Tech & Innovation Manifesto 2026

How technology can create a better tomorrow for Aotearoa

March 2026

TECH NEW ZEALAND

Executive Summary

TECH NEW ZEALAND

Technology and innovation are the catalysts that can transform New Zealand, benefiting all Kiwis.

New Zealand's future prosperity is under threat. Our productivity is lagging, our talent is departing, and our infrastructure deficit is growing.

Technology is the catalyst that can transform New Zealand. It is the foundation for our future prosperity and global competitiveness – whether from agriculture, manufacturing, health or education.

Better use of technology throughout New Zealand will deliver productivity gains, sustainable growth and create high-value jobs.

We have a strong foundation, with the tech sector already contributing $24 billion to GDP (8%), and now we need to pursue opportunities that will allow tech to contribute fully to the nation's prosperity.

Now is the time to focus on four long-term foundations to ensure New Zealand can truly leverage the benefits of technology. We need:

- **World-class local digital infrastructure**
- **Abundant and affordable clean energy**
- **A consistent, attractive investment and talent ecosystem**
- **Strong global connections and export excellence**

New Zealanders deserve a vision for the nation that seizes opportunities while countering risk.

Policymakers must embrace long-term thinking with a bipartisan approach.

Four foundations for long-term prosperity

DIGITAL INFRASTRUCTURE

GOOD TECH

- Build digital public infrastructure
- Accelerate trusted digital identity
- Accelerate open data infrastructure
- Invest more in cyber security
- Invest in Kiwi AI

INVESTMENT & TALENT

PEOPLE

- Include AI in future skills training
- Review NZ Super Fund mandate
- Reform overseas investment rules
- Develop responsive immigration
- Review and enhance R&D incentives

CLEAN ENERGY ADVANTAGE

PLANET

- Build more renewable generation
- Provide regulatory clarity
- Improve electricity price settings
- Attract data centres
- Attract energy-intensive industry

EXPORTS & GLOBAL GROWTH

GROWTH

- Invest in NZ's niche tech opportunities
- Improve ecosystem connectivity
- Bolster digital trade expertise
- Support tech export collaboration
- Expand digital trade agreements

Key Tech & Innovation Policy Recommendations

TECH NEW ZEALAND

DIGITAL INFRASTRUCTURE

GOOD TECH

1. Move faster deploying the Customer & Product Data Act. One sector at a time will takes years. Mandate open data across energy, agriculture, health, and other finance data simultaneously.
2. Increase investment in cyber security to reduce the $1.6b lost to cybercrime annually and improve trust in the digital economy.
3. Publish a Digital Economy Roadmap linking consumer data rights, digital identity, cyber security and AI.
4. Urgently create a legal framework for agentic commerce as AI agents can now buy and sell on behalf of people.
5. Invest in digital inclusion initiatives to ensure all New Zealanders can access, adopt and benefit from digital public infrastructure.

CLEAN ENERGY

PLANET

1. Accelerate renewable energy generation including geothermal, fusion energy and other advanced technologies to increase competition.
2. Actively attract energy-intensive sectors including data centres, supercomputing and energy-intensive food processing, all powered by clean energy, generating low carbon exports.
3. Invest in a smarter grid, using tech and AI to improve the balance between supply and demand.

INVESTMENT & TALENT

PEOPLE

1. Uplift R&D tax incentives to globally competitive levels .
2. Review mandate of NZ Super Fund to direct late stage capital into NZ tech firms, encouraging them to retain HQ and staff in New Zealand.
3. Make every adult in NZ eligible to take free, globally benchmarked courses to gain practical AI skills for work.
4. Review double taxation rules to make it more compelling for investors and international firms to set up in New Zealand.
5. Strategically re-align fees-free policy to courses that attract talent into growth sectors (eg advance tech, biotech, fintech, agritech)
6. Retain the game development subsidy as this sector becomes next $1b export sector.

EXPORTS & GLOBAL GROWTH

GROWTH

1. Create a separate, streamlined regulatory pathway for ‘precision-bred’ (gene-edited) plants and animals, separating them from stricter GMO regulations.
2. Establish a fit-for-purpose regulatory framework to enable safe use of real-world digital assets like tokenised real estate.
3. Launch a targeted grant programme (like CUREator in Australia) to grow NZ’s deep tech, biotech and life sciences commercialisation.
4. Establish a national strategy for quantum technology now - it’s as fundamental to our economy as AI.
5. Align policy like tertiary education, taxation, R&D incentives, with targeted economic growth sectors like agritech, biotech, space and defence tech.

Aotearoa New Zealand's united voice for technology

KiwiSaaS NEW ZEALAND

Tech Marketers NEW ZEALAND

FinTech NEW ZEALAND

Tech Women NEW ZEALAND

BioTech NEW ZEALAND

Blockchain Forum NEW ZEALAND

Quantum Forum NEW ZEALAND

InsurTech NEW ZEALAND

Digital Identity NEW ZEALAND

RegTech NEW ZEALAND

AgriTech NEW ZEALAND

IoT Forum NEW ZEALAND

EdTech NEW ZEALAND

AI Forum NEW ZEALAND
Te Kāhui Atamai Iahiko o Aotearoa

HRTech NEW ZEALAND

CyberTech NEW ZEALAND

TECH NEW ZEALAND

Introduction

Aotearoa New Zealand stands at a crossroads and the numbers tell a stark story. By 2045, we will face a labour shortage of at least 250,000 people. Without policy reform, health spending and pensions will consume 100 percent of income tax revenue. Our productivity continues to lag behind our competitors and our best talent seeks opportunities abroad. Our largest tech firms continue to slowly move offshore to access capital, taking high-value jobs as they go.

Yet this is not a story of inevitable decline. It is a call to action.

Technology is the catalyst that can transform our trajectory. No longer just one sector among many, it has become the foundation for our future prosperity, productivity and global competitiveness. From precision agriculture to advanced manufacturing, and digital health to export services, technology enables us to do more with our small population and overcome the constraints of distance.

The opportunities are clear: by accelerating the safe and inclusive adoption of technology across every sector, we can unlock productivity gains, drive sustainable growth and create high-value jobs. With thoughtful cross-party coordination, over time New Zealand's new industrial base could be large local hi-tech firms.

But realising this potential requires more than incremental change. It demands investment in four critical foundations:

1. **Build world-class local digital infrastructure** including public digital infrastructure that enables seamless interaction between citizens, businesses, and government; open data interchanges that unlock innovation; trusted digital identity systems that facilitate secure online productivity; nationwide cyber security that protects our digital economy; and homegrown AI capabilities that ensure we can harness artificial intelligence quickly, safely and effectively.
2. **Unlock abundant, affordable, clean energy** to power our essential data centres, AI systems and energy-intensive industries that will drive future growth, turning our renewable energy advantage into a global magnet for investment.
3. **Cultivate a consistent, attractive investment and talent ecosystem** that gives businesses confidence to invest and grow globally from here, ensuring every New Zealander can benefit from our digital transformation.
4. **Strengthen global connections and export excellence** through modern trade agreements and strategic investment in niche sectors for sustained tech export growth.

These foundations cannot be built through short-term political cycles or fragmented efforts. They require what may be our greatest competitive opportunity: **a commitment to long-term thinking and national alignment.** This means a bipartisan approach that gives businesses the clarity and consistency to invest confidently, and gives New Zealanders certainty about the future we are building together.

Other similar sized, successful nations including Singapore, Denmark and Switzerland have shown what is possible when countries commit to strategic, long-term nation-building. New Zealand has done it before, and we can do it again.

Together, we can build a cleaner, healthier and more prosperous future for all New Zealanders; one where good technology creates opportunities, solves our demographic and productivity challenges, and ensures no one is left behind. We envision a future where Aotearoa New Zealand doesn't just survive, but thrives as a globally connected, digitally enabled, innovation-driven nation.

Technology will shape our future, that much is certain. The real question is whether we will embrace long-term thinking, make the necessary investments and commit to the bipartisan vision that the government and the tech ecosystem can align to. This shared direction is essential if New Zealand is to harness the full potential of technology and deliver the future our country demands.

Technology will shape our future.

This manifesto sets out how we get there — together.

How to Read this Manifesto

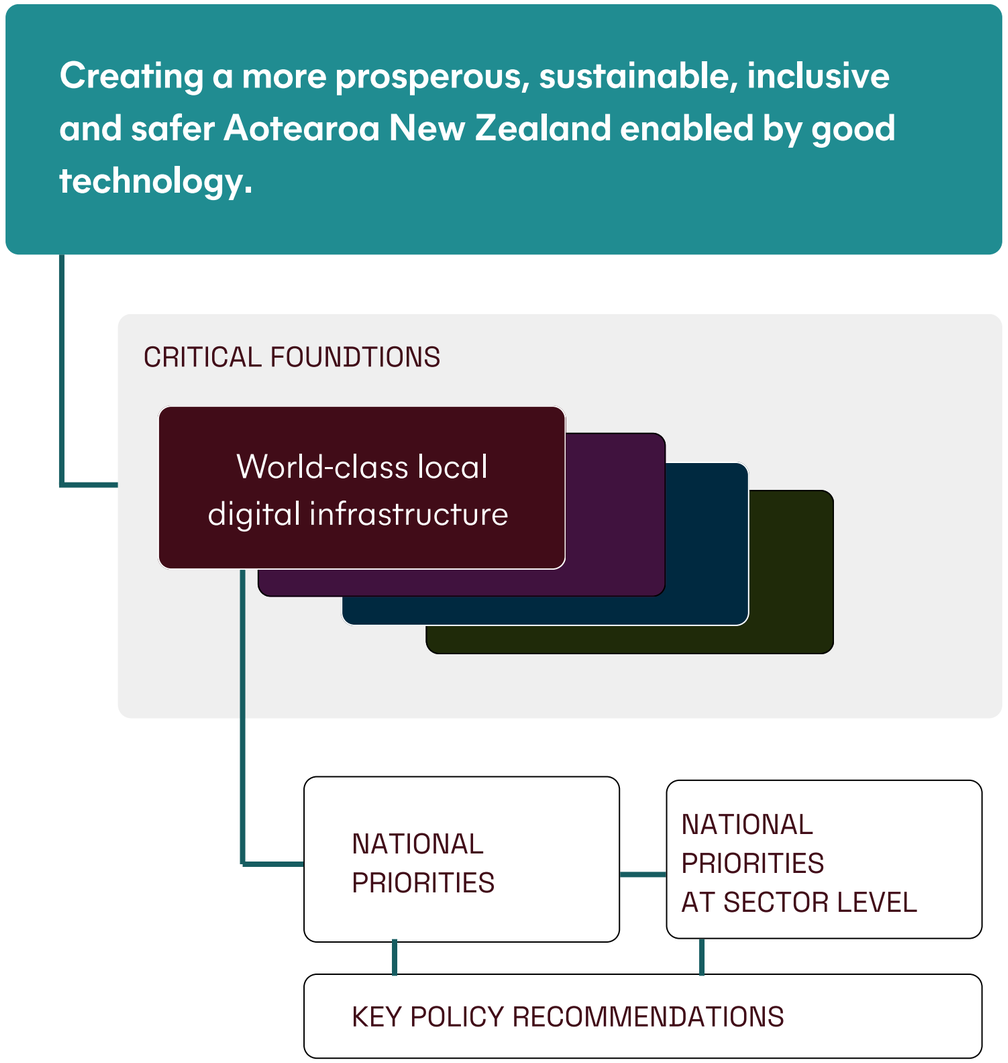
This manifesto has been a collaborative effort across the thousands of members of the many tech communities that make up Tech New Zealand.

To capture and communicate the breadth of ideas about technology's potential for New Zealand, there are many layers to this manifesto.

The reason why this is important is clear, technology can enable a more prosperous, sustainable, inclusive and safer Aotearoa. This manifesto shows how. It is not all-inclusive given the breadth of impact technology has. However, it provides layers of direction all political parties can consider as they prepare for the 2026 election.

The first section details the four foundations that require focus and investment in order to unlock the value of technology across New Zealand's economy and society. Within each foundation, a number of national priorities are identified - key areas that any government of the future should look to.

The appendix includes a section for each community, from agritech and AI to online safety and quantum. These sections include another layer of national priorities and policy ideas.



5x

Tech exports are growing five times faster than the economy

By 2045, NZ faces a projected labour shortfall of

250k +

Uptake of tech is critical

Tech in Aotearoa New Zealand

We have a strong foundation. Our tech economy is a proven global performer; driving export growth, creating jobs and delivering prosperity. Now we must strengthen it with targeted investment in the critical infrastructure that will enable continued and inclusive growth for all New Zealanders.

GROWTH

$24b

Tech sector contribution to GDP, 8% of the total economy.

Tech sector exports make up 11% of NZ's total.

$11.4bn

$1.2b

was invested in R&D in ICT/tech making up 29% of New Zealand's total

29%

NZ Year 13s who are studying tech

31%

Companies in the tech sector

24,012

Jobs in the tech sector

119,520

PEOPLE

IT degree graduates

2,555

Māori tech graduates

7%

ICT jobs right across the economy

(including IT workers in tech firms and non tech firms)

98,290

Sources: Data for 2024, collected from StatisticsNZ, MBIE and Ministry of Education, 2025

Foundation 1:

Build word-class local digital infrastructure

Build world-class local digital infrastructure

In the digital age, infrastructure means more than roads, bridges and power lines. It includes essential data networks, digital platforms, security systems, and artificial intelligence (AI) capabilities that enable modern economies to function efficiently, securely and inclusively. While physical infrastructure moves goods and people, digital infrastructure moves information, enables transactions and unlocks productivity across every sector.

New Zealand has made progress, but we risk falling behind. Other nations are investing more rapidly in digital public infrastructure that reduces friction, cuts cost and enables innovation. For example, Singapore's digital identity system facilitates seamless, secure online services. Denmark's open data platforms have led to the creation of entirely new industries. Meanwhile, cyber threats grow more sophisticated, and AI is reshaping how we work, learn and compete.

We need world-class local digital infrastructure as the backbone for our digital economy and society. This infrastructure needs to be secure, accessible, interoperable and built for an AI-enabled future.

Digital infrastructure is not a luxury; it is an essential enabler of productivity, innovation and competitiveness. It reduces the cost of doing business, enables new services and business models, improves government efficiency and ensures New Zealand can participate fully in the global digital economy. Countries with superior digital infrastructure attract more investment, retain more talent and achieve higher productivity. They create environments where startups can scale rapidly, established businesses can innovate continuously and citizens can access world-class services regardless of where they live.

National priorities

DIGITAL PUBLIC INFRASTRUCTURE

Digital public infrastructure enables seamless, efficient interaction between citizens, businesses and government.

It reduces compliance costs, eliminating duplication and making it easy to do business in New Zealand. This includes modernising legacy systems for a citizen-centric experience, creating common platforms, ensuring government services are AI-first and committing to open data flows.

OPEN DATA INTERCHANGES

Open data interchanges and standards that allow secure, privacy-preserving data sharing between authorised parties. Developing and supporting API-exchanges across multiple sectors (for example, the API-Centre for the payments sector), extending the Customer and Product Data Act 2025 to accelerate innovation in health, transport, energy and beyond. Transition multiple sectors at once.

When data can flow safely and efficiently, businesses can build better services, researchers can solve complex problems and citizens benefit from personalised, responsive solutions.

DIGITAL IDENTITY SYSTEMS

Accelerate uptake of trusted digital identity systems that provide every New Zealander and business with secure, digital identities to use across public and private services. This helps reduce fraud, simplifies online transactions, enables financial inclusion and boosts productivity.

We have built the framework through the Digital Identity Service Trust Framework Act 2023 and now we must invest in driving adoption and engagement.

CYBER SECURITY CAPABILITY

Continued investment in nationwide cyber security capability that protects our critical infrastructure, businesses and citizens from constant, complex and growing cyber threats. This includes supporting businesses to strengthen their security and ensuring New Zealand is a trusted, secure place to do digital business.

National priorities

KIWI AI

Investment in homegrown AI capabilities so we can harness AI capabilities quickly, safely, ethically and effectively. This means investing in local AI research and development, establishing ethical frameworks and safety standards, developing computing infrastructure and local small language models (SLMs). We also need to ensure New Zealand has the expertise and education to deploy AI in ways that benefit everyone while managing risks.

Invest in developing the skills, regulations and local capabilities for all Kiwis to safely engage in agentic commerce (using AI to buy, sell and help manage businesses).

DIGITAL ASSET REGULATION

Establish a clear, proportionate, and principles-based regulatory regime for digital assets and blockchain technologies to protect consumers and signal New Zealand is open for responsible innovation.

A regulatory regime would support economic competitiveness while maintaining trust in the financial system.

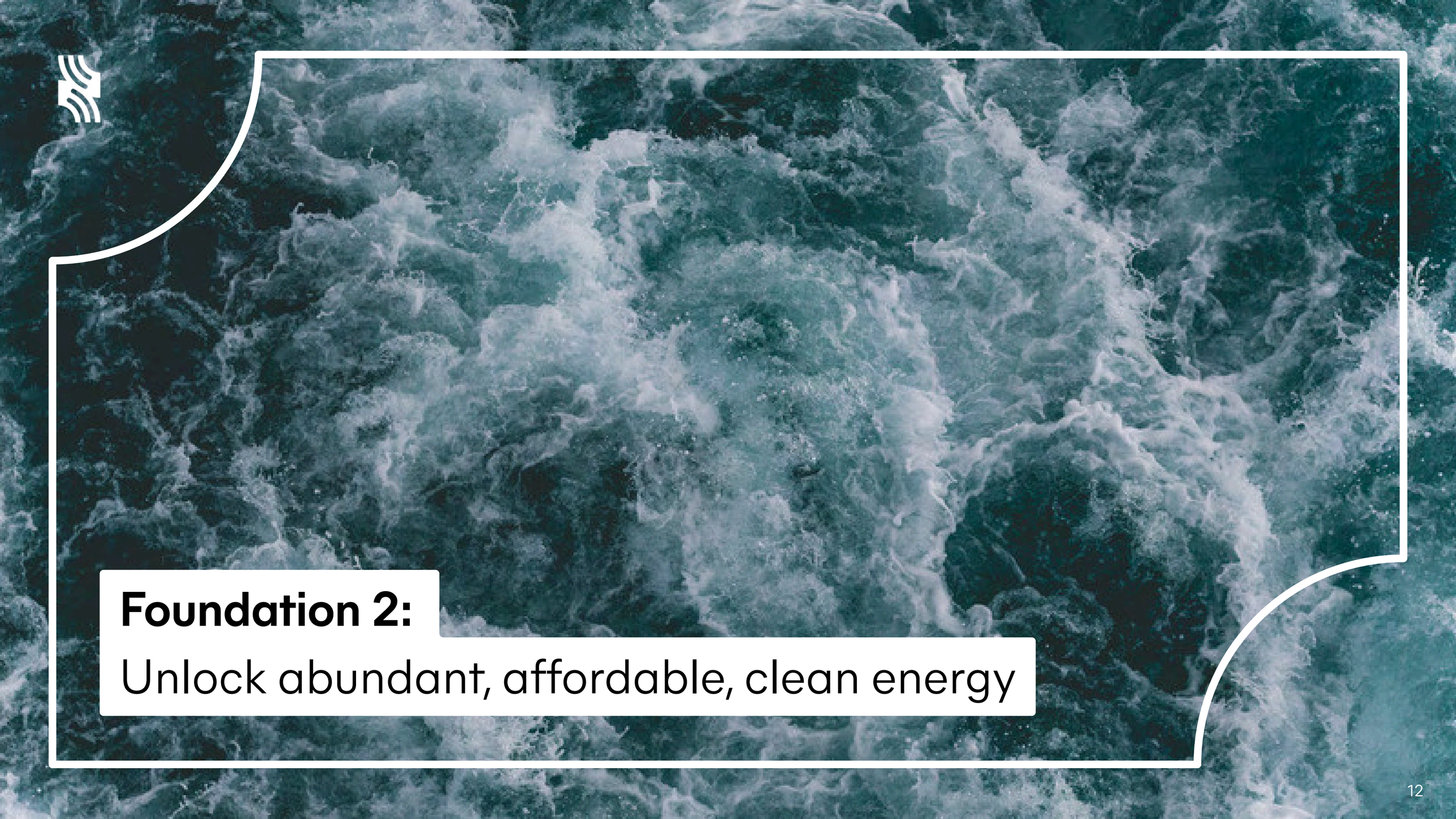
GOVERNMENT PROCUREMENT

Modernise government procurement rules to remove outdated barriers to adoption of Software as a Service (SaaS) across government. This includes legacy pricing constraints, compliance burdens and IP ownership assumptions that do not reflect how cloud services are delivered.

The government should update All-of-Government procurement settings to improve flexibility and value for money, enabling agencies to confidently adopt secure, fit-for-purpose SaaS solutions and strengthening opportunities for New Zealand technology firms.

DIGITAL INCLUSION

Investment in digital inclusion initiatives to ensure all New Zealanders can access, adopt and benefit from digital infrastructure. This includes bridging the digital divide through connectivity programmes, digital literacy training and accessible design that works for everyone regardless of age, location or ability.



Foundation 2:

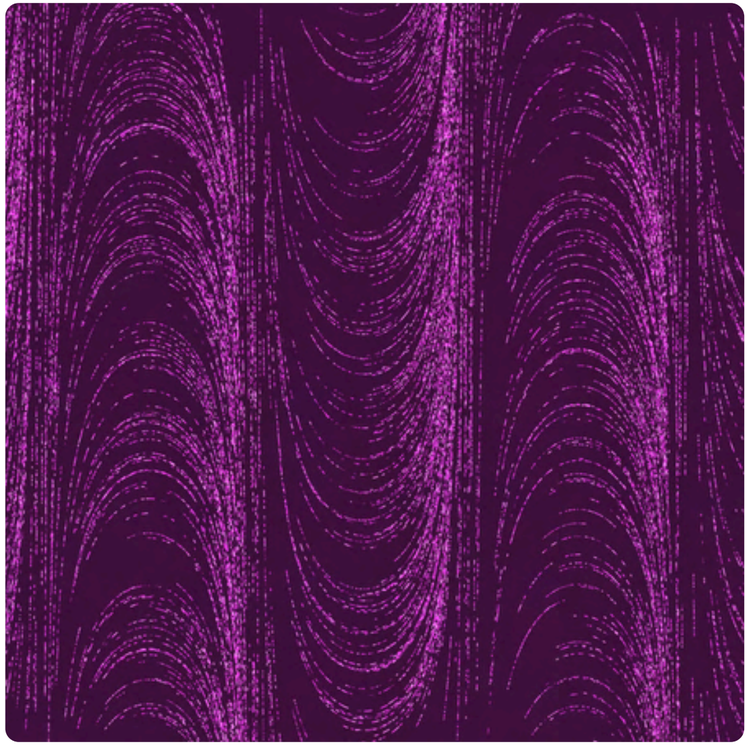
Unlock abundant, affordable, clean energy

Unlock abundant, affordable, clean energy

New Zealand's renewable energy advantage is one of our greatest strategic assets. With over 80 percent of our electricity already generated from renewable sources, we have the foundation to be a global magnet for energy-intensive industries and digital infrastructure.

The vision is clear: clean energy can be our competitive edge – attracting data centres, AI clusters, green hydrogen production, advanced manufacturing and high-value digital content creation. These sectors represent billions of dollars in potential investment and thousands of highly-skilled jobs.

However, our energy must be more than just clean. It must also be abundant, affordable and reliable. Without this, we cannot compete for the investment that drives productivity, creating jobs and growing our exports. With clean energy, we can leverage our natural advantages, unlocking transformational opportunities and position ourselves as a leader in sustainable industrial development.



National priorities

RENEWABLE ENERGY

Accelerate renewable energy generation including geothermal, fusion energy and other advanced technologies to supplement our existing renewables and help meet projected demand. This will increase competition, reduce prices and further improve our sustainability footprint.

REGULATORY CLARITY

Provide regulatory clarity and streamlined consent processes for energy generation, energy pricing and energy-intensive industries, moving away from short-term policy-cycle changes to dependable, long-term frameworks. Encouraging much needed investment by the sector.

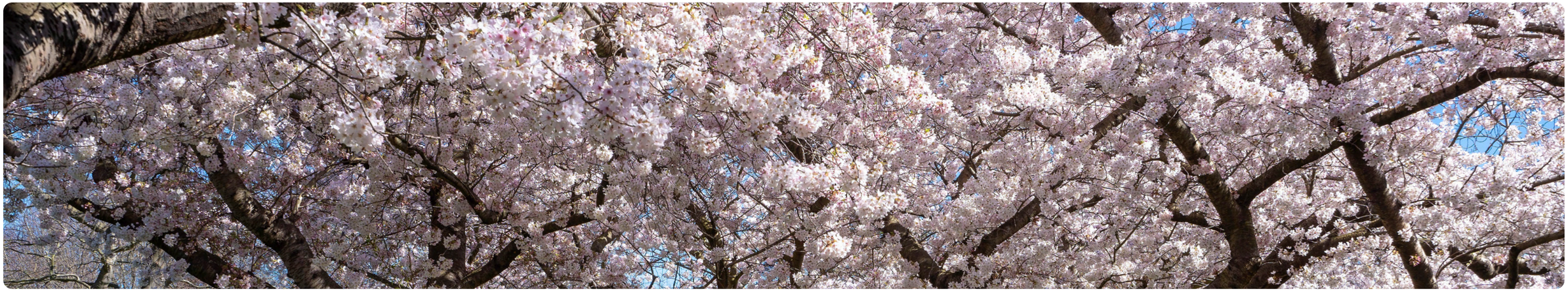
GLOBAL POSITIONING

Position New Zealand as the sustainable tech hub of Asia-Pacific where companies can decarbonise their operations while accessing world-class infrastructure, connectivity and a skilled workforce. Attracting international companies to create more high value jobs for New Zealanders.

INDUSTRY ATTRACTION

Attract energy-intensive sectors including data centres, supercomputing and energy-intensive food processing, all powered by clean energy.

Creating new low carbon export opportunities.



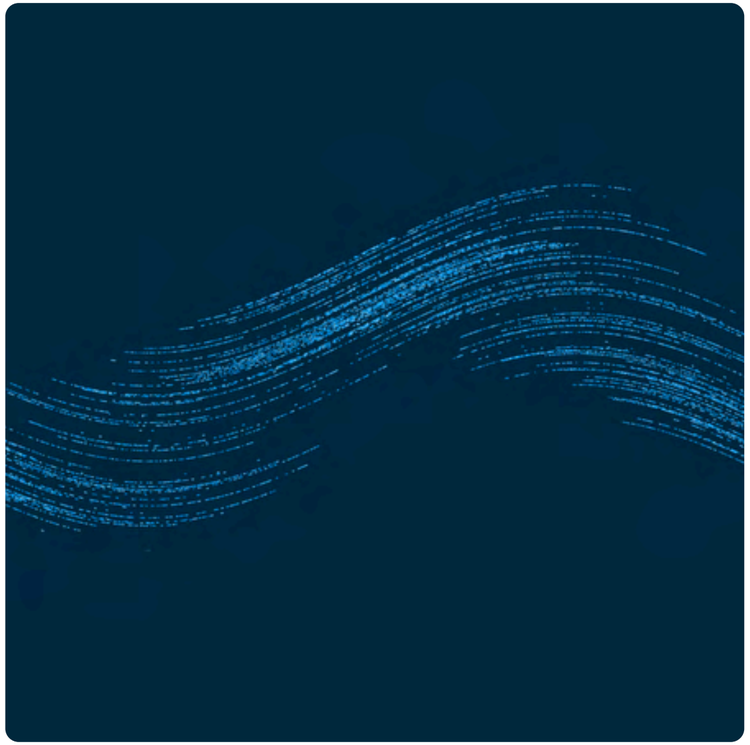
Foundation 3:

Cultivate a reliable, attractive investment and talent ecosystem

Cultivate a reliable, attractive investment and talent ecosystem

New Zealand's small population and distance from markets means we must punch above our weight to attract the investment and talent needed for growth. However, we face persistent challenges: regulatory churn, investment barriers and a skills shortage that constrains innovation and is driving our best talent offshore.

By 2045, we will face a labour shortage of at least 250,000 people. We are competing globally for young, educated, mobile talent, and we're losing ground. Meanwhile, we remain a challenging place for investors. This is limiting the type of capital available to keep our growing tech companies in New Zealand, and the critical investment needed in enabling infrastructure. This must change. We need an ecosystem that welcomes investment and talent, supported by infrastructure and long-term policy settings that provide businesses with confidence to commit and grow in New Zealand. This isn't about filling today's gaps, it's about creating the conditions for sustained local growth, innovation and competitiveness that will carry us through to 2050 and beyond.



National priorities

EDUCATION SYSTEM

Ensure our education system delivers future-focused skills including increased digital literacy, particularly on how to understand, develop and manage in a world of AI.

EMPLOYMENT PATHWAYS

Build stronger links between education providers and employers to enable more on the job learning. This will help improve our adaptability during the current time of rapid technology change.

REVIEW NZ SUPER'S MANDATE

Review the mandate of the NZ Super Fund (and NZGCP) to enable increased local funding for high growth tech firms. This will increase the tech industrial base that remains onshore.

OVERSEAS INVESTMENT REFORM

Reform the Overseas Investment Act to remove unnecessary barriers and make New Zealand an attractive, straightforward destination for growth capital.

IMMIGRATION PATHWAYS

Develop simple immigration pathways calibrated to respond rapidly to skills needs, supported by infrastructure investment in housing, schools and transport. This will help ensure New Zealand is an attractive place to settle for innovators of the future.

REGULATORY CONSISTENCY

Improve regulatory consistency to provide businesses with more reliable pipelines of government digital infrastructure work. This means companies will be able to invest with confidence.

TAX SETTING ENHANCEMENT

Enhance our globally competitive tax settings including reviewing double taxation and increasing research and development (R&D) tax incentives rewarding large scale innovation while matching the top-performing OECD countries.

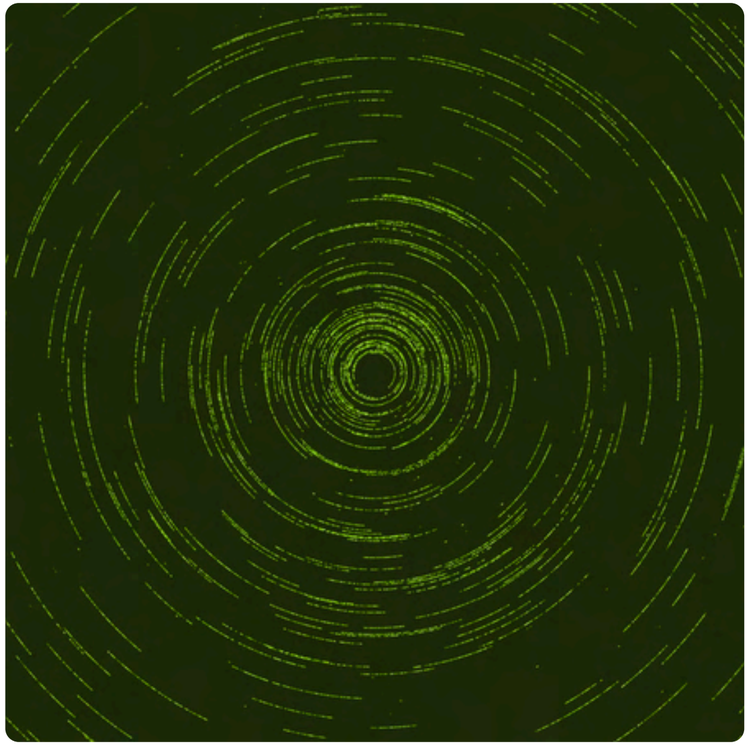
Foundation 4:
Strengthen global connections and export excellence

Strengthen global connections and export excellence

New Zealand's geographic isolation and small domestic market means we must be globally connected and export-focused to prosper. Our tech sector has already proven this is possible. For example, Xero, Fisher & Paykel Healthcare and Rocket Lab demonstrate that world-class innovation can originate from Aotearoa. But scaling from here requires deliberate support for global connections, trade and investment.

The challenge is real: we compete globally for talent and investment, and our distance constrains productivity and growth. However, we have opportunities to build clusters of internationally competitive, niche hi-tech excellence, in sectors where we can lead the world. While doing this, we also help build large New Zealand based and owned global tech firms.

This also requires strong global connections, enabling our tech companies to scale rapidly, compete internationally and lift productivity at home. By clustering investment, talent and infrastructure by sector, where we have genuine competitive advantages, **we can build New Zealand's next industrial base** – export powerhouses to drive economic growth and create high-value jobs across New Zealand.



National priorities

DIGITAL CONNECTIVITY

Continue investment in world-class digital connectivity through additional submarine cables, digital networks including satellites and emerging technologies. This will ensure we're connected to data flows and global markets.

SUPPORT TECH EXPORTERS

Increase national coordination and support for tech exporters including trade missions, market intelligence and practical assistance entering markets, partnering with and supporting industry bodies, but not competing with them.

STRENGTHEN GLOBAL NICHE

Build global niche clusters where New Zealand can achieve world-leading status, including:

- Agritech, food science, nutraceuticals and synthetic-bio, leveraging our primary export base and existing R&D hubs.
- Digital exports in high-value digital services including niche business-to-business SaaS, gaming, film and animation.
- Aerospace and autonomous systems, utilising our clear skies, open ranges and regulatory credibility.
- Medical technology, ensuring deeper collaboration between the public health system and tech developers.
- Semiconductor materials, fusion science and advanced manufacturing, creating stronger domestic ecosystems.

GLOBAL AWARENESS

Actively promote New Zealand's tech capabilities aligned with our niche focus areas, raising our profile in key markets and investor communities, with the government facilitating partnerships. For example, actively promoting New Zealand's agritech strengths as part of our reputation for world-class food production.

DIGITAL TRADE AGREEMENTS

Increase digital focus in modern trade agreements beyond using digital to support traditional trade, to digital services and trusted data flows to achieve high-quality, enforceable agreements across diverse markets.

A call to action: embracing long-term thinking and national alignment

Our four essential foundations – a world-class local digital infrastructure, abundant clean energy, a reliable investment and talent ecosystem, plus strong global connections – are interconnected. They align directly with the BusinessNZ 2050 vision's call for transformational 'X factors' that will redefine our competitiveness and global standing.

But perhaps the greatest 'X factor' is cultural and political: a commitment to long-term thinking.

New Zealand stands at a pivotal moment. Our current trajectory risks under-delivering on future prosperity. Our productivity is lagging, our talent is departing and our infrastructure deficit grows. However, if we act boldly and together, there is still time to reshape our future.

Our manifesto is a call for a strong commitment:

- Bipartisan national vision that transcends electoral cycles for critical long-term decisions regarding infrastructure, energy, education, immigration and investment.
- Cross-party agreements on the critical role of technology in addressing our demographic challenges, productivity slump and growing international competitiveness gap.
- Regulatory consistency and clarity that moves away from 'chop and change' to dependable frameworks giving businesses confidence to invest and grow.
- Strategic nation-building that prioritises future-focused investments over short-term political gains. Let's follow the example of successful small economies like Singapore, Denmark and Switzerland.
- Inclusive growth to ensure all New Zealanders can participate in and benefit from digital transformation.

We know many of the solutions. Now we need the political commitment to deliver them. The technology ecosystem stands ready to invest, innovate, create jobs and drive export growth. But we cannot do it alone.

Together, we can build a New Zealand where technology underpins a safer, cleaner, healthier and more prosperous future for all Kiwis. Where our natural advantages in clean energy are leveraged for economic gain, where our talent chooses to stay and build, and where our companies compete successfully on the world stage.

Our bipartisan 'X factor' must be clarity, consistency and courage, backed by a shared commitment to long-term national success.

The future is not something that happens to us, it's something we build together. Let's build it with the ambition, collaboration and vision that New Zealand deserves.

About us

Tech New Zealand (formerly NZTech) is the united voice for technology across Aotearoa. We're supercharging the growth and uptake of technology in service of a better tomorrow for all New Zealanders.

We are the national connector for Aotearoa's tech ecosystem. We bring people, communities and partners together to grow the tech economy, build skills and inclusion, accelerate sustainable innovation, and ensure technology is trusted and safe. Together, we move forward with shared purpose.

Tech New Zealand is a membership-funded, not-for-profit NGO that includes 16 connected communities. We work alongside public and private sector partners to strengthen the conditions for technology to contribute to New Zealand's economic prosperity, social wellbeing and environmental sustainability.

We exist to create pathways for constructive engagement, shared understanding and collaborative problem-solving. Through our diverse membership, we provide direct access to expertise spanning AI, fintech, agritech, climate and biotech, cyber security, digital identity, blockchain, tech exporters and more. This enables robust, informed policy development grounded in real-world experience from industry, academia, researchers and practitioners across the motu.

Our focus is not on advancing narrow commercial interests, but on ensuring technology serves the wellbeing of all New Zealanders and strengthens our nation's future.

Together, we're supercharging the growth and uptake of technology in service of a better tomorrow for all New Zealanders

Connect
Whakapiki

We bring people together. We create spaces where founders, corporates, researchers, educators, policymakers and communities can meet, share insight and collaborate. By strengthening relationships across the ecosystem, we help individual strengths become collective momentum.

Promote
Whakapiri

We shine a light on the talent, innovation and leadership across Aotearoa's tech ecosystem. Through storytelling, events, research and advocacy, we elevate the work of our communities and ensure tech's contribution is visible, valued and understood – here and overseas.

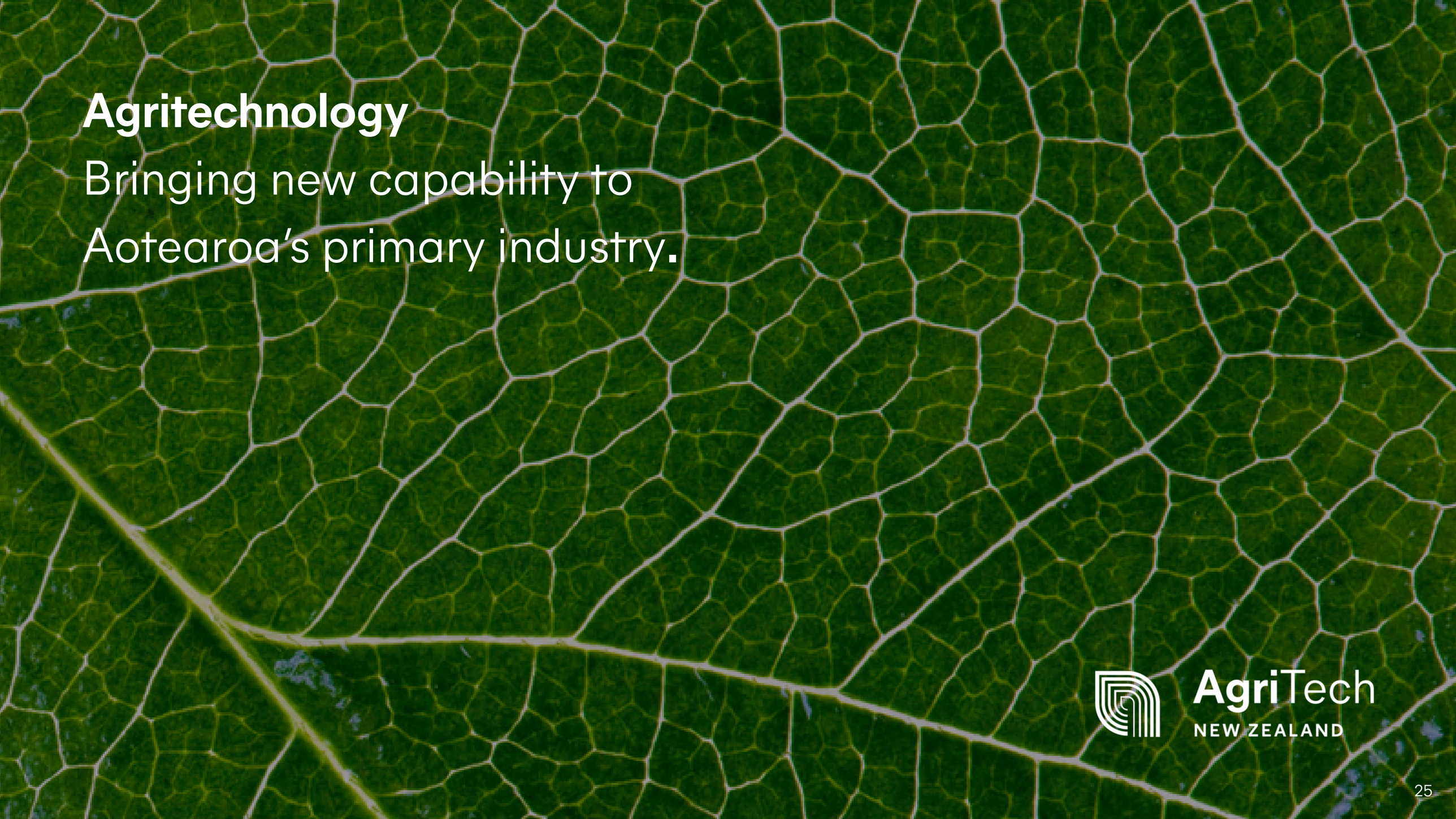
Advance
Kōkiri

We focus on the long game: lifting capability, shaping good policy, and improving the systems that enable a thriving, inclusive digital economy. From skills pathways to exports, climate tech to digital trust, we work alongside members and government partners to shift conditions for lasting change.

Key sectors

The following sections provide short, focused manifestos for a range of sectors and technologies from across our Tech New Zealand communities.

1. Agri-technology (agritech)
2. Artificial Intelligence (AI)
3. Biotechnology (biotech)
4. Blockchain and digital assets
5. Digital identity and trust
6. Education technology (edtech)
7. Financial technology (fintech)
8. Internet of Things (IoT) and data
9. Online safety
10. Quantum technologies



Agritechnology

Bringing new capability to Aotearoa's primary industry.

AgriTech NEW ZEALAND

Agri-technology (agritech)

New Zealand's agritech sector combines our strengths in agriculture and technology to lift productivity, improve environmental performance and create high-value exports. The sector generates almost NZ$3b in export earnings annually and captures 5-8 percent of the global agritech market. Agritech delivers real-world productivity gains for farmers, growers and processors, strengthening regional economies and supporting high-quality jobs throughout New Zealand.

The opportunity: agritech is one of Aotearoa's most mature and immediate technology opportunities, able to drive regional jobs, sustainability and international reputation. With current growth of around 14 percent, further investment and coordination could boost this to 18 percent, contributing more than NZ$8b to the economy by 2030.

Aotearoa has the natural assets and reputation to become the world's agritech testbed, where innovations are developed, trialled and proven. Embedding sustainability and Māori leadership can differentiate New Zealand globally.

Key barriers include:

- **Capital and investment gaps:** shortage of funding and few specialist investors often leads to firms being acquired offshore.
- **Fragmented ecosystem:** scattered clusters and weak coordination, lack of data interoperability, slow innovation and diluted brand visibility.
- **Distance from markets**: isolation limits access to customers, investors and talent, meaning firms remain small in scale.
- **Skills shortages:** gaps in data science, robotics and commercialisation skills restrict growth and on-farm adoption.

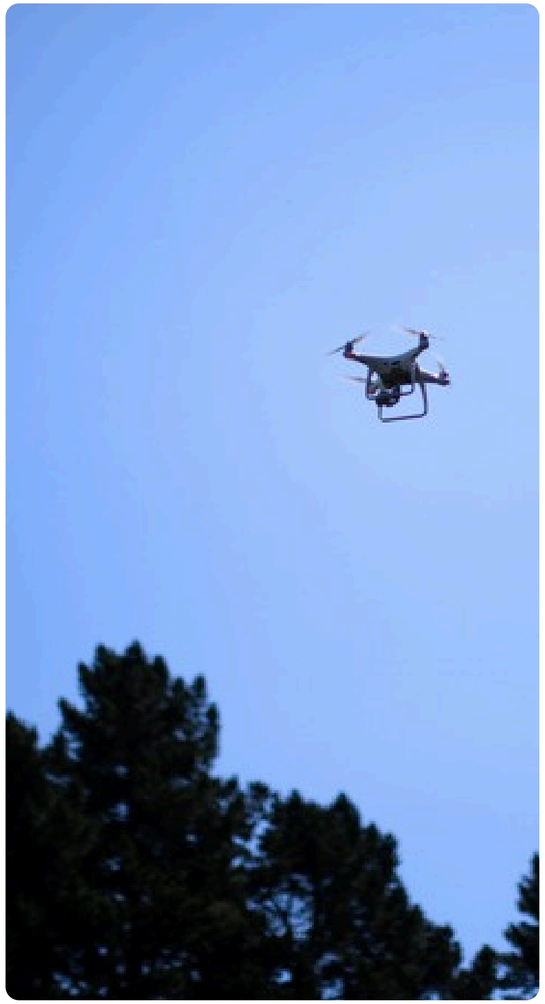
National priorities

PROMOTE GLOBAL CONNECTIVITY

Promote global connectivity to ensure New Zealand is visible on the world stage by establishing offshore landing zones in key markets, brokering international partnerships and embedding our international agritech story in key markets.

DEVELOP SKILLS PATHWAYS

Encourage adoption and develop skills to strengthen the supply of high-skilled talent by increasing agritech-specific STEM pathways and micro-credentials, funding internships and supporting digital-adoption training for farmers.



CLOSE THE CAPITAL GAP

Help close the capital gap so companies can grow. Expanding co-investment funds with agritech mandates, for example, the Primary Sector Growth Fund, actively supports investment and creates new capital funds for long-cycle ventures.

ACCELERATE INNOVATION

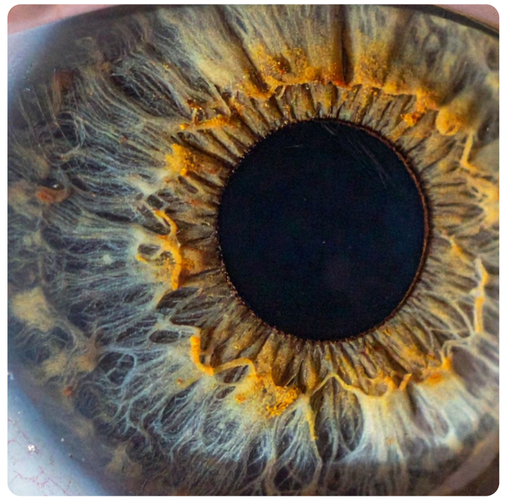
Coordinate the ecosystem to accelerate innovation by providing support funding for a national agritech orchestrator, the development and bedding down of agri-data standards and open agri-data, and investing in regional testbed hubs.

Artificial Intelligence

Harnessing AI's potential for the benefit of all New Zealanders

AI Forum New Zealand
Te Kāhui Atamai Iahiko o Aotearoa

Artificial Intelligence



Artificial Intelligence (AI) is already delivering real productivity gains for New Zealand. Two-thirds of businesses now use AI and almost all report significant efficiency improvements, with minimal job losses. Rather than replacing workers, AI is augmenting their capabilities, helping firms innovate faster, deliver better services and compete on the global stage.

The opportunity: harnessing AI's potential, we can build a more innovative, responsible and inclusive Aotearoa. To maximise this opportunity, we must foster trust and inclusion through a uniquely Aotearoa approach; one that prioritises people and data safety, invests in workforce upskilling and ensures technology's benefits are shared widely across our communities.

Key barriers include:

- Education and trust: Mistrust and misunderstanding of AI remain significant barriers. We need comprehensive education programmes for both current workers and future generations to build confidence and capability.
- Infrastructure investment gaps: Realising AI's full potential requires long-term commitment to sustainable green-energy infrastructure and domestic sovereign AI capability. These investments require strategic vision.
- Cultural integration: We must weave indigenous AI perspectives into our approach - frameworks that are human-centred, connect us to our environment and preserve what makes Aotearoa unique in the global digital landscape.

National priorities

KIWI AI

Investment in homegrown AI capabilities so we can harness AI capabilities quickly, safely, ethically and effectively. This means investing in local AI research and development, establishing ethical frameworks and safety standards, developing computing infrastructure and local small language models (SLMs).

We also need to ensure New Zealand has the expertise and education to deploy AI in ways that benefit everyone while managing risks.

Using New Zealand data to build solutions to New Zealand's challenges.

ENABLE ADOPTION

Enable widespread safe adoption: ensure trust and inclusion underpin AI uptake by investing in education and workforce programmes that build AI literacy, create career opportunities and promote social licence across all communities.

ENABLE COMMERCE

Enable commerce powered by AI: lead in the responsible use of AI and automated technologies by promoting clear standards for how digital systems and AI-enabled tools interact and transact safely.

This includes expanding testbeds for responsible innovation in financial and cross-border services, engineering and construction, the health sector, and AI powered digital twins supporting better management and decision making.

POWER AI SUSTAINABLY

Power AI with renewable energy: grow a sustainable digital economy by investing in clean-energy generation and infrastructure to power AI systems, providing a competitive edge for our digital exports.

INDIGENOUS AI

Support indigenous AI: build trust and social licence through a uniquely New Zealand approach that keeps people and data safe, recognises individuals' needs and reflects our human-centred values.

Biotechnology

Building a long-term bipartisan vision for science and innovation

BioTech NEW ZEALAND

Biotechnology (biotech)

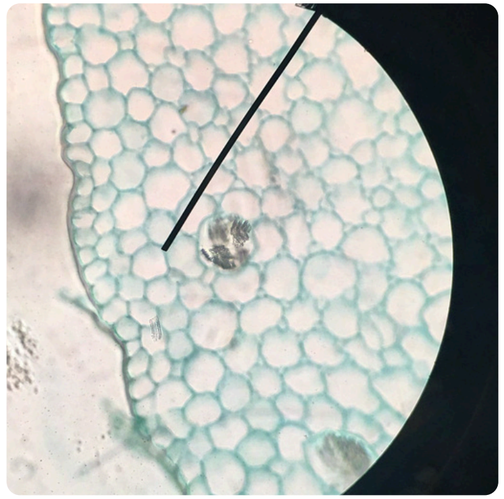
New Zealand's biotechnology sector is growing rapidly and globally is poised to drive the next major industrial and technological revolution, transforming economies and societies in profound ways. This 'Bio Revolution' extends far beyond medicine, impacting everything from agriculture to computing and national security.

Biotech is already delivering results: improving health outcomes, supporting sustainable food production and enabling new materials and manufacturing processes. The sector is increasingly visible on the global stage, with New Zealand companies showcasing innovation at international forums and contributing to a fast-developing life sciences ecosystem.

The opportunity: we can unlock the full potential of biotechnology, by recognising that it is a key sector for New Zealand and building a long-term, bipartisan vision for science and innovation in this space. This vision must provide consistent investment in research and commercialisation, modern regulations and stronger coordination across converging technologies such as AI, quantum, synthetic-bio and advanced manufacturing.

Key barriers include:

- **Lack of recognition of biotechnology's importance :** Lack of support to showcase New Zealand biotech and science capabilities to the world.
- **Short-term funding cycles:** undermining long-term research and innovation.
- **Outdated regulations:** particularly in gene technology, restricting progress and international collaboration.
- **Fragmented strategy and coordination:** slowing adopting and scaling across agencies and sectors.
- **Declining R&D investment:** limiting competitiveness and confidence to innovate.



National priorities

DEVELOP STRATEGY

Develop a long-term, coordinated science and innovation strategy.

This will provide certainty for investment by extending funding horizons beyond political cycles.

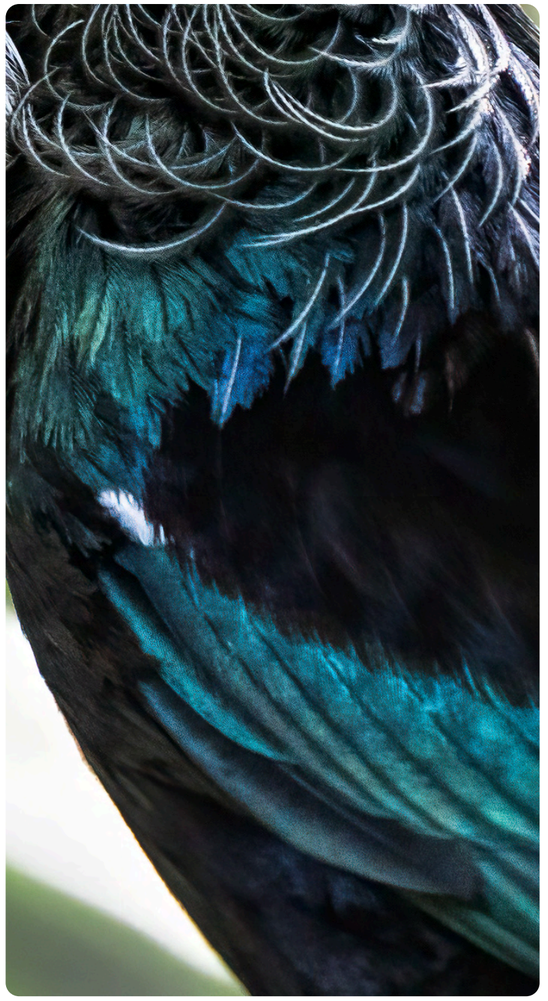
It will also align research priorities across agencies, integrating biotech with other emerging technologies (including AI and quantum computing), and establishing enduring partnerships between government, industry and research institutions.

MODERNISE LAWS

Continue to modernise gene technology laws: enable innovation to advance responsibly and confidently by aligning regulations with global best practice, ensuring balanced, evidence-based oversight that enables safe progress without unnecessary delay.

R&D INVESTMENT

Strengthen R&D investment and other investment incentives: help research-intensive companies scale and commercialise from New Zealand by improving access to growth capital, maintaining competitive tax settings and attracting global partnerships.



Blockchain and Digital Assets

Transitioning to a digital economy for Aotearoa's future.

Blockchain and Digital Assets

Blockchain technologies and digital assets are rapidly transforming the global economy. The market is projected to grow from approximately US$10b in 2021 to over US$150b by 2027. New Zealand is already engaged: nearly half of adults have owned or are considering owning digital assets and NZ$7.8b in crypto transactions were recorded in 2023 alone.

The opportunity: we can harness blockchain technologies to build a trusted, export-ready digital economy that attracts investment, creates high-value jobs and positions New Zealand as a regional hub for compliant, innovation-driven technology. With clear government support and regulatory clarity, blockchain technology could accelerate capital formation for New Zealand businesses, enable tokenised real-world assets (for example, fractional property ownership), and expand tech exports through the global deployment of Kiwi-built platforms.

Key barriers include:

- **Government inaction and policy uncertainty:** deterring investors and driving innovation offshore.
- **Lack of regulatory clarity:** leaving participants without confidence to build or scale.
- **Talent and capital flight:** departing for Australia and other countries with more supportive frameworks.

National priorities

REGULATORY FRAMEWORK

Establish a fit-for-purpose regulatory framework to enable tokenised real-world assets: unlock new forms of investment, ownership and capital formation by setting clear rules for digital-asset issuance and compliance, begin with tokenised real estate as a pilot sector, and aligning with trusted international standards to ensure innovation and investor confidence.

ACCELERATE PROCESSES

Accelerate approval processes for novel financial products and services: enable compliant blockchain businesses to scale from New Zealand by creating transparent regulatory pathways, updating financial-market definitions to reflect digital innovation, and empowering regulators to pilot and license new digital-asset models that meet high compliance standards.

GOVERNMENT SUPPORT

Declare Government support for compliant, consumer-safe blockchain and digital-asset innovation: attract investment, retain talent and provide clarity by clearly articulating the government's position on digital assets, engaging with industry and regulators through a cross-sector forum, and offering targeted incentives for firms that meet New Zealand's high standards.

BUILD DIGITAL TRUST

Underpin real-world asset tokenisation and stablecoins with digital identity and trust infrastructure: enable verified digital credentials to ensure ownership, compliance and integrity of transactions. Partner with industry and regulators to pilot secure platforms. Apply trusted digital identity to enable tokenised assets (for example housing, carbon credits and infrastructure) and explore regulated NZ-dollar-backed stablecoins to improve payment efficiency and attract international investment.

Digital Identity and Trust

Strengthening foundations for a strong digital economy

Digital **Identity**
NEW ZEALAND

Digital Identity & Trust

Digital identity is the foundation of a trusted, connected and inclusive digital economy. It enables people, businesses and government to interact securely and confidently online – across banking, health, education, energy, tax, travel and everyday services.

The opportunity: New Zealand can become a global leader in digital trust infrastructure by building an open, privacy-preserving system that allows people to prove their identity securely and participate fully in the digital economy. By delivering a clear, investable vision and developing sovereign data infrastructure aligned with open standards and privacy by design we can strengthen trust in digital interactions, reduce online harms and fraud, and accelerate innovation across sectors.

Key barriers include:

- **Fragmented understanding and misalignment:** across government, industry and communities that lead to duplicated solutions and inconsistent approaches.
- **Ongoing investment in legacy systems:** due to the absence of a unified Digital Public Infrastructure roadmap, slowing the adoption of modern identity services.
- **Outdated legislation and regulatory settings:** that assume physical identity processes and create uncertainty for agencies, innovators and investors.
- **Limited digital and emerging-technology capability:** across business and government leadership, resulting in risk aversion, slow uptake and inconsistent transformation efforts.

National priorities

BUILD TRUST

Build trust in digital identity: embedding strong privacy and security standards across government and critical services by implementing modern post quantum encryption and resilient system design, and ensuring consistent protection of personal and organisational data.

DEVELOP INFRASTRUCTURE

Develop a modern, interoperable digital trust infrastructure: that replaces siloed registries with portable, verifiable and privacy-preserving credentials across government and industry. This includes adopting common standards, enabling cross-agency interoperability and ensuring New Zealanders can securely control and share trusted information in an AI-enabled economy.

ENABLE AGENTIC COMMERCE

Enable agentic commerce: lead in the responsible use of AI and automated technologies by creating clear standards for how digital systems and AI-enabled tools interact and transact safely, expanding testbeds for responsible innovation in financial and cross-border services, and ensuring transparent governance and strong protections for consumers and small businesses.

BUILD FOUNDATIONS

Underpin real-world asset tokenisation and stablecoins with digital identity and trust infrastructure: enable secure, compliant digital transactions by using verified digital credentials, partner with industry and regulators to pilot secure platforms, apply trusted digital identity to tokenised assets and explore regulated NZ-dollar-backed stablecoins to improve payment efficiency and attract international investment.

Education technology
Creating a world-class workforce

EdTech NEW ZEALAND

Education technology (edtech)

Education technology is essential to New Zealand innovation and is foundational to creating a world-class future and current workforce. The edtech sector connects educators, learners and technology companies to improve access, personalise learning and streamline education administration. The New Zealand edtech sector is already globally connected and export-oriented, with New Zealand firms delivering international solutions to enhance teaching and learning.

The opportunity: The global edtech market is growing at 12 percent CAGR and forecast to be worth US$350b by 2030. New Zealand can build a more connected, trusted and globally recognised edtech sector to access a larger share of this opportunity. This involves strengthening links between public and private education systems, improving access to data and digital tools, and enabling faster, safer adoption of new technologies. A thriving edtech sector will support lifelong learning, export growth and innovation across every industry while embedding Aotearoa New Zealand's unique identity and values in the solutions we share with the world.

Key barriers include:

- **Limited ambition and edtech investment**: that reduces perspectives for long-term growth.
- **Fragmentation and lack of coordination across the education system:** reduces opportunities for collaboration and pooling of resources like networks and information to achieve scale.
- **Increasingly complex and costly data privacy and security processes:** are often difficult for newer companies to navigate.
- **Low levels of trust and sector recognition:** make it harder to build cross-sector partnerships, relationships with educators and investors, and negatively impacts public confidence.

National priorities

INVEST

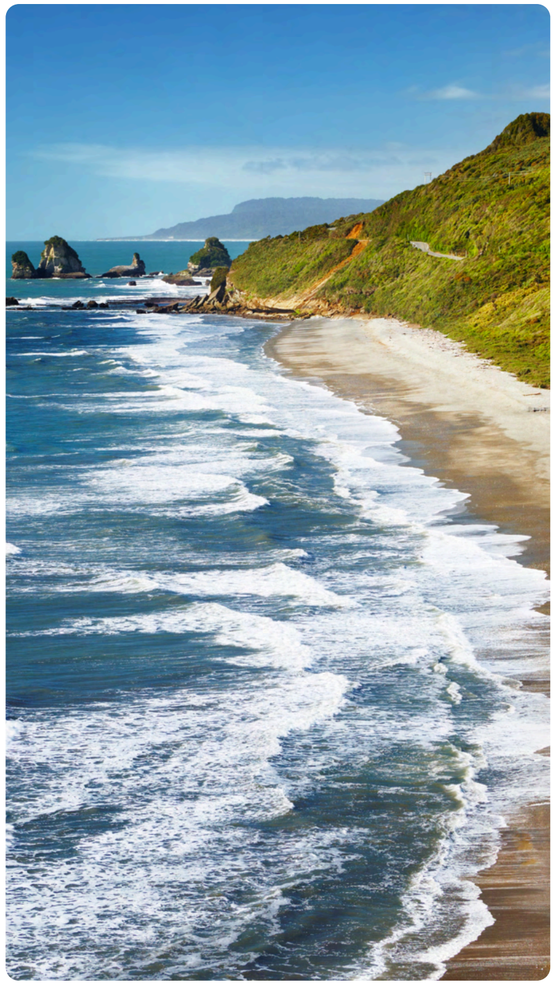
Promote greater investment in home-grown edtech: enabling the sector to innovate and scale, by creating dedicated investment pathways, co-funding pilots that demonstrate measurable education outcomes, and supporting local edtech companies to more efficiently access the local education sector.

PROMOTE

Champion New Zealand's edtech success stories: developing trust, attracting talent, and strengthening international credibility by profiling partnerships between schools, tertiary providers and industry, celebrating innovation that improves learning outcomes, and demonstrating how collaboration between public and private sectors benefits all learners.

PRIVACY & SECURITY

Improve access to edtech data privacy and security assessment processes: enabling new businesses to innovate safely and responsibly by simplifying compliance frameworks, providing clear government guidance, and establishing trusted assessment services tailored for smaller and early-stage edtech firms.



Financial technology and open data

Connecting data to unlock opportunity

FinTech NEW ZEALAND

Financial technology and open data

Financial technology (fintech) is transforming the way New Zealanders work, save, invest and do business. It is now a significant contributor to the economy, generating NZ$2.8b in revenue in 2024. The sector's growth demonstrates the power of a trusted, digitally enabled economy that connects innovation, regulation and global markets.

The establishment of New Zealand's regulated open banking regime gives us a foundation from which to progress toward Open Finance, and eventually Open Data and an Open Life digital economy. We need to leverage this existing work to maximise our potential.

The opportunity: to create an open-data, digitally enabled economy where secure data sharing and trusted digital identity unlock new products, competition and exports. By connecting financial, consumer and government data through open-banking infrastructure and advanced digital identity, New Zealand can become a globally renowned fintech nation. Fintech exports are forecast to reach $7.6b by 2028, powered by innovation and consumer-centric financial tools.

Key barriers include:

- **Fragmented data standards and inconsistent system design:** making it difficult for fintech firms and regulators to build interoperable solutions across sectors.
- **Slow implementation of open-data and digital-identity frameworks:** delaying innovation and eroding New Zealand's first-mover advantage in developing a trusted digital-economy infrastructure.
- **Regulatory uncertainty:** slowing innovation due to privacy, security and financial-market rules.

National priorities

SUPERCHARGE IMPLEMENTATION

Accelerate implementation: of the Consumer Data Right across multiple sectors and the adoption of the Digital Identity Services Trust Framework, maximising the potential of these Acts will unlock growth by coordinating industry and government implementation, ensuring interoperability and establishing open-data infrastructure that builds consumer trust.

SUPPORT GROWTH

Provide growth support for fintechs: via targeted grants and investment from the Ministry of Business Innovation and Employment and NZ Growth Capital Partners, helping with compliance, integration and innovation testing to bring more competition to market quicker.

PRIVACY & SECURITY

Develop an aligned digital-economy strategy that builds on New Zealand's regulated open-banking regime: so the country can progress from Open Finance toward a broader Open Data and Open Life economy. This requires stronger Government leadership to complement industry-led delivery, ensure clear national direction, support inclusive participation and align emerging open-data regimes across sectors such as energy, transport and health.

GLOBAL PARTNERSHIP

Strengthen New Zealand's competitiveness in a rapidly digitising and AI-enabled financial system: by connecting into trusted cross-border regulatory pathways such as those in the United Kingdom and Singapore, enabling borderless finance opportunities and better access to global markets. The government should also prepare for an always-on, AI-powered future by supporting agentic commerce, creating responsible-innovation testbeds and ensuring New Zealand's digital-trust infrastructure can safely underpin automated financial interactions.

Internet of Things (IoT) and data
Harnessing connectivity to drive growth

IoT Forum
NEW ZEALAND

Internet of Things (IoT) and data

The Internet of Things (IoT) continues to present a transformative opportunity for New Zealand to harness connected devices and data-driven insights across our economy. From smart sensors in agriculture to intelligent infrastructure in our cities, IoT technologies are already delivering measurable improvements in efficiency, sustainability and quality of life.

The opportunity: IoT and data can unlock significant economic value across New Zealand's key sectors. In agriculture, smart farming technologies enable precision water management, soil monitoring and livestock tracking, driving productivity gains while reducing environmental impact. In utilities, IoT sensors detect leaks, optimise energy distribution and prevent costly infrastructure failures. In our cities, connected systems improve waste management, traffic flow and public safety. These applications translate to billions in potential cost savings, enhanced resource management of water and energy and improved quality of life through data-driven decision-making and automation.

Key barriers include:

- **Fragmented data standards and interoperability challenges:** inconsistent protocols and lack of common frameworks prevent seamless integration across devices, platforms and sectors, limiting the ability to derive insights from connected systems. Without data standards and API interoperability rules it will be impossible to expand the Customer and Product Data Act beyond Open Banking.
- **Security and privacy vulnerabilities:** the proliferation of connected devices increases exposure to cyberattacks and data breaches, requiring robust security frameworks and constant vigilance to protect critical infrastructure and personal information.
- **Connectivity gaps:** inadequate network coverage, particularly in rural and regional areas, limits the deployment of IoT solutions in sectors like agriculture, where the economic benefits can be most significant.

National priorities

STANDARDS AND FRAMEWORKS

Establish national IoT data standards and interoperability frameworks: accelerate adoption and innovation by developing common data standards across key sectors (agriculture, utilities, transport, health), supporting open API development and data exchange protocols, and ensuring IoT systems can communicate seamlessly to unlock cross-sector insights and efficiencies.

PRIVACY PROTECTIONS

Strengthen IoT security and privacy protections: build trust in connected systems by establishing mandatory security standards for IoT devices and networks, supporting businesses to implement robust cybersecurity measures, creating clear privacy frameworks for data collection and use, and ensuring New Zealand is recognised as a secure, trusted environment for IoT deployment.

ALIGN WITH AUSTRALIA

Implement a smart device cybersecurity labelling scheme aligned with Australia: partner with the New Zealand IoT body, the IoT Forum, to develop and implement a cyber security labelling scheme similar to Australia's Smart Devices Cybersecurity Labelling Scheme. This requires independent certification of smart devices before registration, provide consumers with confidence through independently verified security claims, incentivise manufacturers to address security vulnerabilities and position New Zealand alongside Australia as a regional leader in IoT device security. Trans-Tasman alignment will reduce compliance costs for manufacturers and strengthen consumer protection across both markets.

CONNECTIVITY INFRASTRUCTURE

Invest in connectivity infrastructure: enable widespread IoT adoption by expanding reliable network coverage in rural and regional areas, supporting deployment of low-power wide-area networks (LPWAN) suitable for IoT applications, and ensuring New Zealand has the digital infrastructure to support the growing volume of connected devices and data flows.

Online safety

Creating positive online experiences
for all New Zealanders

Online safety

Tech New Zealand brings technology companies together to help ensure safer, more positive online experiences for all New Zealanders.

In 2022, Tech New Zealand and Netsafe launched the Aotearoa New Zealand Code of Practice for Online Safety and Harms. Major tech firms including Meta, Google, TikTok, Twitch and X (formerly Twitter) have joined as signatories. This Online Safety Code addresses key areas including bullying, child safety, disinformation, harassment, hate speech and misinformation. It includes a mechanism for lodging complaints against breaches, with signatories pledging to uphold these standards and collaborate with authorities as needed.

The opportunity: to embed the Online Safety Code as a core part of New Zealand's approach to online safety, providing a mechanism for industry leadership and collaboration with government. Its scope could extend beyond content harms to other areas where people's wellbeing, safety and privacy are at risk. This will reflect a balanced, practical approach to minimising harm through technology.

Key barriers include:

- **Reluctance to collaborate:** with the Online Safety Code as a self-regulatory instrument, despite such models being common in many other New Zealand sectors.
- **Negative perceptions:** that the Online Safety Code is designed to avoid regulation. The Code has been designed to complement government initiatives, but this can only be achieved through working together to determine where and how potential harms are best addressed.

National priorities

SUPPORT EXISTING PLATFORM

Recognise and embed the Online Safety Code within New Zealand's online safety framework: formally acknowledging it as an industry led mechanism that complements government regulation and enforcement. This will strengthen collective responsibility for preventing harm and allow more agile responses to emerging online risks.

COLLABORATE WITH INDUSTRY

Collaborate with industry on defining and prioritising online harms: identifying the areas of greatest public concern and identifying the range of solutions.

DEVELOP WORK PROGRAMME

Develop a joint work programme to reduce online harms: prioritising and delivering solutions to address online harm, and seek to deliver them in a collaborative manner with the technology sector, so that New Zealand can benefit from a wider range of technologies, ideas, processes and investments from around the world.

Quantum technologies

Leveraging world-class research capability

Quantum Forum
NEW ZEALAND

Quantum technologies

Quantum technologies represent one of the most transformational scientific advances of our generation, with the potential to revolutionise computing, communications, sensing and security. New Zealand has built world-class research capability in quantum optics, photonics and precision atomic physics through decades of investment. It has positioned us as globally recognised in fundamental quantum science.

New Zealand's photonics and quantum sector currently generates NZ$1.5b in output, employing nearly 5,000 people across more than 350 companies. While this is mainly photonics, it positions New Zealand well for the quantum age. Consequently, the government has placed small investments into quantum research through Te Whai Ao Dodd-Walls Centre's Quantum Technologies Aotearoa programme and the recent announcement of a discovery phase for a national platform.

The opportunity: quantum technologies are poised to be as transformational as AI, creating opportunities across multiple sectors of our economy. The opportunity for a small country like New Zealand is the application of this technology across our economy.

By acting now and starting early, investment in quantum discovery and commercialisation will position New Zealand to capture high-value opportunities in precision timing, secure communications, advanced sensing and quantum computing. With our existing research strengths and international partnerships, New Zealand be a global leader in this emerging field.

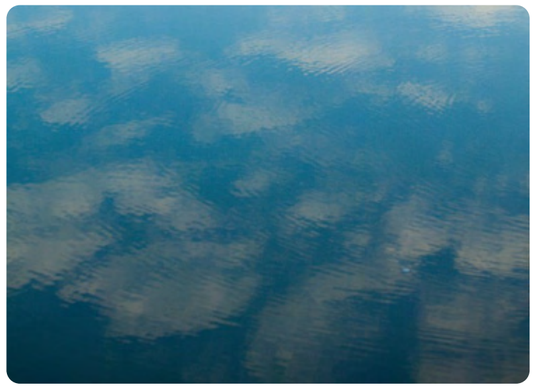
Key barriers include:

- **Limited pathway from research to commercialisation:** New Zealand excels in fundamental quantum research but lacks the infrastructure, investment mechanisms and coordinated strategy to translate discoveries into commercial applications and economic value.
- **Quantum security threats and encryption readiness:** we must prioritise preparing our critical infrastructure and systems with quantum-safe encryption.
- **Skills shortage and talent retention:** the quantum field requires highly specialised expertise and New Zealand struggles to retain quantum scientists and engineers who are recruited by better-funded international programmes, limiting our ability to scale from research to industry.

National priorities

DEVELOP NATIONAL STRATEGY

Develop a national quantum strategy with long-term funding commitments: establish a comprehensive, bipartisan quantum strategy that extends beyond research to include commercialisation pathways, industry development and practical applications across key sectors such as agriculture, healthcare, finance and defence.



INTERNATIONAL COLLABORATION

Collaborate internationally on talent development: leverage New Zealand's existing partnerships with quantum leaders in the USA, Singapore, Korea, UK and Germany to access expertise, infrastructure and markets.

Create attractive career pathways and competitive funding to retain quantum talent while building the next generation of quantum scientists and engineers through targeted education programmes.

PRIORITISE R&D

Focus on practical applications in New Zealand's key sectors: prioritise quantum research and development that addresses real challenges in our economy. This includes precision agriculture, food safety, drug discovery and healthcare optimisation, and quantum communications for secure data transmission.

GLOBAL PARTICIPATION

Actively participate in global efforts: in quantum security and post-quantum cryptography, taking an active role in international forums addressing quantum encryption standards and quantum-safe security protocols.

STRENGTHEN ECOSYSTEM

Help strengthen the quantum ecosystem: support Tech New Zealand and Dodd-Walls as they develop a dedicated industry body to coordinate New Zealand's quantum sector, connecting researchers, startups, investors and end-users.

Guided by purpose.
United by technology.
Building a better tomorrow,
together.

TECH
NEW ZEALAND