



**MANATŪ KAUPAPA  
WAONGA**  
NEW ZEALAND  
MINISTRY OF DEFENCE



TE OPE KĀTUA O AOTEAROA  
**DEFENCE FORCE**

# **STRATEGIC INDUSTRIAL BASE STATEMENT**

**UNCREWED SYSTEMS &  
UNCREWED COUNTER SYSTEMS**

## INTRODUCTION

New Zealand is not immune from the increasing tensions felt throughout the world. We must build resilience in our supply chains, so we are less affected by events outside of our control. That is why Defence has committed to creating Strategic Industrial Base Statements for areas where New Zealand needs higher levels of sovereign industry capability in supporting the New Zealand Defence Force.

As outlined in the New Zealand Defence Industry Strategy, the three priorities are uncrewed systems and uncrewed counter systems, space capabilities and sustainment. These represent areas where investment and cooperation between Defence and industry will support national and supply chain resilience, including by growing export opportunities.

These base statements are intended to provide greater granularity of Defence's approach, how Defence will support the relevant sector, and the opportunities for innovation and doing things differently.

## UNCREWED SYSTEMS AND UNCREWED COUNTER SYSTEMS

A key lesson for New Zealand from the war in Ukraine is that smaller nations can effectively challenge larger adversaries by rapidly adopting and adapting new technologies and working in partnership with industry to integrate those technologies quickly. The clearest example of this is the rapid development and deployment of uncrewed systems and uncrewed counter systems by the Ukrainian Armed Forces.

The requirement to operate in an environment where there is an uncrewed system threat is also driving investment in uncrewed counter systems. Such systems are needed to protect personnel, sensitive infrastructure, and operating platforms and equipment.

## INDUSTRY CONTEXT

New Zealand's uncrewed systems sector is growing fast. The sector is diverse, encompassing mainly small and medium-sized enterprises and start-ups, primarily focused on commercial and dual-use applications.

New Zealand's uncrewed counter system technology is less developed. It currently consists of a small number of companies producing one or two solutions, and several distributors offering integration and support services.

Investment in higher levels of New Zealand sovereign capability in uncrewed systems and uncrewed counter systems has several key benefits for Defence, including:

- an ability to move quickly from experimentation to the acquisition and deployment of credible capability;
- an ability to iterate quickly;
- access to New Zealand industry expertise and capability to support international partnerships;
- greater supply chain resilience; and
- a genuine willingness to partner and address Defence challenges.

Importantly, investment in higher levels of New Zealand sovereign capability in uncrewed systems and uncrewed counter systems also supports the Government's economic growth agenda.

## DEFENCE'S APPROACH

For uncrewed systems and uncrewed counter systems the level of current sovereign maturity in New Zealand ranges from early technical developments, right through to fielded systems that have been deployed operationally. Defence will work with New Zealand industry to lift levels of maturity and grow the necessary capabilities.

However, in cases where the NZDF needs a capability now, and mature New Zealand systems are not yet available or not suitable, then proven solutions operated by our partners will be sought, including those in use with the Australian Defence Force. In such cases, opportunities for New Zealand companies will be in such areas as sensor and payload development, training solutions, command and control systems, data fusion, and through-life sustainment.

A limited range of uncrewed systems are already in use with the NZDF, including uncrewed aerial and surface and sub-surface vessels. These are used primarily for intelligence, surveillance, and reconnaissance. The NZDF is also actively experimenting with new technologies, including robotic ground vehicles and one-way effector drones.

The DCP includes indicative investments of \$50 – \$100 million for uncrewed maritime vessels, \$100 – \$300 million for long-range remotely piloted aircraft, and up to \$50 million for uncrewed counter aerial systems. There is also funding for experimentation and themed competitions focused on the development of sovereign uncrewed systems and uncrewed counter systems. Importantly, new Government Procurement Rules give Defence the flexibility to opt-out from open advertising a procurement when acquiring a prototype co-developed or co-produced with the NZDF.

Supply chain resilience will be a central factor in how Defence procures these systems.

Uncrewed systems and uncrewed counter systems must be supported by supply chains that can absorb disruption and enable rapid adaptation. Defence will therefore prioritise systems with diversified and reliable supply pathways, including where key elements of development, production and sustainment can be delivered in New Zealand.

Defence will favour modular and open architecture designs that allow components, payloads, and software to be updated or replaced quickly, including through domestic integration. This reduces reliance on single source suppliers and creates opportunities for New Zealand companies to participate across the full lifecycle of these systems, from design and development through to manufacture and sustainment.

Defence will adopt more targeted and collaborative procurement models. As part of this, Defence will accelerate work developing a detailed understanding of New Zealand suppliers' capabilities, including those able to contribute to system development, prototyping, advanced manufacturing, and integration.

A Request-for-Information (RFI) will be released in April 2026 to obtain a detailed understanding of New Zealand capabilities.

Early engagement with industry is important. It will be used to shape requirements, test solutions, and run leaner, more focused procurements. This may include collaborative early engagement workshops, technical development, iterative sourcing, and experimentation. Mechanisms, such as the Technology Accelerator, and engagement with Defence Science and Technology, will support this by enabling concept testing, early risk reduction, and faster contracting cycle times.

Tender evaluation criteria will explicitly consider supply chain resilience, while recognising the need to balance resilience with the timely introduction of capability into service. Defence will assess how suppliers intend to ensure continuity of supply, reduce dependencies and support domestic design and production opportunities, alongside their ability to deliver capability at pace. Prime contractors will be directed to produce New Zealand Industry Capability Plans that demonstrate how New Zealand suppliers will be integrated into their supply chains.

Where full sovereign participation is not practical, Defence will adopt a regional approach that leverages trusted international partners to complement domestic capacity. The requirement that Prime contractors produce New Zealand Industry Capability Plans will also allow New Zealand industry to focus on areas where it can provide the greatest resilience and long term value.

Developing higher levels of sovereign industry capability in uncrewed systems and uncrewed counter systems extends beyond the acquisition of platforms. As noted above, there are also opportunities in sensor and payload development, training solutions, data fusion, command and control systems, and sustainment. The aim is to build a domestic ecosystem of defence technology and expertise.

## SUMMARY

This Strategic Industrial Base Statement outlines Defence's plan to grow New Zealand's sovereign capability in uncrewed systems and uncrewed counter systems, recognising them as critical to future NZDF operations and national resilience. Driven by a deteriorating strategic environment and lessons from Ukraine, Defence aims to rapidly adopt, adapt, and integrate emerging technologies by partnering closely with local industry, prioritising modular and open architectures, and building resilient supply chains.

New Zealand's uncrewed systems sector is expanding quickly, and Defence intends to accelerate development through targeted procurement, early engagement with industry, and experimentation. While partnerships with trusted international suppliers will remain necessary, Defence will emphasise sovereign participation wherever possible.