar concerns to a new conversation for the future.

Industry Views Thematic Summary

A capable industry under pressure.

01 Many participants expressed pride in the industry's skills and track record, alongside concerns about reduced commissioning and funding, changing markets, rising costs, gaps in international production and prolonged uncertainty.

Scarcity strains relationships.

02 *Several participants linked competition and strained relationships to scarce resources, with some emphasising conditions rather than individuals as the cause.*

"Defensiveness results from desperation."

Different parts, shared interests.

03 Despite tensions across domestic and international production, film and television, crafts and businesses, participants recognised their interdependence and wanted less divisive discussion.

"Focused on fostering connections not silos."

Partnership in sector decisions.

04 Several wanted closer relationships with funding agencies and government ministries, with industry recognised as a partner and source of expertise.

"The actual workers are outside the loop."

Stability matters as much as scale.

05 Participants linked sector health to multi-year organisational funding, a steady mix of domestic and international projects of different sizes and lasting career pathways.

Resources shape who can take part.

06 Views on the Screen Industry Workers Act (SIWA) were mixed, ranging from support for clearer worker protections to concern about cost and delay, with several guilds saying they could not afford to take part in negotiations. Equity-led and community organisations described stretching small resources across large demands.

"How to best serve without being stretched too thin?"

Shared information strengthens a shared voice.

07 Many saw consistent sector data as essential to better planning, advocacy and resolving disagreements.

The industry brings solutions.

08 Participants offered practical ideas for improving cohesion and highlighted initiatives already underway. Some also asked the agencies to adapt.

"The NZFC's response to a changing environment remains too fixed and similar to the past"

External Views Thematic Summary

Many voices weaken collective influence.

01 External participants described fragmentation as a persistent barrier to understanding industry priorities or shared positions.

Stronger government relationships need understanding on both sides.

02 Interviewees saw regular cohesive engagement, clearer requests and greater mutual understanding as ways to strengthen industry–government relationships.

Collaboration on screen does not always extend beyond it.

03 External participants recognised effective production collaboration but described competition, a perceived focus on individual interests and uneven trust as barriers to shared efforts.

A shared story needs shared evidence.

04 Interviewees wanted a clearer account of the industry's public, economic and cultural value and recognised that data is lacking.

"Creative sector including screen has a lack of official data"

Shared priorities matter more than a single structural answer.

05 Participants favoured a focused strategy with concrete actions but differed on which organisational arrangements would best support delivery.

Creative strengths need sustainable businesses behind them.

06 Interviewees linked sustainable companies and careers to international opportunities, New Zealand intellectual property and coordinated capability development.

"Need to join the dots – refine and connect programmes, projects and people."

Many interview participants had constructive suggestions for ways forward: this is a sector of flexible and creative thinkers.

A key challenge is that flux is a permanent feature of the industry, not a passing phase. These ups and downs place huge pressure on individuals, businesses and organisations to pursue what each individual project needs in the short term.

Collectively holding a long-term vision for the screen sector will need collaborative commitment, effort and regular engagement.

Industry organisations and sector cohesion

This work included considering the relationship between sector cohesion, industry organisations and NZFC, as well as NZFC's Core Funding Programme. This report does not make a recommendation on core funding. Instead, it raises questions for consideration that are specific to the current Aotearoa New Zealand screen sector.

This sections analysis draws on meetings as well as previous NZFC annual reports and papers related to funding industry organisations, along with current funding contract information.

In this report, "industry organisations" refers to pan-sector organisations, worker guilds, community alliances and the business interest groups.

Industry organisations

The earliest reference to the relationship between NZFC and an industry organisation is in the 1984 Annual Report:

> *"A grant was provided to The Guild of Film and Television Arts - a positive move by the industry to develop a united voice. It includes public sector television as well as actors, writers and independent filmmakers."*

Across the decades, that relationship has taken many shapes and sizes as the industry, the organisations and NZFC have changed over time. Funding to support industry organisations has always been connected to the function within the NZFC Act *"to encourage and promote cohesion in the film industry"*.

In the last ten years there has been a steady increase in the number of industry organisations with a range of mandates across representation, worker groupings, equity, sustainability, community and economic interests.

Around 20 organisations currently operate in the industry at various levels of size and scale. Some have income through membership, participation and grants and some have been supported through screen agencies for programme delivery and core costs.

The value industry organisations deliver

Industry organisations deliver a range of important work that is fundamental to the screen industry. These include:

- sector advocacy and policy engagement
- workforce development and professional capability building
- mentorship, networking and career guidance
- support for equitable representation and diverse voices
- dissemination of information and sector intelligence
- strengthening community connections and professional networks
- advice on employment conditions, health and safety, contracts and disputes
- cultural leadership and knowledge-sharing

Collectively, these functions contribute to productivity, industry capability and workforce sustainability which contribute to cohesion.

Many deliver agency-funded capability and professional development programmes, while others focus specifically on economic opportunities for the industry.

Participants described this value in their own words:

> *"The scaffolding around the industry"*
>
> – **Industry organisation**

The NZFC Core Funding Programme

Assessment of the organisations contracted suggests three distinct organisational purposes:

- Recognising Te Tiriti centrality including NZFC obligations and Rautaki Māori.
- Connecting equity, inclusion, practitioners, audiences and production outcomes through pan-sector organisations.
- Strengthening craft and business capability, working conditions and the connection between domestic and international production through worker organisations.

All the organisations work across the full screen sector, not specifically in film.

This assessment suggests that NZFC had maintained a single fund which did not reflect the range of mandates or breadth of impact across the industry organisations. This raised the question of whether the fund was successfully engaging with the specific organisational mandates.

The industry meetings described increased organisation collaboration, including among those outside of NZFC's Core Funding Programme. However, collaboration did not extend as far as funded organisations sharing overhead arrangements or result in organisational consolidation. The funding contracts did not require these changes, nor were they industry driven.

This suggests there was a risk that the fund was unintentionally reinforcing organisational separation in a way that made industry-wide coordination, advocacy and shared prioritisation less likely.

> *"Current funding model is generating competition between organisations and guilds"*
>
> *"Current model is generating unfairness"*
>
> – **Industry organisations**

Review of past records also suggests that NZFC decisions and available funding were being left to determine which organisations could continue, rather than the industry considering collectively the balance of representative bodies against the constrained public funding environment.

Industry organisations and government

This report also mapped industry businesses and individuals whose direct engagement with Ministers and ministries could influence the industry's relationship with government. Added to the ten industry organisations supported via NZFC, this produced a total of more than 60 entities.

A small number of organisations and businesses can afford professional lobbyists, which could influence the quality of their relationship with government.

The consultation indicates that separate approaches to agencies and ministries, without clear shared priorities, make it harder for government to engage with the screen industry as a whole – economically, culturally and creatively.

Industry organisations have tried previously to build a stronger collective connection. In 2011, a meeting was held between the screen industry guilds, organisations and unions resulting in the formation of a new combined industry group, Screen Industry New Zealand (SINZ). In 2022, the SINZ Steering Group delivered a report to the sector titled *The Screen's Pan Sector Body: A Recommendation Report*, which was a response to a key recommendation in the government-commissioned *Screen Sector Strategy 2030*.

Unfortunately, SINZ, despite privately raising seed money and significant time from those involved, did not become a sustainable entity for pan-sector representation to government.

This history identifies that a collective approach is possible, and lessons learned from those experiences could inform what support and resources future efforts would need to move from shared intent to a cohesive approach that is impactful and lasting.

Questions for industry consideration

Industry organisations bring important knowledge, relationships and support to the sector. The role of this report is to raise questions about whether greater coordination, shared services or partnerships could help organisations sustain their work and improve cohesion across the sector. Any new options would need to be assessed for their costs, benefits and effects on the communities' organisations serve, particularly in relation to culture, equity and inclusion.

Questions the industry could consider are:

- Is there a new approach to industry organisations that could deliver a more cohesive relationship within industry and with government entities?
- Could Te Tiriti o Waitangi inform a unique approach grown out of Aotearoa's cultural specificity that better recognises and uplifts the industry?
- Could industry take a greater role in considering how to sustain organisations, their work and resources together?
- Could some organisations broaden their membership and / or remit, form contractual partnerships, share overheads or consolidate?
- If the industry has a collective long-term goal, how do organisations and individuals participate in achieving it?

Financial and resourcing constraints affect agencies and industry organisations alike.

> *"There is more room for cohesion and collaboration but*
>
> *it's having the time and resource to actually do it."*
>
> – **Industry organisation**

Exploring different ways of working together could take account of both industry organisations' need for stability and the sector's need for stronger coordination.

A more cohesive future

Stronger cohesion within the industry could enable a strong, clear and shared vision for the future of the screen sector. A shared vision would give the sector the capacity to weather more change, attract new voices and workers, and adapt through technology, rather than being weakened by short-term change.

Working together as an industry with a vision would make engagement with government entities more effective and efficient, creating the stability needed to meet the cultural and economic needs of the public and industry participants.

In practical terms strengthened cohesion could deliver:

- Stronger internal industry relationships that enable the progress of common goals, as well as goals more specific to a community, a set of businesses or workers.
- More effective and timely consultation with ministries on policy changes that enable the production of more screen content for local and international audiences.
- Industry organisations establishing strategic partnerships with agencies to empower stronger creativity and capability across domestic and international production.

International references to consider

Looking outside of Aotearoa New Zealand's borders offers some ideas that could be useful in how to shape a new path forward. The desire for a coordinated or unified approach is a consistent request from governments internationally when facing a variety of uncoordinated policy demands from industries. How screen industries have approached the challenge differs across countries but a clear vision, agreed priorities and a coordinated approach appear central to success in the countries reviewed.

International screen industries, agencies and governments are also responding to pressures familiar to Aotearoa New Zealand, recalibrating how they work together to secure their local and international presence.

Appendix C sets out international examples of pan-industry structures and ways that governments and industries interact, offered as external reference.

Any thoughts on whether a more cohesive voice requires a different organisational structure should keep three principles in mind:

Te Tiriti o Waitangi. Fundamental and unique to Aotearoa New Zealand.

Identify what is needed locally. For example, convening, negotiating and bargaining are distinct forms of engagement. Establishing which of these the industry and sector currently lacks is a more useful starting point than deciding what kind of body to create.

Design for diversity. Specialist and culturally specific mandates need to be protected by design.

Conclusion

Aotearoa New Zealand's screen industry already knows how to work together. Every project depends on many people pulling in the same direction, often under real pressure.

The findings in this report identify that the necessary next step is to bring that same spirit to how the industry works with itself and with government.

The industry can best strengthen its position in the screen sector by demonstrating more unity. The capability and delivery that the industry demonstrates project after project, year after year, needs to be demonstrated in its representation of itself.

The industry needs to tell its own story clearly and consistently so that the public, economic and cultural value of the screen sector is undisputable.

There is a lot to build on - an industry full of ideas and pride in its craft, and a willingness within the industry and at ministry level to connect and talk more effectively.

In considering how best to collaborate for productive change, it is crucial that the next steps are forward-looking, focused on a future vision, not short-term survival.

The NZFC is turning 50 in 2028. The commission was born because members of a fledgling industry advocated for its creation, with a vision of its potential.

Now is a moment where the current industry can work together to design and advocate for a pathway into the next 50 years. A more visionary approach to sector cohesion where our cultural specificity is the driving force not only of our stories and the way we work, but also our approach to sector infrastructure, practices and cohesion.

A new path forward that recognises that the industry practitioners, businesses and organisations are the constant in the sector, not government or agency personnel.

There is an opportunity for the industry to hold the pen for change - to explore an industry-defined approach to partnership and collaboration that moves from many entities advocating separately, to one industry designing a pathway to a stronger screen sector.

In any group, a shared vision for the future and a determination to get there generates optimism. Optimistic people are creative risk takers – the people the future of this sector relies on.

The sector needs core shared goals, backed in practice. With those in place, the sector can turn its history of creative success into a stronger, steadier future for the people who make screen stories in Aotearoa New Zealand and the audiences who enjoy them.

> *"The screen sector needs to trust our own ability to adapt. Trust our resilience"*
>
> – **Senior practitioner**

Recommendations for action

The aspiration for this report is that it will encourage reflection and ongoing conversation in the sector, and most particularly, in the industry. The following actions are recommended to start a process of change:

01

Industry connecting to industry – break down silos, re-establish common ground.

Focus on one core goal – reduce fragmentation to improve the relationship with government.

02

Industry connecting to screen agencies – re-examine existing relationships.

Propose ways to work together that acknowledge both the constrained funding environment and the critical place the industry holds in the sector.

03

Industry connection to government – consider potential for structured engagement.

Propose ways to engage consistently in regular, open conversations between industry, agencies and ministries.

Mai i te puna whakaaro ka koropupū ake te oranga mō te Iwi.

From the spring of thought, bubbles forth the wellbeing for the people.

Appendix A – Industry Views

About this appendix

This appendix presents a thematic account of what was heard in meetings with 45 people across 24 organisations, businesses and individual practitioners. They included worker guilds, equity-led and community organisations, producers, screen businesses working in domestic and international production, and practitioners from early career to senior.

The information gathered has been anonymised. This account does not present formal findings, organisational positions or recommendations; it describes diverse, sometimes conflicting perspectives and identifies areas where common ground may exist.

This appendix offers a candid account of the pressures preventing a capable and committed industry from working as well as it could and invites industry, agencies and government to consider ways to act collectively to improve cohesion.

How to read this appendix

This account was developed from notes taken during meetings. Perceptions shape how people work together, but many of the views recorded have not been independently tested and should not be repeated as established fact. Statements are not attributed. Instead, the wording shows the type of information:

- **Evidence** – data, figures, documents or processes participants referred to, introduced with words such as “reported” or “cited”.
- **Perception** – participants' experience or understanding of a situation, which can be widely held yet incomplete, shown by words such as “described”, “said”, “felt” or “perceived”.
- **Interpretation** – participants' views on causes and solutions (“linked”, “attributed”, “suggested”, “argued”), and patterns identified across meetings (“broadly agreed”, “generally”).

“One”, “some”, “several” and “many” indicate the broad weight of views rather than precise counts. “Participants” without a qualifier means a view raised across meetings, not necessarily held by everyone.

Each theme moves from what participants shared, through what is already working, to differences and common ground, where most interpretation sits. Each theme ends with ideas for collective action, which are gathered in Appendix A.1.

The big picture

- **A capable industry under sustained pressure.** Many participants described a very difficult environment: reduced commissioning, changing markets, rising costs, gaps in international production and long-running uncertainty. There was real pride in the industry’s skills and track record while acknowledging challenges.
- **Scarcity shapes behaviour.** Several participants said scarce resources lead to competition and strained relationships; others attributed this to current conditions rather than to people.
- **One industry with many parts.** International and domestic, film and television, crafts and businesses were often described as in tension, yet participants on different sides said the parts depend on each other and want discussions that do not set one against another.
- **Industry and agencies as sector partners.** Several participants described a gap between the industry and the agencies and ministries that fund and regulate the sector, and said the industry should be treated as a partner and subject-matter expert in decisions about its future.

- **Stability matters as much as scale.** Participants linked sector health to industry continuity: multi-year organisational funding, a steady mix of project sizes both domestic and international, and lasting career pathways.
- **Shared information supports a shared voice.** Many said the sector lacks consistent information about itself, which weakens planning, advocacy and the resolution of disagreements.
- **The industry is a source of solutions.** Meetings generated many practical ideas and highlighted initiatives already under way.

Themes

Ideas listed under each theme were raised by participants and are presented here for further consideration. They are not author recommendations.

Working together: coordination, representation and voice

Participants described both challenges and positive collaboration between organisations with different purposes.

What participants shared

- **Activities and capacity.** Some participants described similar professional development programmes serving the same practitioners and competition for resources or members. Others described limited time and resources to pursue collaboration.
- **Relationships and representation.** Some participants described strained relationships between organisations or questioned whether existing representative arrangements reflected the range of interests within their membership. Others reported difficulty being included in sector conversations.
- **Leadership and shared purpose.** Some participants spoke about the importance of clearer shared purpose and finding common ground. One interview linked a perceived lack of sector leadership to a lack of leadership development in the industry.

What is already working

Participants gave examples of co-designed programmes, cross-craft workshops, joint events and health and safety initiatives. Some described positive experiences of partnership and collaboration despite a difficult year.

Differences and common ground

Some participants supported a pan-sector body or approach; one view was that such a body would need to be self-sustaining. Participants also emphasised the importance of different voices and finding common ground without everyone speaking with one voice - *"agreeing to disagree agreeably"*.

Ideas for collective action

A pan-sector forum or body to develop shared positions; exploring how organisations' different purposes and activities could be better understood and coordinated; organisational leadership development opportunities; coordination of event calendars (also *see Appendix A.1)*.

Evidence, and engagement with government and agencies

Participants wanted a better-informed, two-way relationship with government and agencies, built on shared data.

What participants shared

- **Missing and unshared data.** Many said the sector lacks regular, shared data and some perceived that data collected through agencies is not shared. Some reported that immigration settings and the Letter of No Objection (LONO) process do not capture the level of income lost to local practitioners.

- **Consultation without change.** Participants described many government reviews and consultations with limited impact, frequent changes of Ministers and being treated as lobbyists rather than experts. Some reported that, since 2021, MBIE and MCH had opened consultation more broadly, which they felt removed specialist and technical understanding.
- **A fragmented government interface.** Some perceived that responsibility for screen is split across government ministries, which can create confusion and result in people being referred in circles for anything outside the New Zealand Screen Production Rebate (NZSPR). Some reported that dedicated contacts at Immigration and WorkSafe had been removed.
- **Communication with NZFC.** Several wanted more open, regular communication with NZFC; some said it had taken them a long time to understand what NZFC can and cannot do and some perceived that key market relationships rest with too few people.

What is already working

Some organisations have regular engagement with ministers and officials, sector-commissioned research and constructive relationships with particular agencies.

Differences and common ground

Participants broadly agreed that consistent evidence, collected regularly rather than rebuilt every few years, would benefit everyone, as would clearer communication between industry, agencies and government.

Ideas for collective action

Regular sector data collection; sharing data already held; structured forums that include industry, agencies and ministries (also *see Appendix A.1)*.

Resourcing the sector's industry organisations

Organisations wanted funding stable enough to plan, keep good people and show value to their members.

What participants shared

- **Short-term funding.** Many organisations described the challenges of sustainability when funding is short-term, uncertain or tied to running workshops; short-term funding can mean organisations need an exit plan every six months given their commitments to contractors and overheads.
- **Competition and fairness.** Some perceived that the current funding model creates competition between organisations and unfairness in which receive core funding.
- **Showing value to members.** Guilds described difficulty showing value to members without resources for consistent services, noting that advocacy is less tangible than legal advice or training.

What is already working

Membership organisations interviewed reported between around 200 and 1,200 members, with some reporting growth. Participants also pointed to employer-supported membership schemes, effective social media, philanthropic funding and successful development programmes.

Differences and common ground

Some felt industry organisations should aim for financial independence; others argued that functions such as worker representation warrant ongoing public support, calling the alternative a "false economy". Participants broadly agreed that funding committed over two to three years or more would let organisations plan and keep good people, and that clearer funder expectations would help.

Ideas for collective action

Exploring shared structures and administrative services for some organisations (also *see Appendix A.1)*.

International and domestic production: one industry or two?

This was among the most strongly felt and contested themes, centred on how the rebates (NZSPR), work and conditions are balanced between international and domestic production.

What participants shared

- **Who benefits.** One participant contrasted the high level of rebate on international production with limited elevation of New Zealand storytelling or talent, and some perceive NZFC as prioritising international work. In contrast, other participants perceived that the importance of new GDP, crew skills transfer and broader economic value from international work can be undervalued across the industry and required more resourcing from NZFC.
- **A gap in rates and conditions.** Several described a significant gap in rates and conditions between international and domestic work, and some crew perceived that they effectively subsidise domestic production.
- **Volatility.** Some participants reported large swings in international activity and noted that a significant downturn takes two to three years to recover from financially.
- **Performers.** Representatives described little space for local actors in international productions and are seeking policy changes through ongoing discussions with ministers.

What is already working

International productions provide work, build skills, technology and craft; domestic productions ensure the creativity of local storytellers reaches local and international audiences, delivers high cultural impact and offers chances for crew to step up.

Differences and common ground

There were different views on proposed levies as a path to investment obligations or training; on whether rebate criteria are too demanding or not demanding enough; and on whether international activity strengthens or crowds out local storytelling. Participants who disagreed on policy still generally wanted international production to continue and the domestic to thrive - “a slope, not a gap” between the two, and a mix of project sizes. Some suggested investing in local talent and creativity is part of what attracts international work.

Ideas for collective action

Better forward information for planning; a data-informed conversation about links between international and domestic production in skills, continuity of work and locally-owned intellectual property; shadowing and shared training across international and domestic work (also *see Appendix A.1)*.

Equity, inclusion and Te Tiriti o Waitangi

Participants spoke about the importance of safe, community-led spaces and “confidence of inclusion” and described barriers that differ between communities.

What participants shared:

- **Community-led support.** Participants described the value of trusted, community-led spaces that build confidence, protect story sovereignty and help practitioners understand and navigate the industry.
- **Access to opportunity.** Some participants described limited access to funding, production opportunities and career progression. Barriers were not the same for every community and included gaps in industry knowledge, professional networks, financing experience and access to decisionmakers.
- **Participation in production.** Some reported being included in projects to improve equity but without equivalent access to creative, business or leadership knowledge and responsibilities.

- **Wider gaps.** Participants also described long-standing pay inequity, uneven representation in technical training and parts of the workforce, and the need for further work on disability, d/Deaf and neurodivergent inclusion.

What is already working

Community-led development initiatives, toolkits and safe spaces, long-standing networks, more diverse intakes in some disciplines, scholarships and internships.

Differences and common ground

Participants broadly agreed that the sector should reflect the people of Aotearoa, that inclusion needs practical support as well as intent, and that Te Tiriti responsibilities sit with every organisation. Views differed on how inclusion is best delivered: some emphasised community-led organisations and spaces as essential to building confidence, while some felt that occupation development programmes are now spread across too many organisations serving the same practitioners. Some also questioned whether the established short-film-to-feature pathway works for everyone.

Ideas for collective action

Well-supported targeted film production opportunities; attachment and placement opportunities specific to these communities; resourced organisational Māori strategies; better data on who makes and appears in international and local content in terms of equity and inclusion (also *see Appendix A.1)*.

Capability, careers and working conditions

Participants described gaps in career pathways and pressure on working conditions, and wanted consistent, long-term investment in capability.

What participants shared:

- **Career pathways.** Participants described a long step from short films to features, a “mid-career ceiling”, and limited pathways for crew and for writers.
- **Working conditions.** Participants raised long hours, instability, mental health, missing contracts and fear that speaking up could affect future work. Some raised concerns about employment and health and safety compliance on some productions.
- **Collective bargaining.** The process under SIWA was described as stalled: bargaining has yet to begin, government funding to support negotiations is no longer available and some smaller guilds said the cost of taking part is beyond them.
- **Skills gaps.** Some said crew would benefit from knowing how projects are financed; some perceived gaps in producers’ business, financing and market skills, and in local understanding of modern post-production.
- **Artificial intelligence.** Composers and sound practitioners described their craft and long-term income as under significant pressure from artificial intelligence.

What is already working

Project development initiatives, some organisation-initiated attachment schemes, business toolkits, mentoring, wellbeing initiatives and a programme building international connections for producers. Some observed generational change in working culture, with one describing “the angry people” as ageing out; another noted that people entering some crafts are more diverse than those currently leading them.

Differences and common ground

Views on SIWA ranged from strong support to strong criticism. Views differed on perceived constraints on domestic production: public funding levels, market and business focus in project development, and funding settings that can put cultural and international market requirements at odds. Participants broadly agreed that

capability takes consistent, long-term investment - “years of seed to grow talent” - connected to real production, and that safe, fair conditions benefit everyone.

Ideas for collective action

Career-stage pathways; business training; a training levy; shared wellbeing support (also *see Appendix A.1)*.

Audiences, markets and sustainable businesses

Participants described a significantly changed market and pressure on business sustainability: securing finance and reaching audiences for domestic projects and maintaining a flow of international production and post-production work.

What participants shared

- **A changed market.** Participants described more competition for finance and audience attention, rising costs and local commissioning opportunities reduced by around $50 million.
- **Business viability.** Production businesses described small margins, the burden of cash-flowing market finance, local decisions that are tied to funding rounds unlike international partners, and difficulty meeting cultural and international market requirements in single projects. Some reported a lack of development funding for factual and unscripted series.
- **Sustaining service resources.** Participants described uncertain bookings and gaps between projects that make it difficult to plan and sustain investment in studios, equipment and facilities. Post-production and visual effects businesses also sought a steadier flow of international work to sustain their workforce.
- **Connection with local audiences.** Some perceived a weak connection between local content and local audiences, and some questioned whether an international festival focus has distanced some work from communities.

What is already working

Local festivals and screenings that connect work with audiences, practitioners, international partners and awards pathways; organisations supporting film releases with screenings and online creators building audiences. Some visual effects businesses also described using international service work to support development of their own intellectual property.

Differences and common ground

Participants placed different emphasis on cultural purpose, creative ambition and commercial returns in considering how New Zealand work can reach audiences and sustain production businesses. Participants broadly agreed that local and international audiences should be central, and that New Zealand stories have cultural and commercial value.

Ideas for collective action

A national screen centre to connect audiences, practitioners and markets; more flexible timing of funding decisions and new private investment models to support project financing; collectives of production companies; and collaboration among small post-production, visual effects and animation companies to work on domestic and international projects *(also see Appendix A.1)*.

An invitation

Many of the issues in this account are long-standing, and participants were candid about them. That candour, and the number of practical ideas people brought, suggests an industry that wants to strengthen the screen sector.

Participants and the wider sector are invited to respond: to say where this account reflects their experience and where it does not, which claims most need testing and which ideas they would want to explore together.

Appendix A.1: Ideas raised for further exploration

The ideas below were raised by participants and have been grouped into broad areas for anonymity. They are recorded for further exploration by the sector. They have not been assessed for cost, feasibility or support and they are not recommendations of this report. Some ideas were contested by other participants.

- **Coordination:** Clearer roles for organisations grouped by function; a single industry body or forum (views differ on its form and funding); agreeing on how successful sector cohesion might be measured; leadership development for industry leaders; learning from umbrella bodies in other export and creative sectors.
- **Government engagement:** Shared industry positions on priority issues; building mutual understanding between the industry and government; clearer leadership of screen policy across government ministries; clearer pathways for screen export support; restoring dedicated contacts for immigration and workplace safety matters; consideration of the Beijing Treaty on Audiovisual Performances, to which New Zealand is not currently a signatory and which performers' representatives said would support residuals.
- **Funding:** Multi-year organisational funding; organisations sharing administrative services; levy options on streamers (strongly contested); private co-investment alongside public funds; developing philanthropy for screen.
- **Equity and inclusion:** Targeted, well-scaffolded production opportunities with long lead-in times, such as low-budget features; films in community languages with community involvement in marketing; resourcing Māori strategies across organisations; support for Māori makers to meet rebate requirements; safe-space practices for events partnered with Rainbow and other community organisations; pilots for disabled, d/Deaf and neurodivergent practitioners; research on and attention to pay equity on crews.
- **Evidence:** A regular sector survey; data on inbound enquiries and why projects do or do not come to New Zealand; sharing data from production surveys; better identification of screen workers in injury data; workforce diversity data; data on offshore cast and practitioner fees to inform the impact on practitioners and worker guilds in terms of lost opportunity; evaluating the outcomes of existing funds and schemes.
- **Capability:** Capability development tied to production outcomes; low-budget first-feature initiatives, possibly with tertiary partners; attachments and shadowing, including on international productions and through LONO processes; international placements; mid-career pathways; business, financing and market training; planning post-production during pre-production; contract education; a training levy; internships; mentoring; responding to the effects of artificial intelligence that are already happening and preparing for future impact.
- **Audiences and markets:** Community-owned or community-supported exhibition; support for international awards campaigns; a national screen centre; regional and touring versions of sector events; impact producing; collectives of independent production companies; development funding for factual and unscripted series; an animation development pipeline and market; growing post-production.

Appendix B – External Views

About this appendix

This appendix presents a thematic account of what was heard in 12 meetings involving 14 participants, from organisations that work outside the New Zealand screen industry but regularly interact with it across government ministries, funding agencies, strategy contributors, adjacent creative sector and international perspectives.

All comments have been anonymised, and no individual or organisation is identified. This account does not present formal findings, organisational positions or recommendations.

How to read this appendix

This account was developed from notes taken during meetings in which participants were asked for their views on the industry and wider sector's health, cohesion, opportunities and risks. It reflects the range of views expressed, including critical perspectives, grouped into themes with supporting points drawn directly from the interview notes. It does not present formal findings, organisational positions or recommendations.

Perceptions shape how people work together, but many of the views recorded have not been independently tested and should not be repeated as established fact. Terms such as "several" and "broad agreement" indicate the general weight of views rather than precise counts.

This account offers a candid outside view of how the screen industry is understood and experienced by those who work with it. It invites industry, agencies and government to consider how they can work together to strengthen trust, communication and shared purpose within the wider screen sector.

Themes

Fragmentation limits collective influence

Fragmentation was the most consistently raised theme across meetings. It is widely seen as a long-standing feature of the industry rather than a recent development.

- A high number of distinct groups and organisations makes it difficult for external stakeholders to get a consistent view of the industry.
- Some sub-sectors, such as game development, were described as more joined-up and collaborative than the traditional screen sector.

Relationships with government need greater consistency and sophistication

Government stakeholders described genuine difficulty engaging with an industry that presents many voices and has no consistent central point of contact.

- Interviewees recognised the complexity of working across multiple ministers, ministries, mandates and processes. The industry does not always understand the constraints, timeframes or evidence requirements within government, while government does not always have an integrated understanding of the industry.
- There is a perceived lack of sophistication in how the industry interacts with bureaucracy, with feedback at times open-ended rather than framed as clear, actionable requests.
- More regular, structured engagement could build mutual understanding between government and industry, improving consultation quality and strengthening the wider sector. Forum models some ministries use with other New Zealand economic sectors were identified as useful references.

Competition and individual interests are barriers to cooperation

Several interviewees identified trust as an underlying issue within the industry and between the industry and government. They often linked this to a perceived focus on individual interests, competitive behaviour and a belief among some individuals and groups that they "know best". These attitudes can crowd out collective problem-solving.

- Interviewees noted that the industry collaborates effectively in making screen work but is less successful at collaborating on shared infrastructure, advocacy and long-term development.
- The industry's competitive dynamic was likened to a zero-sum game. Greater alignment among producers, domestic and international, was identified as an opportunity to strengthen collective efforts.
- When a single organisation, company or individual approaches government, this can be seen as advocacy for individual interests rather than a collective industry position.

A stronger narrative and better data are needed

The screen industry was frequently described as less effective than it could be at explaining its economic and cultural value, and as lacking the trusted data on which government places particular weight. The game development sub-sector was cited as a strong example because its member data supports credible advocacy and a shared understanding of its work.

- Interviewees felt the industry sometimes struggles to tell its own story, particularly how its work benefits the public.
- A long-term, cross-sector goal of positioning New Zealand as a creative powerhouse was identified as a potentially stronger unifying story than the current fragmented presentation.
- There is ongoing investment in data-gathering initiatives at funding-agency level, suggesting recognition of this gap with efforts underway in specific areas.

A need for a concise shared strategy, and consideration of comparative models

Interviewees suggested that the 2030 industry-wide strategy process lacked a single problem or opportunity for the whole sector to coalesce around and was not actionable enough (Screen Sector Strategy 2030). The core challenges it identified are still present today. Interviewees expressed differing views on whether the industry needs consolidation of existing organisations, a new pan-industry body, a shared-services model or stronger alignment through an existing wider creative-sector entity.

- Multiple interviewees independently suggested the industry needs to agree on one strategy and a small number (three to five) of concrete actions, rather than a broad agenda that dilutes focus.
- There was broad agreement that coordination should be shaped by what the industry needs, rather than by a preferred organisational structure. Any approach should avoid duplication, provide clear value to members and be accountable for agreed results. Practical options included shared services, coordinated advocacy, common data and a regular government-industry forum.
- Smaller comparable sectors and WeCreate were cited as credible examples of achieving a stronger, more unified voice with government.

Sustainable businesses and pathways to growth remain a challenge

Financial sustainability, rising production costs and workforce capability gaps were recurring practical concerns. Interviewees said international connections, discoverability and market development need to be considered alongside domestic cultural objectives rather than separately.

- Constrained budgets make it very difficult for local production companies to sustain a viable business from domestically funded content alone, particularly as the cost of compliance has also increased substantially.

- Several interviewees identified opportunity in a stronger middle tier: New Zealand-created intellectual property capable of reaching international audiences while supporting durable local companies and careers.
- Professional development spend has grown but is seen as lacking a central strategy across the agencies and industry, with individual initiatives usually proposed in isolation rather than joined up. Genuine successes were noted where initiatives were well targeted.

Looking ahead

The meetings describe a screen industry with strong creative capability, resilience and a clear commitment to its work. They also point to connected challenges: fragmented representation, uneven trust, inconsistent engagement with government, limited shared data, a lack of focused priorities and pressure on sustainable businesses and career pathways. Interviewees most often traced these challenges back to fragmentation: without a clearer and more consistent industry voice, they found it difficult to engage with or act on what industry asks for.

Strengths to build on

- A resilient and internationally recognised creative community with a strong record of collaboration in making screen work.
- Examples of joined-up sub-sectors, well-targeted capability initiatives and productive relationships that show cooperation is possible.
- New Zealand stories, talent and intellectual property with cultural value at home and potential to reach international audiences.

Opportunities to explore

Interviewees saw greater coordination within the industry as the starting point for the opportunities below.

- **A small number of shared priorities.** Focus on practical outcomes that different parts of the sector can support and contribute to.
- **More consistent ways for industry and government to work together.** A consistent point of industry contact, regular engagement and clearer requests would make it easier for government to respond, while a better understanding of government processes would help the industry frame those requests.
- **A shared evidence base and clearer story.** Trusted data and a stronger account of the sector's public, economic and cultural value would support more credible advocacy.
- **Stronger links between capability and business development.** Joining up initiatives could strengthen career pathways, sustainable companies and the development of New Zealand intellectual property.
- **Building on what is already working.** Successful approaches within screen and comparable sectors can be adapted without requiring every organisation or interest to become the same.

The meetings do not point to a single structural answer. They suggest that progress begins with the industry agreeing on clearer priorities and a more consistent voice, which would give a firmer basis for engagement in the wider sector. Building on the industry's existing strengths would support a more connected and confident future.

Appendix C – International References

This information about international screen sectors, how they coordinate and connect across industry, government and agencies is provided to give perspective through an international lens.

These references have been selected for the strength of the evidence they offer and their potential applicability, although none is directly transferable.

None of these examples have an equivalent to Aotearoa New Zealand's Te Tiriti o Waitangi obligations, some of these industries operate at a greater scale, and each has their own cultural, geographic and financial specificities.

The ideas within these structures are offered to all parts of the screen sector to consider, test and debate to see if they are useful in considering how to strengthen cohesion here.

Specifically, in considering the screen industry's relationship to government and whether a more cohesive voice requires a different organisational structure, this report recognises that it is important to consider the following:

- Identify what is needed locally. For example, convening, negotiating and bargaining are distinct forms of engagement across the industry as well as with agencies and government. Establishing which of these the industry and sector currently lack is a more useful starting point than deciding what kind of body to create.
- Specialist and culturally specific mandates need to be protected by design.

Resourcing will need consideration but it's important that perceptions of available resources don't restrict the thinking before determining what is needed.

Examples of ways industry interface with government:

United Kingdom – British Screen Forum and the Creative Industries Council

British Screen Forum (BSF), formerly the British Screen Advisory Council, is an independent, industry-funded membership body covering the audio-visual sector across film, television, games and online. Membership is individual and senior rather than organisational, comprising around 100 executives drawn from across the screen sector.

BSF convenes rather than negotiates. Its activity centres on policy roundtables, closed insight events, an annual conference and written submissions to parliamentary inquiries and government consultations. It does not bargain on behalf of members and does not displace the trade bodies and unions whose leaders sit within it.

BSF is a private organisation akin to a trade association and was organised to help the industry present a coordinated response to policy issues handled by government. It has no statutory role and no formal seat in policy development.

The formal industry-government interface sits instead in the Creative Industries Council (CIC), a joint forum co-chaired by two Secretaries of State and two industry Co-Chairs, whose members include trade bodies, national agencies, cultural institutions and creative businesses. The CIC led the industry negotiations behind the Creative Industries Sector Plan in 2025 and was remodelled in December 2025 to align with the government's growth strategy.

BSF is funded by industry through membership subscriptions and receives no core public funding. The CIC is convened and serviced by government, and its members are appointed and unpaid.

This UK reference separates convening from negotiating. One body builds shared understanding in private; a second carries settled positions to ministers; specialist bodies keep their own mandates throughout. Cohesion comes from adding a thin layer, not from consolidating existing organisations. The caveat is financial: a wholly subscription-funded convening body works only where a large corporate membership can carry the cost.

Denmark – A Consolidated Industry Side and a Fixed Policy Cycle

Denmark's coherence derives less from a coordinating forum than from two structural features: an unusually consolidated industry association and a periodic cross-party funding settlement that gives the sector a fixed deadline to organise around.

The Danish Producers' Association (Producentforeningen) represents producers of film, television, commercials and games within one organisation, acting both as a trade association seeking political influence and as the employers' association that negotiates collective agreements with the relevant employee organisations. Alongside this, Vision Denmark operates as the national business cluster for games, film, television, animation and XR, connecting more than 120 members and partners.

Film and television production are regulated through four- or five-year political agreements. The Film Agreement 2024-2027 was adopted as a broad compromise across the parties in the Danish Parliament and sets the framework and funding for the Danish Film Institute (DFI). It reserves DKK 1 million a year for the studies and committee work conducted under it, including a committee on the future of Danish film. Ahead of negotiations, the DFI publishes a consolidated proposal setting out priority areas for the sector.

Individual industry organisations are member funded. Vision Denmark is supported by the European Union, the Danish Board of Business Development and the Ministry of Higher Education and Science, delivered in partnership with its founding industry organisations. Public cluster funding is therefore conditional on independent organisations working jointly, not on any of them merging.

The predictable, dated government negotiation cycle is itself a coordination mechanism: it gives organisations a reason and a deadline to reach common positions, and gives government a defined moment at which to receive them.

Ireland – Federated Guilds Within a Government-Led Plan

Screen Guilds of Ireland (SGI) is a federation of department-level guilds representing crew across more than 20 departments, from art and camera to sound, stunts and visual effects.

Each department or guild nominates a representative to SGI, which engages with Screen Ireland, Screen Producers Ireland, SIPTU and other recognised bodies on matters affecting crew. Member guilds retain their own identity, membership and remit, and SGI describes its role as unifying and informative rather than substitutive. It sits alongside, not above, the wider network of Irish organisations, including Screen Producers Ireland, Animation Ireland, the Screen Directors Guild of Ireland, and Women in Film and Television Ireland.

Ireland's coordination architecture is led from the public side. The Audiovisual Action Plan, launched in 2018 under the Creative Ireland Programme, set eight policy areas delivered across departments and agencies, with an Audiovisual Steering Group overseeing implementation.

SGI is member-funded and constituted as a committee of its member guilds. Irish public investment flows to the agency, to skills and to production, not to a coordinating body.

Federation is most achievable where the constituent organisations already share a mandate. SGI works because every member guild represents crew; it does not attempt to reconcile crew, producer, cultural and diversity interests within one structure.

South Africa – The South African Screen Federation

The South African Screen Federation (SASFED) is the national federation of independent screen industry organisations, founded in 2006 in response to a government call for the independent production sector to speak with a united voice.

SASFED's constitution admits only bona fide industry bodies; individuals cannot join directly. Each member organisation appoints a council member and the council elects the Chair, Vice-Chair and Treasurer annually.

SASFED has a formalised relationship with their government through the Terms of Engagement with the National Film and Video Foundation (NFVF), binding both parties to quarterly stakeholder meetings on industry strategy,

policy and interventions. It holds two permanent seats on the South African Film and Television Awards Board and is represented on the Independent Communications Authority of South Africa's Digital Television Advisory Group. It also makes formal submissions to parliamentary committees on legislation and programme design. This written engagement protocol suggests a fixed meeting cadence and named seats on relevant Boards may be more durable than goodwill and will survive changes of personnel.

SASFED is a registered non-profit and public benefit organisation with no government funding. Additional capacity has been assembled through project vehicles such as the South African Screen Sector Support Initiative, established jointly with the Independent Producers' Organisation and funded by industry and philanthropic contributions. It does not receive core funding which makes it challenging for SASFED to have the capacity to ensure delivery on its partnership with government and industry.

Cross-Cutting Observations from these examples

- In these examples coordination sits above existing organisations, not in place of them. Every model retains independent guilds and specialist bodies, and the coordinating layer draws its authority from them. None have consolidated their representative organisations by merger.
- Coordination is function specific. BSF convenes, the CIC negotiates, SGI aggregates a single crew mandate and Producentforeningen bargains. Bodies asked to convene, negotiate, bargain and deliver services at once do not feature in this sample.
- Public funding has coordinating impact when attached to joint activity rather than to an institution. Denmark's cluster funding and its fixed film agreement cycle both change behaviour without government funding a body to speak on the sector's behalf.
- Recognition is inexpensive; capacity is not. South Africa shows formal recognition without resource, and the United Kingdom shows resource without formal recognition. Neither combination is complete.

Consideration might be given to a hybrid of these models: a federation of existing organisations for representation, a defined channel through which that federation reaches government, and targeted funding for shared activity that gives organisations a practical reason to work together.

Additional Nordic screen sector references for broad consideration:

There are very similar challenges and numbers of players across the Nordic region (organisations, companies, regional bodies, etc). However, the traditionally higher levels of work driven by individual languages, strong national film cultures, public broadcasting, and more accessible co-production structures have traditionally meant more stability and sustainability than New Zealand.

Core organisational funding does not appear to be offered in the region, perhaps because of the scale of their own film and TV industries. Also, many of these organisations have other income, copyright income administration is common.

Below are specific engagement and structures references that may be useful to consider.

Denmark – Sector Town Halls

Recognising the level and pace of change and increasing pressure the Danish Film Institute has begun convening 'Sector Town Halls' each quarter. These are aimed at wide screen sector participation to openly discuss and debate the challenges everyone is facing. The Town Hall topics include democracy and participation, new financing landscapes and those who sit on public money; new directors and new perspectives.

Finland – Advisory Board

The Finnish Film Foundation has an Advisory Board of industry groups whose members include Audiovisual Producers Finland; Finnish Arts and Culture Agency; Finnish Film Directors Guild; Finnish Cinema Association; Finnish Film Distributors Association; Writers' Guild of Finland; Finnish Arts and Culture Agency; Film Festivals.

Norway – Formal Consultation, Talent Development and Indigenous Collaboration

The Norwegian Film Institute (NFI) has two formal windows in the spring and autumn where industry input on initiative proposals, insight needs and generally on policy.

NFI collaborates with Talent Norge on the talent programme UP. Talent Norge was initiated by the Norwegian Ministry of Culture and Equality and founded in 2015 in a partnership with independent philanthropic foundations, aiming at world class talent development within the arts. Inspired by the highly successful work that has been done within high-performance sports Talent Norge aims to assist talented performers to fulfil their full potential and build professional careers. Talent Norge does not support individual talents financially but collaborates with external talent programmes from all cultural fields.

NFI collaborates with the International Sami Film Institute (ISFI). The ISFI is a non-profit, non-governmental organisation dedicated to supporting the development, production, and international visibility of Sámi film and audiovisual storytelling. Established in 2009, the International Sámi Film Institute is jointly owned by the Sámi Parliament, Norway and Guovdageaidnu Municipality.