GW3
GREATER WHITSUNDAY ALLIANCE
MACKAY ▶ ISAAC ▶ WHITSUNDAY

2026

GREATER WHITSUNDAY

# DIGITAL CAPABILITY ECOSYSTEM MAPPING REPORT

FEBRUARY 2026

The Greater Whitsunday Digital Capability Ecosystem Mapping project was developed by GW3 in partnership with GWI, guided by the Greater Whitsunday Digital Leaders Group and informed by regional stakeholders.


# Table of Contents

**Project Purpose** ..... **5**

***1. INTRODUCTION*** ..... ***8***

**1.1 Project Context & Objectives** ..... **8**

Why This Project Matters ..... 8

Project Objectives ..... 9

**1.2 Methodology** ..... **10**

Desktop Research & Ecosystem Mapping ..... 10

Readiness Index Survey ..... 11

Integration with local Research ..... 11

***2. THE DIGITAL ECOSYSTEM LANDSCAPE*** ..... ***12***

**2.1 Ecosystem Overview** ..... **12**

Understanding Stakeholder Categories ..... 14

**2.2 Mapping considerations** ..... **16**

**2.3 Network observations** ..... **18**

**2.4 Role observations** ..... **20**

Infrastructure & Connectivity (18 entities) ..... 20

Digital Service Providers (24 entities) ..... 20

Education & Training (22 entities) ..... 21

Government & Policy (28 entities) ..... 22

Industry Associations (21 entities) ..... 22

Innovation Ecosystem (22 entities) ..... 23

**2.4 Stakeholder Engagement Matrix** ..... **25**

**2.5 Current Initiatives & Programs** ..... **26**

Major Digital Infrastructure Projects ..... 26

Digital Skills Programs ..... 26

Innovation & Adoption Support ..... 27

SME Support Programs ..... 27

Workforce Development ..... 29

Available Funding Support ..... 29

*3. SME DIGITAL CAPABILITY ..... 31*

**Strategic Priority: The Middle Adopter Opportunity ..... 31**

**Strategic Priority: Industry-Specific Interventions ..... 32**

**Recommended Training Pathways ..... 33**

**What Businesses Told Us ..... 35**

Survey Scope ..... 36

*4. DIGITAL READINESS ASSESSMENT ..... 36*

**Individual and firm preparedness and support system effectiveness ..... 37**

Sector preparedness ..... 39

Digital Capability Readiness ..... 41

Roles contributing to Digital Capability ..... 43

Achieving excellence ..... 45

*5. SWOT ..... 46*

**Strengths ..... 47**

**Weaknesses ..... 48**

**Opportunities ..... 48**

**Threats ..... 49**

*6. RECOMMENDATIONS ..... 51*

**Recommendation 1: Reinforce the Collaborative Structure of the "Space Between" ..... 51**

**Recommendation 2: Continue Mapping, Evaluation, and System-Level Learning ..... 52**

**Recommendation 3: Leverage Existing Infrastructure and Trusted Intermediaries ..... 52**

**Recommendation 4: Segment and Stage Support Around "Middle Adopters" ..... 54**

**Recommendation 5: Strengthen Advocacy, Investment Attraction and Collective Positioning ... 55**

**Recommendation 6: Formalise Cross-Sector Learning and Transfer ..... 56**

*Appendices ..... 56*

**Appendix A: SME Survey Detailed Analysis ..... 57**

**A.1 Survey Design and Methodology ..... 57**

**A.2 Respondent Demographics ..... 57**

**A.3 Digital Maturity Index Methodology ..... 58**

**A.4 Industry Digital Profiles ..... 60**

**A.5 Statistical Analysis: Correlation Findings ..... 61**

**A.6 Tool Adoption Breakdown ..... 62**

**A.7 Barrier Analysis ..... 63**

**A.8 Training Needs Analysis ..... 64**

**A.9 Selected Qualitative Responses ..... 65**

**A.10 Limitations and Suggested Further Research ..... 65**

**Appendix B: Stakeholder Engagement Matrix ..... 67**

**Appendix C: Complete Stakeholder Database ..... 73**

**Appendix D: Policy Alignment Mapping ..... 82**

**Appendix E: Glossary & References ..... 85**

Acronyms ..... 85

Technical Terms ..... 86

# EXECUTIVE SUMMARY

## Project Purpose

The Greater Whitsunday region has set an ambitious goal: to become Australia's most hyperconnected region that captures sustained global investment for the benefit of our communities by 2030. Achieving this vision requires more than better internet, it demands that local businesses, particularly small and medium enterprises, have the *knowledge, confidence, and support* to adopt digital tools that drive productivity and growth.

This project mapped the region's entire digital skilling and support ecosystem, assessed regional readiness, and surveyed SMEs to understand their current capabilities and needs. The goal was practical: identify where gaps exist and recommend targeted interventions, with a strategic focus on "middle adopter" businesses—those that have started their digital journey but need support to progress further.

The research combined ecosystem mapping of 135+ stakeholders, a Readiness Index assessment with key regional actors, and direct survey responses from 73 businesses across the Mackay, Isaac, and Whitsunday local government areas.

**Key Findings**

The Greater Whitsunday region has a strong foundation for digital capability, but outcomes are constrained by system-level issues rather than an absence of activity.

**Strengths include:**

- An established regional backbone and convening capability through GW3 and partner organisations
- A broad and functioning ecosystem spanning education, industry, government, and innovation
- High openness to new technologies and unexpectedly strong AI adoption among SMEs
- Demonstrated ability to attract and deliver major multi-partner initiatives

At the same time, the evidence highlights several system constraints:

- **Low clarity and wayfinding** is the weakest readiness condition, with limited shared understanding of who does what and how support fits together.
- **Capacity constraints** rather than capability gaps, driven by workforce shortages, funding cycles, and limited ability to absorb additional workload.
- **Time and cognitive load** as the dominant barriers for SMEs, outweighing connectivity or motivation.
- **Uneven specialist capability**, particularly in cybersecurity and advanced digital services.
- **Geographic concentration of services**, creating access challenges for some communities.

**The Middle Adopter Opportunity**

A central finding of the SME survey is that **54.8% of businesses are "middle adopters"**- already using foundational digital tools and AI, but lacking structured pathways to embed and scale digital practices.

Digital capability varies significantly by **industry**, not by geography, reinforcing the need for sector-informed approaches rather than location-based interventions. This middle-adopter cohort represents the region's highest-leverage opportunity to lift overall digital capability and accelerate progress toward the 2030 vision.

**Strategic Implications**

The analysis shows that the region does not need more disconnected programs. Instead, it needs stronger **system stewardship**: clearer coordination, visible pathways, better use of trusted intermediaries, and sustained attention to the "space between" policy, programs, and practice.

The Digital Roadmap provides strategic direction. This report identifies the **enabling conditions required for that roadmap to succeed**, particularly for SMEs navigating rapid technological change.

**Recommendations**

Six strategic recommendations are proposed, each grounded in the combined evidence base and explicitly aligned to the region's strengths, weaknesses, opportunities, and threats:

1. **Reinforce the collaborative structure of the "space between"** by clarifying backbone functions and supporting shared operational coordination capacity across partners.
2. **Continue ecosystem mapping and evaluation** as a living practice to support wayfinding, learning, and accountability.
3. **Leverage existing infrastructure and trusted intermediaries** (chambers, industry bodies, hubs) to improve reach, relevance, and peer learning.
4. **Segment and stage support around middle adopters,** focusing on progression rather than entry-level awareness.
5. **Strengthen advocacy, investment attraction and positioning** to elevate the Greater Whitsunday region as a credible destination for digital investment, talent, and policy focus, while reinforcing internal confidence, alignment, and momentum.
6. **Formalise cross-sector learning and transfer** to accelerate diffusion of digital practices between industries.

These recommendations are intentionally complementary to the Digital Roadmap. They do not introduce new strategic priorities but strengthen the conditions under which existing priorities can be delivered effectively and sustainably.

**Path Forward**

If implemented, these recommendations position digital capability not as a series of isolated initiatives, but as a **coherent regional system** that is visible, navigable, adaptive, and inclusive. By focusing on system conditions and middle adopters, the Greater Whitsunday region can shift from pockets of excellence to sustained, region-wide digital capability uplift.

# 1. INTRODUCTION

## 1.1 Project Context & Objectives

The Greater Whitsunday region stands at a digital crossroads. Encompassing the Mackay, Isaac, and Whitsunday local government areas, the region has built its success in mining, agriculture, and tourism. Now, as these traditional industries evolve through digitalisation, automation, and emerging technologies, the region faces both opportunity and urgency.

The region has an ambitious vision: by 2030, to become **Australia's most hyperconnected region that captures sustained global investment for the benefit of Greater Whitsunday communities**. This vision is supported by five clear digital ambitions:

1. Increase connectivity, speed and coverage within the region
2. Digitally skill an increased number of the region's professions and community members
3. Support improved and increased digital connection to business premises
4. Digitally enable economic opportunities through the life of the roadmap
5. Develop a regional digital competitive advantage

Digital capability underpins all of these ambitions. It's not just about faster internet or newer software, it's about ensuring local businesses, particularly small and medium enterprises (SMEs), have the knowledge, confidence, and support to adopt digital tools that drive productivity, competitiveness, and growth.

Within this context, this digital mapping project was led by **Greater Whitsunday Alliance (GW3)**, in partnership with **Greater Whitsunday Innovation (GWI)**. The project has been guided and endorsed by the Greater Whitsunday **Digital Leaders Group**, which provides strategic oversight of the region's digital roadmap and ensures alignment with agreed regional priorities and ambitions.

The Digital Leaders Group plays a stewardship role, offering direction, validation, and collective leadership to ensure initiatives progress in a coordinated and regionally consistent manner, while delivery is enabled through collaboration across industry, government, and the broader digital ecosystem.

### Why This Project Matters

The need for digital capability is embedded across all aspects of economic and community development in the region. The region's transition into advanced industries like agtech, biofutures, aerospace, and knowledge-intensive mining creates new workforce demands. The need is not limited to advanced industries, with increased need for efficient delivery

options and technology-driven higher quality of care in the health and social sector. SMEs require clarity, capability and capacity to adopt digital tools across sales, marketing, and operations to remain competitive. Without local options, people will leave the region to pursue skills in emerging technologies.

This project addresses these challenges by mapping the digital skilling and support ecosystem, identifying where gaps exist, and recommending practical interventions targeted at "**middle adopters**", ie. businesses that have started their digital journey but need support to progress further. By focusing on this segment, we can shift the overall regional capability curve and accelerate progress toward the 2030 vision.

## Project Objectives

The Greater Digital Capability Mapping project was commissioned to support execution of the Greater Whitsunday Digital Roadmap. Specifically, this project aimed to:

- **Identify and categorise all digital skilling and support stakeholders** operating in or servicing the Greater Whitsunday region, including infrastructure providers, service companies, education and training institutions, government agencies, industry associations, and innovation ecosystem actors
- **Develop a visual stakeholder map** that illustrates relationships, interactions, and dynamics within the region's digital capability ecosystem, creating a living resource for coordination and collaboration
- **Conduct a SWOT analysis** of the region's digital ecosystem to gain deeper insights into stakeholder groups, assess current interactions, and identify opportunities for enhanced collaboration, funding partnerships, and knowledge-sharing
- **Create a stakeholder matrix** that categorises stakeholders based on their engagement and influence within the digital skilling ecosystem, enabling strategic prioritisation of collaboration efforts
- **Deliver a comprehensive gap analysis and strategic recommendations** that identify current gaps in digital capability support, highlight where efforts may be duplicated or misaligned, and propose actionable projects to enhance SME digital capability—with emphasis on interventions for middle adopter businesses

## 1.2 Methodology

This project employed multiple complementary research methods to build a picture of the region's digital capability ecosystem and readiness. The approach balanced what existing data reveals, and the lived experience of those working to enhance digital capability across Greater Whitsunday.

### Desktop Research & Ecosystem Mapping

The project began with desktop research integrating existing stakeholder intelligence, regional strategic documents, and publicly available directories. Entries were enriched through the Startup Status proprietary database and systematic searches of government programs, training providers, industry associations, and technology service companies operating in or serving the region.

This research identified and categorised over 135 entities across the digital capability ecosystem, examining:

- Infrastructure and connectivity providers
- Digital service companies and consultants
- Education and training institutions
- Government agencies and programs
- Industry associations and peak bodies
- Innovation ecosystem support organisations

The ecosystem map was developed using the Startup Status platform, creating an interactive, filterable resource that stakeholders can continue to use and update beyond this project.

## Readiness Index Survey

To understand regional digital readiness from multiple perspectives, a modified Readiness Index survey was undertaken with key stakeholders. This evidence-based assessment examined system conditions across five enabling dimensions:

1. **Clarity & Understanding** – Are the digital tools, programs, and support for digital capability in the region known and understood?
2. **Connection & Connectivity** – Can businesses access digital infrastructure, services, and networks effectively and is there sufficient physical and social infrastructure for digital connectivity?
3. **Capability & Capacity** – Do stakeholders and SMEs have the skills and resources to deliver or adopt digital solutions?
4. **Collaboration for Purpose** – Are system actors working together effectively to enhance regional digital capability?
5. **Advocacy & Promotion** – Is there strong leadership championing digital adoption and communicating success stories?

Survey respondents included representatives from agriculture, mining and resources, tourism, education, government, and business support organisations. Each completed a 25-minute assessment examining 15 indicators across the five dimensions.

The survey employed a 360-degree assessment approach where stakeholders evaluated not only their own perspective but also how they perceived other sectors and roles. This revealed collaboration gaps, hidden strengths, and systemic barriers that single-perspective surveys miss. All responses were confidential and are reported in de-identified, anonymised format.

## Integration with local Research

The project incorporated desktop research and SME survey data gathered by GW3 and GWI through networking events and local engagement activities. This provided crucial insights into current digital skill levels among regional SMEs and validated findings from the broader ecosystem assessment.

# 2. THE DIGITAL ECOSYSTEM LANDSCAPE

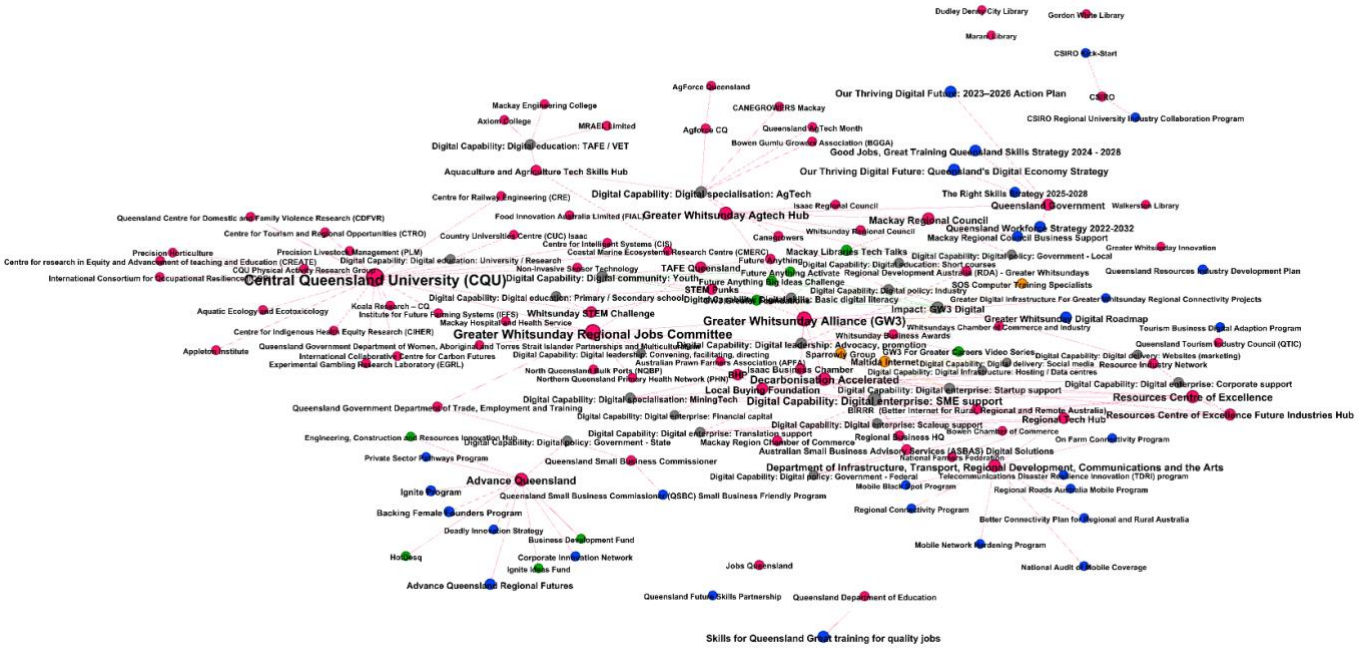
## 2.1 Ecosystem Overview

The digital capability ecosystem in the Greater Whitsundays region reflects a structure similar to communities across regional Australia, made up of industry bodies, service providers, connectivity and hosting infrastructure, government institutions, and skills development entities including primary and secondary schools, vocational and training organisations, and higher education. Other characteristics shared with communities that have lower population densities and geographic regionality include low service diversification and specialisation, a lack of service redundancy, and greater competition among economic development portfolios for scarce funding. These challenges require intentional intervention to bridge the gaps. An accessible and regularly maintained map provides clarity to inform these interventions.

**Key Findings at a Glance**

- The region has a **large, active, and well-established digital ecosystem** (135+ actors), indicating that capability exists; the challenge is coordination and visibility, not absence.
- **Backbone and convening functions are strong but concentrated,** with a small Number of organisations carrying disproportionate responsibility for alignment, coordination, and advocacy.
- The ecosystem operates as a **loosely connected network rather than a navigable system,** with potential for duplication, unclear pathways, and reliance on informal relationships.
- **Foundational digital services are well represented,** but there are clear gaps in **advanced and specialist capability** (notably cybersecurity, advanced analytics, and applied AI).
- Services are **Geographically concentrated in Mackay,** improving efficiency but creating access and equity challenges for Isaac and Whitsunday businesses.
- The greatest leverage lies in **system stewardship**: improving clarity, wayfinding, and coordination to unlock value from existing assets.

A map of the ecosystem considers not only the stakeholders, their roles, and the functions they provide, but also how the actors are connected and the enabling policy infrastructure. There is value in reflecting the inherent complexity of the system while ensuring accessibility of services from a simplified and accessible visual map. The network graph below reflects an indication of the hubs, organisations, and policies connected by functions provided in the Greater Whitsundays region.




The digital capability ecosystem is defined by the functions served and those impacted. These are practically applied to a map through tags associated with actors and reflect the interconnected nature of the system. Functions provide an adaptive framework that can be built on and expanded to accommodate changes in the system.

| **Community** | **Delivery** | **Education** |
|---|---|---|
| • Gender<br>• Mature age<br>• Youth | • Custom programming<br>• Social media<br>• Websites (marketing) | • Primary / Secondary school<br>• Short courses<br>• TAFE / VET<br>• University / Research |
| **Enterprise** | **Infrastructure** | **Leadership** |
| • Corporate support<br>• Financial capital<br>• Scaleup support<br>• SME support<br>• Startup support<br>• Translation support | • Fixed broadband<br>• Hosting / data centres<br>• Mobile / wireless<br>• Satellite / remote | • Advocacy, promotion<br>• Convening, facilitating, directing |
| **Policy** | **Skills** | **Specialisation** |
| • Global<br>• Government – federal<br>• Government – state<br>• Government – local<br>• Industry | • Advanced digital skills<br>• AI literacy and adoption<br>• Basic digital literacy<br>• Cyber security awareness and safety<br>• Specialised software training<br>• Virtual and augmented reality | • Advanced Manufacturing<br>• AgTech<br>• HealthTech<br>• Tourism |

## Understanding Stakeholder Categories

The digital capability ecosystem operates through interconnected functions. Multiple stakeholders often perform similar roles through different pathways, relationships are simultaneously collaborative and competitive, and individual organisations' contributions can be both enabling for some participants and constraining for others depending on context and timing.

**Digital skills development** flows through universities, TAFE, private training providers, and workplace programs, each bringing different timeframes, funding models, and industry connections.

**Technology adoption support** reaches SMEs through government programs, industry associations, private consultants, and peer networks, each with different trust relationships and technical expertise.

**Funding** comes from federal grants, state programs, local government initiatives, and private investment, each with different priorities, timelines, and application requirements.

**Infrastructure provision** happens through telecommunications companies, NBN, government programs, and private providers, each addressing different connectivity needs and geographic areas.

The following sections describe the six primary stakeholder categories and their roles in the digital capability ecosystem.

**Table: Digital Ecosystem Stakeholder Categories**

| Stakeholder Group | Description | Key Examples |
|---|---|---|

| | | |
|---|---|---|
| **Infrastructure & Connectivity** | Telecommunications providers, network operators, and infrastructure companies delivering the physical and digital connectivity foundation | Telstra, NBN Co, QCN Fibre, Optus, Starlink providers |
| **Digital Service Providers** | IT consultants, digital agencies, software vendors, cloud service providers, and technology companies delivering solutions to businesses | CopilotHQ, local IT consultancies, managed service providers, software companies |
| **Education & Training** | Universities, TAFEs, RTOs, private training providers, primary and high schools, and programs delivering digital skills development at all levels | CQUniversity, TAFE Queensland, University of Southern Queensland, micro-credentialing providers |
| **Government & Policy** | Federal, state, and local government agencies, economic development bodies, and programs providing funding, policy, and coordination | Queensland Government (DSDI, DETSI), Federal programs, Mackay/Isaac/Whitsunday Regional Councils, GW3 |
| **Industry Associations** | Sector-specific peak bodies and associations representing agriculture, mining, tourism, and other industries in digital transformation | Canegrowers, Resource Industry Network, Tourism Whitsundays, Chambers of Commerce |
| **Innovation Ecosystem** | Research institutions, innovation hubs, accelerators, and organisations fostering technology development and commercialisation | Resources Centre of Excellence (RCOE), Greater Whitsunday Innovation (GWI), AgTech Hub, university research centres, startup support programs |

## 2.2 Mapping considerations

This mapping process acknowledges the complexity, interdependence, and open-system nature of digital capability. It is not intended to present a closed or definitive account of "the system," but rather to provide a structured way of seeing relationships, gaps, and opportunities across a dynamic landscape.

Key considerations to keep in mind are outlined below.

**Use, interpretation, and ethical considerations**

This initial mapping report should be understood as a draft representation of a complex and evolving system. As with any mapping exercise, there will inevitably be missing stakeholders, incomplete relationships, and instances where tags or connections do not fully capture the nuance of how the system operates in practice. When taken out of context, these gaps or misclassifications have the potential to lead to misinterpretation or unintended conclusions.

Maps and datasets also carry a risk of being selectively interpreted or "weaponised" -used to advocate for or against particular services, organisations, or approaches in ways that were not intended by the mapping process. Without appropriate framing, readers may infer absence as failure, visibility as dominance, or density as effectiveness, despite the map not being designed to support such judgements.

For this reason, it is essential that any public presentation or use of the map is undertaken with contextual explanation. Consideration should be given to how the information may be perceived by those within the system, those outside the community, and those directly impacted by the services and relationships represented. The map is most appropriately used as a tool for shared reflection and dialogue, rather than as evidence for performance assessment or advocacy in isolation. Ongoing validation with community stakeholders, and openness to refinement over time, are critical to ensuring that the map supports constructive understanding rather than unintended harm.

**Information availability**

The analysis is based on available data and documents at the time of review. Some datasets reflect regional rather than LGA-specific trends.

**Scope and Boundary Definition**

The scope of a mapping process is inherently broad and intersects multiple domains of policy, service delivery, and community life. A narrow focus on a single theme of digital capability risks overlooking contributing factors such as liveability or industry transitions. The map therefore adopts a deliberately expansive boundary to reflect the interrelated nature of digital capability.

**Geography and Service Catchments**

The geographic focus of this mapping is the Greater Whitsundays region, including Mackay, Whitsundays, and Isaac LGAs. This is applied pragmatically rather than rigidly. Many services operate across the wider region, are physically located in neighbouring towns, or are headquartered outside the region while delivering outreach, remote, or drive-in services. The map reflects service availability, not solely the physical location of providers.

**Redundancy, Specialisation, and Boundary-Spanning Roles**

Services and roles vary in design and function. Some operate across areas, others are highly specialised, and some are explicitly designed as boundary-spanners that connect across systems. Apparent “duplication” in the map may reflect intentional overlap, risk mitigation, or different entry points for individuals and organisations with varying needs rather than inefficiency.

**An Indicative and Evolving Model**

The mapping should be understood as an indicative model rather than a comprehensive or static representation of current state. It provides the underlying structure and tooling to add, edit, and refine data over time. As such, the map is best viewed as a living asset that can evolve alongside community knowledge, service changes, and policy shifts, rather than a one-off inventory.

**Service Availability, Not Capacity or Capability**

The map reflects the presence of services, programs, hubs, and policy touchpoints within the local ecosystem. It does not assess service quality, cultural safety, workforce capability, resourcing levels, or actual capacity to meet demand. Absence or presence on the map should not be interpreted as a judgement on effectiveness or sufficiency.

**Gaps and Limitations in Tagging**

Tagging of services, programs, and hubs has been applied to support thematic analysis and pathway exploration. While undertaken systematically, this tagging remains indicative and requires ongoing validation with community stakeholders, service providers, and lived-experience perspectives. Tagging should be treated as provisional and subject to continuous improvement as understanding deepens.

**Lived Experience and Informal Supports**

The map primarily captures formal services, programs, and institutional actors. Informal supports - such as networks, peer relationships, cultural connections, communities, and informal mentors - are harder to represent but are often critical to outcomes. Their relative invisibility on the map should not be interpreted as a lack of importance. Such ‘soft infrastructure’ will be added as they are further identified.

**Power, Access, and Visibility**

Mapping inevitably reflects what is visible, documented, and funded. Grassroots initiatives, culturally embedded practices, or emerging responses may be under-represented, while

larger or better-resourced organisations may appear more prominent. The map does not imply relative influence, power, or effectiveness based on size or number of connections alone.

**Pathways Are Non-Linear**

Pathways through systems are rarely linear or sequential. Engagement may be episodic, simultaneous, cyclical, or disrupted by life events. The map supports pathway exploration but should not be read as prescribing a single "correct" or typical journey through services.

**Temporal Dynamics**

The service landscape is shaped by funding cycles, pilot programs, staff turnover, and policy reform. What is accurate at one point in time may change rapidly. The map reflects a snapshot informed by available data at the time of development and should be periodically reviewed to remain relevant.

**Data Integrity and Interpretation**

The mapping integrates multiple data sources, including publicly available information, organisational descriptions, interviews, observations, and program documentation. Variability in data quality, completeness, and currency is unavoidable. Interpretation should therefore be cautious and complemented by qualitative insights and local knowledge.

**Cultural context, language, and representation**

This mapping has been undertaken within a specific cultural and place-based context, and particular care is required in how people groups, organisations, and ways of working are represented and interpreted. Language used in the map reflects administrative and service-system conventions rather than cultural worldviews. As such, the map should be interpreted with cultural humility, recognising that visibility within the mapping does not equate to importance or legitimacy. Ongoing engagement is essential to validate interpretations, refine representation, and ensure that the map supports understanding rather than inadvertently reinforcing deficit-based or externally defined narratives.

## 2.3 Network observations

**A strong baseline of established infrastructure**

The Greater Whitsundays digital capability ecosystem includes established and enabling infrastructure including foundational education and skills pathways spanning primary and secondary schools, TAFE/VET providers, and university and research institutions, alongside industry bodies, regional hubs, and representation across local, state, and federal government. These stakeholders are not isolated, connected through collaborative and convening structure, policies, and programs. With this base in place, there is opportunity to: mobilise the network of local providers; strengthen consistency, capability, and capacity across existing roles; provide deeper connectivity, accessibility, and alignment between actors, and deep dive into specialist sectors, demographics, and focus areas.

**Central convening roles**

Central convening and coordination functions are anchored around established roles including the Greater Whitsunday Alliance (GW3), the Greater Whitsunday Regional Jobs Committee (RJC), and the Resources Centre of Excellence (RCOE), all of whom play visible roles in strategy, advocacy and cross-sector alignment. Greater Whitsunday Innovation (GWI) contributes to the region's innovation ecosystem through place based support and event led engagement. There are also large institutions that can provide central roles including Central Queensland University and TAFE, and sector-specific functions including the AgTech Hub, Whitsundays Chamber of Commerce & Industry, Isaac Business Chamber, Mackay Region Chamber of Commerce and Resources Hub. These entities are prominently identified when mapping relationships with programs, committees, and policies.

As with many regionally based organisations and programs, activities are often delivered within time limited and program-based funding cycles, which can affect continuity and consistency of engagement for industry seeking support.

Taken together, this landscape highlights the need for clearly defined roles that operate within what is often described as the "space between", supporting both strategic and operational functions related to convening, coordination, and advocacy across the system.

**Policy Alignment**

The region is supported by a diverse and increasingly aligned set of policy frameworks at federal, state, and regional levels that recognise digital capability, connectivity, and digital transformation as priority enablers of economic growth, workforce participation, competitiveness, and service delivery. At the Commonwealth level, national digital policy frameworks such as the Australian Government's Digital Economy Strategy 2030 outline a long-term vision for Australia to be a leading digital economy and society by 2030, with actions to support digital infrastructure, skills and inclusion, secure and trusted systems, and digital adoption by business. This is complemented by whole-of-government digital and data initiatives, including the Australian Digital Capability Framework, which guides workforce and capability development, and the Data and Digital Government Strategy, which aims to deliver simple, secure, and connected digital services for people and business.

At the state level, Queensland's Our Thriving Digital Future Strategy and Action Plan and the broader Queensland Digital Economy Strategy focus on building digital talent, supporting business digital transformation, and enhancing government responsiveness and service delivery through digital technologies.

Locally, the Greater Whitsunday Digital Roadmap translates these policy directions into a place-based vision and priorities for the region. Together, these policies provide strategic direction and alignment, but their impact depends on visible, practical, and measurable action. Where apparent, this mapping connects programs and stakeholders directly to relevant policy settings, and there is an ongoing opportunity to expand and maintain clear links between policy intent and coordinated action across the regional digital ecosystem.

## 2.4 Role observations

### Infrastructure & Connectivity (18 entities)

Digital connectivity functions now like an essential service and underpins economic participation, service delivery, and regional resilience. Reliable internet access is foundational to all digital activity across the Greater Whitsunday region, enabling businesses, communities, and government to operate effectively. The connectivity ecosystem includes major telecommunications providers (Telstra, Optus), the National Broadband Network (NBN Co), alternative fibre and wireless providers such as QCN Fibre and Wireless Nation, and satellite services supporting remote and regional communities. Together, these entities form critical infrastructure that supports productivity, inclusion, and access to essential services across the region

**Key observations:**

- Strong presence of major national providers
- Recent significant investment: $3.5 million Digital Connectivity Project (GW3, BHP, Telstra) enhancing connectivity in Moranbah and Dysart
- Geographic gaps remain in coverage, particularly in remote agricultural and mining areas
- Limited local technical expertise for complex infrastructure issues
- Several notable initiatives exist including:
    - Smart Transformation Initiative addressing mobile blackspots
    - Whitsunday Regional Council IoT network development
    - NBN fixed wireless and satellite services for regional coverage

### Digital Service Providers (24 entities)

This diverse category spans from large-scale technology companies to local IT consultancies. Service providers deliver everything from basic computer support to advanced cloud solutions, cybersecurity, software development, and digital transformation consulting.

**Key observations:**

- Mix of local providers and Brisbane/national companies servicing the region
- Strong presence in managed IT services and basic digital support
- Notable gap in locally-based cybersecurity specialists
- Limited local capacity in advanced services (AI/ML, data analytics)

- Some successful regional technology companies (e.g., Vayeron acquired by Kadant, Smart Water System commercialised through Honeywell)

## Education & Training (22 entities)

Educational institutions and training providers form the backbone of workforce digital capability development. This category includes universities, TAFE campuses, registered training organisations, and specialised digital skills programs.

**Key observations:**

- Strong institutional presence with CQUniversity, TAFE Queensland, and University of Southern Queensland
- Multiple TAFE campuses across the region (Mackay, Canonvale, Bowen)
- Recent investment in specialised training infrastructure and capability, including the Agriculture and Aquaculture Tech Skills Hub, delivered through a joint federal and state funding partnership.
- Delivery of advanced and applied skills pathways through initiatives such as the Queensland Future Skills Partnership, supporting automated technology capability and METS sector skill development. Growing use of micro credentials and modular training approaches to respond to emerging digital skills needs and industry demand.
- Ongoing challenges in course viability and sustainability due to small cohort sizes and dispersed regional demand, particularly for specialised digital and technology focused training.
- A range of initiatives are currently contributing to digital capability development across the Greater Whitsunday region. These initiatives span workforce skilling, applied digital capability, innovation adoption, and sector specific transformation, and are delivered through collaboration between regional organisations, training providers, industry, and government. Examples include:
    - **Foundational digital skills programs** supporting small and medium enterprises and the regional workforce, delivered through ecosystem partnerships and supported by state workforce funding mechanisms.
    - **Applied digital, automation, and future of work initiatives** led by tertiary and vocational education providers in collaboration with industry partners, building job ready digital capability across priority sectors.
    - **Industry specific digital capability partnerships** across mining, agriculture, tourism, and related supply chains, responding to sector led productivity and technology adoption needs.
    - **Innovation and digital adoption support programs**, delivered through regional innovation intermediaries and aligned to state based innovation and economic development funding programs.

- **Decarbonisation related digital capability initiatives**, supporting SMEs to adopt digital tools for emissions tracking, efficiency, and transition planning.

A detailed overview of current initiatives, delivery arrangements, partners, and funding alignment is provided later in this report in section 2.5.

## Government & Policy (28 entities)

Government stakeholders span federal, state, and local levels, providing funding, policy frameworks, economic development coordination, and direct program delivery. This is the largest single category, reflecting the significant public sector role in regional development.

**Key observations:**

- Strong coordination through Greater Whitsunday Alliance (GW3) as a backbone organisation that supports alignment across government, industry, and delivery partners
- An active Greater Whitsunday Regional Jobs Committee, providing a structured mechanism to address workforce and skills priorities, including those related to digital capability and future skills.
- A diverse mix of funding sources supporting digital, workforce, and innovation related initiatives, including state and federal mechanisms such as the Regional Enablers Program, Regional Economic Development (RED) grants
- Three local councils (Mackay, Isaac, Whitsunday) with varying digital capability focus
    - Access to a wide range of Commonwealth digital and connectivity programs and policy frameworks, with uptake by regional SMEs often constrained by time, capacity, and navigation challenges rather than program availability.

## Industry Associations (21 entities)

Industry associations represent specific sectors and provide trusted intermediaries between businesses and support services. These organisations understand industry-specific needs and have established relationships with member businesses.

**Key observations:**

- Strong representation across agriculture (Canegrowers, Bowen Gumlu Growers Association, Australian Mango Industry Association)
- Active mining/METS coordination through Resource Industry Network (RIN) and the Resources Centre of Excellence (RCOE)
- Tourism representation through Tourism Whitsundays, Mackay Isaac Tourism and regional visitor associations
- Chambers of Commerce providing cross-sectoral business support

- Variable digital capability focus across associations
- Associations engage in various ways:
    - Some associations actively promote digital adoption (e.g., through field days, workshops)
    - Others primarily focused on traditional advocacy with limited digital support capacity
    - Opportunity for enhanced partnerships to reach middle adopter SMEs through trusted networks

## Innovation Ecosystem (22 entities)

This category includes research institutions, innovation hubs, accelerators, and programs specifically designed to foster technology development, commercialisation, and adoption.

**Key observations:**

- Innovation Hubs such as Greater Whitsunday Innovation (GWI) function across multiple stakeholder categories including education & training and innovation ecosystem support
- Growing AgTech ecosystem with dedicated hub and support programs
- Resources Centre of Excellence (RCOE) serving mining/METS sector innovation
- Emerging biofutures/biomanufacturing focus
- University research centres (CQUniversity DISH, agricultural research partnerships)
- Limited venture capital or angel investment presence in the region
- Few locally-based accelerator programs compared to metropolitan areas
- Success story: Vayeron (IoT company) acquired by NYSE-listed Kadant Corporation

**Note on Geographical Distribution**

Mackay Regional Council area hosts the highest concentration of infrastructure (approx. 60%), including tertiary education providers (CQUniversity, TAFE), digital service providers, and coordination bodies (e.g. GW3, RDA). This is largely reflective of Mackay's larger population base, greater business density, and its function as a central service and logistics hub within the region — (rather than a reflection of capability or innovation disparity across the LGAs)

The Isaac Regional Council area is focused on mining/METS support with strong industry association presence and growing digital infrastructure investment, though connectivity challenges persist in remote areas.

The Whitsunday Regional Council area centres on tourism and agricultural innovation (horticulture, aquaculture) but has more pronounced connectivity gaps and fewer locally-based service providers, relying more heavily on Mackay-based or external services.

This geographic concentration creates both efficiency for coordination and equity challenges for service access. Businesses in Isaac and Whitsunday areas may face additional barriers accessing digital capability support compared to Mackay-based enterprises.

## 2.4 Stakeholder Engagement Matrix

Understanding stakeholder influence and engagement levels is essential for effective ecosystem coordination. Not all stakeholders play the same role or have the same capacity to drive digital capability development.

Appendix B: Stakeholder Engagement Matrix provides targeted engagement principles for each stakeholder category based on their influence, interest, and involvement levels.

### Middle Adopter SME Engagement

The project specifically targets "middle adopter" SMEs, businesses that have begun their digital journey but require targeted interventions to progress further. Different stakeholders play distinct roles in reaching and supporting this segment.

| Stakeholder | Role in Middle Adopter Support | Engagement Approach |
|---|---|---|
| **Industry Associations** | Trusted intermediaries with direct member relationships | Leverage for needs identification, program promotion, and peer referrals |
| **Chambers of Commerce** | Cross-sector SME access and local business voice | Partner for awareness campaigns, event hosting, and business referrals |
| **Digital Service Providers** | Direct delivery of technology solutions | Coordinate through provider networks to improve service quality and referral pathways |
| **Greater Whitsunday Innovation** | SME-focused training and innovation support | Primary delivery partner for accessible "bite-size" capability programs |
| **TAFE Queensland** | Accessible, accredited skills pathways | Promote micro-credentials and flexible learning options suited to time-poor businesses |

## 2.5 Current Initiatives & Programs

Beyond individual organisational efforts, several significant collaborative initiatives are actively enhancing digital capability across the region:

### Major Digital Infrastructure Projects

**Digital Connectivity Project ($3.5M)**

- Partners: GW3, BHP, Telstra
- Focus: Enhanced connectivity in Moranbah and Dysart
- Part of Smart Transformation Initiative addressing mobile blackspots
- Demonstrates successful public-private partnership model

**Connect Greater Whitsunday Project**

- Partners: GW3, MRC, IRC, WRC, RDA
- Focus: Assess regional connectivity and infrastructure goals
- Business cases support strategic advocacy, collaboration and investment

### Digital Skills Programs

**Greater Digital Skills Program**

- Funded: Jobs Queensland 'Grow Your Own' Round 2
- Launched: Digital Futurist Forum (August 2024)
- Target: Middle adopter SMEs across priority sectors
- Delivery: Partnership between GW3, training providers, and industry

**Agriculture and Aquaculture Tech Skills Hub ($1.5M)**

- Partners: Federal Government, Queensland Government, CQUniversity, TAFE Queensland
- Focus: Multi-commodity training for digital and technology skills
- Addressing: Agricultural workforce capability gaps

**Queensland Future Skills Partnership**

- Partners: BMA, TAFE Queensland, CQUniversity, Advance Queensland
- Focus: Automated technology pathways for resources sector
- Deliverables: 12 accredited skillsets for METS sector plus micro-credentials

## Innovation & Adoption Support

**AgTech Hub**

- Focus: Agricultural technology adoption and ecosystem coordination
- Activities: Demonstrations, networking, technology validation
- Funded: Regional Enablers Program (Advance Queensland)

**Resources Centre of Excellence (RCOE)**

- Focus: Mining and METS innovation
- Activities: Technology demonstrations, industry networking
- Aligned with: Advanced Manufacturing Week, Digital Innovation Skills Hive

**Geospatial Hub Economic Impact Assessment**

- Focus: Support the growth of geospatial and EO business and workforce capability
- Activities: Research, Workshops, Industry and Government Engagement

## SME Support Programs

**Decarbonisation Accelerated Program**

- Focus: Supporting SME decarbonisation journeys
- Includes: Digital capability support linked to sustainability and productivity outcomes.
- Partners: GW3, Local Buying Program, Queensland Government with support from training providers and industry stakeholders.

**GWI Future Growth Strategy**

- Focus: Strengthen Innovation Hub and SME Digital Capability
- Includes: Digital skills workshops and resources.
- Funded: Regional Enablers Program (Advance Queensland)

**Resource Industry Network (RIN)**

- Focus: Connecting SME innovators and early-stage businesses into broader innovation networks, facilitating access to collaboration, events, ventures, and regional knowledge sharing.
- Activities: Innovation events and forums, capability building workshops, founder and SME networking, connection to advisory services, and promotion of digital and technology adoption pathways

- Aligned with: Queensland Government innovation priorities, Regional Enablers Program, Tech Verge conference, and broader regional innovation and digital capability initiatives

**Bowen Gumlu Growers Association**

- Focus: Horticulture productivity, innovation, and industry capability
- Activities: Adoption of precision agriculture tools, digital traceability, data driven crop management, and technology enabled compliance practices
- Aligned with: AgTech Hub initiatives, supply chain digital platforms, sustainability and export requirements

**Reef Catchments**

- Focus: Natural resource management, sustainability, and land stewardship
- Activities: Use of spatial data, digital monitoring platforms, decision support tools, and digital reporting systems for landholders and SMEs
- Aligned with**:** Reef protection programs, agricultural sustainability frameworks, digital environmental compliance systems

**Chambers of Commerce and Business Associations**

- Focus: SME advocacy, business capability, and local economic participation
- Activities: Digital awareness events, workshops on e commerce, digital marketing and cyber security, peer networking and referrals
- Aligned with: Small business support initiatives, Queensland Small Business Month, local and regional SME programs

**Australian Prawn Farmers Association (APFA)**

- Focus: Productivity, sustainability, and innovation in prawn aquaculture
- Activities: Delivery of digital capability uplift through adoption of farm management software, sensor technologies, water quality monitoring systems, data driven production optimisation, and digital biosecurity and compliance tools
- Aligned with: Queensland aquaculture strategy, AgTech and BlueTech initiatives, and sustainability reporting requirements

**Mackay Manufacturing Hub**

- Focus: Manufacturing sector
- Activities: Expert advice, business development and networking
- Aligned with**:** Business innovation and growth initiatives, workforce skilling programs, Decarbonisation Accelerated, Diversification.

**Local Government**

- Focus: SME support
- Activities: Business support information and linkages

- Aligned with**:** Chambers of Commerce, Economic Development, Innovation and Community Hubs

## Workforce Development

**Greater Whitsunday Future Finder**

- Launched: July 2025
- Function: Digital platform connecting young people to career opportunities including increasing awareness of digital technology enabled roles available across the region.
- Purpose: Address workforce attraction, retention and improved alignment between education, industry, and emerging skills demand

**Greater Whitsunday Regional Jobs Committee (RJC)**

- Focus: Addressing workforce shortages and future skills needs across priority sectors
- Activities: Employer engagement, workforce planning, skills pathway development, and coordination of place based workforce initiatives
- Funded: Queensland Government (2025-2027)

**Greater Careers Connect**

- Focus: Bridging the gap between study and work by connecting students studying in priority skill areas (including digital enabled career areas) with regional employers early in their qualification, providing exposure to real career opportunities and clearer visibility of local career pathways.
- Activities: Online careers expos, structured mentoring, and industry networking events that connect students with employers and provide practical insight into workplace expectations and regional opportunities.
- Funded through: Queensland Government Workforce Participation Fund

## Available Funding Support

Several funding programs are accessible to regional SMEs for digital adoption:

**State Programs:**

- RED Grants (up to $100,000)
- Regional Enablers Program
- Advance Queensland initiatives

- QRIDA financing mechanisms (No current digital-focused financing options)

**Federal Programs:**

- Regional Connectivity Program
- Digital Solutions - Australian Small Business Advisory Services (grants up to $2,500)
- Modern Manufacturing Initiative
- Small Business Debt Helpline (up to $1,500 support)

**Industry-Specific:**

- Agriculture innovation grants
- Mining technology adoption support
- Tourism digital transformation programs

**Challenge:** Many SMEs are unaware of available funding or find application processes complex. This represents a significant knowledge gap in the ecosystem.

# 3. SME DIGITAL CAPABILITY

A survey of small and medium enterprises was conducted across the Mackay, Isaac, and Whitsunday region to understand digital capability from the business perspective. The **Your Business & Digital Tools: What's Working, What's Needed?** Survey ran during October-November 2025 and collected responses from 73 businesses representing a cross-section of regional industries.

**Key Findings at a Glance**

**54.8% of respondents are 'Middle Adopters',** ready for capability uplift with the right support. This validates the regional strategy of targeting businesses that have begun digital transformation but needs structured pathways to progress further.

**Industry matter more the geography,** digital capability varies significantly by sector (p=0.041) but not by council area (p=0.43). This means intervention should be sector-specific rather than location-based.

**AI adoption is surprisingly higher at 68.5%,** more businesses use AI daily then use CRM systems, but the gap between occasional use and strategic integration represents the next capability frontier.

**Time and cost are the dominant barriers,** 70% cite lack of time to research and implement tools, and 63% cite cost. Connectivity (11%) is no longer the primary obstacle for most businesses.

## Strategic Priority: The Middle Adopter Opportunity

The survey's most significant finding is the concentration of businesses in the middle maturity band. Using a weighted Digital Maturity Index based on digital tool usage, the regional mean sits at 38.7 with scores ranging from 6.7 to 95.6. Figure 1 shows the distribution across the 73 surveyed businesses.

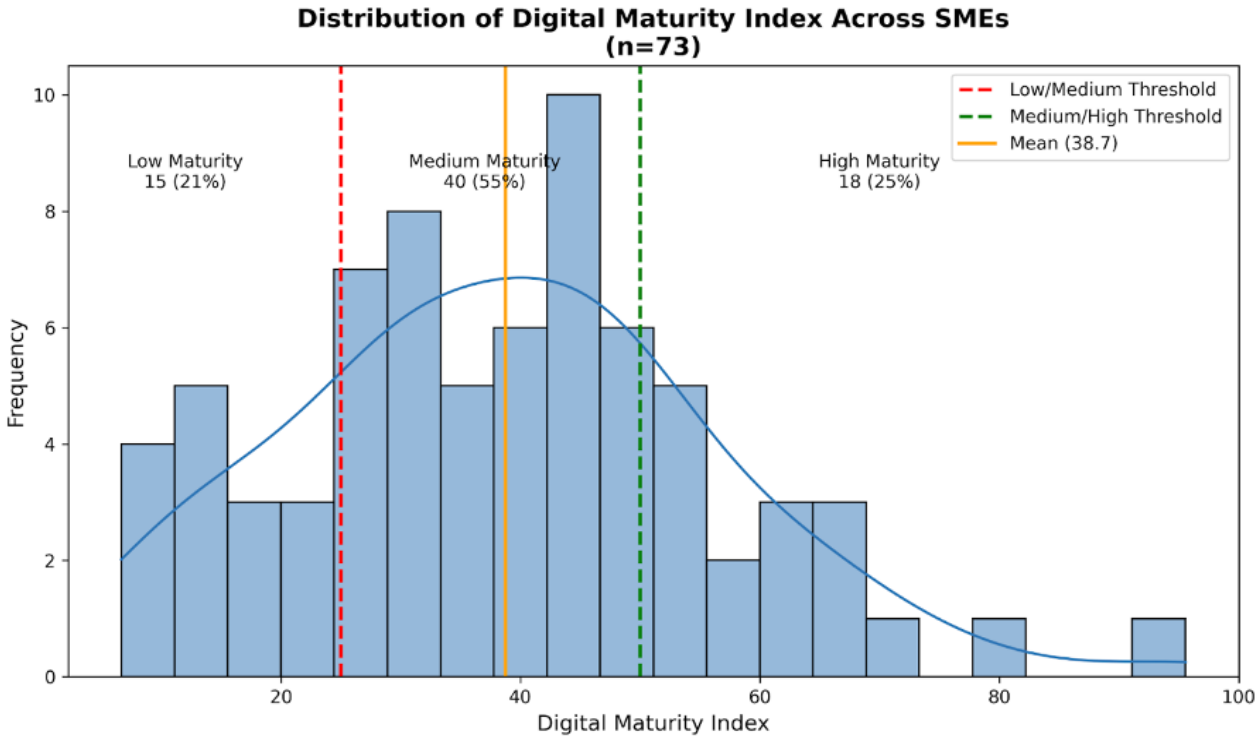



***Figure 1:*** *Distribution of Digital Maturity Index across surveyed SMEs. The middle maturity band (25-50) contains 54.8% of respondents, validating the strategic focus on Middle Adopters.*

**Middle Adopters** have solid foundation tool adoption and are engaging with AI and CRM systems. However, unlike businesses with higher maturity they haven't yet systematically embedded these tools into their operations. The survey data shows they're experimenting but not fully integrated, the gap between tool awareness and digital transformation.

**This segment warrants strategic focus for two reasons.** First, they represent the largest cluster. Second, they have sufficient digital foundations to benefit immediately from structured capability programs, whereas businesses with lower maturity may require more foundational training before intermediate tools become relevant. Businesses with higher maturity, predominantly larger enterprises with existing capability, are better positioned as peer mentors than as program participants. Concentrating resources on Middle Adopters offers the broadest reach with the most receptive audience.

## Strategic Priority: Industry-Specific Interventions

Statistical analysis confirms that industry sector significantly influences digital capability ($p=0.041$), while geographic location does not ($p=0.43$). This finding has direct implications for program design: sector-specific content will be more effective than location-based approaches.

| Industry | Maturity | Distinctive Profile & Opportunity |
|---|---|---|

| | | |
|---|---|---|
| Tourism, Hospitality & Retail | 44.6 | Highest AI adoption (83%). Strong on customer-facing tools. Challenge: 42% cite staff resistance. |
| Education & Professional Services | 42.0 | Strong collaboration tool adoption. Interest in agentic AI suggests early adopters pushing frontiers. |
| Mining, METS, Manufacturing | 41.0 | Solid collaboration and cloud adoption. Emerging IoT adoption aligned with Industry 4.0 trends. |
| Health & Community Services | 32.6 | More conservative adoption, likely due to regulatory constraints. High demand for digital ethics training (47%). |
| Agriculture & Aquaculture* | 20.6 | Lowest maturity. 0% AI adoption, 75% cite skills barrier, 50% cite connectivity. Requires dedicated foundation building. |

**Small sample (n=4), interpret with caution, but pattern warrants attention given agriculture's economic importance.*

Detailed industry radar charts showing tool adoption profiles across all categories are provided in Appendix A.4.

## Recommended Training Pathways

Survey responses clearly indicate that businesses at different maturity levels need different support. The top training request (Microsoft 365, 42.5%) reflects foundation-level needs, while three AI-related topics appear in the top ten, indicating strong interest in emerging technology. Figure 2 illustrates how training needs differ dramatically based on digital confidence level.

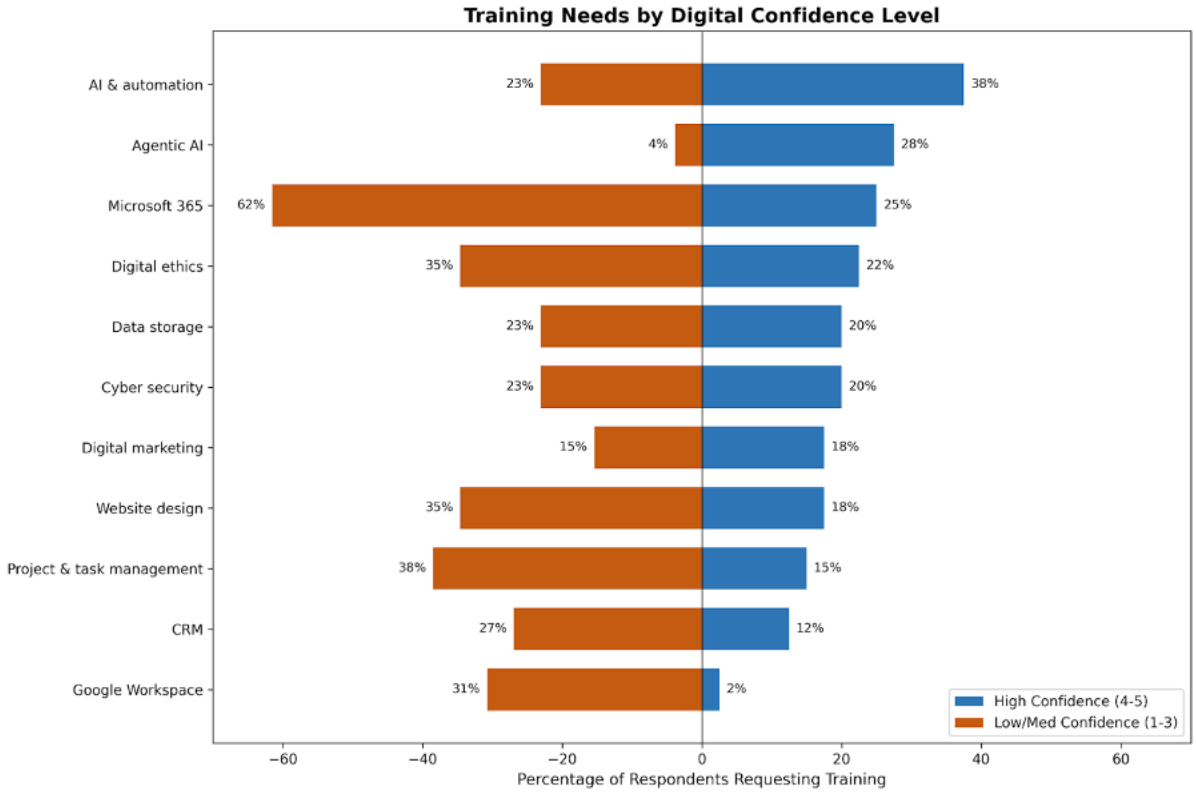



***Figure 2:*** *Training needs differ significantly by digital confidence level. Lower-confidence businesses prioritise foundational skills (Microsoft 365: 62%), while higher-confidence businesses seek advanced capabilities (Agentic AI: 28% vs 4%).*

The following tiered approach aligns program design with what businesses actually requested:

**Tier 1: Digital Foundations & Productivity Uplift**

**Target audience:** Foundation Builders and lower-confidence businesses (62% of whom requested Microsoft 365 training)

- Microsoft 365 productivity and workflow optimisation
- Project and task management fundamentals
- Website design and optimisation basics
- Sustainable data storage and management

**Tier 2: Applied Digital & AI Adoption**

**Target audience:** Middle Adopters ready to advance (38% of higher-confidence businesses requested AI and automation training)

- AI and automation: Copilot, ChatGPT, workflow automation
- CRM implementation and customer data strategy
- Digital ethics and responsible AI practices

- Cyber security and data privacy essentials

**Tier 3: Digital Leadership & Advanced Capability**

**Target audience:** Digital Leaders and advanced practitioners (28% requested agentic AI training, 18% sought system integration)

- Agentic AI: autonomous agents, workflow orchestration
- System integration and advanced automation
- Industry 4.0 applications (IoT, business intelligence)
- Peer mentorship and knowledge sharing across the region

**Delivery Considerations**

Business feedback emphasised that *format and timing matter as much as content*. Programs should offer flexible delivery including recorded sessions, micro-learning modules, and varied scheduling to reach audiences that traditional workshops miss. Qualitative responses repeatedly identified the need for peer learning opportunities: *"You don't know what you don't know, what are other businesses in related industries using?"* Sole traders particularly requested mentoring and peer networks to help navigate digital decisions.

## What Businesses Told Us

Open-ended survey responses (n=18 substantive comments) revealed themes that inform how support programs should be designed:

**"You don't know what you don't know"** Multiple respondents expressed uncertainty about what tools exist and what other businesses use successfully. This awareness gap suggests value in peer showcases, tool demonstrations, and curated recommendations rather than just skills training.

**Challenges for sole traders** Several sole traders described making digital decisions in isolation: *"As a sole trader I do not have colleagues to discuss digital options with so research and decision making is solely me."* This points to value in peer networks and dedicated sole trader support.

**Industry-specific needs** Respondents requested industry-tailored content rather than generic digital skills training. Businesses want to see how tools apply to their specific operational context.

## Survey Scope

This survey provides a useful snapshot of regional digital capability, though interpretation should note: the sample skews toward established businesses (82% operating 8+ years) and larger enterprises (29% with 50+ employees); Whitsunday representation is limited (n=3); and self-selection means actual regional capability may be lower than the survey suggests. Full methodological details and statistical analysis are provided in Appendix A.

# 4. DIGITAL READINESS ASSESSMENT

A structured expert (key informant) survey drew on purposively selected individuals with demonstrated knowledge of specific sectors or domains within the regional system. The survey was completed by 16 individuals with an average response time of 25 minutes. Seventy per cent of respondents lived in the region and 52% worked in the region for more than ten years, while 26% lived in and 43% worked in the region for five years or less.

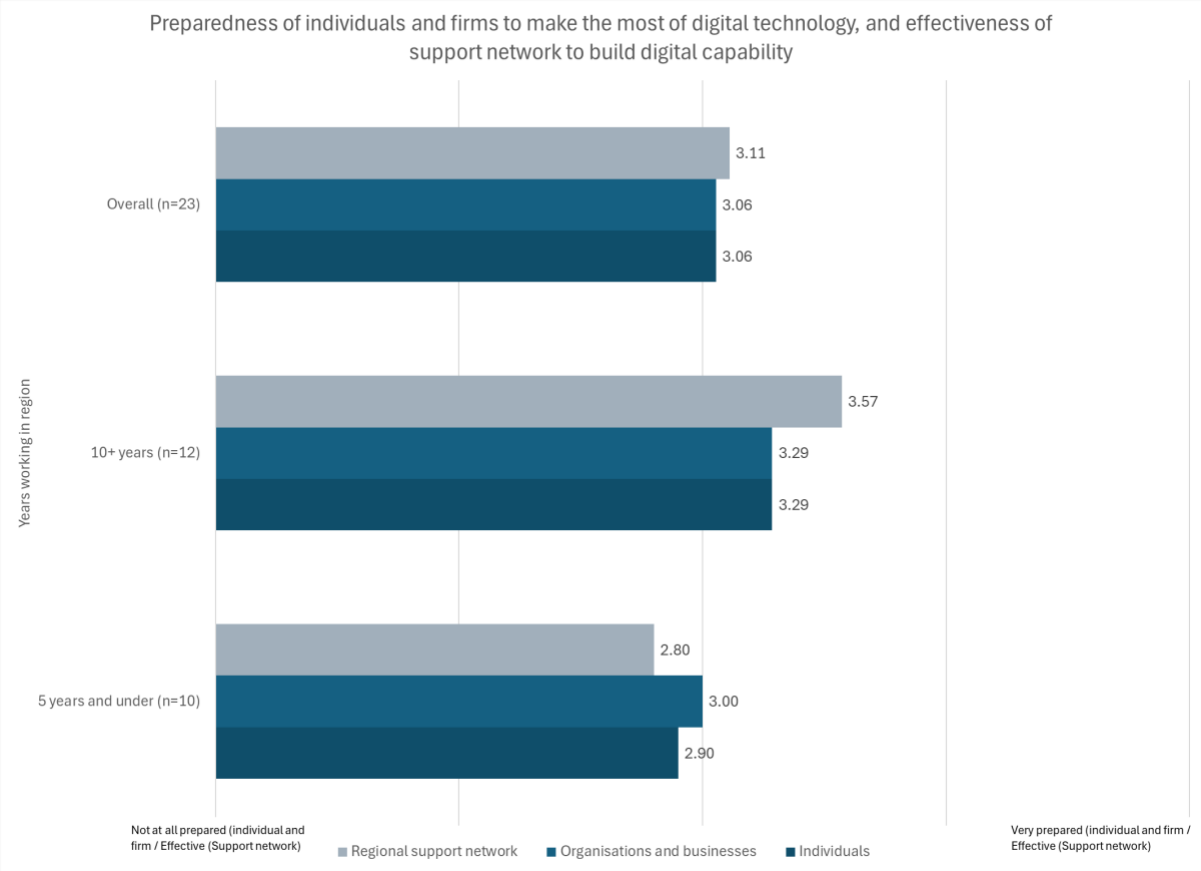
**Key findings at a Glance**

- **Connection is the strongest readiness condition,** with established networks and organisations supporting digital capability, though infrastructure reliability remains uneven in some areas.
- **Openness to digital change is high,** but practical skills, awareness of global tools, and training available are inconsistent, creating a gap between intent and execution.
- **Capacity is the most constrained condition:** organisations exist, but workforce shortages, finding cycles, and sustainability issues limit scale and continuity.
- **Clarity is the weakest readiness condition,** with low shared understanding of roles, pathways, and how the system fits together, directly affecting navigation for SMEs.
- **Advocacy and collaboration are present but fragmented,** limiting the region's ability to influence policy, attract investment, and sustain momentum.
- **Digital readiness varies more by sector than geography,** reinforcing the need for industry-specific approaches rather then place-based interventions alone.

# Individual and firm preparedness and support system effectiveness

Digital capability is considered from perspectives of individual, firm, and supporting system:

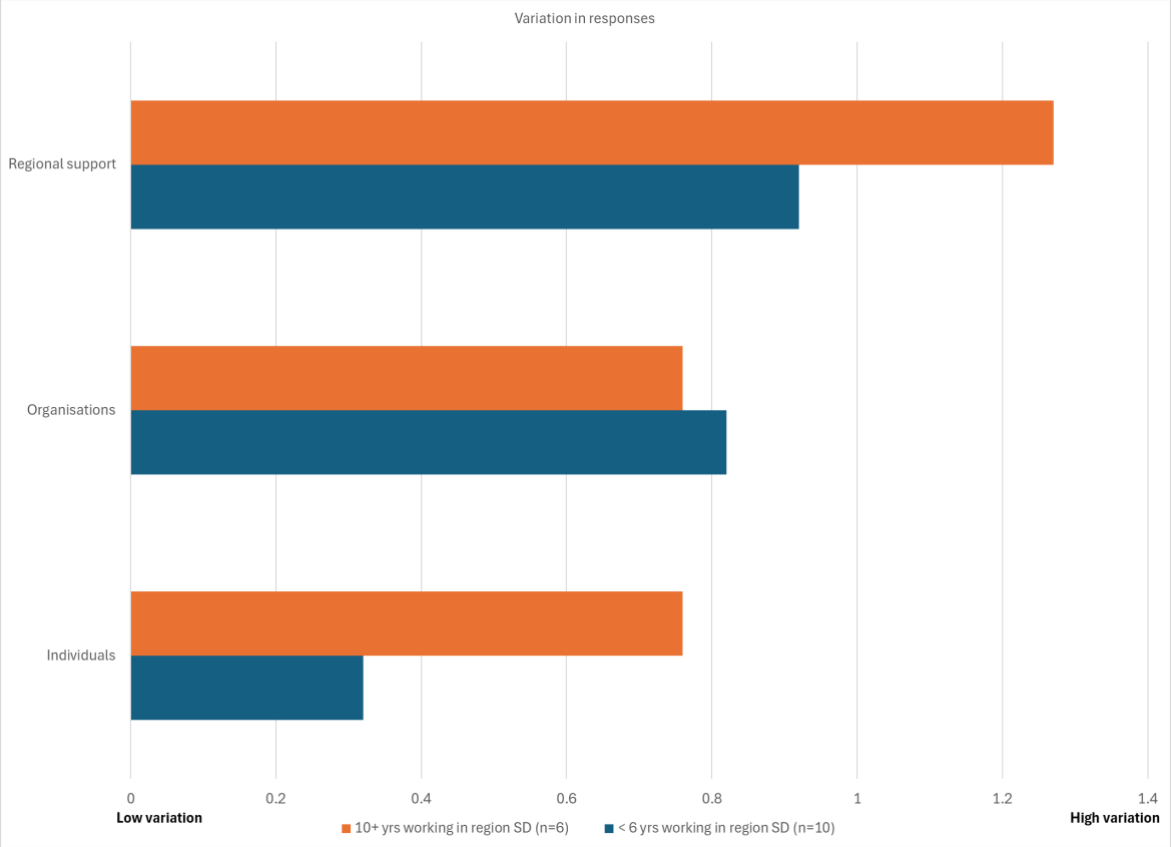
> *To what extent do you feel that individuals, organisations and businesses, and your community are prepared to make the most of digital technology in work and everyday life? How effective is the regional support network - including service providers, industry bodies, education and training organisations, and government - in helping individuals and businesses build digital capability? (Scale 1 = Not at all prepared – 5 = Very well prepared)*




Overall, respondents rated the preparedness of individuals, firms, and the effectiveness of regional digital support at similar levels, with mean scores ranging from 3.06 to 3.11. At an aggregate level, this suggests that respondents do not see a strong imbalance between individual capability, organisational readiness, and the support available to build digital capability.

However, while average ratings were similar, there was greater variation in views about the effectiveness of the regional support system than for individuals or firms (standard deviation of approximately 1.1 for support, compared with around 0.7 for individuals and 0.9 for firms). This variation was more pronounced when looking at time spent working in the

region, particularly between those who have worked locally for ten years or more and those with less than six years' experience.




Respondents with longer tenure tended to rate the system more positively overall, while those newer to the region were more likely to express uncertainty or lower confidence in system effectiveness. In contrast, perceptions of individual and firm readiness were more stable across tenure groups.

Strengths at the individual level were commonly framed around everyday competence. Respondents noted that "*individuals are competent in their day-to-day digital technology*" and that "*uptake of tech is already occurring, next generation of workforce already adopts it in everyday life.*" At the same time, several respondents highlighted limits to this capability, observing that individuals may have "*limited knowledge about what is globally available*" and that "*there are pockets of skilled individuals however there is also an inherent amount of apathy to technology.*"

At the organisational level, respondents described selective and uneven adoption. Some saw positive examples of support and engagement, such as "*I see first-hand how TAFE is supporting industry.*" Others highlighted hesitation or constrained investment, noting that "*organisations and businesses do not see the benefit or value in investing in digital capability unless there is a clear and immediate return.*" This mix aligns with firm ratings sitting close to individual ratings, but with some variability depending on sector and context.

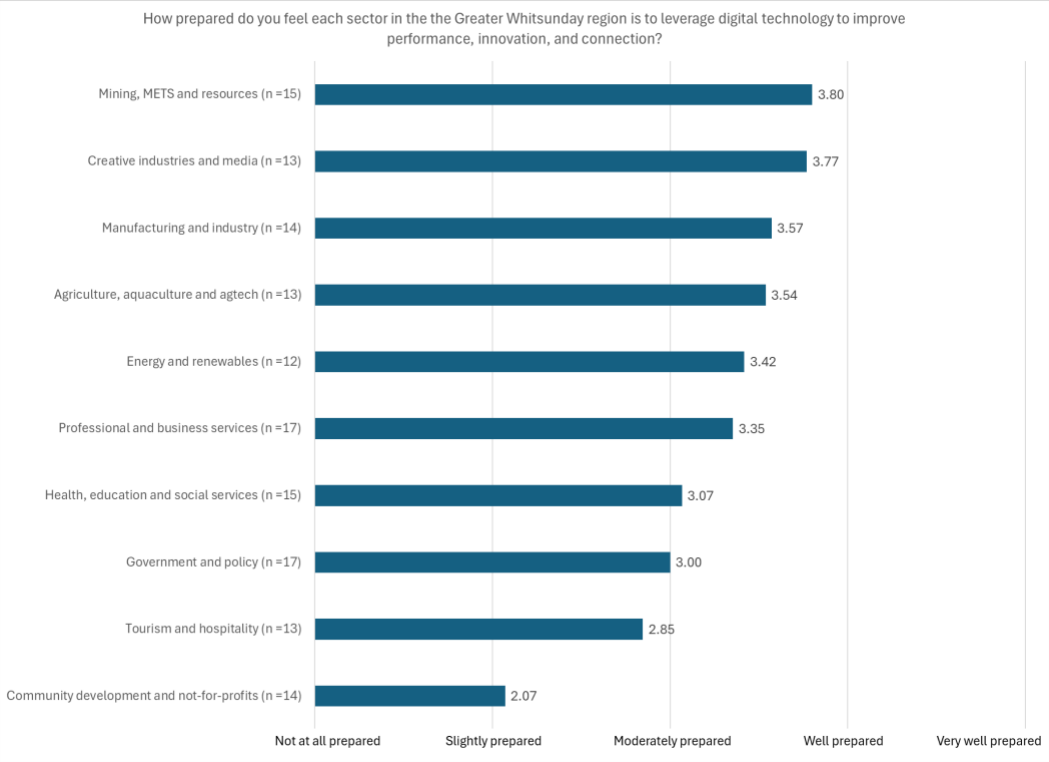
Views of the regional support system were the most mixed, reflecting the higher variation in quantitative ratings. Some respondents emphasised that support does exist, stating "*I know personally that there is a lot of support available.*" Others pointed to inconsistency and access challenges, describing "*pockets of support*" and noting that "*resources and skills are deficient, availability is limited.*" Infrastructure and workforce issues were also raised, with comments such as "*internet reliability and speed is holding this region back*" and "lack of TAE's in the region, RTO certified courses are difficult to access."

The responses suggest that digital capability in the region is experienced as uneven rather than absent. While individuals and organisations demonstrate capability in many contexts, experiences of the regional support system differ, particularly by time working in the region.

## Sector preparedness

Different sectors across the Greater Whitsunday region are at various stages in using and benefiting from digital technology.

*Thinking about what you've seen or experienced, how prepared do you feel each sector in the Greater Whitsunday region is to leverage digital technology to improve performance, innovation, and connection?*




### *Preparedness of sectors to make the most of digital technology*

Respondents' views on digital preparedness vary meaningfully by sector. Average ratings range from 2.07 to 3.80, indicating that while some sectors are perceived as relatively well prepared, others are seen as lagging. Variation is also uneven across sectors, with standard

deviations ranging from 0.50 to 1.08, suggesting that experiences within sectors differ considerably.

Sectors most commonly rated as more prepared include Mining, METS and resources (3.80), Creative industries and media (3.77), Manufacturing and industry (3.57), and Agriculture, aquaculture and agtech (3.54). In contrast, Community development and not-for-profits (2.07) and Tourism and hospitality (2.85) were rated lowest on average, with Health, education and social services (3.07) and Government and policy (3.00) sitting closer to the midpoint.

### *Sectors perceived as more prepared*

Higher-rated sectors were often described as operating in environments where digital tools are already embedded in day-to-day operations or where commercial pressure drives adoption. Qualitative comments reflect this, with respondents noting that “uptake of tech is already occurring” and that in some industries “next generation of workforce already adopts it in everyday life.”

In sectors such as mining, advanced manufacturing, and agtech, respondents frequently implied that digital capability is necessary to operate effectively, aligning with stronger average ratings and relatively lower variation (e.g. Agriculture st dev 0.50). However, even in these sectors, preparedness was not seen as universal, with several respondents emphasising that “there are pockets of skilled individuals” rather than consistent capability across all organisations or locations.

The creative industries and media sector shows both a high average score (3.77) and a relatively high standard deviation (1.05), suggesting strong capability in some parts of the sector alongside weaker readiness elsewhere.

### *Sectors with mixed or moderate preparedness*

Sectors such as Energy and renewables (3.42), Professional and business services (3.35), Manufacturing and industry (3.57), and Health, education and social services (3.07) sit in the middle range. Qualitative commentary suggests that while digital tools are present, uptake is uneven and often constrained by workforce capacity, infrastructure, or competing priorities.

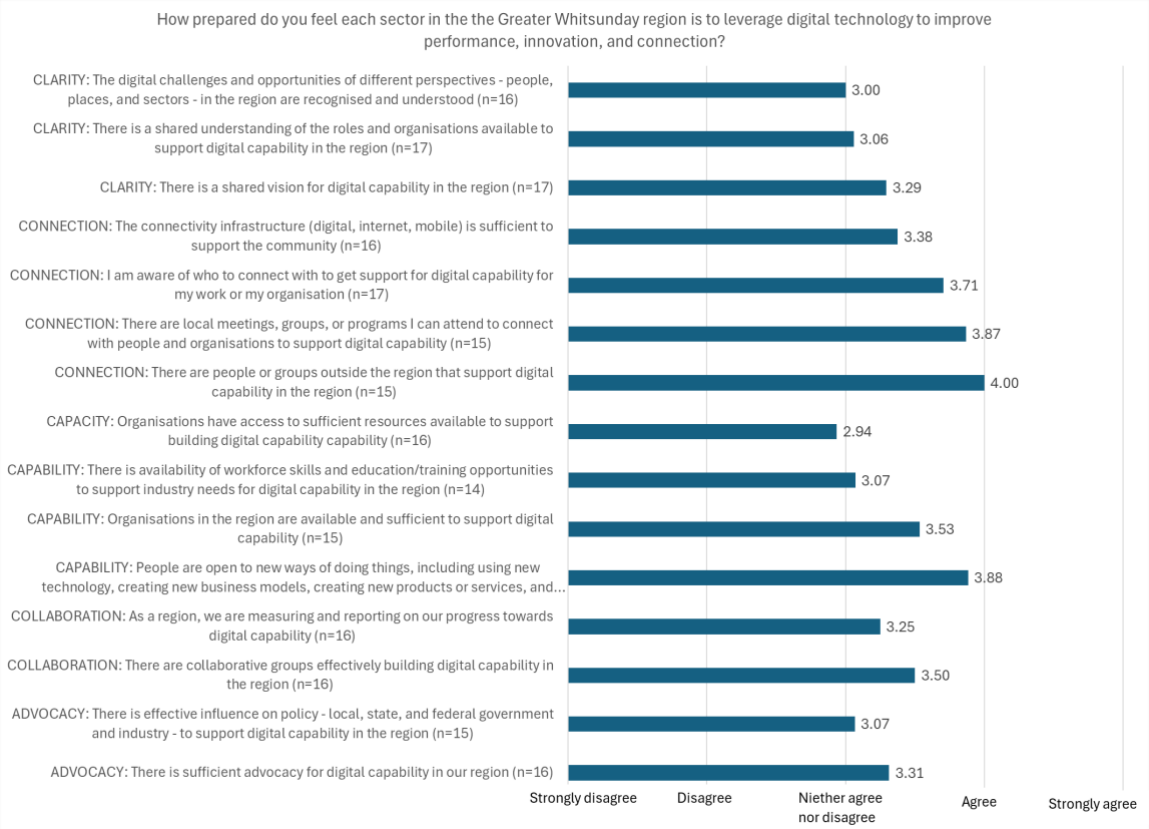
Respondents noted, for example, that “technology is changing faster than ever and it is becoming increasingly difficult to keep up”, and that access to relevant training and support remains inconsistent, particularly outside major centres. These comments align with moderate averages combined with standard deviations between 0.77 and 0.90, indicating varied experiences across organisations within the same sector.

### *Sectors perceived as less prepared*

Community development and not-for-profits stand out as the lowest-rated sector (average 2.07, st dev 0.59), suggesting relatively consistent perceptions of lower preparedness. Qualitative reflections help contextualise this, with respondents pointing to structural constraints such as “resources and skills are deficient, availability is limited” and “sustainability is challenging.”

Similarly, Tourism and hospitality (2.85) shows both a lower average and high variation (st dev 0.95), indicating that while some operators are digitally capable, many struggle to adopt or sustain digital practices. Respondents noted a broader challenge that “organisations and businesses do not see the benefit or value in investing in digital capability unless there is a clear and immediate return,” a dynamic particularly relevant to small, seasonal, or low-margin sectors.

## Digital Capability Readiness




To understand how well the region is positioned to build digital capability, responses were analysed across five readiness conditions: Clarity, Connection, Capability, Capacity, and Advocacy & Collaboration. Together, these conditions provide a way of looking beyond individual programs or initiatives to assess how the broader system supports digital readiness. Rather than asking whether activity exists, this lens highlights how well efforts are aligned, resourced, connected, and sustained.

### *Connection: a clear strength in the system*

Connection is the strongest of the five readiness conditions. Respondents rated highly the presence of people and groups both inside and outside the region who support digital capability (4.00), as well as opportunities to connect through local meetings, groups, and programs (3.87). Awareness of who to connect with was also relatively strong (3.71).

Qualitative comments reinforce this sense that networks and relationships exist. Several respondents noted that support is available if you know where to look, with one stating, "*I know personally that there is a lot of support available.*" Others pointed to specific actors contributing to connection, for example, "*I see first hand how TAFE is supporting industry.*"

At the same time, connectivity infrastructure was rated lower than other connection indicators (3.38), reflecting a recurring concern that "*internet reliability and speed is holding this region back.*" This suggests that while social and organisational connections are relatively strong, physical infrastructure can still limit how effectively those connections translate into action.

### *Capability: openness exists, skills are uneven*

Results for capability show a clear distinction between attitude and execution. Respondents strongly agreed that people in the region are open to new ways of doing things (3.88), including adopting new technology and business models. This openness is reflected in comments such as "*uptake of tech is already occurring, next generation of workforce already adopts it in everyday life.*"

However, perceptions of workforce skills and training availability were notably lower (3.07). Qualitative responses point to gaps between willingness and practical capability, with comments including "*some lack of understanding of current digital eco-system*" and "*individuals are competent in their day to day digital technology but have limited knowledge about what is globally available.*"

### *Capacity: the most constrained condition*

Capacity indicators were among the lowest rated overall. Access to sufficient resources to support digital capability received the lowest score across the system measures (2.94). Availability of organisations to support digital capability was rated higher (3.53), but qualitative responses indicate that these organisations are often stretched.

Respondents pointed directly to resourcing and workforce constraints, noting that "*resources and skills are deficient, availability is limited*" and "*lack of TAE's in the region, RTO certified courses are difficult to access.*" One respondent summarised the challenge succinctly: "*sustainability is challenging.*"

### *Advocacy and collaboration: present, but uneven*

Advocacy and collaboration indicators sit in the mid-range. Respondents reported moderate confidence that there is sufficient advocacy for digital capability (3.31) and moderate

influence on policy and decision-making (3.07). Collaboration among groups working on digital capability was rated slightly higher (3.50), while measuring and reporting progress received a mid-range score (3.25).

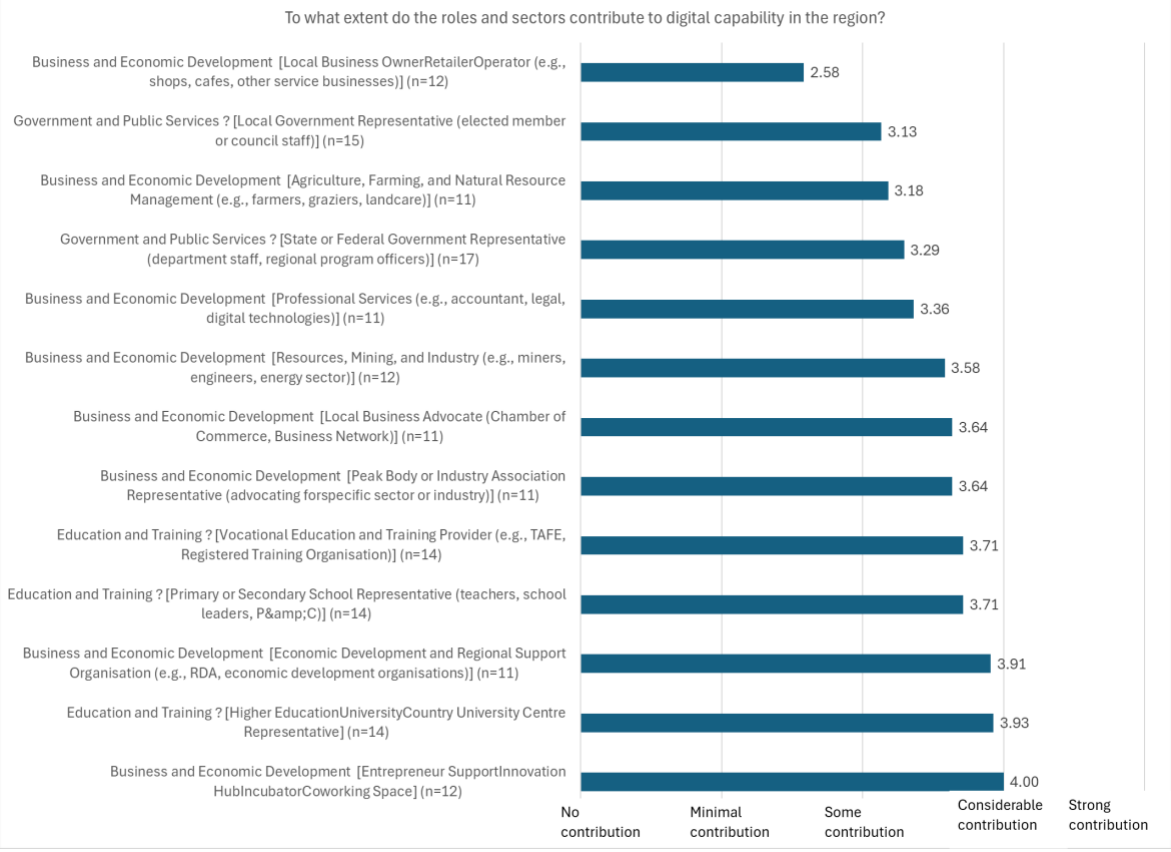
Qualitative comments indicate that collaboration is occurring, but often in pockets rather than as a coordinated system, echoing earlier reflections that "*there are pockets of support.*" While respondents can identify examples of collaborative activity, fewer comments suggest strong alignment or shared measurement across initiatives.

### *Clarity: the weakest readiness condition*

Clarity is consistently the lowest-rated readiness condition. Shared understanding of roles and organisations (3.06), recognition of different perspectives and needs (3.00), and a shared vision for digital capability (3.29) all sit below other system indicators.

Qualitative responses reflect this lack of clarity. Several comments imply uncertainty about how the system fits together, with respondents describing variation in understanding and engagement rather than a common direction. As one noted, "technology is changing faster than ever and it is becoming increasingly difficult to keep up and make the most of the efficiencies."

## Roles contributing to Digital Capability




Respondents were asked to assess the extent to which different roles and sectors contribute

to building digital capability in the region. Overall, responses suggest that no single group is seen as solely responsible, with most roles rated between 3.1 and 4.0, indicating moderate to strong perceived contribution across the system.

The highest-rated contributors are those most directly involved in entrepreneurship, innovation, and education pathways. Business and economic development roles linked to entrepreneur support, innovation hubs, incubators, and coworking spaces received the highest average rating (4.00), followed closely by higher education and university-related roles (3.93) and economic development and regional support organisations such as RDAs (3.91). These results suggest that respondents see organisations operating at the intersection of skills, innovation, and regional development as central contributors to digital capability.

Education and training roles are also viewed as important contributors, particularly primary and secondary schools and vocational education and training providers, both rated at 3.71. This indicates a shared perception that digital capability development spans the pipeline from early education through to workforce preparation, rather than being confined to post-school training alone.

### *Business-facing and sector-based contributors*

A cluster of business-oriented roles sit in the mid-to-upper range. Peak bodies and industry associations (3.64), local business advocates such as chambers of commerce (3.64), and resources, mining, and industry actors (3.58) are all seen as making a meaningful contribution. Professional services, including accounting, legal, and digital technology services, are rated slightly lower (3.36), but still above the midpoint, suggesting these roles are recognised as contributors, albeit not always in a visible or coordinated way.

Agriculture, farming, and natural resource management roles are rated at 3.18, indicating a moderate contribution. This may reflect the diversity within the sector, where digital capability varies significantly by operation type, scale, and access to support.

### *Government and local business roles*

Government roles are perceived as contributing at a moderate level. State and federal government representatives are rated at 3.29, while local government representatives are slightly lower at 3.13. These results suggest respondents recognise a role for government in supporting digital capability, but may see that contribution as indirect or uneven.

The lowest-rated group is local business owners and operators (e.g. retailers, cafes, service businesses), with an average rating of 2.58. This indicates respondents see this group as contributing less to regional digital capability overall, potentially reflecting capacity constraints rather than lack of importance, given the operational focus and limited resources of many small businesses.

## Achieving excellence

### *What excellence in digital capability would look like in the Greater Whitsundays*

Across responses, excellence in digital capability is consistently described as a combination of reliable infrastructure, confident use of digital tools, and visible, practical application across sectors.

A foundational expectation is reliable, fast, and affordable connectivity. Respondents were explicit that "reliability and speed = critical" and that excellence would include "multiple internet service providers providing excellent coverage at reasonable rates" as well as "secure connectivity that doesn't cost more than business insurance every month." This positions digital infrastructure not as an aspirational feature, but as a basic operating requirement for households and businesses.

Beyond infrastructure, excellence is associated with practical competence and confidence, particularly in emerging technologies. Respondents pointed to "people are competent at using AI tools" and "access to updated tools and tutorials" as markers of a digitally capable region. This competence is expected to translate into everyday practice, with "evidence of businesses using digital technology in everyday service delivery improving services for the community" and "business using digital technology to improve their profitability and service to customers."

Several responses emphasised equity and consistency across the region, describing excellence as "digital equity capability across the regions" and "same or similar services delivered locally to regional communities via shared services." This includes recognition of "First Nations data sovereignty and representation on digital expansion and innovation projects."

Finally, excellence is framed as a shared responsibility, with respondents envisioning "large business and corporations, government and economic development bodies sharing responsibility through a digital capability plan where everyone plays a role," including "big business supporting their network of suppliers to remain competitive."

### *What would need to be done to achieve excellence*

Responses to the second question focus less on vision and more on specific actions and system changes required to reach that level of excellence.

A strong theme is the need for tailored and accessible capability building, rather than one-size-fits-all training. Respondents called for "bespoke training linked to individual requirements," "a new level of ownership over an individual's digital readiness journey," and "mechanisms in place to measure the capability gaps in the existing workforce so that tailored uplift programs can be designed for each sector/cohort." One response noted that "running training programs tends to attract the usual type of business… but does not adequately reach the majority of business and organisations who are busy just keeping their head above water."

There is also a strong emphasis on bringing support to where people are, rather than expecting them to navigate complex systems. Suggestions included “digital hubs where access to support, education, resources and information are vital but need to be visible and well promoted,” as well as “digital capability officers that can visit business and organisations in their space at a time that suits them.” Proposals such as “audits of business capacity” and an “online learning hub” reflect a desire for clearer entry points and more practical engagement.

Infrastructure and advocacy remain central to what needs to change. Respondents pointed to “infrastructure, investment and formal regulations of ‘digital metre charge rates’,” alongside “advocacy in telecommunications networks and services” and “bridging the digital gap between served and underserved communities.”

Finally, respondents highlighted the importance of coordination, collaboration, and shared storytelling. Actions identified include “collaboration between local, state and federal government to move forward collaboratively,” “continued support services and awareness of digital technology in our region,” and “case studies to showcase success stories.” Several responses stressed the need for “all regional stakeholders working together to promote events” and “stakeholders understanding what each other’s priority areas are.”

### *Overall synthesis*

Taken together, the responses suggest that excellence in digital capability in the Greater Whitsundays is not seen as a single initiative or program, but as a coherent system. Excellence is defined by reliable and affordable infrastructure, confident and practical use of digital tools, and equitable access across communities. Achieving it requires tailored support, visible and localised delivery, stronger coordination, and shared ownership across government, industry, education, and the community.

# 5. SWOT

This SWOT analysis draws on three integrated evidence sources: the digital capability ecosystem mapping, the regional Digital Readiness Assessment, and the SME Digital Capability survey. The analysis focuses not on individual programs, but on the strengths, gaps, and leverage points of the regional system as it supports SME digital adoption and progression.

| **Strengths** | **Weaknesses** |
|---|---|
| • Established regional backbone and coordination<br>• Broad and functioning ecosystem base<br>• Strong education and skills infrastructure<br>• High openness and emerging technology uptake<br>• Demonstrated delivery capability | • Low system clarity and wayfinding<br>• Capacity constraints, not capability gaps<br>• Time and cognitive load as dominant SME barriers<br>• Uneven specialist capability<br>• Geographic concentration of services |
| **Opportunities** | **Threats** |
| • Large, clearly defined ‘middle adopter’ cohort | • Pace of technological change |

- Shift from programs to pathways
- Industry-led and cross-sector innovation
- Trusted intermediaries as delivery channels
- Alignment with external funding and policy
- Technology reducing distance constraints

- Fragmentation and duplication
- Reliance on key individuals and organisations
- Workforce shortages
- Equity and inclusion risks
- Regionality

## Strengths

**Established regional backbone and coordination**

- The presence of **GW3 as a recognised backbone organisation** provides a clear anchor for regional coordination, policy alignment, and funding leverage. This is reinforced by strong convening roles played by the Digital Leaders Group, Regional Jobs Committee, RCOE, and GWI.
- The existence of a **Digital Roadmap** gives the region strategic clarity and legitimacy when engaging state and federal partners.
- Multiple active programs demonstrate capacity to secure federal and state investment for regional initiatives.

**Broad and functioning ecosystem base**

- The ecosystem includes **135+ mapped actors** spanning infrastructure, service providers, education, government, industry associations, and innovation, indicating that capability is present rather than absent.
- Strong representation across **key economic sectors** (mining/METS, agriculture, tourism, manufacturing), providing a diversified base for digital adoption.

**Strong education and skills infrastructure**

- Multiple tertiary and vocational providers (CQUniversity, TAFE Queensland, UniSQ) offer a solid foundation for workforce development, supported by recent investments such as the **AgTech Skills Hub** and **Future Skills Partnership**.
- Growing micro-credentialing and applied skills models align well with SME needs.

**High openness and emerging technology uptake**

- Readiness Index results show high **openness to new ways of working**, even where skills are uneven.
- SME survey results indicate **unexpectedly high AI usage (68.5%)**, suggesting readiness for more advanced capability uplift rather than basic awareness campaigns.

**Demonstrated delivery capability**

- The region has a track record of **successfully delivering complex, multi-partner initiatives** (e.g. $3.5M Digital Connectivity Project).
- Evidence of **commercially successful regional tech companies** (e.g. Vayeron, Smart Water System) provides credibility and proof points.

## Weaknesses

**Low system clarity and wayfinding**

- Clarity is the **lowest-rated readiness condition**, with limited shared understanding of who does what, how programs fit together, and where SMEs should start.
- SMEs report **difficulty navigating support**, despite the volume of programs and providers.
- Multiple programs and stakeholders create navigation challenges for SMEs seeking support.
- Some indication of local providers not having capacity or need to actively promote capabilities; and related "capability invisibility" where digital skills exist but aren't showcased regionally.

**Capacity constraints, not capability gaps**

- While organisations exist, **capacity to deliver at scale is constrained** by workforce shortages, funding cycles, and course viability issues in regional contexts.
- Education and training providers face challenges sustaining offerings due to **small cohort sizes** and limited specialist staff (e.g. TAE, cybersecurity).

**Time and cognitive load as dominant SME barriers**

- Nearly **70% of SMEs cite lack of time** as the primary barrier, outweighing connectivity, skills, or motivation.
- This suggests existing support models often **ask too much of SMEs** in terms of discovery, decision-making, and integration.

**Uneven specialist capability**

- Notable gaps in **locally based advanced services**, particularly cybersecurity, advanced analytics, and AI/ML implementation.
- Heavy reliance on external or metropolitan providers reduces responsiveness and trust for some SMEs.

**Geographic concentration of services**

- Most services and coordination functions are **concentrated in Mackay**, creating access challenges for Isaac and Whitsunday businesses.
- While geography does not predict digital maturity, it does affect **ease of access to support**.
- Small regional population limits course viability and commercial sustainability for some services.

## Opportunities

**Large, clearly defined ‘middle adopter’ cohort**

- Over **54% of SMEs fall into the middle adopter category**, representing the highest-leverage segment for regional uplift.
- These businesses already use core tools and AI but lack structured pathways to embed and scale digital practices.

**Shift from programs to pathways**

- Strong opportunity to move from fragmented initiatives to **tiered, segmented pathways** aligned to digital maturity, industry context, and time constraints.
- The evidence strongly supports differentiated approaches for foundation, middle, and advanced adopters.

**Industry-led and cross-sector innovation**

- Digital capability varies more by **industry than geography**, enabling targeted sector pathways (e.g. tourism automation, METS IoT, agtech foundations).
- Cross-sector convergence (ag–mining–energy–tourism) presents opportunities for **shared platforms, skills, and solutions**.

**Trusted intermediaries as delivery channels**

- Industry associations and chambers are well positioned as **trusted conduits** to SMEs, particularly for middle adopters who do not actively seek digital programs.
- Leveraging these channels reduces friction and improves relevance.

**Alignment with external funding and policy**

- Strong alignment with **state and federal digital economy priorities** creates opportunity to attract further investment.
- Emerging technologies (AI, biofutures, geospatial) create new demand for skills and services the region can shape early.

**Technology reducing distance constraints**

- Continued improvement in **LEO satellite and fixed wireless services** reduces the impact of remoteness, enabling hub-and-spoke delivery models.

## Threats

**Pace of technological change**

- The speed of AI and automation adoption risks **outpacing the region's ability to build safe, effective capability**, particularly for SMEs with limited internal capacity.
- Without intervention, this could widen gaps between digital leaders and the rest of the business base.

**Fragmentation and duplication**

- Multiple uncoordinated programs risk **duplication, fatigue, and confusion**, reinforcing the very navigation problem SMEs report.
- Short-term funding cycles threaten continuity and institutional memory.

**Reliance on key individuals and organisations**

- Heavy dependence on a small number of backbone and convening organisations creates **single-point-of-failure risk** if funding or leadership changes.

**Workforce shortages**

- Ongoing shortages in trainers, digital specialists, and educators constrain delivery and sustainability of capability uplift.
- Competition with metropolitan markets for talent remains a structural challenge.

**Equity and inclusion risks**

- Without targeted intervention, First Nations communities, sole traders, and smaller operators risk being **left behind**, particularly as digital capability expectations rise.
- Failure to address inclusion may undermine social licence and long-term resilience.

**Regionality**

- Systemic impacts from geographic distance and low population density inherent to regional and remote communities (infrastructure, demographic shifts, housing, access to services, 'regional tax')

# 6. RECOMMENDATIONS

The following recommendations are intentionally focused on **system stewardship, coordination, and enablement**, rather than program delivery. They build on the Greater Whitsunday Digital Roadmap by strengthening the *conditions* under which roadmap initiatives can succeed, ensuring that activity is connected, visible, and navigable for businesses and stakeholders at all stages of digital capability.

## Recommendation 1: Reinforce the Collaborative Structure of the "Space Between"

Strengthen and formalise the collaborative architecture that sits between policy, programs, and practice by creating a regional backbone  as a shared governance and alignment mechanism, while securing sustainable investment in **operational coordination capacity**.

This includes clarifying roles and confirming accountability across convening, coordination, delivery, and advocacy functions, and resourcing the day-to-day work required to connect actors, reduce duplication, and translate strategy into action. To also acknowledge existing work in this area, assess effectiveness, and to balance central coordination with a need to create space for multiple support actors.

| Evidence base | SWOT linkage |
|---|---|
| • **Ecosystem Mapping:** Identifies a broad but fragmented set of actors, with coordination concentrated in a small number of organisations.<br>• **Readiness Assessment:** Shows strong connection and collaboration potential, but low clarity regarding roles, pathways, and system navigation.<br>• **SME Survey:** Indicates that businesses experience the system as difficult to navigate, despite the presence of multiple initiatives. | • **Builds on strengths:** Existing backbone organisations, history of collaboration, proven delivery capability<br>• **Addresses weaknesses:** Fragmentation, low system clarity, reliance on informal coordination<br>• **Mitigates threats:** Single-point-of-failure risk, duplication, program fatigue<br>• **Leverages opportunities:** Middle-adopter readiness, alignment with external investment priorities |

**Relationship to the Digital Roadmap**

This recommendation **does not replicate roadmap actions**. Instead, it strengthens the **governance and coordination layer** that enables roadmap priorities to be delivered coherently, sustained over time, and adapted as conditions change.

## Recommendation 2: Continue Mapping, Evaluation, and System-Level Learning

Establish an ongoing, visible practice of **ecosystem mapping, evaluation, and sense-making** to connect policy intent to on-the-ground activity, track outcomes over time, and support clear wayfinding for businesses and stakeholders.

This includes:

- Maintaining the digital capability ecosystem map as a living asset
- Regularly evaluating outcomes across programs and initiatives
- Benchmarking progress and gaps
- Using a consistent framework (e.g. Readiness: clarity, connection, capability & capacity, collaboration, advocacy & promotion) to describe system performance across stages of digital capability, from basic to advanced

| Evidence base | SWOT linkage |
|---|---|
| • **Ecosystem Mapping:** Demonstrates the value of making actors and relationships visible, while also revealing fragmentation.<br>• **Readiness Assessment:** Provides a repeatable, structured way to assess system conditions beyond individual program metrics.<br>• **SME Survey:** Highlights the need for clearer pathways and signposting as businesses progress in capability. | • **Builds on strengths:** Existing analytical capability, strong data foundations, appetite for evidence-based decision-making<br>• **Addresses weaknesses:** Capability invisibility, lack of shared understanding of what exists and what works<br>• **Mitigates threats:** Loss of institutional knowledge, short-term funding cycles<br>• **Leverages opportunities:** Continuous improvement, targeted investment, clearer advocacy narratives |

**Relationship to the Digital Roadmap**

The Roadmap sets what the region aims to achieve. The recommendation focuses on *how progress is understood, connected, and communicated* over time. It complements the Roadmaps by providing a **monitoring, learning, and navigation layer,** not a new strategy.

## Recommendation 3: Leverage Existing Infrastructure and Trusted Intermediaries

Systematically leverage existing peak bodies, chambers of commerce, hubs, and member-based organisations as **primary channels** for digital capability visibility, peer learning, and engagement - particularly for middle-adopter SMEs.

Practical examples include:

- **Digital Capability Champion Award** through chambers or industry bodies

- Showcasing **sector-specific case studies** that demonstrate applied digital outcomes
- Embedding digital capability narratives into existing events, communications, and networks rather than creating new standalone programs

| Evidence base | SWOT linkage |
|---|---|
| • **Ecosystem Mapping:** Shows strong presence of trusted intermediary organisations with established SME relationships.<br>• **Readiness Assessment:** Indicates that connection exists but is under-utilised for coordinated digital uplift.<br>• **SME Survey:** Suggests businesses respond better to relatable, peer-based examples than abstract training offers. | • **Builds on strengths:** Strong industry bodies, chambers, and regional hubs<br>• **Addresses weaknesses:** Low visibility of local capability, limited peer learning mechanisms<br>• **Mitigates threats:** Engagement fatigue, over-reliance on new programs<br>• **Leverages opportunities:** Industry-specific pathways, social proof, scalable engagement |

**Relationship to the Digital Roadmap**

This recommendation **activates delivery pathways already implied in the Roadmap** but does not introduce new initiatives. It focuses on *how existing structures are used* to amplify roadmap objectives, rather than redefining priorities.

# Recommendation 4: Segment and Stage Support Around "Middle Adopters"

**Description**

Explicitly segment digital capability support around the **middle-adopter cohort**, and sequence interventions to help businesses move from informal or partial digital use to embedded, scalable practice.

This includes recognising that many SMEs are already using digital tools (including AI) but lack:

- integration across systems,
- confidence in governance and risk,
- clarity on "what's next" rather than "what's possible."

| Evidence base | SWOT linkage |
|---|---|
| • **SME Survey:** Over half of SMEs sit in the middle-adopter category, with high AI usage but inconsistent application and integration.<br>• **Readiness Assessment:** High openness and connection, but lower clarity and advocacy.<br>• **Ecosystem Mapping:** Strong availability of foundational support, weaker progression pathways. | • **Builds on strengths:** Existing adoption, openness to technology<br>• **Addresses weaknesses:** Lack of structured progression pathways<br>• **Mitigates threats:** Widening gap between digital leaders and laggards<br>• **Leverages opportunities:** Largest, highest-return uplift cohort |

**Relationship to the Digital Roadmap**

The Roadmap identifies priority domains and actions. This recommendation refines *who* support is primarily designed for and *how it is staged*, without redefining strategic priorities.

## Recommendation 5: Strengthen Advocacy, Investment Attraction and Collective Positioning

Establish a coordinated, system level approach to advocacy and collective positioning that actively elevates the Greater Whitsunday region as a credible destination for digital investment, talent, and policy focus, while reinforcing internal confidence, alignment, and momentum.

This recommendation moves beyond promotion to position digital capability and adoption as economic infrastructure, requiring deliberate and sustained advocacy to influence funding decisions, private sector investment, and policy settings at state and national levels.

This includes:

- Developing a clear regional digital value proposition that articulates why Greater Whitsunday is positioned to lead as Australia's most hyperconnected regional economy.
- Coordinating investment ready narratives and evidence that link digital capability outcomes to productivity, workforce participation, decarbonisation, and industry competitiveness.
- Aligning advocacy efforts across GW3, councils, education providers, industry bodies, and major employers to present a single, consistent voice to government and investors.
- Actively leveraging case studies, data, and demonstrated outcomes to support proactive engagement with funding agencies, infrastructure providers, and private capital, rather than relying on reactive grant cycles.
- Embedding digital capability outcomes into broader regional advocacy relating to infrastructure, workforce, liveability, and investment attraction.

| **Evidence base** | **SWOT linkage** |
|---|---|
| • **Readiness Assessment:** Advocacy and promotion is one of the least developed conditions.<br>• **Ecosystem Mapping:** Strong activity but limited system-level visibility beyond the region.<br>• **SME Survey:** Businesses value relatable examples but report limited awareness of local success. | • **Builds on strengths:** Proven projects and emerging success stories<br>• **Addresses weaknesses:** Low visibility of capability and outcomes<br>• **Mitigates threats:** Under-recognition in funding and policy decisions<br>• **Leverages opportunities:** External investment, talent attraction, regional positioning |

**Relationship to the Digital Roadmap**

This recommendation **supports the Roadmap's ambition** by strengthening the region's ability to advocate for itself. It does not add new actions; it improves how outcomes are communicated and leveraged.

## Recommendation 6: Formalise Cross-Sector Learning and Transfer

Create deliberate mechanisms for **cross-sector digital learning and transfer**, particularly between industries with higher digital maturity (e.g. METS, energy) and those earlier in adoption (e.g. tourism, smaller agribusiness).

This could include:

- cross-sector showcases,
- shared problem-solving forums,
- sector-agnostic digital capability themes (data, automation, cybersecurity).

| Evidence base | SWOT linkage |
|---|---|
| • **Ecosystem Mapping:** Digital capability clusters around certain sectors and firms.<br>• **Readiness Assessment:** Strong collaboration potential across the region.<br>• **SME Survey:** Businesses seek practical, peer-relevant examples. | • **Builds on strengths:** Sector depth and diversity<br>• **Addresses weaknesses:** Siloed capability development<br>• **Mitigates threats:** Uneven digital maturity across the economy<br>• **Leverages opportunities:** Faster diffusion of proven practices |

**Relationship to the Digital Roadmap**

The Roadmap addresses sector priorities individually. This recommendation works *between* those priorities, accelerating learning without altering sector strategies.

# Appendices

**Appendix A: SME Survey Detailed Analysis**
**Appendix B: Stakeholder Engagement Matrix**
**Appendix C: Complete Stakeholder Database**
**Appendix D: Policy Alignment Mapping**
**Appendix E: Glossary & References**

# Appendix A: SME Survey Detailed Analysis

This appendix provides the complete technical analysis supporting Section 3: SME Digital Capability. It includes survey methodology, respondent demographics, Digital Maturity Index, statistical analysis, and detailed findings.

## A.1 Survey Design and Methodology

The ***"Your Business & Digital Tools: What's Working, What's Needed?"*** survey ran during October-November 2025 and collected responses from 73 businesses across the Mackay, Isaac, and Whitsunday regions. The survey explored four key areas:

1. **Current tool usage:** 18 tool categories from foundation platforms (cloud storage, accounting software) through to emerging technologies (AI, IoT, geospatial systems)
2. **Digital confidence:** Self-assessed overall digital confidence and confidence in internet connectivity
3. **Adoption barriers:** Common obstacles including time constraints, cost, skills gaps, and staff resistance
4. **Training needs:** Selected training topics and open-ended feedback about support requirements

## A.2 Respondent Demographics

### Respondent Type

Just over half (53%) were employees responding about their own roles, while 47% were business owners or managers responding about their business overall. This mix provides perspectives from both strategic decision-makers and day-to-day technology users.

### Business Maturity

The sample skews toward established businesses:

- 82% have operated for eight or more years
- Only 10% represent newer businesses (0-4 years old)

This suggests findings primarily reflect the digital journey of mature regional enterprises rather than startups.

### Business Size Distribution

| Employee Count | Percentage | Notes |
|---|---|---|
| Sole trader | ~10% | |
| 2-4 employees (micro) | ~16% | Combined 26% |
| 5-19 employees | 34% | Largest group |
| 20-49 employees | ~11% | |
| 50+ employees | 29% | Large group |

### Industry Coverage

Five industries provided sufficient responses for meaningful statistical analysis:

| Industry | Sample Size |
|---|---|
| Health & Community Services | n=15 |
| Mining, METS, Manufacturing & Construction | n=15 |
| Tourism, Hospitality & Retail | n=12 |
| Education & Professional Services | n=7 |
| Agriculture & Aquaculture | n=4* |
| Other (diverse sectors) | n=20 |

**Small sample, interpret with caution*

### Regional Distribution

37% of respondents indicated their business operates across multiple council areas. Among single-region businesses: Mackay (n=25), Isaac (n=12), Whitsunday (n=3). The limited Whitsunday representation prevents reliable regional comparisons for that area.

## A.3 Digital Maturity Index Methodology

Simply counting which tools businesses use doesn't capture digital sophistication; a business using cloud storage and social media is in a very different position than one using AI analytics and IoT sensors. The Digital Maturity Index weights tool adoption according to complexity:

### Tool Weighting System

| Weight | Tool Category | Examples |
|---|---|---|
| 1.0x | **Foundation tools** | Cloud storage, accounting, social media, collaboration, POS |
| 1.5x | **Intermediate tools** | CRM, project management, e-commerce, email marketing, analytics |
| 2.0x | **Advanced tools** | AI tools, BI platforms, IoT, AR/VR, geospatial systems |

The index combines frequency of use (from "Never" to "Daily") with these weightings, producing a score from 0 to 100.

### Distribution Results

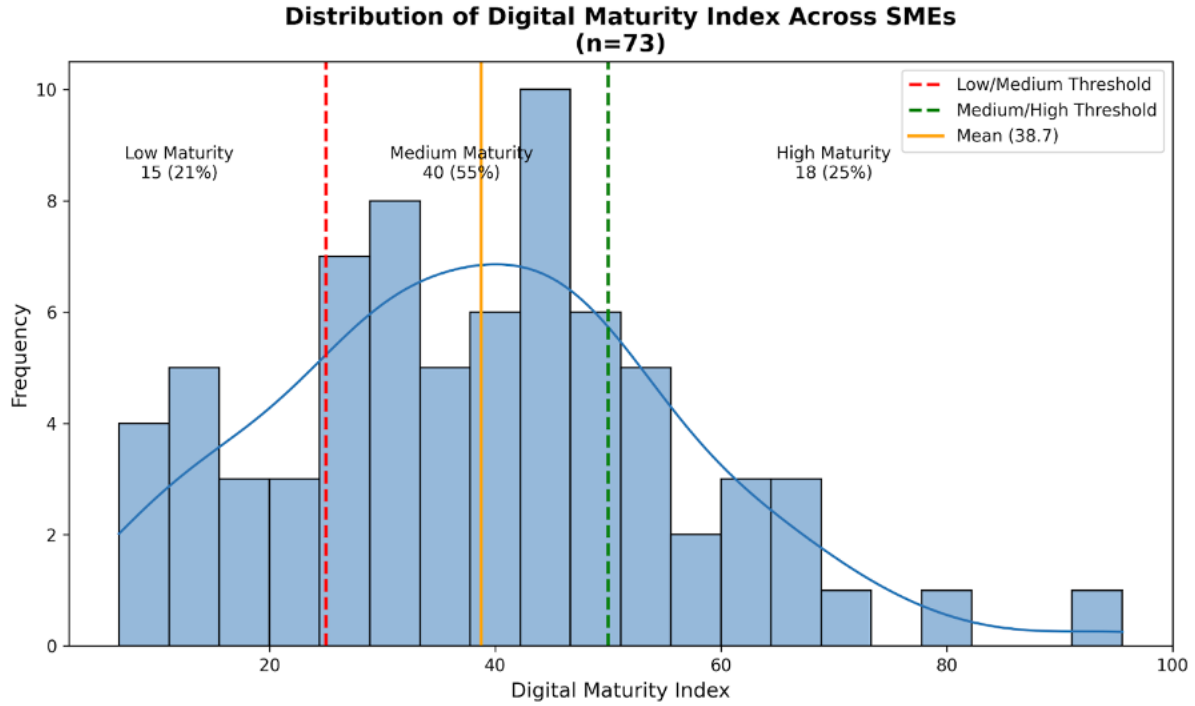



***Figure A1:*** *Distribution of Digital Maturity Index across surveyed SMEs (n=73). The histogram shows a roughly normal distribution with mean 38.7 (SD 17.7). Vertical dashed lines indicate maturity band thresholds: Low/Medium at 25 (red), Medium/High at 50 (green), with the mean shown in orange. The middle maturity band (25-50) contains 54.8% of respondents.*

- Regional mean: 38.7 (SD: 17.7)
- Score range: 6.7 to 95.6
- Lower maturity (<25): 21% (n=15)
- **Middle adopters (25-50): 54.8% (n=40)**
- Higher maturity (>50): 25% (n=18)

# A.4 Industry Digital Profiles

Statistical analysis (ANOVA) confirms that industry sector significantly influences digital capability (F=2.71, p=0.041), while geographic location does not show significant differences (p=0.43 for digital confidence, p=0.27 for connectivity confidence). Figure A2 presents radar charts showing the distinctive digital tool adoption profiles across five industries with sufficient sample sizes.

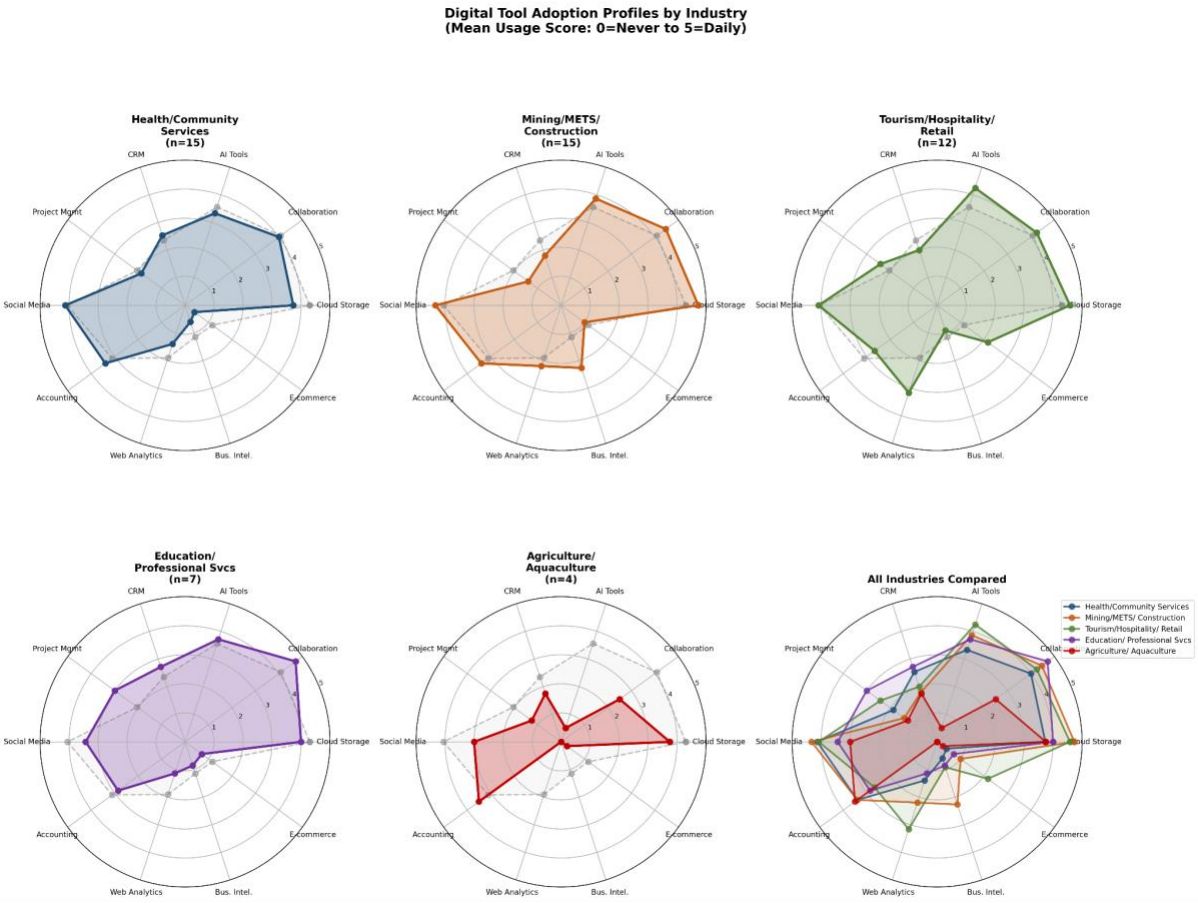



***Figure A2:*** *Digital tool adoption profiles by industry (mean usage score: 0=Never to 5=Daily). Each radar chart shows adoption across 12 tool categories. Tourism/Hospitality/Retail shows the most expansive profile with particularly high AI Tools and Social Media adoption. Agriculture/Aquaculture (n=4, interpret with caution) shows a notably contracted profile across nearly all categories. The bottom-right panel overlays all industries for direct comparison.*

# A.5 Statistical Analysis: Correlation Findings

Spearman correlation analysis across maturity scores, confidence levels, business characteristics, and perceived barriers reveals several insights. Figure A3 presents the complete correlation matrix.

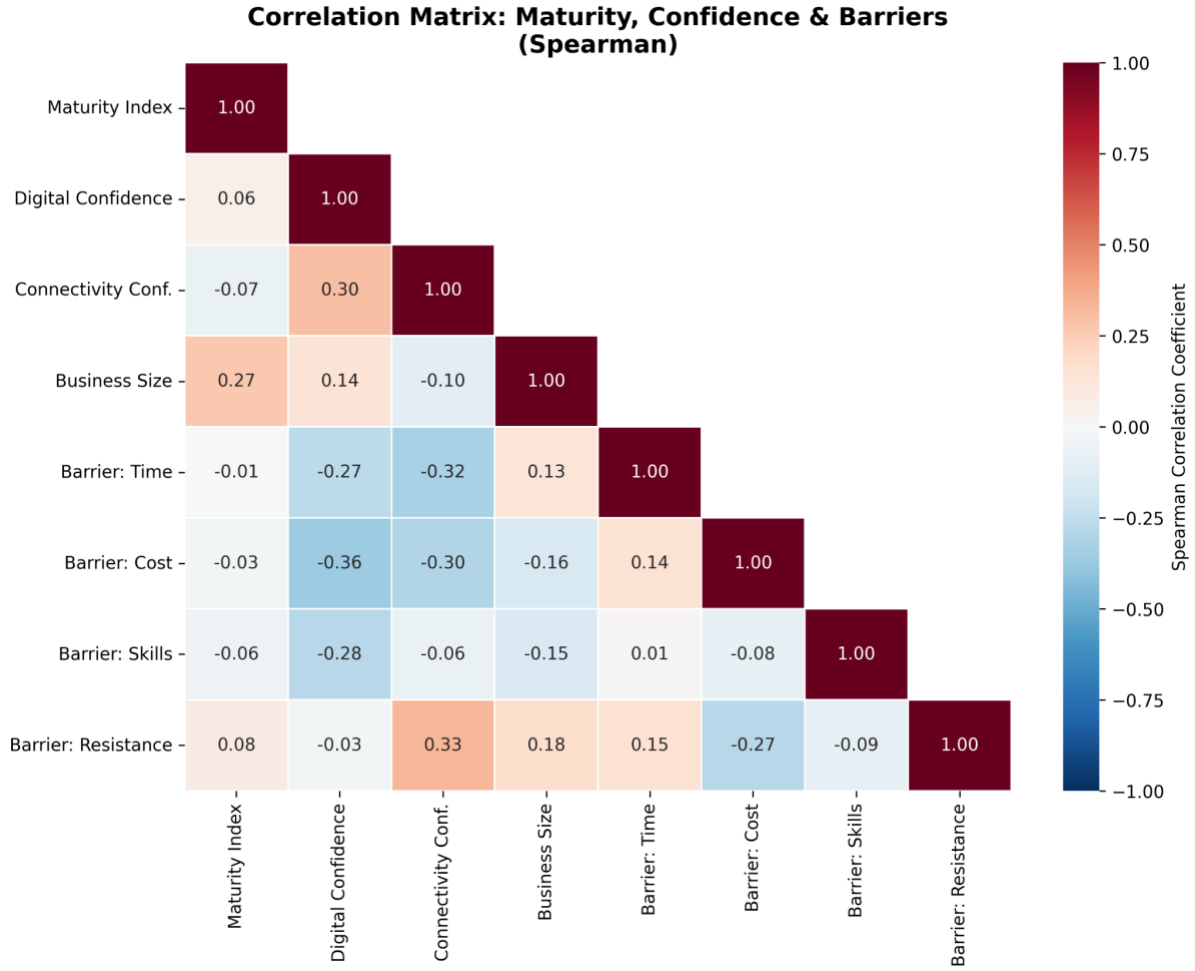



***Figure A3:*** *Spearman correlation matrix showing relationships between Digital Maturity Index, confidence measures, business size, and barrier perceptions.*

### Key Statistical Findings

**Insight 1 – Business size is the only significant predictor of digital maturity:** Correlation between business size and maturity index: r=+0.27, p=0.038. Larger businesses demonstrate measurably higher digital capability, likely reflecting greater resources for technology investment and dedicated IT personnel.

**Insight 2 – Digital confidence predicts barrier perception, not actual capability:** Self-reported digital confidence shows almost no correlation with measured digital maturity (r=+0.06, p=0.647). However, confidence strongly correlates with barrier perception: Cost barrier (r=-0.36, p=0.005), Skills barrier (r=-0.28, p=0.035), Time barrier (r=-0.27, p=0.039).

**Insight 3 – Connectivity confidence enables ambition but surfaces resistance:** Businesses confident in internet connectivity report lower time barriers (r=-0.32, p=0.013) and cost barriers (r=-0.30, p=0.021), but higher staff resistance (r=+0.33, p=0.011). When connectivity is reliable, businesses attempt more ambitious initiatives that surface change management challenges.

**Insight 4 – Barriers don't predict maturity levels:** Time (r=-0.01), cost (r=-0.03), skills (r=-0.06), and resistance (r=+0.08) barriers show essentially no correlation with actual maturity scores. High-maturity and low-maturity businesses report similar barrier profiles.

**Insight 5 – Cost and resistance represent distinct organisational profiles:** Businesses citing cost as a barrier are significantly less likely to cite staff resistance (r=-0.27, p=0.036), suggesting two distinct profiles requiring different interventions.

## A.6 Tool Adoption Breakdown

### Foundation Tools (Near-Universal)

- Cloud Storage: 84.9% using daily/weekly
- Social Media for Business: 78.1% active
- Collaboration Tools: 76.7% active
- Accounting & Finance Software: 61.6% active

### Intermediate Tools (Adoption Gap)

- Project Management Tools: 42.5% active
- CRM Systems: 35.6% active (0% among sole traders, 64% among 5-19 employee businesses)
- Point of Sale: 35.6% active
- Web Analytics: 31.5% active
- E-commerce: 23.3% active

### Advanced Tools (Emerging)

- Business Intelligence: 26% active
- Geospatial/Earth Observation: 20.5% active
- IoT Devices: 15.1% active
- AR/VR Tools: 5.5% active

### AI Tools: Detailed Breakdown

68.5% of businesses use AI tools daily or weekly which is higher than CRM, e-commerce, or many intermediate tools.

- Daily use: 52.1%
- Weekly use: 16.4%
- Monthly use: 5.5%
- Rarely/Never: 21.9%

**AI adoption by industry:**

- Tourism/Retail: 83% active
- Mining/METS: 73% active
- Education/Professional Services: 71% active
- Health/Community Services: 67% active
- Agriculture: 0% active*

## A.7 Barrier Analysis

**Overall Barrier Prevalence**

1. Lack of time to research, test, integrate: 69.9%
2. Cost of purchasing and integration: 63.0%
3. Lack of digital skills/confidence: 30.1%
4. Resistance from staff/coworkers: 26.0%
5. Poor internet connectivity: 11.0%
6. Not provided appropriate tools: 9.6%

**Barrier Patterns by Industry**

- Health/Community: 87% cite cost (highest)
- Tourism/Retail: 42% cite staff resistance (highest)

# A.8 Training Needs Analysis

### Top 10 Requested Training Topics

| Rank | Training Topic | % Requested |
|---|---|---|
| 1 | Microsoft 365 productivity & workflow | 42.5% |
| 2 | AI & automation (Copilot, ChatGPT, workflow automation) | 32.9% |
| 3 | Digital ethics & responsible AI | 26.0% |
| 4 | Cyber security & data privacy | 23.3% |
| 5 | Project & task management tools | 23.3% |
| 6 | Website design & optimisation | 23.3% |
| 7 | Customer Relationship Management (CRMs) | 19.2% |
| 8 | Sustainable data storage & management | 19.2% |
| 9 | Agentic AI (autonomous agents, workflow orchestration) | 16.4% |
| 10 | Digital marketing & social media advertising | 16.4% |

### Training Needs by Digital Confidence Level

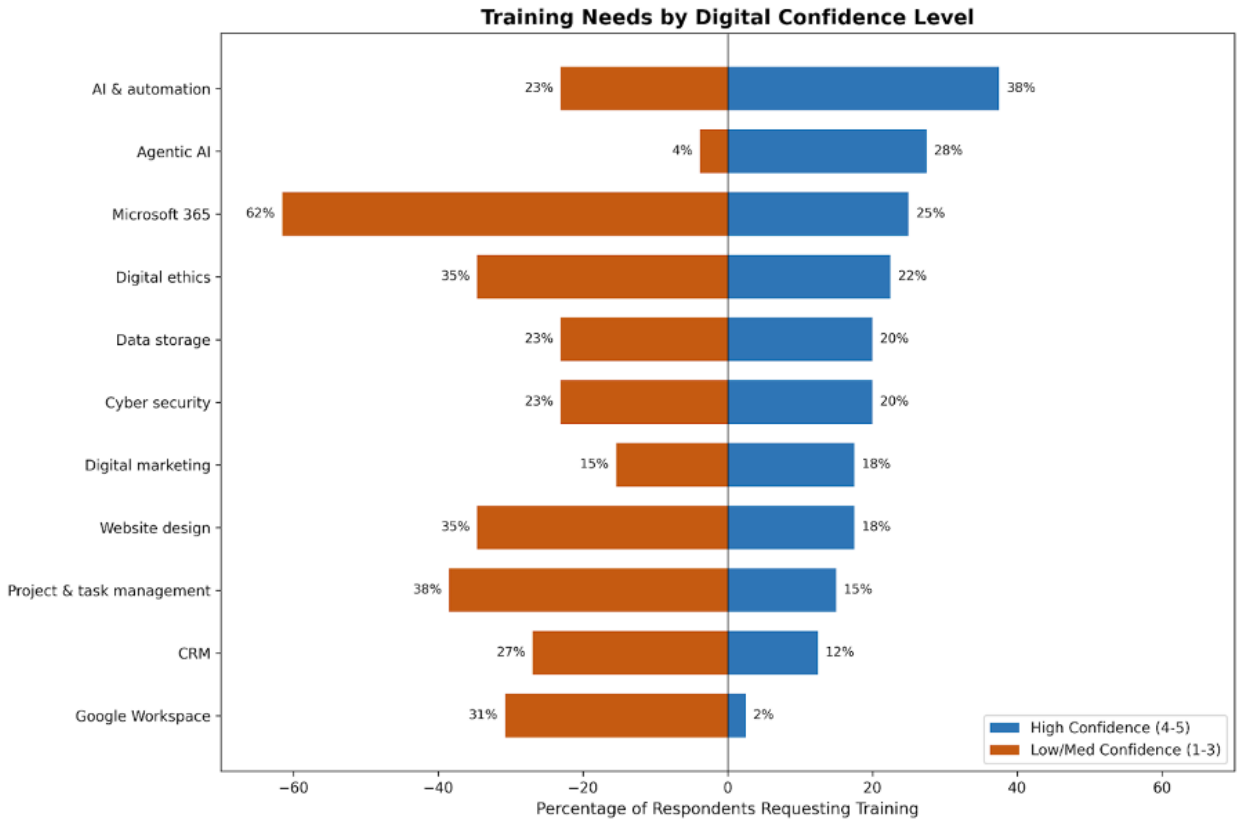



***Figure A4:*** *Training needs differ significantly by digital confidence level. The diverging bar chart shows percentage of respondents requesting each training topic, split by confidence level (Low/Medium confidence 1-3 shown left in orange; High confidence 4-5 shown right in blue).*

**Lower-confidence businesses (rating 1-3) prioritise:**

- Microsoft 365: 62% (vs 25% for high-confidence)
- Project management: 38%
- Website design: 35%
- Google Workspace: 31%

**Higher-confidence businesses (rating 4-5) prioritise:**

- AI & automation: 38% (vs 23% for lower-confidence)
- Agentic AI: 28% (vs 4% for lower-confidence)
- Cyber security: 20%
- System integration: 18%

## A.9 Selected Qualitative Responses

Open-ended responses (n=18 substantive comments) provided context for quantitative findings:

*On awareness gaps:*

> "You don't know what you don't know—what are other businesses in related industries using?"
>
> "Better understanding of what's available"
>
> "Just simply understanding how, who and what to fix issues as it is hard to know where to go or how to start"

*On sole trader challenges:*

> "As a sole trader I do not have colleagues to discuss digital options with so research and decision making is solely me and I worry a lot that I am making the best choice."
>
> "For me as a sole trader it is around the education piece... when you are flying solo you find it hard to step outside of the box"

*On practical constraints:*

> "Any training is good training, but the biggest hurdle for me is whether a course conflicts with my job roster."

*On industry-specific needs:*

> "Industry based training sessions"
>
> "Like to understand how to make my own bots specifically for my business"

## A.10 Limitations and Suggested Further Research

### Sample Limitations

- Total sample (n=73) provides good overall reliability but limits subgroup analysis
- Whitsunday under-representation (n=3) prevents reliable regional comparisons

- 18 industries have fewer than 5 respondents each

### Potential Biases

- Established business bias: 82% from businesses 8+ years old
- Large business over-representation: 29% from 50+ employee businesses
- Self-selection: Respondents likely more digitally engaged than non-respondents

### Suggested Further Research

- AI use case specificity: Ask what businesses use AI for, not just whether they use it
- Barrier intensity: Scale barriers (minor/moderate/major) rather than binary yes/no
- Longitudinal tracking: Repeat survey annually to measure capability progression
- Non-respondent outreach: Target Agriculture and Whitsunday for deeper engagement
- Employee vs owner perspectives: Compare responses within same business

# Appendix B: Stakeholder Engagement Matrix

| Stakeholder Category | Influence and Interest | Involvement | Engagement Principle | Approach | Examples | Links to Digital Roadmap |
|---|---|---|---|---|---|---|
| **Infrastructure Layer** (Telstra, NBN Co, QCN Fibre, Channel Wireless) | **Influence:** High - controls foundational connectivity that enables all digital activity; infrastructure decisions affect entire region. **Interest:** Moderate to High - commercial interest in expanding coverage; government partners interested in addressing blackspots. | Active in major projects ($3.5M Digital Connectivity Project); ongoing network maintenance and upgrades. | Infrastructure Partnership | Position as essential enablers for all Roadmap ambitions. Coordinate advocacy for infrastructure investment. Facilitate connections between infrastructure providers and end-user needs. | Telstra for $3.5M Digital Connectivity Project partnership; NBN Co for fixed wireless and satellite expansion; QCN Fibre for regional backbone infrastructure. | Ambition 1 (Connectivity, speed, coverage); Ambition 3 (Digital connection to business premises); Horizon I strategies (RQ14, RQ15) |
| **Service Providers - IT & Managed Services** (NQBE Integrated IT, EHW Tech, CHAPtech, Elevate Technology, Cloud Technologies Mackay, Iscape, Trantech, Moranbah IT, Easy Internet Services) Frontrow Technologies (Myriad) | **Influence:** Moderate - directly impact SME digital adoption through service delivery; shape local capability through skills transfer. **Interest:** High - commercial interest in SME digital transformation; business growth tied to regional capability uplift. | Active in delivering digital services; variable engagement with ecosystem coordination; mostly operating independently. | Market Development and Coordination | Engage as delivery partners for SME digital transformation. Coordinate through provider networks to reduce duplication and improve referral pathways. Support capability development and specialisation. | Local IT providers for SME technology implementation; managed services for ongoing support; cloud migration assistance for business systems modernisation. | Ambition 4 (Digitally enable economic opportunities); Middle adopter SME focus; Horizon II Digital Skilling strategies (RQ37, RQ38) |
| **Service Providers - Digital Marketing & Web** (Strategic Media Partners, Rebel Nation, Cross Digital Agency, Bright | **Influence:** Moderate - enable SME online presence and digital marketing capability. **Interest:** High | Active in service delivery; limited ecosystem coordination; sector-agnostic client base. | Market Development and Coordination | Engage for SME online presence development. Support capability transfer to build internal SME capacity. | Digital agencies for online presence development; web developers for e-commerce capability; marketing services for | Ambition 4 (Digitally enable economic opportunities); Middle adopter SME focus |

| | | | | | | |
|---|---|---|---|---|---|---|
| Light Marketing, Illuminate Web Design, Black Cactus Digital, Whitsunday Marketing, Osher Digital) | - commercial interest in growing SME digital adoption. | | | Coordinate referral pathways with IT providers. | digital customer acquisition. | |
| **Education & Training - Higher Education** (CQUniversity including DISH, Chair in Automation) | **Influence:** High - shapes advanced workforce capability; determines specialist skills availability; influences research and innovation direction. **Interest:** High - student outcomes and industry partnerships central to mission; research impact priorities. | Active through DISH partnership, Chair in Automation, Generative AI Toolkit; strong industry collaboration; cross-sectoral research. | Workforce Development Partnership | Leverage R&D capabilities and student pathways. Focus on applied research and workforce development alignment. Support advanced and specialist skills development . | CQUniversity for Chair in Automation partnership, DISH technology showcasing, advanced degrees, Generative AI Toolkit, cross-sectoral skills programs. | Ambition 2 (Digitally skill professions); Horizon II Digital Skilling (RQ25, RQ26, RQ27); Ambition 5 (Competitive advantage) |
| **Education & Training - Vocational** (TAFE Queensland, AgTech Skills Hub, CUC Isaac) | **Influence:** High - shapes foundational workforce capability; determines vocational pathway availability; regional reach through multiple campuses. **Interest:** High - student outcomes, program viability, industry partnerships. | Active through AgTech Skills Hub, free micro-credentials, nationally recognised qualifications; some coordination challenges between providers. | Workforce Development Partnership | Partner as primary foundational skills pathway. Focus on "bite-size" training approaches for middle adopter SMEs. Support micro-credential development and promotion. | TAFE Queensland for AgTech Skills Hub delivery, free micro-credentials, foundational digital training; CUC Isaac for remote higher education access. | Ambition 2 (Digitally skill professions); Horizon II Foundational Skilling (RQ22, RQ23, RQ24); Middle adopter focus (RQ37, RQ38) |
| **Government - Federal** (Dept of Infrastructure, CSIRO, AusIndustry) | **Influence:** High - shapes national policy direction; allocates significant infrastructure and skills funding; sets regulatory frameworks. **Interest:** | Funding through Regional Connectivity Program, ASBAS Digital Solutions; indirect through research agencies. | Strategic Alignment | Leverage policy alignment and national program integration. Position regional initiatives within national priorities | Department of Infrastructure for Regional Connectivity Program funding; ASBAS Digital Solutions for SME support ($25M+ Round 3); CSIRO Kick-Start for | Horizon I (Infrastructure); Ambition 1 (Connectivity); Funding access for ecosystem gaps |

| | | | | | | |
|---|---|---|---|---|---|---|
| | Moderate - focused on national outcomes; regional engagement through specific programs. | | | including digital economy strategy and regional development . | research collaboration. | |
| **Government - State** (Advance Queensland, Jobs Queensland, DSDI, Queensland DPI, QRIDA) | **Influence:** High - primary funding partner for regional initiatives; policy enabler through multiple departments; significant regulatory role. **Interest:** High - regional development priorities; digital economy strategy; workforce development focus. | Active through Advance Queensland, Jobs Queensland, DSDI; direct funding for programs like Greater Digital Skills, Regional Enablers. | Active Collaboration | Engage as primary funding partner and policy enabler. Focus on reducing departmental fragmentation through integrated proposals. Align with state digital economy and skills strategies. | Advance Queensland for Regional Enablers Program; Jobs Queensland for Grow Your Own funding (Greater Digital Skills); DSDI for regional development alignment; Queensland DPI for sector programs. | All Roadmap Ambitions; Horizon II strategies; Workforce Development Playbook alignment |
| **Government - Local** (Mackay Regional Council, Isaac Regional Council, Whitsunday Regional Council) | **Influence:** Moderate to High - infrastructure planning authority; community development leadership; local economic development mandate. **Interest:** High - economic development, job creation, community resilience connected to digital capability. | Active through economic development teams; partnerships with GW3; infrastructure planning; some direct programs. | Coordination and Local Enablement | Leverage local knowledge and community connections. Engage for infrastructure planning and community development alignment. Ensure geographic equity across three council areas. | Mackay Regional Council for RCOE partnership, economic development leadership; Isaac Regional Council for mining community digital inclusion; Whitsunday Regional Council for tourism-digital integration. | Ambition 3 (Digital connection to business); Horizon I (Infrastructure); Geographic equity |
| **Industry Associations - Agriculture** (Canegrowers Mackay, Bowen Gumlu Growers Association, AgForce CQ) | **Influence:** High - represent significant member bases; trusted conduits to agribusinesses | Variable engagement - Canegrowers highly active, others less engaged with digital specifically; | Strategic Alliance and Member Reach | Partner as trusted intermediaries with producer networks. Leverage for sector- | Canegrowers Mackay for sugarcane sector digital adoption and Smartcane BMP; BGGA for horticulture | Ambition 4 (Digitally enable economic opportunities); Horizon II Agriculture strategies; |

| | | | | | | |
|---|---|---|---|---|---|---|
| | ; drive industry priorities. **Interest:** High - member digital capability affects industry competitiveness; workforce development central to mandate. | sector-focused rather than cross-sector. | | specific digital needs identification. Engage for "word-of-mouth" promotion to middle adopter SMEs. | technology trials; AgForce for beef sector engagement. | Middle adopter reach |
| **Industry Associations - Mining/METS** (Resource Industry Network, QMEA) | **Influence:** High - represent major regional employers; strong industry networks; drive innovation priorities. **Interest:** High - automation, safety, efficiency all connected to digital capability. | Active through RIN events, RCOE partnership; strong engagement with innovation programs. | Strategic Alliance and Member Reach | Partner for METS sector digital capability development. Leverage for mining community engagement. Support technology demonstration and workforce development. | Resource Industry Network for METS sector coordination and innovation focus; QMEA for workforce pipeline development. | Horizon II Mining/METS strategies; Cross-sector collaboration |
| **Industry Associations - Tourism** (Tourism Whitsundays, MIT, QTIC) | **Influence:** Moderate - represent tourism operators; coordinate sector marketing; deliver state programs. **Interest:** High - digital capability critical for tourism competitiveness and visitor experience. | Active through destination marketing; TBDAP program delivery; variable operator engagement. | Strategic Alliance and Member Reach | Partner for tourism operator digital transformation. Leverage for TBDAP program promotion. Support booking system and customer experience technology adoption. | Tourism Whitsundays for operator engagement; QTIC for TBDAP delivery ($4.5M program, $2,500 rebates); MIT for local coordination. | Ambition 4 (Digitally enable economic opportunities); Tourism sector digital transformation |
| **Industry Associations - Business/Cross-Sector** (Mackay Region Chamber of Commerce, Bowen Chamber, Whitsundays Chamber) | **Influence:** Moderate - represent cross-sector SME base; trusted local business voice; convening capacity. **Interest:** High | Active through member services; events and networking; some digital program promotion. | Strategic Alliance and Member Reach | Partner for cross-sector SME reach. Leverage for awareness campaigns and referrals. Engage for middle adopter | Mackay Region Chamber for SME reach and program promotion; Bowen and Whitsundays Chambers for geographic coverage. | Ambition 4 (Digitally enable economic opportunities); Middle adopter SME reach; Geographic equity |

| | | | | | | |
|---|---|---|---|---|---|---|
| | - member business success tied to digital capability. | | | identification and support. | | |
| **Innovation Ecosystem - Hubs** GWI, RCOE, DISH) | **Influence:** Moderate to High - shapes innovation culture; provides infrastructure for collaboration; connects sectors and stakeholders. **Interest:** High - innovation and digital capability central to mission; commercial sustainability depends on ecosystem health. | Active through events (Tech Verge, Innovation Expo), coworking, technology showcasing; | Network Coordination and Infrastructure | Leverage as delivery partners for innovation programs. Coordinate to avoid duplication. Support cross-sector connection and collaboration. Position as demonstration and showcasing venues. | Greater Whitsunday Innovation for coworking, Tech Verge event (140+ participants), SME support; RCOE for mining-agriculture technology transfer, Pit to Port initiative; DISH for technology showcasing. | Ambition 5 (Regional digital competitive advantage); Horizon II and III sector strategies; Cross-sector collaboration |
| **Innovation Ecosystem - Accelerators** (QuantumTX, Farmers2Founders) | **Influence:** Moderate - support startup development; connect to investment; build innovation pipeline. **Interest:** High - startup success and ecosystem building central to mission. | Emerging presence through QuantumTX ($25K/participant, 12 weeks); connections to external programs. | Network Coordination and Infrastructure | Leverage for startup pipeline development. Connect regional innovators to acceleration opportunities. Avoid duplication with complementary positioning. | QuantumTX Queensland METS/Defence Accelerator for dual-use technology commercialisation; Farmers2Founders connections for producer-led startups. | Ambition 5 (Regional digital competitive advantage); Horizon III emerging sectors |
| **Economic Development - Regional Coordination** (GW3, RDA Greater Whitsunday, Regional Jobs Committee) | **Influence:** High - initiates and coordinates major projects; convenes stakeholders; advocates at state and federal levels; manages key funding relationships. **Interest:** High - digital | Leading role through Digital Roadmap ownership, skills programs, connectivity projects; backbone organisation for ecosystem. | Leadership and Backbone Coordination | Maintain as backbone organisation for digital ecosystem strategy. Lead cross-sectoral coordination while partnering where others have expertise or mandate. Ensure Roadmap | GW3 for Digital Roadmap ownership, Greater Digital Skills Program, $3.5M connectivity project coordination, Future Finder platform; RDA GW for federal program access; RJC for workforce governance. | All Digital Roadmap Ambitions and Strategies; Central coordination point |

| | | | | | | |
|---|---|---|---|---|---|---|
| | capability central to regional economic strategy; workforce development priority; cross-sector coordination mandate. | | | implementation through stakeholder alignment. | | |
| **GAP: Cybersecurity** | **Influence:** Would be High - critical for protecting expanding digital infrastructure. **Interest:** N/A - no local provider identified. | No local cybersecurity specialist services mapped. Critical ecosystem weakness. | **ACTION REQUIRED** | Attract provider, develop partnership with external specialist, or build local capability through training existing providers. | Federal Cyber Wardens program (free online training) only current resource; no local advisory capacity for SMEs. | Horizon I Cybersecurity ; Critical gap for infrastructure protection |
| **GAP: First Nations Digital Coordinator** | **Influence:** Would be High - essential for inclusive ecosystem development. **Interest:** N/A - no dedicated role identified in region. | Limited targeted programs; Trading Tracks listed but no detailed programs; state programs exist but minimal regional presence. | **ACTION REQUIRED** | Co-design program with First Nations communities. Establish dedicated coordinator role. Develop culturally appropriate training pathways. | First Nations Digital Careers (state program); Digital Service Centres model; Digital IKCs example from other regions. | Horizon II First Nations Skilling (RQ29); Critical gap for inclusive development |

# Appendix C: Complete Stakeholder Database

| Stakeholder | Website | Role | Description |
|---|---|---|---|
| **Advance Queensland** | https://advance.qld.gov.au/ | Government & Policy | Queensland Government's flagship innovation initiative providing grants and support to entrepreneurs, researchers, and innovators across priority sectors. |
| **AgForce Queensland** | https://tafeqld.edu.au | Industry Associations | Queensland's largest vocational education and training provider, delivering courses at the Mackay campus and across regional Queensland. |
| **Agforce CQ** | https://www.agforceqld.org.au/ | Industry Associations | Peak not-for-profit organisation representing Queensland's broadacre producers across cattle, grain, cane, sheep, wool, and goats since 1999. |
| **CQU Appleton Institute** | https://www.cqu.edu.au/research/organisations/appleton-institute | Education & Training | CQUniversity research institute studying sleep, fatigue, and shift work impacts on health and safety. |
| **Aquaculture and Agriculture Tech Skills Hub** | https://tafeqld.edu.au/campaigns/aquaculture-and-agriculture-tech-skills-hub | Education & Training | Queensland Government initiative supporting workforce development, training, and education pathways in agricultural technology and aquaculture sectors. |
| **CQU Aquatic Ecology and Ecotoxicology** | https://www.cqu.edu.au/about-us/our-schools/health-medical-applied-sciences/aquatic-ecology-ecotoxicology | Education & Training | CQUniversity research group investigating freshwater ecology, water quality, and ecotoxicology in Central Queensland. |
| **Australian Prawn Farmers Association (APFA)** | https://apfa.com.au/ | Industry Associations | National industry body representing Australian prawn farming businesses across production, sustainability, and market development. |
| **Australian Small Business Advisory Services (ASBAS) Digital Solutions** | https://business.gov.au/grants-and-programs/australian-small-business-advisory-services-digital-solutions-round-3 | Government & Policy | Federal government program providing low-cost digital advisory services to small businesses in areas like online marketing, AI, and cybersecurity. |
| **Axiom College** | https://www.axiomcollege.com.au/ | Education & Training | Registered Training Organisation (RTO 40489) delivering nationally recognised qualifications from Certificate I to Diploma at its Mackay campus since 1994. |
| **BHP** | https://www.bhp.com/what-we-do/global-locations/australia/queensland | Industry Associations | Global resources company operating five metallurgical coal mines in Queensland's Bowen Basin |

| | | | |
|---|---|---|---|
| | | | and the Hay Point Coal Terminal near Mackay. |
| **BIRRR (Better Internet for Rural, Regional and Remote Australia)** | https://birrraus.com/ | Infrastructure & Connectivity | Community-led advocacy group improving internet connectivity for rural, regional, and remote Australians. |
| **Bowen Chamber of Commerce** | https://bowencc.com.au/ | Industry Associations | Not-for-profit business organisation promoting small business viability in Bowen through networking, the Business Hub platform, and regional partnerships. |
| **Bowen Gumlu Growers Association (BGGA)** | https://www.bgga.com.au/ | Industry Associations | Regional industry body representing horticultural growers and agribusinesses in the Bowen and Gumlu region of North Queensland. |
| **CANEGROWERS Mackay** | https://mackaycanegrowers.com.au/ | Industry Associations | Peak representative body for sugarcane growers across Mackay and Plane Creek milling regions, established in 1926. |
| **CQU Physical Activity Research Group** | https://www.cqu.edu.au/research/organisations/appleton-institute/physical-activity-research-group | Education & Training | CQUniversity research group investigating physical activity, sedentary behaviour, and health outcomes across populations. |
| **CSIRO** | https://www.csiro.au/ | Education & Training | Australia's national science agency conducting research across agriculture, health, manufacturing, and energy from over 55 locations nationwide. |
| **Canegrowers** | https://www.canegrowers.com.au/ | Industry Associations | Peak representative body for Australian sugarcane growers, representing around 80% of Queensland's cane farming families since 1926. |
| **Central Queensland University (CQU)** | https://www.cqu.edu.au/ | Education & Training | Australia's largest regional university, founded in 1967, with over 30,000 students across 20+ locations and Queensland's first dual-sector university. |
| **CQU Centre for Indigenous Health Equity Research (CIHER)** | https://www.cqu.edu.au/research/organisations/jawun-research-institute | Education & Training | CQUniversity research institute (formerly CIHER) focused on improving health outcomes for Aboriginal and Torres Strait Islander peoples. |
| **CQU Centre for Intelligent Systems (CIS)** | https://www.cqu.edu.au/research/organisations/centre-for-intelligent-systems | Education & Training | CQUniversity research centre conducting applied research in artificial intelligence, machine learning, and quantum computing. |

| | | | |
|---|---|---|---|
| **CQU Centre for Railway Engineering (CRE)** | https://www.cqu.edu.au/research/organisations/centre-railway-engineering | Education & Training | Australia's leading rail research centre conducting applied research in heavy haul and passenger rail systems for major operators. |
| **CQU Centre for Tourism and Regional Opportunities (CTRO)** | https://www.cqu.edu.au/research/organisations/centre-for-tourism-and-regional-opportunities | Education & Training | CQUniversity research centre investigating sustainable tourism development and regional economic opportunities in Queensland. |
| **CQU Centre for research in Equity and Advancement of teaching and Education (CREATE)** | https://www.cqu.edu.au/research/organisations/create | Education & Training | CQUniversity research centre focused on improving educational equity, teaching quality, and student outcomes. |
| **CQU Coastal Marine Ecosystems Research Centre (CMERC)** | https://www.cqu.edu.au/research/organisations/cmerc | Education & Training | CQUniversity research centre studying coastal and marine ecosystems, including Great Barrier Reef health and fisheries sustainability. |
| **Country Universities Centre (CUC) Isaac** | https://www.cucisaac.edu.au/ | Education & Training | Regional learning hub in Moranbah providing free study spaces, technology, and academic support for university students in the Isaac region. |
| **Decarbonisation Accelerated** | https://www.decarbonisationaccelerated.com.au/ | Innovation Ecosystem | GW3 initiative supporting the Greater Whitsunday region's transition to clean energy and reduced emissions across traditional resource industries. |
| **Department of Infrastructure, Transport, Regional Development, Communications and the Arts** | https://www.infrastructure.gov.au/ | Government & Policy | Australian Government department responsible for transport, communications, infrastructure, regional development, and the arts. |
| **Dudley Denny City Library** | https://www.mackay.qld.gov.au/libraries | Education & Training | Mackay Regional Council's main public library in central Mackay, offering lending, digital resources, and community programs. |
| **CQU Experimental Gambling Research Laboratory (EGRL)** | https://www.cqu.edu.au/research/organisations/experimental-gambling-research-laboratory | Education & Training | CQUniversity research facility conducting experimental studies on gambling behaviour and harm minimisation. |

| | | | |
|---|---|---|---|
| **Food Innovation Australia Limited (FIAL)** | https://www.fial.com.au/ | Innovation Ecosystem | Australian Government-backed industry growth centre connecting food and agribusiness with research, investment, and export opportunities. |
| **Future Anything** | https://futureanything.com/ | Innovation Ecosystem | Brisbane-based education company delivering youth entrepreneurship programs in schools, including the X Challenge engaging over 5,000 students annually. |
| **Gordon White Library** | https://www.mackay.qld.gov.au/libraries | Education & Training | Mackay Regional Council public library serving the southern Mackay area with lending, digital resources, and community programs. |
| **Greater Whitsunday Agtech Hub** | https://greaterwhitsundayalliance.com.au/programs/greater-whitsunday-agtech-hub/ | Innovation Ecosystem | GW3-led initiative promoting agricultural technology innovation and adoption across the Mackay-Isaac-Whitsunday region. |
| **Greater Whitsunday Alliance (GW3)** | https://greaterwhitsundayalliance.com.au/ | Stakeholder Group | Independent regional economic development organisation for the Mackay, Isaac, and Whitsunday regions, established in 2017. |
| **Greater Whitsunday Innovation** | https://gwinnovation.com.au/ | Innovation Ecosystem | Not-for-profit coworking and innovation hub at CQUniversity Mackay, supporting entrepreneurs and startups with flexible workspaces and business programs. |
| **Greater Whitsunday Regional Jobs Committee** | https://dtet.qld.gov.au/training/employers/regional-jobs-committees | Stakeholder Group | Queensland Government regional workforce committee hosted by GW3, connecting employers, training providers, and councils to develop local skilling solutions. |
| **CQU Institute for Future Farming Systems (IFFS)** | https://www.cqu.edu.au/research/organisations/institute-for-future-farming-systems | Education & Training | CQUniversity's flagship agricultural research institute covering precision agriculture, livestock management, and farming technology. |
| **CQU International Collaborative Centre for Carbon Futures** | https://www.cqu.edu.au/research/organisations/international-collaborative-centre-for-carbon-futures | Education & Training | CQUniversity research centre investigating decarbonisation, carbon management, and sustainable energy transitions for resource industries. |
| **International Consortium for Occupational Resilience (ICOR)** | https://www.curtin.edu.au/research/icor/ | Education & Training | Multi-university research consortium focused on worker health, safety, and resilience in high-demand occupations. |
| **Isaac Business Chamber** | https://www.isaacbusinesschamber.com/ | Industry Associations | Regional business advocacy organisation representing |

| | | | |
|---|---|---|---|
| | | | businesses across the Isaac Region in Central Queensland. |
| **Isaac Regional Council** | https://www.isaac.qld.gov.au/ | Government & Policy | Local government authority for the Isaac region in Queensland's Bowen Basin, supporting communities across Moranbah, Clermont, and Dysart. |
| **Jobs Queensland** | https://jobsqueensland.qld.gov.au/ | Government & Policy | Queensland Government statutory body providing independent advice on workforce planning, skills demand, and training priorities. |
| **Koala Research – CQ** | https://www.cqu.edu.au/research/organisations/koala-research-cq | Education & Training | CQUniversity research program investigating koala populations, habitat, health, and conservation in Central Queensland. |
| **Local Buying Foundation** | https://www.localbuyingfoundation.com.au/ | Innovation Ecosystem | BHP-linked foundation reinvesting over $14 million into training, business development, and capacity building for small and Indigenous businesses in regional communities. |
| **MRAEL Limited** | https://www.mrael.com.au/ | Education & Training | Queensland's leading not-for-profit provider of education, training, and employment services, founded in Mackay in 1985 as part of the IntoWork Group. |
| **Mackay Engineering College** | https://mec.eq.edu.au/ | Education & Training | Trade Training Centre in Mackay delivering vocational education in automotive, electro-technology, and engineering through hands-on workshops since 2011. |
| **Mackay Hospital and Health Service** | https://www.mackay.health.qld.gov.au/ | Stakeholder Group | Queensland Government health service delivering public hospital and health services across the Mackay, Isaac, and Whitsunday regions. |
| **Mackay Region Chamber of Commerce** | https://www.mackayregionchamber.com.au/ | Industry Associations | Regional chamber of commerce established in 1887, representing over 10,000 organisations through advocacy, education, and business connection. |
| **Mackay Regional Council** | https://www.mackay.qld.gov.au/ | Government & Policy | Local government authority for the Mackay region serving over 120,000 people with municipal services, planning, and economic development. |
| **Marani Library** | https://www.mackay.qld.gov.au/libraries | Education & Training | Mackay Regional Council public library in the Pioneer Valley |

| | | | |
|---|---|---|---|
| | | | township of Mirani, serving surrounding communities. |
| **National Farmers Federation** | https://nff.org.au/ | Industry Associations | Australia's peak national farming body advocating policy across market access, biosecurity, digital connectivity, and education since 1979. |
| **CQU Non-Invasive Sensor Technology** | https://www.cqu.edu.au/research/organisations/institute-for-future-farming-systems | Education & Training | CQUniversity research program developing non-invasive sensing technologies for precision agriculture and livestock management. |
| **North Queensland Bulk Ports (NQBP)** | https://www.nqbp.com.au/ | Infrastructure & Connectivity | Queensland Government-owned port corporation managing the ports of Mackay, Hay Point, Abbot Point, and Weipa. |
| **Northern Queensland Primary Health Network (PHN)** | https://www.nqphn.com.au/ | Stakeholder Group | Australian Government-funded primary health network improving healthcare access and coordination across Northern Queensland. |
| **CQU Precision Horticulture** | https://www.cqu.edu.au/research/organisations/institute-for-future-farming-systems | Education & Training | CQUniversity research program applying precision agriculture technologies to horticultural production in tropical and subtropical regions. |
| **CQU Precision Livestock Management (PLM)** | https://www.cqu.edu.au/research/organisations/institute-for-future-farming-systems | Education & Training | CQUniversity research program developing precision technologies for monitoring livestock health, welfare, and productivity. |
| **Queensland AgTech Month** | https://www.daf.qld.gov.au/ | Innovation Ecosystem | Annual Queensland Government initiative showcasing agricultural technology innovation and accelerating AgTech adoption statewide. |
| **CQU Queensland Centre for Domestic and Family Violence Research (CDFVR)** | https://www.cqu.edu.au/research/organisations/queensland-centre-for-domestic-and-family-violence-research | Education & Training | CQUniversity research centre providing evidence-based research, training, and resources on domestic and family violence prevention. |
| **Queensland Department of Education** | https://education.qld.gov.au/ | Government & Policy | Queensland Government department responsible for state schooling, early childhood education, and higher education policy. |
| **Queensland Government** | https://www.qld.gov.au/ | Government & Policy | The state government of Queensland, responsible for legislation, public administration, |

| | | | |
|---|---|---|---|
| | | | and service delivery across the state. |
| **Queensland Government Department of Trade, Employment and Training** | https://desbt.qld.gov.au/ | Government & Policy | Queensland Government department responsible for workforce development, vocational education, small business support, and employment programs. |
| **Queensland Government Department of Women, Aboriginal and Torres Strait Islander Partnerships and Multiculturalism** | https://www.dsdsatsip.qld.gov.au/ | Government & Policy | Queensland Government department leading policy on Aboriginal and Torres Strait Islander partnerships, community services, and the arts. |
| **Queensland Small Business Commissioner** | https://www.qsbc.qld.gov.au/ | Government & Policy | Independent Queensland Government office supporting small businesses through mediation, advocacy, and dispute resolution services. |
| **Queensland Tourism Industry Council (QTIC)** | https://www.qtic.com.au/ | Industry Associations | Peak representative body for Queensland's tourism and hospitality industry, providing advocacy, workforce development, and digital capability programs. |
| **Regional Business HQ** | https://www.businesshq.org.au/ | Innovation Ecosystem | Lead provider of the Digital Solutions program in Queensland, offering government-subsidised digital advisory services to small businesses. |
| **Regional Development Australia (RDA) - Greater Whitsundays** | https://www.rdagreaterwhitsundays.org.au/ | Government & Policy | Australian Government-funded initiative supporting economic development, job creation, and investment attraction across the Mackay-Isaac-Whitsunday region. |
| **Regional Tech Hub** | https://regionaltechhub.org.au/ | Infrastructure & Connectivity | Australian Government-funded service providing free, independent phone and internet advice for regional, rural, and remote Australians. |
| **Resource Industry Network** | https://www.resourceindustrynetwork.com.au/ | Industry Associations | Mackay-based membership organisation connecting mining equipment, technology, and services (METS) businesses with opportunities in the resources sector. |
| **Resources Centre of Excellence** | https://www.rcoe.com.au/ | Innovation Ecosystem | A Mackay facility connecting research, technology, education, |

| | | | |
|---|---|---|---|
| | | | and the METS sector with mine simulation and training capabilities. |
| **Resources Centre of Excellence Future Industries Hub** | https://www.rcoe.com.au/ | Innovation Ecosystem | Stage 2 expansion of the Resources Centre of Excellence in Mackay, featuring laboratories and training facilities for emerging industries. |
| **STEM Punks** | https://www.stempunks.com.au/ | Education & Training | Queensland-based education technology company delivering hands-on STEM workshops and programs to schools and communities. |
| **TAFE Queensland** | https://tafeqld.edu.au | Education & Training | Queensland's largest vocational education and training provider, delivering programs including Fee-Free TAFE courses at its Mackay campus. |
| **Walkerston Library** | https://www.mackay.qld.gov.au/libraries | Education & Training | Mackay Regional Council public library in Walkerston, south of Mackay, offering lending and community programs. |
| **Whitsunday Business Awards** | https://www.whitsundaycoastchamber.com.au/business-awards/ | Industry Associations | Annual awards program celebrating innovation, leadership, and excellence across the Whitsunday business community, launched in 2025. |
| **Whitsunday Regional Council** | https://www.whitsundayrc.qld.gov.au | Government & Policy | Local government authority for the Whitsunday region, serving communities from Bowen to Airlie Beach across over 23,000 square kilometres. |
| **Whitsunday STEM Challenge** | https://www.whitsundaystemchallenge.com.au/ | Education & Training | Regional STEM education event encouraging students across the Whitsunday region to engage in hands-on science and technology challenges. |
| **Whitsundays Chamber of Commerce and Industry** | https://www.whitsundaycoastchamber.com.au/ | Industry Associations | Regional business association representing businesses across Airlie Beach, Proserpine, and the wider Whitsunday region since 2013. |
| **Matilda Internet** | https://matilda.net.au/ | Digital Service Providers | Regional internet service provider in Mackay delivering broadband and wireless connectivity to businesses and residents. |
| **SOS Computer Training Specialists** | https://soscomputertraining.com.au/ | Digital Service Providers | Mackay-based computer training specialist delivering customised Microsoft software courses for businesses through small group and one-on-one sessions. |

| | | | |
|---|---|---|---|
| **Sparrowly Group** | https://www.sparrowly.com/ | Digital Service Providers | Sparrowly Group is a national award-winning business working across advisory, training and workforce planning. |
| **Business Development Fund** | https://advance.qld.gov.au/ | Innovation Ecosystem | Queensland Government co-investment program providing matched funding to early-stage and high-growth companies. |
| **Engineering, Construction and Resources Innovation Hub** | https://advance.qld.gov.au/ | Innovation Ecosystem | Advance Queensland initiative supporting innovation and collaboration in Queensland's engineering, construction, and resources sectors. |
| **Future Anything Activate** | https://futureanything.com/ | Education & Training | Future Anything's school-based entrepreneurship activation program connecting students to real-world challenges through curriculum-aligned learning experiences. |
| **Future Anything Big Ideas Challenge** | https://futureanything.com/ | Education & Training | Regional youth entrepreneurship event where students develop innovative solutions to real-world problems and pitch to judges for prizes. |
| **GW3 For Greater Careers Video Series** | https://www.greaterwhitsundayalliance.com.au/ | Education & Training | GW3 workforce development initiative showcasing career pathways and employment opportunities across the Greater Whitsunday region. |
| **GW3 Greater Foundations** | https://www.greaterwhitsundayalliance.com.au/program/greater-foundations/ | Education & Training | GW3 workforce readiness program preparing job seekers for employment in the Greater Whitsunday region's key industries. |
| **Ignite Ideas Fund** | https://advance.qld.gov.au/ | Innovation Ecosystem | Queensland Government grant program funding innovative startups and SMEs to accelerate product development and market growth. |
| **Mackay Libraries Tech Talks** | https://www.mackay.qld.gov.au/libraries | Education & Training | Free Mackay Regional Council Libraries program offering regular technology education sessions for community members. |

# Appendix D: Policy Alignment Mapping

| Policy Name | Policy Year | Policy Hub | Policy Priorities |
|---|---|---|---|
| **Advance Queensland Regional Futures** | | Advance Queensland | Collaborative projects; Ecosystem development; Events and activations; Regional Enablers Program |
| **Backing Female Founders Program** | | Advance Queensland | Female Founders Co-Investment Fund; Accelerating Female Founders Program; Backing Female Founders – Investment Readiness |
| **Better Connectivity Plan for Regional and Rural Australia** | 2022 | Department of Infrastructure, Transport, Regional Development, Communications and the Arts | |
| **CSIRO Kick-Start** | | CSIRO | |
| **CSIRO Regional University Industry Collaboration Program** | | CSIRO | |
| **Corporate Innovation Network** | | | Corporate Innovation Network |
| **Deadly Innovation Strategy** | 2018 | Advance Queensland | |
| **Good Jobs, Great Training Queensland Skills Strategy 2024 - 2028** | 2024 | Queensland Government | Skills for good jobs: Get more Queenslanders into highly skilled jobs quicker; Training that has the power to change lives: Support Queenslanders to access the lifelong benefits of training for good, highly skilled jobs; TAFE for all Queenslanders: Deliver training across Queensland and skills for local economies by putting TAFE at the heart of the training system; A training system backing Queenslanders: Build on the strengths of our world-class training system by working with our partners, promoting opportunities offered by training and standing up for Queenslanders; Quality and results driven: Focus on economic priorities, local needs and student outcomes so our training system delivers for Queensland |
| **Greater Digital Infrastructure For Greater Whitsunday Regional Connectivity Projects** | 2024 | Greater Whitsunday Alliance (GW3) | |
| **Greater Whitsunday Digital Roadmap** | 2022 | Greater Whitsunday Alliance (GW3) | Horizon I: Enhancing the region's digital foundation; Horizon II: Expanding digital progress for priority industries agriculture and aquaculture; Horizon II: Expanding Digital Progress for Priority Industries Mining and METS; Horizon II: Expanding digital progress for priority industries digital skilling; Horizon III: Planning for digital futures in priority growth sectors - biomanufacturing, aviation/aerospace, decarbonisation |

| | | | |
|---|---|---|---|
| **Ignite Program** | | Advance Queensland | Ignite Spark Program; Ignite Ideas Fund; Ignite+ |
| **Mackay Regional Council Business Support** | | Mackay Regional Council | Business support service; Small Business Mentoring Program; Greater Whitsunday Grant Finder |
| **Mobile Black Spot Program** | | Department of Infrastructure, Transport, Regional Development, Communications and the Arts | |
| **Mobile Network Hardening Program** | | Department of Infrastructure, Transport, Regional Development, Communications and the Arts | |
| **National Audit of Mobile Coverage** | 2024 | Department of Infrastructure, Transport, Regional Development, Communications and the Arts | |
| **On Farm Connectivity Program** | 2023 | Department of Infrastructure, Transport, Regional Development, Communications and the Arts | |
| **Our Thriving Digital Future: 2023–2026 Action Plan** | 2023 | Queensland Government | Priority 1: Close the digital divide; Priority 2: Contemporary digital government services; Priority 3: Improved connectivity for regional communities; Priority 4: Industries and businesses excel; Priority 5: Pipeline of talent for digital careers; Priority 6: Digitally enabled government |
| **Our Thriving Digital Future: Queensland's Digital Economy Strategy** | | Queensland Government | Close the digital divide; Contemporary digital government services; Improved connectivity for regional communities; Industries and businesses excel; Pipeline of talent for digital careers; Digitally enabled government |
| **Private Sector Pathways Program** | | Advance Queensland | |
| **Queensland Future Skills Partnership** | 2019 | Advance Queensland | Skillsets |
| **Queensland Resources Industry Development Plan** | 2019 | Advance Queensland | Grow and diversify the industry; Build a safe and resilient future workforce |
| **Queensland Small Business Commissioner (QSBC) Small Business Friendly Program** | | Queensland Small Business Commissioner | Mackay Small Business Friendly Program |
| **Queensland Workforce Strategy 2022-2032** | 2022 | Queensland Government | Workforce Participation; Local Solutions; School-to-Work Transitions; Workforce Attraction and Retention; Skilling Queenslanders Now and Into the Future |

| | | | |
|---|---|---|---|
| **Regional Connectivity Program** | | Department of Infrastructure, Transport, Regional Development, Communications and the Arts | |
| **Regional Roads Australia Mobile Program** | | Department of Infrastructure, Transport, Regional Development, Communications and the Arts | |
| **Skills for Queensland Great training for quality jobs** | 2019 | Queensland Department of Education | Future skills through an adaptive system; Jobs for regional Queensland; Quality; Better pathways; Inclusivity and the public provider; Industry and small business |
| **Telecommunications Disaster Resilience Innovation (TDRI) program** | | Department of Infrastructure, Transport, Regional Development, Communications and the Arts | |
| **The Right Skills Strategy 2025-2028** | 2025 | Queensland Government | The Right Skills for Queensland's ECONOMY; The Right Skills for QUEENSLANDERS; The Right Skills delivered by a robust TRAINING SYSTEM |
| **Tourism Business Digital Adaption Program** | 2024 | Queensland Tourism Industry Council (QTIC) | |

# Appendix E: Glossary & References

## Acronyms

| Acronym | Full term |
|---|---|
| **APFA** | Australian Prawn Farmers Association |
| **AR/VR** | Augmented Reality / Virtual Reality – technologies that overlay digital information on the physical world (AR) or create immersive digital environments (VR) |
| **BI** | Business Intelligence – software and practices for analysing business data to inform decisions |
| **BHP** | BHP Group Limited – global mining company with significant operations in the Greater Whitsunday region |
| **BMA** | BHP Mitsubishi Alliance – a coal mining joint venture operating in the Bowen Basin |
| **CQU** | Central Queensland University (CQUniversity) |
| **CRM** | Customer Relationship Management – software systems for managing interactions with customers and prospects |
| **CSIRO** | Commonwealth Scientific and Industrial Research Organisation |
| **DETSI** | Department of the Environment, Tourism, Science and Innovation (Queensland Government) |
| **DISH** | Digital Innovation Skills Hive – a CQUniversity initiative |
| **DSDI** | Department of State Development and Infrastructure (Queensland Government) |
| **EO** | Earth Observation – the gathering of information about the Earth's surface using remote sensing technologies, including satellites |
| **GW3** | Greater Whitsunday Alliance |
| **GWI** | Greater Whitsunday Innovation |
| **ICT** | Information and Communications Technology |
| **IoT** | Internet of Things – networked physical devices embedded with sensors and software that collect and exchange data |
| **IRC** | Isaac Regional Council |
| **IT** | Information Technology |
| **LEO** | Low Earth Orbit – satellite systems operating at lower altitudes (e.g. Starlink), offering lower latency than traditional geostationary satellites |
| **LGA** | Local Government Area – the geographic jurisdiction of a local council |
| **METS** | Mining Equipment, Technology and Services – the supply chain of companies providing products and services to the mining industry |
| **ML** | Machine Learning – a subset of artificial intelligence where systems learn from data to improve performance without explicit programming |
| **MRC** | Mackay Regional Council |
| **NBN** | National Broadband Network – Australia's wholesale broadband network infrastructure |
| **QRIDA** | Queensland Rural and Industry Development Authority |
| **RCOE / RCoE** | Resources Centre of Excellence – a regional innovation and industry support body for the mining and METS sector |
| **RDA** | Regional Development Australia – a network of committees supporting regional economic development |
| **RED** | Regional Economic Development (grants program) |
| **RIN** | Resource Industry Network – an industry association connecting METS businesses in the Mackay region |
| **RJC** | Regional Jobs Committee – a Queensland Government mechanism for addressing workforce and skills priorities at a regional level |
| **ROI** | Return on Investment |
| **RTO** | Registered Training Organisation – an organisation approved to deliver nationally recognised vocational education and training |
| **SME** | Small and Medium Enterprise – businesses typically employing fewer than 200 people (Australian definition) |
| **SWOT** | Strengths, Weaknesses, Opportunities, Threats |
| **TAFE** | Technical and Further Education – Australia's public vocational education and training provider network |
| **TAE** | Training and Assessment qualification – the credential required to deliver nationally accredited training in Australia |
| **UniSQ** | University of Southern Queensland |

| | |
|---|---|
| **VET** | Vocational Education and Training – nationally recognised qualifications delivered by TAFEs and RTOs |
| **WRC** | Whitsunday Regional Council |

## Technical Terms

| Term | Description |
|---|---|
| **Agentic AI** | Artificial intelligence systems capable of operating autonomously to complete multi-step tasks, make decisions, and orchestrate workflows with minimal human intervention |
| **AgTech** | Agricultural technology – the application of digital tools, data, and automation to improve agricultural productivity and sustainability |
| **Backbone organisation** | An organisation that provides ongoing coordination, alignment, and operational support across a network of partners, rather than delivering programs directly |
| **Biofutures / Biomanufacturing** | Industries focused on producing materials, chemicals, fuels, and products from biological resources, often leveraging advanced manufacturing and biotechnology |
| **BlueTech** | Technology innovation applied to aquaculture, marine industries, and water management |
| **Boundary-spanner** | An organisation or role that intentionally connects across different systems, sectors, or domains to facilitate collaboration and information flow |
| **Cloud storage** | Remote data storage accessed via the internet, allowing files to be stored, managed, and retrieved from offsite servers |
| **Collective impact** | A structured approach to collaboration where multiple organisations align around a shared agenda, common measures, and coordinated activities to address complex issues |
| **Copilot** | Microsoft's AI assistant integrated into Microsoft 365 applications; also used generically to refer to AI-powered productivity assistants |
| **Cybersecurity** | The practice of protecting computer systems, networks, and data from digital attacks, unauthorised access, and damage |
| **Data sovereignty** | The principle that data is subject to the laws and governance of the jurisdiction in which it is collected |
| **Decarbonisation** | The process of reducing carbon dioxide and other greenhouse gas emissions, often supported by digital tools for tracking, reporting, and efficiency |
| **Digital capability** | The combination of skills, knowledge, confidence, and access required for individuals and organisations to effectively use digital technologies |
| **Digital ecosystem** | The interconnected network of organisations, programs, infrastructure, policies, and relationships that collectively support digital capability in a region |
| **Digital literacy** | The foundational ability to use digital devices, software, and the internet for everyday tasks and communication |
| **Digital maturity** | The extent to which an organisation has integrated digital tools and practices across its operations, measured on a spectrum from basic adoption to strategic transformation |
| **Digital Roadmap** | The Greater Whitsunday Digital Roadmap – the region's strategic plan for digital connectivity, skills, and economic development to 2030 |
| **Digital transformation** | The process of integrating digital technology into all areas of a business, fundamentally changing how it operates and delivers value |
| **E-commerce** | Electronic commerce – buying and selling goods or services over the internet |
| **Ecosystem mapping** | The process of systematically identifying, categorising, and visualising the actors, relationships, and functions within a system |
| **Fixed wireless** | A type of internet connection that uses radio signals transmitted between fixed points (towers and receivers) rather than physical cables |
| **Geospatial** | Relating to data that has a geographic component, used in mapping, spatial analysis, and location-based decision-making |
| **Hyperconnected** | A state of extensive digital interconnection between people, devices, systems, and organisations, enabling seamless information flow and collaboration |
| **Industry 4.0** | The fourth industrial revolution, characterised by the integration of digital technologies such as IoT, AI, automation, and data analytics into manufacturing and industry |
| **Key informant survey** | A research method that gathers insights from individuals selected for their specialised knowledge of a particular topic, sector, or system |
| **Micro-credentials** | Short, focused qualifications that certify competency in a specific skill or knowledge area, typically completed in less time than traditional qualifications |
| **Middle Adopters** | In this report, the segment of SMEs that have adopted foundational digital tools and are experimenting with AI but have not yet systematically embedded digital practices |

| | |
|---|---|
| **Peer learning** | An approach where individuals or businesses learn from others in similar contexts, sharing practical experiences and solutions |
| **Precision agriculture** | The use of GPS, sensors, drones, and data analytics to optimise crop management and farm productivity |
| **Readiness Index** | A structured assessment framework used in this report to evaluate regional digital readiness across five dimensions: Clarity, Connection, Capability, Capacity, and Advocacy & Collaboration |
| **Satellite broadband** | Internet connectivity delivered via satellite, providing coverage in areas where fixed-line or wireless infrastructure is unavailable |
| **System stewardship** | The practice of actively managing and coordinating across a system to ensure alignment, reduce fragmentation, and improve outcomes for participants |
| **Trusted intermediary** | An organisation with established credibility and relationships within a community or sector, able to effectively connect businesses with support services |
| **Wayfinding** | In an ecosystem context, the ability of businesses and individuals to navigate available services, programs, and support pathways to find what they need |

The Greater Whitsunday Digital Capability Ecosystem Mapping project was developed by GW3 in partnership with GWI, guided by the Greater Whitsunday Digital Leaders Group and informed by regional stakeholders.

GREATER WHITSUNDAY INNOVATION

GW3D GREATER WHITSUNDAY ALLIANCE MACKAY ▶ ISAAC ▶ WHITSUNDAY

BMA BHP Mitsubishi Alliance

The Transformation Region Project is a five year strategic partnership between GW3 and BMA.