



**connecting
aotearoa
summit 2026**



Ensuring that by 2030 everyone in Aotearoa is connected to the best broadband service that meets their needs: An executive report from this year's Summit.

tuanz
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Introduction

The central question driving this year's Connecting Aotearoa Summit was clear and urgent: How do we get everyone connected to the best broadband service that meets their needs to live and thrive in our digital future by 2030? This is an ambitious national goal that demands coordinated action from our policymakers, industry players, and community leaders. We are looking to directly influence the next government's mandate ahead of the 2026 election, securing a cross-party commitment to this crucial 2030 target.

The overall sentiment radiating across the presentations at the Summit was one of collaboration and shared optimism, underpinned by an urgent recognition of our current challenges.

Industry leaders, community advocates, and policymakers united around an undeniable consensus: universal connectivity is no longer a luxury or a privilege. It is a non-negotiable right fundamentally required for full participation in modern education, healthcare delivery, and economic prosperity. If we want to meet our vision that everyone in Aotearoa is connected to the best broadband service that meets their needs, we have to tackle the digital divide head-on.

Craig Young
CEO, TUANZ



Snapshot of the Digital Divide (The Current Data)

To set the scene, the following table extracts the most critical and current statistics mentioned across the summit regarding household exclusion rates, pricing disparities, and technology uptake.

HOUSEHOLD EXCLUSION

Approximately 400,000 homes remain digitally excluded from meaningful access.

1/5

COST OF MEANINGFUL CONNECTIVITY

The estimated required cost, though frontline advocates stress it should be \$30 and under.

\$27-54

FIXED BROADBAND GAP

New Zealand households without a fixed broadband connection.

170,000

LEO SATELLITE UPTAKE

The number of rural connections Starlink captured in just four years.

27%

RURAL PRICING PENALTY

Rural consumers pay an average of \$113.52 compared to \$87.86 for urban consumers.

29%

FIBRE NETWORK REACH

The network provides fibre access to the vast majority of the population.

~88%

DIGITAL SAFETY CONFIDENCE

The proportion of the population feeling confident in keeping themselves safe online.

13%

RURAL INFRASTRUCTURE BUILD

The number of cell sites The Rural Connectivity Group (RCG) has successfully delivered, to provide mobile coverage in remote areas.

590

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CHAPTER ONE

Strengthening Rural Connectivity

The vitality, growth, and resilience of our rural communities are the backbone of New Zealand's economy. To keep this backbone strong and thriving into the future, we must acknowledge that universal connectivity is no longer just a nice-to-have; it is a fundamental human lifeline.

The systemic barriers facing our rural regions are undeniably complex. We are dealing with incredibly rugged geographical limitations, from the steep, slip-prone roads of the Awakino Gorge to the remote expanses of the West Coast and Fiordland, which make installing traditional infrastructure physically and financially daunting. Alongside this, rural New Zealanders are dealing with changes like legacy networks being retired, and grappling with socioeconomic realities like power poverty and housing shortages that compound the digital divide.

The human impact of these failures can be catastrophic. Connectivity in rural Aotearoa isn't just about streaming Netflix; it is about the "golden hour" of survival. When extreme weather hits or a medical emergency occurs on a remote farm, robust internet and mobile



NZ Story

coverage dictate whether a rescue helicopter can be dispatched in time to save a life. On a day-to-day level, connectivity enables the delivery of vital telehealth services, empowers our children to participate in modern education, and allows our agribusinesses to utilise smart technologies, like digital halters for livestock, to remain globally competitive while managing environmental compliance. When connectivity fails, or is simply unavailable, it breeds social isolation and directly harms the well-being of our rural whānau.

For Māori in remote communities, these barriers represent an "invisible inequity" that restricts access to the digital economy and essential services. This is no longer just an issue of convenience; it's a matter of structural exclusion. Bridging this divide is the fundamental prerequisite for regional productivity and social cohesion.

The data shared at the summit paints a vivid picture of a market undergoing a massive reset. To date, the Rural Connectivity Group (RCG) has successfully delivered 590 shared-RAN cell sites across the country, providing critical coverage to 32,042 previously unserved rural homes, with 15,000 of those actively using the fixed wireless access service. However, geographic challenges remain: while our mobile network operators cover around 47% of New Zealand's total geography, the RCG's investment covers an additional 13%, highlighting just how difficult it is to reach the deepest rural pockets terrestrially.

At the same time, we are riding a wave of disruption driven by Low Earth Orbit (LEO) satellite technologies. Starlink has captured 27% of rural connections in just four years, while reliance on legacy copper has plummeted to just 20%. For a number of these households, the rise of Low Earth Orbit (LEO) satellites and Fixed Wireless Access (FWA) is not just a replacement for discontinued services, but will be their first viable high-speed entry point into the digital economy.

Despite these technological leaps, a frustrating “rural penalty” persists. Rural households still pay an average of \$13 more per month for broadband than their urban counterparts, with the gap stretching over \$20 in some regions. This creates a two-way squeeze for lower-income rural families facing higher prices, contributing to the reality that in some rural areas, 1 in 7 households still lack a broadband connection entirely. Furthermore, while Starlink boasts an 80% overall satisfaction rate based on its high speeds, its customer service satisfaction score plummets to just 49%, proving that the human element of technical support is still vastly underserved in the satellite market.

The summit discussions provided a look at how we tackle these challenges, with agreement that collaboration and a mix of technologies are our best way forward. Deputy Speaker and MP Barbara Kuriger set a collaborative and grounded tone early on. She reminded us that the 13% of our population living rurally contribute massively to our economy, and their needs aren’t fundamentally different from urban dwellers:



“We all want good roads, we all want good education, we all want good health care... but actually we just deliver it differently in rural New Zealand.”

– Barbara Kuriger, Deputy Speaker and MP

Telecommunications Commissioner Tristan Gilbertson offered a highly insightful perspective on the current market dynamics. While he acknowledged the incredible speed and disruption brought by LEO satellites, he highlighted a critical difference of opinion in the market

regarding consumer priorities. He pointed out that despite the performance advantages of satellite, 56% of rural consumers coming off copper are still deliberately choosing local terrestrial providers:



“If you’re running a farm or a rural business or a rural household, it’s not just about speed. It’s also about relationships, about knowing that when something goes wrong, you know who to call and they will actually show up.”

– Tristan Gilbertson, Telecommunications Commissioner



Paul Sutherland on NZ Story



"New Zealand doesn't need to debate about technologies. It needs connectivity that works."

- Jason Paris, CEO of One NZ

Jason Paris, CEO of One NZ, challenged the room to stop arguing over which specific technology is best and instead focus on the end-user. He strongly advocated for a "horses for courses" approach, using fibre, wireless, or satellite wherever it makes the most practical sense. He pushed back against unnecessary regulatory complexity and technology tribalism, stating, "New Zealand doesn't need to debate about technologies. It needs connectivity that works". Jason called for the establishment of a clear, unified outcome such as 100% connectivity by 2050 coupled with long-term spectrum certainty, allowing the industry to just get on with building the infrastructure without constant regulatory interference.

Ian Hooker, CEO of the RCG, also agreed with this multi-technology approach, noting that direct-to-cell satellite services are complementary to, rather than a replacement for, terrestrial cell sites. He noted that while satellites are incredible for isolated areas, cell sites are still absolutely necessary to handle the capacity demands of people living, working, and driving through rural communities.

SPOTLIGHT: THE RCG SHARED RAN MODEL

The Rural Connectivity Group remains a pioneering global case study in collaboration. By deploying a Shared Radio Access Network (RAN), the RCG allows Spark, One NZ, and 2degrees to operate from a single set of electronics on a single tower. This eliminates the need for duplicated infrastructure and reduces the cost of reaching remote areas. Furthermore, to combat extreme weather and power outages, over 70 of these sites are completely off-grid, utilising solar panels, lithium batteries, and emergency generators to keep communities connected when the mains power fails.



Busy is Not a Plan – Opinion Piece

In May 2023, three months after Cyclone Gabrielle, TUANZ's Rural Connectivity Symposium met in Christchurch under the theme "Future Proofing our Rural Communities." The takeaway I carried home was clear: rural resilience should be intentionally built, not improvised after a crisis.

On the public side of the ledger, three years have produced a \$6.4 million co-investment in battery backup at a few hundred rural cell sites: a sound measure, and the only entry on that side. Beyond that, the sector, myself included, mostly returned to everyday business. It is easy to mistake being busy for having a plan.

Rural communities did not wait for the coordinated plan that never came. They adopted Starlink, individual decisions that collectively shifted the market. The Commerce Commission's latest report shows Starlink has overtaken Spark as the largest rural broadband provider. The debate over access is largely settled, and so is any question about quality; the market has answered both. I operate a wireless network that competes with Starlink, so neither is a concession I make lightly. Weigh what follows accordingly.

A community with Starlink kits stashed at the town hall is better prepared than in 2023. But follow the chain. Homes and businesses use Starlink. Some RCG sites serving them are backhauled over it. Around fifty rural schools, many of them civil defence hubs, connect through it. Two of our three mobile carriers now provide satellite-to-mobile coverage through the same constellation. In 2023, everyday connectivity, mobile fallback, and emergency systems were separate. Now they increasingly depend on a single platform that everyone assumes will not fail. It has, twice. In May 2024, a geomagnetic storm degraded the service, by the company's own account. In July 2025, a failure in its core network software took it offline worldwide for over two hours. Both times, nobody in New Zealand could do anything but sit and wait. When Gabrielle disrupted ground networks, crews physically restored them. The infrastructure that can be repaired locally is diminishing.

The latest monitoring shows more rural connectivity options than ever, but the trend underneath runs the other way. Copper is being withdrawn, 3G has been switched off, and WISP towers that no longer pay their way are

being decommissioned. I know because I have pulled one down myself. Some communities already have fewer options than they did five years ago, a change they had no say in. The period of maximum choice has passed. Others are heading the same way. Richard Feasey, the independent expert the Commission engaged, warned of these risks last October. The warning was published alongside a disclaimer, and monitoring continued as before. On the public record, the exposure has never been assessed, because assessing it is nobody's job.

When asked who is responsible, Minister Paul Goldsmith maintains that resilience sits solely with operators and their customers. While candid, this position is insufficient. New Zealand's largest rural operator carries no resilience obligations, yet in many areas is becoming the only remaining option. Who is accountable for these communities? Under the current arrangement, no one in particular.

Any country seeing its regional and emergency communications consolidate onto a single foreign platform would ask what oversight is needed. New Zealand has not. The fix is not financial. The government should count each community's remaining independent paths, publish the count, and keep it current. Call it the independent paths register. Two options that share a tower, a power feed, or a platform are one path, not two. Where one path remains, someone should decide whether that is enough, and own the decision. Where it is not, the options can at least be debated openly, which is more than happens now. Starlink is an excellent product, but it was never put forward as the national resilience plan; it assumed the role by default.

New Zealand built a world-class fibre network once a decision was made. By 2029, someone will stand up at another symposium and take stock of another three years. The honest assessment today is that no clear decision has been made. If the same remains true in 2029, this will no longer be unplanned drift; it will be a deliberate choice.



Alex Stewart is the Founder and Managing Director of WombatNET, a wireless internet service provider operating in the Greater Wellington region.

CHAPTER TWO

Shaping the Future of Resilient Networks

The Summit made one thing abundantly clear: simply providing a connection is no longer the end goal. In our increasingly unpredictable climate, ensuring that connectivity is resilient, robust, and reliable is a strategic imperative. Connectivity is the lifeline that binds our rural communities together during times of crisis.

The human impact of these barriers is profound. As we heard throughout the summit, when extreme weather hits, telecommunications are not a luxury; they dictate the golden hour of survival. A lack of resilient connectivity means emergency helicopters cannot be deployed, telehealth services fail, and isolated families are cut off from vital support networks. When the 'lines' go down, the resulting social isolation breeds fear and anxiety. Yet, the overwhelming feeling from the summit was one of optimism.

By understanding these barriers, we are uniquely positioned to build a digital ecosystem that protects and empowers our rural whānau, no matter what the weather throws at us.



To understand where we need to go, we must look at the data shaping our current resiliency landscape. According to recent climate risk assessments shared at the summit, proactive investment in resilience delivers a staggering ten to one return on investment. Despite this clear economic and social benefit, approximately 97% of current public spending on climate hazards is directed toward post disaster recovery, leaving a mere 3% dedicated to proactively building resilience. This is a crucial imbalance that our sector must work collaboratively to flip.



On the infrastructure front, the recent levels of investment in rural capacity has been encouraging. The Rural Connectivity Group (RCG) has successfully deployed 590 cell sites across the country. Crucially for resilience, over 70 of these are entirely off grid, utilising solar panels, lithium batteries, and emergency generators. Furthermore, the government and industry are currently working to upgrade around 100 highly vulnerable cell sites in regions like Northland and the East Coast with 24 hour battery backup systems to withstand sustained power outages. Meanwhile, the rapid uptake of Low Earth Orbit (LEO) satellite technology, which now accounts for 27% of all rural

connections and can provide a new layer of redundancy for communities completely disconnected from terrestrial networks. Satellite-to-mobile technologies are filling coverage gaps, as well as providing much needed connectivity in times of disaster.



The overarching agreement across the panel discussions was that resilience requires a “whole of society” approach, but the speakers offered different perspectives on where our immediate focus should lie.

Ellen Strickland from the Brainbox Institute presented research focusing on the proactive frameworks required for climate resilience. She noted that looking at isolated parts of a network is like touching different parts of an elephant in the dark; we need to turn on the light and look at the whole system together. She introduced the “5 Rs” of internet infrastructure resilience: Robustness, Redundancy, Resourcefulness, Rapidity, and Relationships. Ellen firmly believes that building shared purpose and community centered planning is just as important as the physical hardware, noting that acting early and in a coordinated way reduces long term costs and human disruption.

The 5 Rs of Internet Resilience

- **Robustness:** Designing systems to withstand extreme weather.
- **Redundancy:** Providing backup capacity, such as satellite backhaul.
- **Resourcefulness:** Leveraging the “number eight wire” mentality of frontline responders.
- **Rapidity:** Prioritising timely repairs to minimise disruption.
- **Relationships:** Pre-building inter-organisational ties for faster crisis response.



Paul Brislen, CEO of the Telecommunications Forum (TCF), brought a practical, operational perspective to the table. He highlighted the intense, cascading interdependency of our critical infrastructure during a crisis. Telecommunications rely entirely on electricity, electricity relies on roads to move repair crews, roads rely on fuel, and the fuel sector relies completely on telecommunications. Paul argued that while batteries and generators are essential, true resilience starts with protecting the power supply.

Mark Eager, CEO of the Mobile Health Group, grounded the conversation in the human element, sharing stories from the aftermath of Cyclone Gabrielle. Mark highlighted a key difference in perspective: while technologists focus on bandwidth and latency, rural people view connectivity simply as a means to reach help and stay united. He shared how Ngāti Porou communities utilised “dropped in” Starlink units and generators, but it was the local “aunties” who organised the fuel rosters to keep them running. As standard emergency plans failed, locals used Facebook Messenger to organise their own rescues.



“Telecommunications didn’t make the resilience... it was from the people with the number eight wire.”

– Mark Eager, Mobile Health Group.

SPOTLIGHT: MARAE BASED COMMUNITY RESILIENCE HUBS

A standout case study discussed by Hūhana Lyndon and Mark Eager was the transformation of rural marae into fully self sufficient civil defense hubs. In regions like Ngātiwai, the government and community have partnered to install solar power systems across 14 local marae. During extreme weather events, these locations combine local solar power, battery backups, and LEO satellite terminals to become the ultimate safe havens. Crucially, the innovation here isn’t just the hardware; it is the community education. Training local whānau to operate the solar switches and manage the satellite connections ensures that when urban repair crews cannot reach isolated valleys, the community has the absolute power to stay connected and coordinate their own recovery.



Markus Spiske on Unsplash

SPOTLIGHT: TACTICAL 5G AND THE VEHICLE AS A NODE (VAAN)

Michael Miltiadou from Ericsson showcased pioneering advancements in mission critical communications. Traditional emergency networks have been restricted to voice only, but Ericsson is leveraging 5G standalone networks to deploy "Tactical Humanitarian Operations Response" (THOR) units. These are fully contained, private 5G networks on wheels that can be dropped into disaster zones to provide instant broadband. Furthermore, the "Vehicle as a Node" innovation is turning standard emergency vehicles into mobile network hubs. By equipping fire engines and police cars with dual modem routers that combine satellite and 5G, first responders carry an always on network with them, enabling live video streaming and drone communications in the deepest rural environments.



Diana Macesanu on Unsplash



CHAPTER THREE

Making Internet Affordable and Advancing Digital Equity

The vitality of Aotearoa relies on the inclusion of every citizen in the digital world. Yet, affordable connectivity and digital equity remain some of the most complex challenges facing the telecommunications sector. Connectivity is no longer a luxury; it is the fundamental gateway to modern education, healthcare, employment, and social participation. Advancing digital equity means ensuring that every New Zealander, regardless of their postcode or income, has the tools, skills, and affordable internet access needed to thrive.



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The systemic barriers to this equity are distinctly pronounced in rural regions. Remoteness creates extreme geographical limitations, driving up the cost of infrastructure deployment and resulting in a market where rural consumers often pay a premium for their basic connections. These geographical hurdles are deeply compounded by socioeconomic realities. In many isolated communities, digital exclusion is just one symptom of broader systemic challenges, such as power poverty, housing instability, and the rising cost of living. A connection is entirely useless if a household cannot afford to keep the lights on, or if the monthly subscription forces a choice between data and groceries.

The human impact of these barriers is profound and far-reaching. When vulnerable populations are digitally excluded, they are cut off from essential government services, telehealth consultations, and emergency communications. Furthermore, the rapid digitisation of banking and social support means that those without digital skills or devices face intense social isolation and loss of dignity. As the modern world accelerates, solving this participation gap is a strategic imperative. The industry should move beyond simply building coverage to actively fostering digital resilience, ensuring that technology acts as an enabler for all rather than a wedge that drives the disadvantaged further behind.

The data presented at the summit by the Digital Equity Coalition Aotearoa (DECA) and the Telecommunications Commissioner starkly outlined the current digital divide. Across Aotearoa, one in ten households has no internet access whatsoever, and one in ten New Zealanders entirely lack basic digital skills or the confidence to use digital tools. This exclusion is disproportionately felt among marginalised groups, with disabled people being twice as likely to have no internet access, and Māori and Pasifika communities being significantly less likely to be connected than the general population.

The financial burden of getting online can be a critical barrier. Research indicates that meaningful connectivity currently costs a household between \$27 and \$54 per week, whereas frontline digital advocates stress that affordable solutions need to sit firmly at \$30 or under per month to be viable for low-income families. For rural users, this affordability crisis is exacerbated by a “rural penalty.” Rural households pay an average of \$13 more per month for broadband than urban consumers. This creates a severe two-way squeeze, as rural households face higher prices while often earning lower average incomes.

The summit featured perspectives from frontline advocates, industry participants, and political leaders, revealing a strong consensus that the digital divide is a multidimensional crisis, though opinions varied on how best to intervene.

Elle Archer, Chair, Te Hapori Matihiko, delivered an argument that digital inclusion can no longer be viewed merely as a charity initiative, but must be treated as critical economic infrastructure. She emphasised that society is making massive policy and emergency management decisions without sufficiently localised digital intelligence. Through her work on the Kaunuku framework, Elle highlighted that digital inclusion is a system condition requiring visibility across multiple dimensions, including motivation, trust, skills, and safety. She passionately argued that failing to address these dimensions creates structural exclusion.



"This is not a technology gap, it is a participation gap. Digital inclusion is now core national infrastructure."

- Elle Archer, Te Hapori Matihiko

Leala Faleseuga, a Digital Inclusion Librarian from Libraries Horowhenua, grounded the high-level policy discussions in her reality from the frontline. She shared powerful stories of assisting community members who are entirely overwhelmed by a society that is digitising too fast for them. Her daily work involves everything from helping elderly citizens avoid devastating romance scams that wipe out their life savings, to assisting people in accessing housing and medical services that have moved entirely online. Leala pointed out that grassroots organisations are doing this vital work on the "smell of an oily rag" and that the loss of pandemic-era

government funding for digital navigators has left communities incredibly vulnerable. She challenged the sector, stating:



"If your service or your communications or your process is purely digital, you're leaving people behind."

- Leala Faleseuga, Libraries Horowhenua

Ken Walliss from Chorus brought a wholesale industry perspective, drawing on his experience chairing the NBN's low-income and digital inclusion forum in Australia. Ken agreed entirely with the community advocates that connectivity alone does not solve the divide without addressing devices and skills. He highlighted Chorus's recent launch of Equity Fibre 100, an initiative designed to provide a profit-out, low-cost wholesale connection capped at a \$30 retail price. While he acknowledged this is a strong step forward, Ken agreed that urgency and continuous cross-sector collaboration are required to make a lasting impact.

The political panel, featuring Jenny Marcroft (NZ First), Hūhana Lyndon (Green Party) and Reuben Davidson (Labour Party), further expanded the conversation by proving that digital inequity spans both deep rural and highly urban environments. Hūhana noted that in places like the remote Hokianga, connectivity is inherently tied to broader infrastructure failures; communities must resolve housing quality and power poverty before broadband can even be maintained. Conversely, Reuben highlighted that in urban electorates like Christchurch East, there is "glass to the gate" everywhere, yet the divide persists purely due to extreme poverty, leaving young people socially isolated and locked out of modern educational opportunities when they go home.



SPOTLIGHT: THE KAUNUKU LOCALISED DIGITAL FRAMEWORK

Developed through research and stewarded by DECA, Kaunuku is a place-based digital inclusion framework. Moving beyond simple connectivity metrics, Kaunuku measures digital equity across multiple pillars: Identity, Motivation, Access, Skills, Trust, and Safety. By ingesting diverse datasets from infrastructure providers, councils, and community surveys, Kaunuku generates a standardised “Digital Inclusion Score” for local districts. This enables targeted, evidence-based interventions rather than guesswork, ensuring that investment is directed exactly where it is needed most to prevent systemic exclusion.

SPOTLIGHT: GRASSROOTS DIGITAL NAVIGATORS

The summit heavily spotlighted the critical, unheralded work of local libraries and community hubs acting as digital safe havens. Initiatives like Skinny Jump provide highly affordable, flexible, prepaid broadband connections to homes that cannot commit to standard contracts. Digital inclusion librarians and navigators are working face-to-face to provision these modems, while simultaneously teaching digital literacy, explaining AI, and providing urgent education on scam protection, proving that human relationships are the ultimate key to technology adoption.

Calls to Action

1. Formalise telecommunications as a critical national utility.

We need to continue to advocate for the official recognition of telecommunications with the same critical utility status as water and electricity.

ACTION

Partner with government and emergency management agencies to ensure network restoration workers receive priority frontline access during civil defense emergencies, and establish framework settings that unlock proactive “build back better” infrastructure funding.



Scott Graham on Unsplash



2. Evolve any future Government funding to an outcome-based model.

Modernise the regulatory and funding framework to guarantee a baseline level of meaningful outcomes needed and wanted by all New Zealanders.

ACTION

Shift state funding models away from mere geographic coverage metrics toward measurable digital inclusion and participation outcomes. Incorporate an “inclusive by design” mandate for essential civic and banking services, ensuring robust, non-digital alternative pathways remain available for vulnerable communities. Jointly develop business cases with the government that measure the broader socioeconomic value (healthcare, education, and social cohesion) of connecting the final percentages of rural New Zealand, rather than relying strictly on commercial return on investment.

3. Recognise and support the community-managed resilience hubs.

Recognise the already decentralised network of localised lifelines to ensure equitable access to communications during major network or power outages.

ACTION

Champion a model to equip and support local community centres, schools, and marae with robust solar power, battery storage, and satellite backups, reducing the inequitable reliance on individual household investments.



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4. Drive industry co-opetition and data sharing.

Break down organisational silos to build a highly accurate, localised picture of New Zealand's digital infrastructure gaps.

ACTION

Establish a framework for providers and stakeholders to share anonymised, localised datasets to map real-world system failures and black spots.

5. Establish a national digital inclusion compact.

Build an ecosystem behind a singular, accountable strategy to unite fragmented digital equity initiatives.

ACTION

Partner with the Digital Equity Coalition Aotearoa (DECA) to formalise a cross-sector compact that enables government, industry, and philanthropy to commit to clear, measurable equity targets.



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Tony Stoddard on Unsplash

6. Optimise regulatory enablers.

Streamline the operational environment to accelerate the deployment and hardening of networks.

ACTION

Advocate for spectrum allocation models that prioritise rapid deployment over high licensing costs, while introducing clear resilience standards for critical rural infrastructure sites.

Direct Speaker Demands



Fund a Common Operating Picture (COP)

Paul Brislen issued a direct demand to the government and the National Emergency Management Agency (NEMA) to fund a single, unified digital platform. During a crisis, the telco, power, and roading sectors desperately need a shared, real time map to coordinate recovery efforts, rather than relying on antiquated PDF emails.



Shift Funding to Proactive Resilience

Ellen Strickland challenged policymakers to completely flip the current funding model. She demanded that we move away from dedicating 97% of our budgets to post disaster recovery and instead invest heavily in proactive, community centered resilience planning, capitalizing on the proven ten to one return on investment.



Corporate Accountability for Inclusion

Elle Archer issued a direct challenge to the telecommunications and corporate sectors: If an organisation benefits financially and operationally from digital transformation, they must take formal responsibility for digital inclusion. She demanded that companies share their anonymised commercial datasets with community frameworks like Kaunuku to help accurately map the nation's digital blind spots.



Donate Time and Expertise

Vic MacLennan challenged every professional in the room to donate just one hour of their week to volunteer at a local library, support a senior citizens' technology class, or assist a Code Club. She stressed that community organisations desperately need the technical expertise that sits abundantly within the corporate sector.



Fund the Frontline

Leala Faleseuga demanded that the government and industry establish permanent, sustainable funding streams for digital navigators and community hubs, noting that the demand for digital help is rising exponentially while grassroots resources are completely drying up.



Long term Connectivity Goal

Jason Paris called leaders to mandate a clear, long-term national connectivity goal (2050 horizon) and a technology-neutral approach.

2026 KPMG Agribusiness Agenda

The “Status Change” Imperative

The rural sector is currently navigating a pivotal transition. Global food systems are projected to change more in the next 25 years than in the previous 13,000. In this context, 75% of industry leaders advocate for “status change”, intentional, non-linear innovation, over incremental improvements to the status quo. Technology is identified as the primary lever for this change, essential for building resilience against climate shocks, geopolitical disruptions, and supply chain fragility.

Broadband and Connectivity: From Availability to Equality

A significant shift has occurred in the sector’s perspective on digital connectivity. “Broadband equality for all” has risen to the 5th highest priority for industry leaders in 2026, up from 10th in 2025.

Metric	Details
Priority Rank	5th overall. (Score: 8.04/10)
Primary Shift	From “availability” of connectivity to “equality of cost.”
Key Driver	While solutions like Starlink have largely addressed geographical availability, the focus is now on the ongoing cost and affordability of high-quality broadband.

Emerging Connectivity Use Cases

- **Wearable (Human) Devices and Digital Trackers:** Anticipated to become standard by 2050 for monitoring health and diet. The report notes the possibility that compliance with dietary advice from these devices may eventually become a requirement for insurance cover.
- **On-Farm Productivity:** Connectivity is increasingly linked to the use of wearable technology on livestock to drive productivity and optimize land use.

Artificial Intelligence (AI) and Data Integration

AI has transitioned from a conceptual belief that it would deliver competitive advantage to a “ticket to play.” The priority to “deepen capabilities to maximise use of AI” recorded its highest score in 2026, ranking 13th equal overall.

Key AI Insights

- **Customer Integration:** International consumer-packaged goods (CPG) companies are already using AI to model consumer behaviour. New Zealand exporters must adopt similar technologies to remain relevant to these global partners.
- **Operational Necessity:** AI is viewed as an essential enabler of productivity, resilience, and credibility.
- **The Capability Gap:** The primary constraint is not a lack of AI tools, but a lack of human skills and capability with organisations to deploy and optimize them effectively.

Digital Innovation in Trade and Finance

The report identifies several “Global Future Shapers” that rely on advanced telecommunications and digital infrastructure:

- **Tokenised Digital Payments:** Stablecoin mechanisms are expected to grow exponentially, replacing historic multi-bank payment chains with near-instant, low-cost cross-border settlements.
- **Parametric Insurance:** Risk management is shifting toward data-driven resilience using real-time analytics and alternative capital to manage systemic, climate-driven risks.
- **Instant Commerce:** Fast commerce is evolving into “instant commerce,” requiring real-time operations, hyperlocal supply chains, and high-speed digital coordination.

Innovation and Adoption Challenges

Despite the high priority placed on technology, several “handbrakes” impede progress:

- **The Adoption Capability:** “Innovation adoption” is identified as a core capability. There is frustration that many promising pilot projects fail to reach scale due to capital constraints or a “perfectionist” mindset that delays implementation.
- **Regulatory Lag:** Regulatory frameworks are often seen as trailing behind technological reality, particularly regarding biotechnology and digital trade.
- **Cyber Security:** Cyber criminals are noted to maintain an advantage over law enforcement, driving higher costs for business resilience and rapid recovery systems.

Summary of Actions for the Government

The report outlines several key expectations for Government intervention to support technological and infrastructural resilience:

- **Legislative Modernisation:** Enact the Gene Technology Bill to provide the industry with tools considered critical for long-term competitiveness.
- **Regulatory Efficiency:** Speed up consenting processes and ensure regulatory settings are relevant to real-world business challenges, acting as an enabler rather than a “handbrake.”
- **Co-Investment in Adoption:** Provide co-investment for large-scale technology adoption, particularly where the “potential prize” for the New Zealand economy is significant.
- **Resilient Rural Infrastructure:** Prioritise investment in resilient rural infrastructure (ranked 4th priority) to support operational efficiency and attract talent.
- **International Digital Trade:** Work with global partners to address non-tariff barriers and develop frameworks for digital trade, including hydrogen-fuelling capabilities for next-generation shipping vessels.
- **Support for Agri-Tech Exports:** Collaborate with the sector to package New Zealand farm system knowledge and technology as exportable products, particularly for emerging markets like India.

KPMG’s Agribusiness Agenda 2026 brings together perspectives from industry leaders across the food and fibre sector, and is now in its 17th year. The Agenda draws on insights from across the value chain to identify priorities that will shape the sector’s future.



A man wearing a wide-brimmed hat and a blue and white checkered shirt is walking away from the camera on a grassy hill. A small child in a light-colored shirt and a hat is walking beside him, holding his hand. In the background, a black and white cow is grazing. The scene is set in a rural landscape with rolling hills under a bright sky.

CONCLUSION

The consequence of inaction is an exponential scaling of the equity gap. As AI and quantum technologies emerge, those currently on the wrong side of the participation gap will find the distance to the digital economy completely impossible to bridge. Digital inclusion is no longer just a social issue; it is core national infrastructure essential for New Zealand's democratic stability and economic future. We have the technology; we now require the political and social will to deploy it equitably. We must adjust the sail now, before the wind of technological change leaves our most vulnerable communities behind.

TUANZ: Championing a Brighter Digital Future for every New Zealander

The Technology Users Association of New Zealand (TUANZ) is the voice of all technology users in Aotearoa New Zealand. Established as a not-for-profit organisation, TUANZ acts as the independent group representing the interests and needs of individuals, businesses, and organisations as they navigate the evolving technology landscape.

Our membership encompasses a diverse range of technology users, from small businesses and innovative startups to large enterprises and public sector entities. This broad network connects those who utilise technology to achieve their goals, fostering a community dedicated to understanding, adopting, and maximising the benefits of digital tools and services.

TUANZ plays a crucial role in bridging the gap between technology providers and end-users. We work collaboratively across sectors, engaging with government, industry, and the wider community to ensure that technology deployment and policy decisions are user-centric and contribute to a thriving digital ecosystem for all New Zealanders.

Our focus is on empowering technology users through education, advocacy, and the facilitation of meaningful connections. We strive to ensure that New Zealanders can confidently and effectively leverage technology to enhance productivity, innovation, and overall quality of life. We provide a platform for an informed and influential user voice, advocating for policies and practices that support positive technology outcomes for our members and the nation.

Methodology

The initial draft report was created by analysing all the audio recordings and presentations from the day using Google's NotebookLM AI tool to identify key themes, actions, and recommendations. This final version has been edited and reviewed by Craig Young, CEO of TUANZ.





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