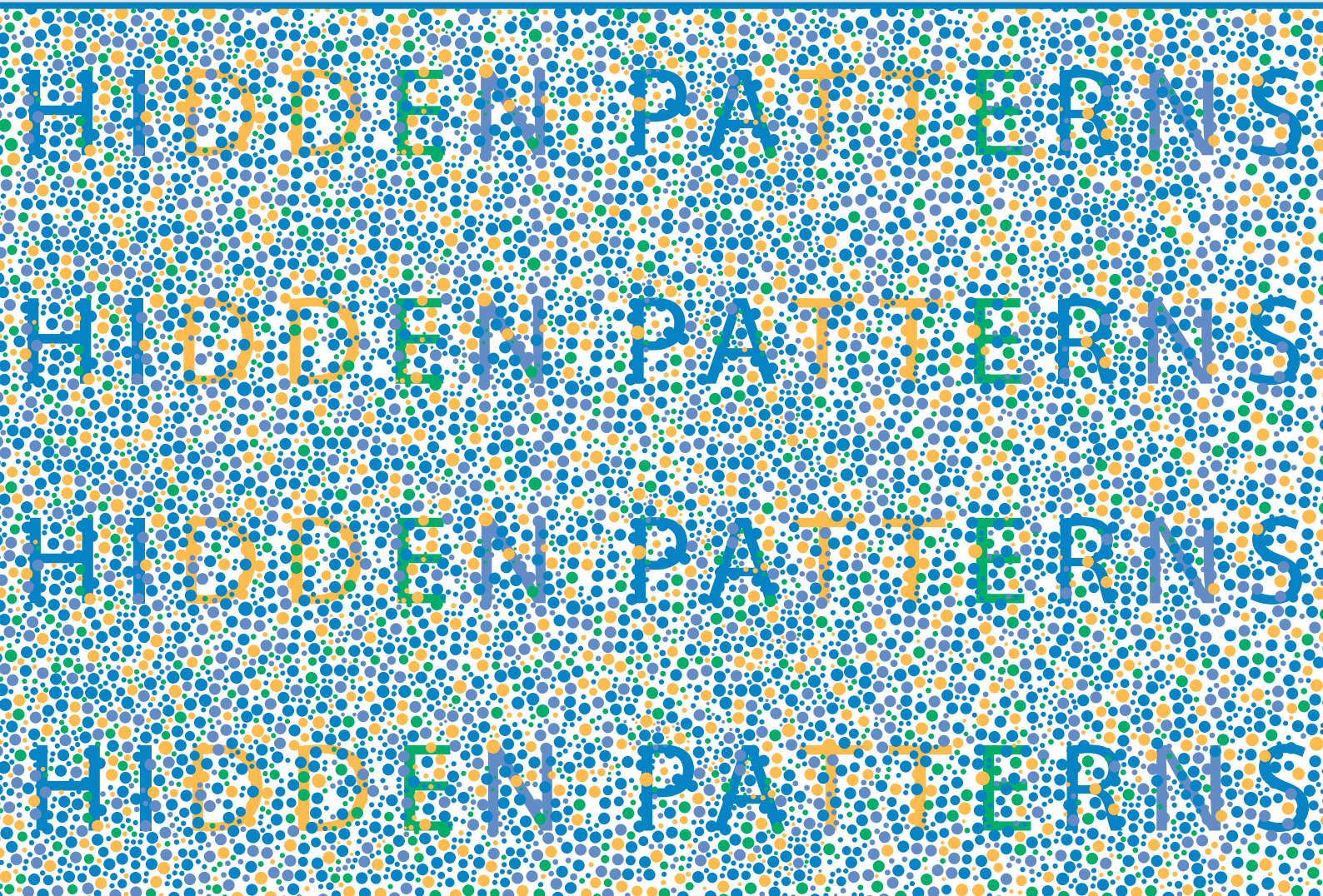


Think Piece 47: June 2026

Hidden Patterns in Global Defence Strategies: 12 countries compared



MCGUINNESS INSTITUTE
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This think piece compares the documented defence strategies of 12 countries using the Institute's strategy pyramid. The results should be interpreted with caution and are intended to support discussion and further research rather than inform decision-making. Please read the limitations section on p. 10.

In a world increasingly impacted by the recent Israel and US war with Iran, the prolonged Russia–Ukraine war, ongoing cyber-attacks, broken supply chains and mounting pressure on democratic institutions, defence and security can no longer be understood as a military question alone.

The countries that appear most prepared to cope with this new world, in a defence sense, are not simply those with the largest budgets, the largest percentage spend of GDP on defence, or the most powerful armed forces. Rather, they are those that align purpose, strategy and execution, and embed defence and security thinking across society, critical infrastructure, independent institutions and emergency management systems. In this new world, security and defence must be approached as a whole-of-society effort.

Comparative analysis of 12 countries

The goal of this think piece is to assess how New Zealand's current defence and security strategy compares with those of other countries included in the analysis. The 12 countries selected comprise trading partners, neighbouring countries, Commonwealth countries and countries at war, in order to explore a range of contrasting strategies.

The analytical approach applies the McGuinness Institute strategy pyramid (see Figure 1) alongside Microsoft 365 Copilot to compare and rank the defence and security strategies of the 12 countries. In addition, each strategy is assessed relative to the other 11 using four characteristics that stood out, highlighting each country's distinct strategic profile (see Figure 2 overleaf and the section on strategy focus on p. 6).

The strategy pyramids in Figure 2 (overleaf) are used to illustrate how well purpose, strategy and execution are aligned within each country and compared with the other 11 countries. The pyramid is designed to identify which of the three layers – purpose, strategy or execution – is comparatively weakest within a country's strategic defence system, when assessed against the other 11 countries.

Where a pyramid stands firmly, for example Singapore, these elements are tightly connected and mutually reinforcing. Where the pyramid appears less stable, its shape highlights gaps. In the case of New Zealand, these gaps point to a notable lack of clarity around how the strategy will be implemented.

Country rankings (see order overleaf) are based on responses to the nine strategy pyramid questions below (see Figure 1). Alignment of purpose, strategy and execution alone is not sufficient. A country may have a well-aligned pyramid but still rank poorly if its strategy is narrow, overly centralised, insufficiently transparent, weakly embedded across society, or difficult to implement. For example, Singapore ranks highly because its strategy is deeply embedded across society, infrastructure and trusted institutions, and is supported by strong public participation and continuous testing. By contrast, Russia ranks differently not because it lacks alignment, but because its system is more narrowly state-centred, less transparent, and less broadly embedded across society, arguably making execution more challenging.

For contrast, we have included each country's traditional physical defence measures (see Table 1, p. 7). However, we consider that these measures have been superseded by newer indicators; personnel numbers and military expenditure alone no longer adequately capture how deterrence is achieved or how success is realised on the battlefield.

Figure 1: McGuinness Institute strategy pyramid¹

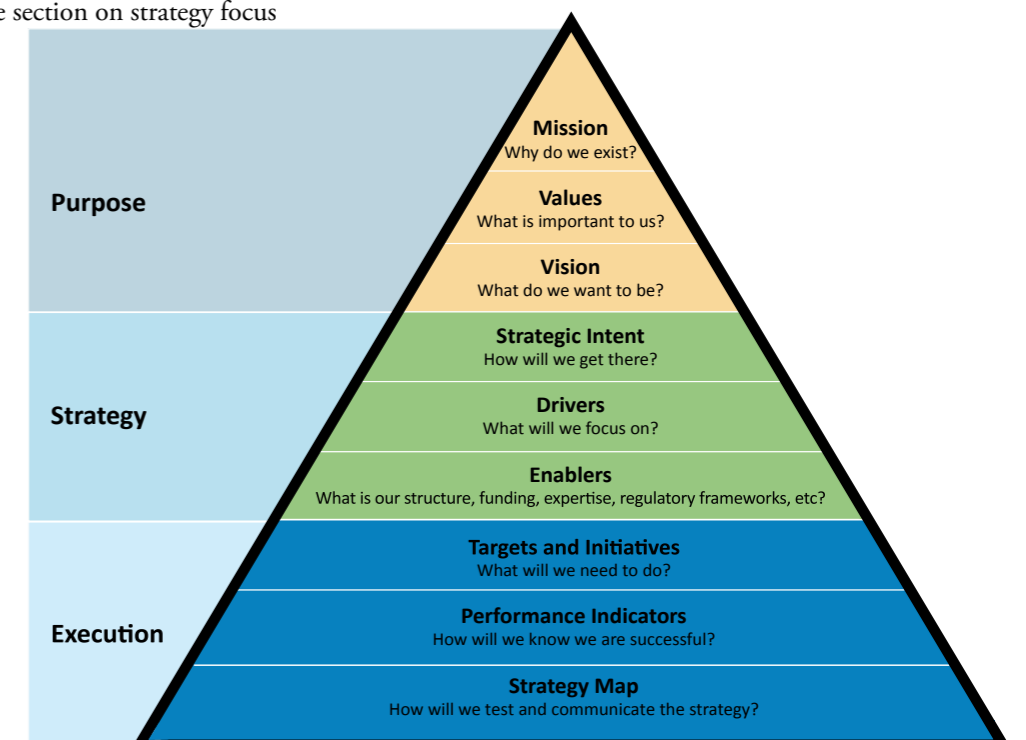
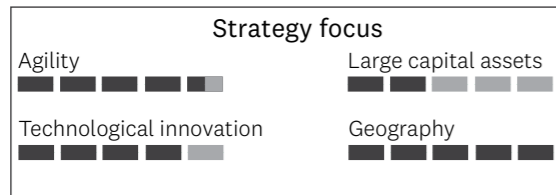
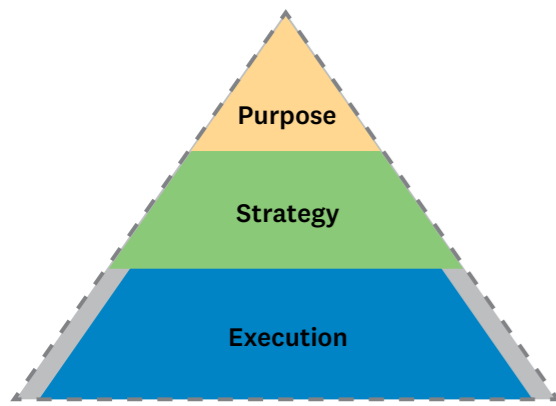
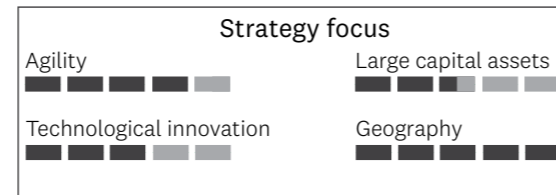
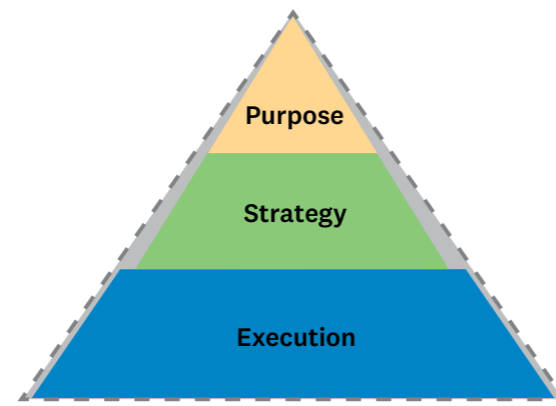


Figure 2: Comparative strategy pyramids for 12 countries by rank order

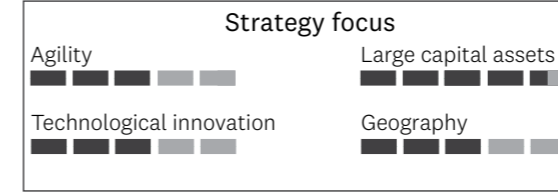
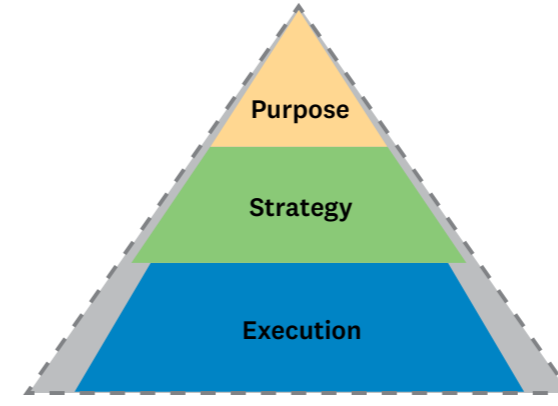
Note: The strategy focus key can be found on p. 6.



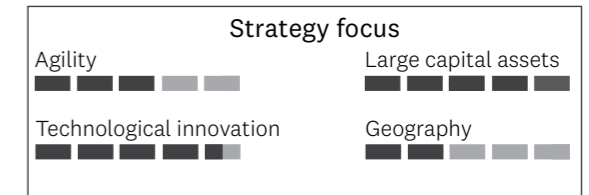
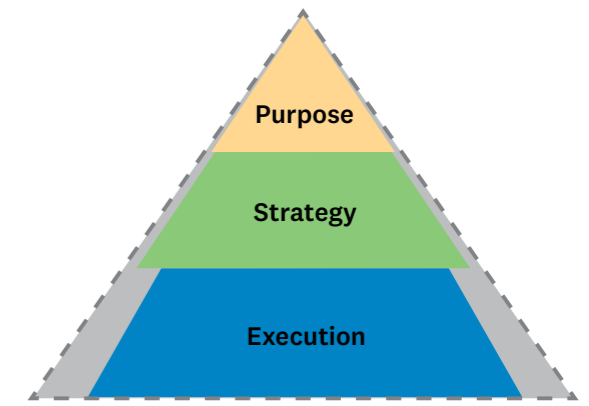
1. Singapore



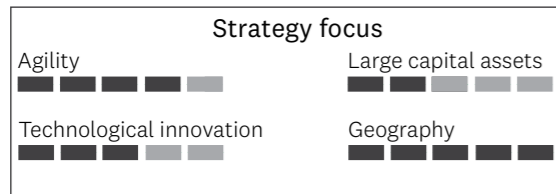
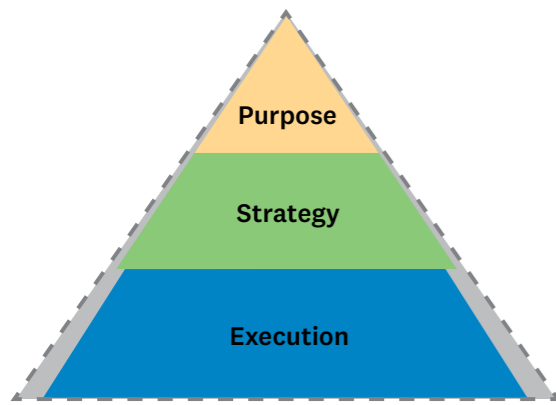
2. Norway



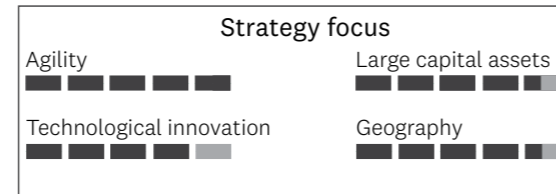
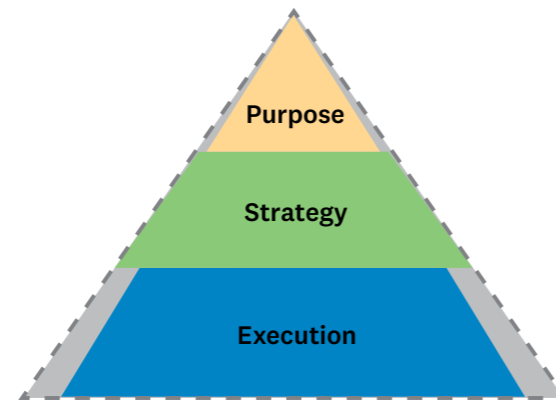
7. United Kingdom



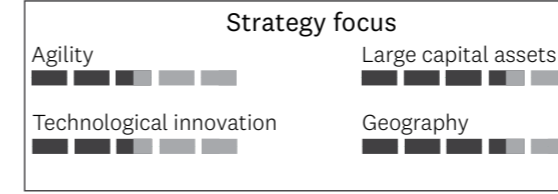
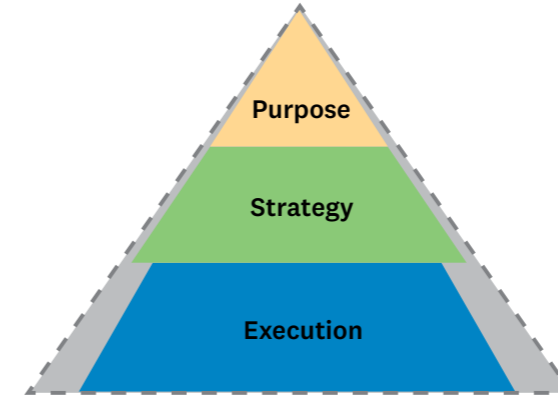
8. United States



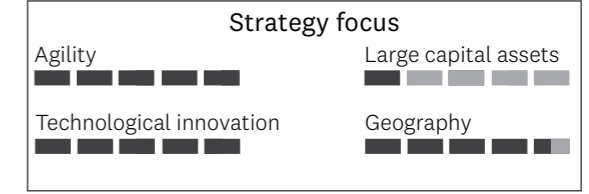
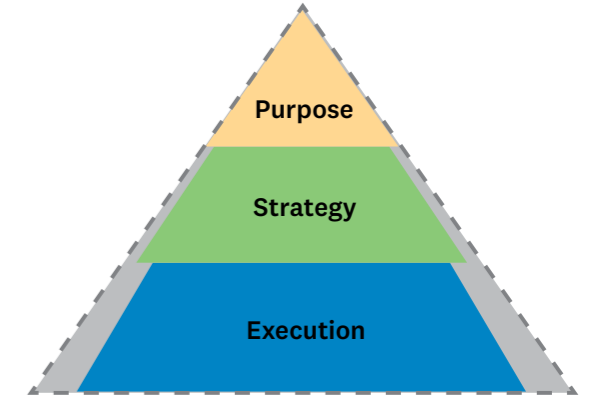
3. Finland



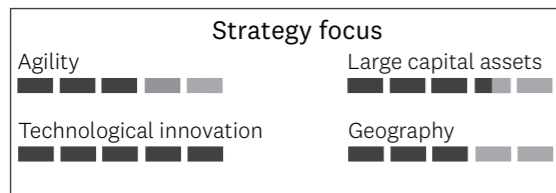
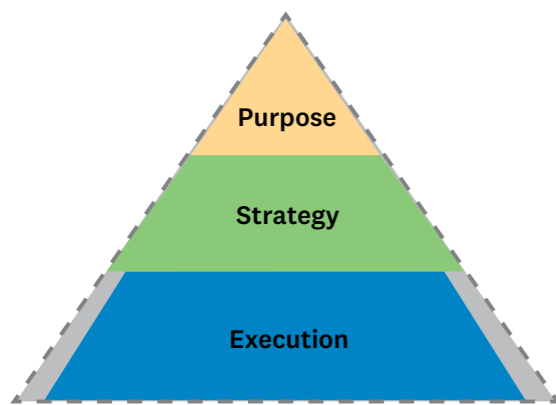
4. Australia



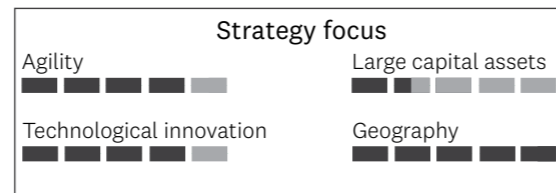
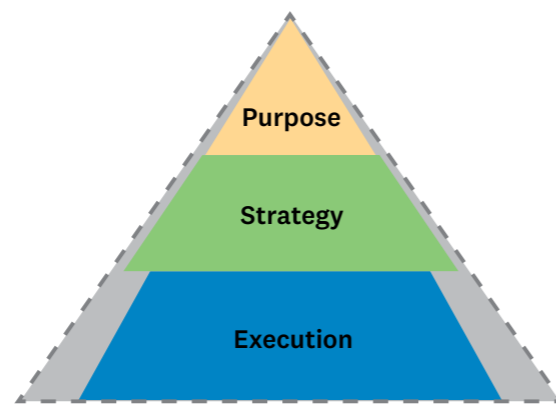
9. Canada



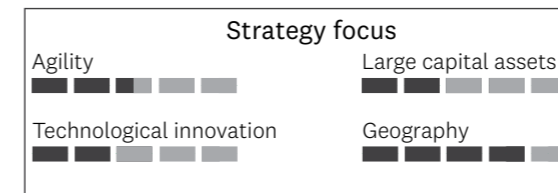
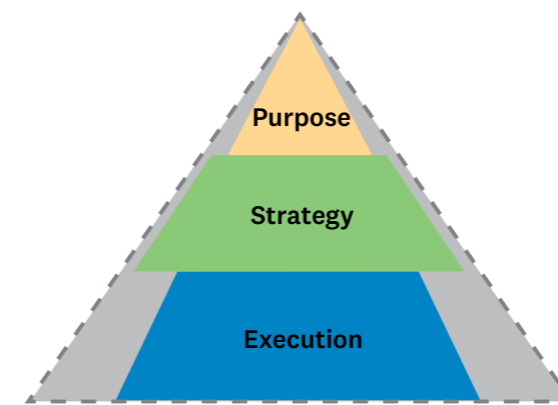
10. Ukraine



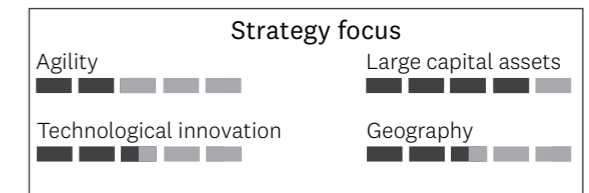
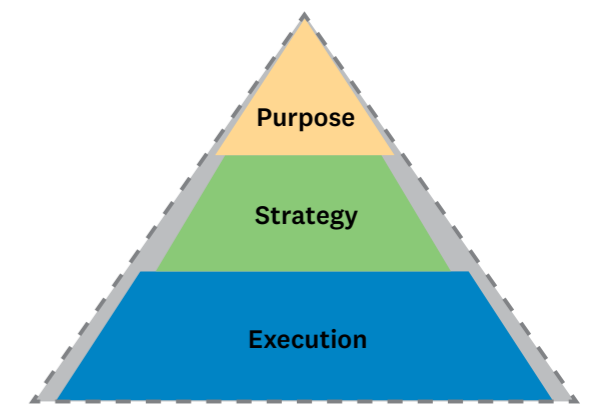
5. China



6. Taiwan



11. New Zealand



12. Russia

The McGuinness Institute strategy pyramid

The strategy pyramid asks nine questions.

The top layer of the pyramid asks whether a country has a clear mission, values and vision. The middle layer asks whether there is a coherent strategic intent, shaped by the right drivers and supported by credible enablers. The base tests the hardest question of all: whether strategy is translated into targets, initiatives, measurement, reporting, and a visible map for implementation.

This distinction between alignment and content matters because many countries are good at describing how their purpose, strategy and execution fit together into a consistent whole (often called doctrinal coherence), but few are good at building anti-fragile strategic systems in practice. A neat strategy can still be too rigid, too opaque, too militarised, or too disconnected from civil society. By contrast, the strong-performing countries in this analysis tend to combine military credibility with societal preparedness, institutional discipline and visible execution machinery.

That is why the highest-ranked systems, Singapore, Norway, Finland and Australia, are distinguished not simply by stronger defence planning, but by their ability to embed defence and security across the broader life of society.

Comparing countries

The countries are discussed in three groups, organised by rank.

Top group: Singapore, Norway, Finland and Australia (balanced and embedded systems)

These countries are strongest because they align purpose, strategy and execution and connect defence to resilience, institutions, infrastructure and national discipline.

1. Singapore:² ranks first because it offers the most complete and publicly assessable strategy of the 12 countries

Its mission is expressed directly and unambiguously: to enhance Singapore's peace and security through deterrence and diplomacy, and, if these fail, to secure a swift and decisive victory over the aggressor. The state's mission is then operationalised through the National Service (compulsory conscription) and a Total Defence framework.

Total Defence is a whole-of-society approach built on six pillars: military, civil, economic, social, digital, and psychological. The result is a strategy that is unusually visible to the public, deeply embedded socially, and repeatedly exercised through mechanisms such as Exercise SG Ready (which aims to enhance resilience and readiness for crises and disruptions). Singapore's system appears to work because each layer of the pyramid reinforces the others. The purpose is clearly articulated. The strategy is coherent. The execution framework is visible, consistently applied and repeatedly reinforced.

2 and 3. Norway³ and Finland:⁴ deliver the best whole-of-society preparedness

Norway ranks second because it connects a national security strategy, a long-term defence plan and a total preparedness/total defence white paper with especially strong execution mechanisms, including annual reporting to Parliament and the designation of 2026 as the Total Defence Year (this is a

nationwide mobilisation of preparedness activities, rather than a single exercise). Its strategic priorities are explicit: rapidly strengthen defence capability, enhance societal resilience, and strengthen economic security. This is a highly developed system in which military planning, civil preparedness, critical infrastructure and civilian support to defence are all treated as parts of a single architecture.

Finland ranks third and is arguably the most embedded whole-of-society model. Its *Security Strategy for Society* (2025) describes comprehensive security as a system in which the vital functions of society are safeguarded through cooperation between authorities, the business community, organisations and citizens. The strategy explicitly emphasises resilience, response to disruptions and the role of individuals as key actors. It also includes a practical monitoring mechanism through the *Security Report for Society*, submitted annually to government. Finland therefore performs very strongly on all three layers, even if the system is slightly less publicly simple and visually legible than Singapore's.

4. Australia:⁵ delivers a strong strategic architecture

Australia ranks fourth because of the strength of its strategic reset. The 2024 and 2026 *National Defence Strategy* documents explicitly shift the country toward a concept of National Defence, in which a strategy of denial, which aims to stop an adversary from achieving its political or territorial goals by making the cost of aggression prohibitively high or impossible to succeed at, becomes the cornerstone of defence planning. This is coupled with a whole-of-nation framing, stronger self-reliance, a major integrated investment programme and a disciplined process of biennial review and update. Australia has moved unusually quickly to articulate the connection between the strategic environment, national defence, industrial resilience, acquisitions, workforce and partnerships. That combination lifts Australia into the top tier.

Australia's placement demonstrates that strategy can be rapidly refreshed when changes in the geopolitical environment are matched by regular review cycles, visible public documentation and clear capability priorities. Australia has not yet achieved the same societal embeddedness as Singapore, but its direction of travel is highly coherent and strongly resourced.

Middle group: China, Taiwan, United Kingdom, United States and Canada (strategically strong, but structurally uneven)

These countries tend to demonstrate strong clarity of purpose and strategic direction, but exhibit weaker levels of transparency, societal integration and execution capability.

5. China:⁶ delivers a strong purpose but lacks transparency

China ranks fifth because it may have the most integrated and expansive strategic security doctrine of all the countries examined, but does not explain in detail how that will be achieved. The 2025 white paper *China's National Security in the New Era* sets out a holistic national security approach in which 'people's security' is the ultimate goal, 'political security' is the fundamental task, and national interests are the guiding principle. The doctrine spans politics, economy, technology, military affairs, development and social stability, and aims to modernise the national security system and capacity through deep reforms. There is a strong line of sight between national

purpose, strategic logic and system-building.

China ranks below the top group not because it lacks strategic integration or execution capacity, but because its strategy is not clear on the detail and lacks transparency in comparison with other countries. The public framework is visible, but external scrutiny, reporting and deliberative feedback are weaker. A country can therefore have a strong strategic centre and still rank slightly lower in this analysis if its system is harder to test or understand from the outside.

6. Taiwan:⁷ delivers a strong purpose but lacks execution

Taiwan ranks sixth because it demonstrates one of the strongest combinations of clear purpose and innovative strategy, but its execution architecture is still maturing. Taiwan's current approach centres on defending sovereignty, preserving democracy and liberty, and ensuring that government and society can continue to function during coercion or war. The Presidential Whole-of-Society Defense Resilience Committee links five resilience areas, including civilian training, critical supply distribution, infrastructure, evacuation systems and network protection, into a coherent strategic picture. President Lai's framing is especially clear: Taiwan must 'build strength through resilience'.

Taiwan's weakness lies not in strategic logic but in the fact that execution is still being built out under pressure. This is a country actively turning theory into drills, committees, legal frameworks and budgets, rather than one that has already settled into a mature steady-state system. That is why Taiwan's pyramid shows a weakness at the base even though it ranks relatively highly overall.

7 and 8. United Kingdom⁸ and United States:⁹ deliver a strong purpose but are currently undergoing significant transformation

The United Kingdom ranks seventh because the *National Security Strategy 2025: Security for the British People in a Dangerous World* and *Strategic Defence Review 2025: Making Britain Safer – secure at home, strong abroad* together provide a clear and serious strategic framework to enable a shift to war-fighting readiness and a NATO first model. That is a strong purpose and strategy combination. However, much of the execution layer is still in transformation over the next decade, which is why the base of the UK pyramid remains visibly weak.

The United States ranks eighth for a similar reason. The public direction of travel in 2025 was clear: stronger homeland defence, deterring China in the Indo-Pacific, and burden-sharing by allies. The White House published the 2025 *National Security Strategy of the United States of America*, and the Department of War began building a new National Defense Strategy using interim strategic guidance as its base. However, the actual execution framework was still in motion, which is why the base of the US pyramid is weaker than the upper layers.

9. Canada:¹⁰ delivers a strong purpose but lacks strategy and execution

Canada ranks ninth because Canada's defence policy update, *Our North, Strong and Free: A Renewed Vision for Canada's Defence* (2024), provides a much clearer strategic direction

than before, especially by centring Arctic sovereignty, North American defence, and a renewed defence vision responsive to climate change, Russia, China, the changing character of conflict, and the North American Aerospace Defense Command (NORAD) modernisation. The policy also lays out a multi-year funding uplift and a more explicit strategic focus on the Arctic than previous Canadian defence doctrine.

Canada ranks below the first group of four because execution appears more delivery-constrained and less settled. The policy vision is clear, but the visible institutional machinery for turning that vision into broad, repeatable and publicly tracked execution is less convincing than in Singapore, Norway, Finland and Australia.

Outliers: Ukraine, New Zealand and Russia (high strain, partial systems or weak balance)

These countries are outliers for three different reasons:

- Ukraine: extraordinary wartime execution, but long-term sustainability is under strain
- New Zealand: improving direction, but weak execution depth
- Russia: coercive state capacity, but weak trusted and resilient execution balance.

10. Ukraine:¹¹ delivers a strong purpose but is currently undergoing a long war

Ukraine ranks tenth, but this ranking must be interpreted carefully. Ukraine arguably has one of the strongest purpose layers of all 12 countries because its mission is existential: survival, sovereignty, defence and resilience. Its approach is also highly adaptive, centred on frontline stabilisation, strengthening defence capability, protecting the sky and sea routes, and expanding domestic weapons production and innovation. The Ministry of Defense and the National Security and Defense Council provide a strong strategic frame, and Ukraine has used the war to accelerate digitalisation (such as modernising command-and-control systems and expanding secure digital communications), and defence-industrial growth.

Ukraine ranks differently because even strong strategy cannot fully offset the strain of a live war. The execution layer operates under conditions of attrition, resource stress, dependence on external support, and constant destruction. In other words, Ukraine's pyramid reflects a very strong mission and strategic logic, but a base that remains under extraordinary pressure.

11. New Zealand:¹² delivers a strong purpose but lacks a whole-of-society approach

Aotearoa New Zealand's National Security Strategy: Secure Together Tō Tātou Korowai Manaaki, the *Strategic Defence Policy 2025* and the *2025 Defence Capability Plan* together provide a much clearer mission and strategic logic than previously. The Government has recognised that threats now reach New Zealand more directly, that security must be pursued earlier and more deliberately, and that the country needs a more combat-capable Defence Force. It has also started to connect national security to critical infrastructure and cyber resilience. However, New Zealand still ranks low because the execution layer remains thin at the whole-of-society level. There are real defence initiatives and funding, but there is not yet the same

depth of public performance indicators, whole-of-society preparedness architecture, security-of-supply logic, focus on exercises or cross-government resilience machinery seen in the stronger systems. That is why New Zealand's largest weakness sits at the base of its pyramid.

12. Russia:¹³ delivers a strong purpose but remains narrow

Russia ranks last, and this is where the distinction between shape and rank becomes most important. Russia's pyramid appears relatively 'full' because its purpose, strategy and execution are tightly aligned. The official National Security Strategy places state security, sovereignty, internal unity and political stability at the centre. The strategy is clear and highly centralised. The state also shows significant execution capacity through mobilisation, war-economy adaptation and forceful implementation. That is why the Russian pyramid does not appear weak.

Yet Russia ranks last overall because the broader assessment is not just about internal control. It is about whether the overall system is balanced, resilient, adaptive, transparent, and whole-of-society in a sustainable way. Russia's system is narrow, rigid and confrontational. It performs strongly in internal state alignment, but weakly when assessed against broader criteria of institutional balance, adaptability and publicly accountable strategic maturity. In short: Russia looks internally aligned, but not broadly well-formed. That is why a relatively stable pyramid can still rank lowest overall.

Strategy focus

Each country has its own unique defence and security profile. Given the above analysis, four characteristics appear to drive and shape a country's chosen strategy. These characteristics are illustrated beneath each country's pyramid in Figure 2 (see key below). The implications of each country's strategic approach are, in turn, reflected in the statistics presented in Table 1.

Agility

Of the 12 countries assessed, Australia appears the most institutionally flexible because it has embedded adaptation into the strategy process itself, with biennial updates to its *National Defence Strategy*¹⁴ and investment programme. Ukraine is the most operationally flexible under wartime pressure, while Singapore remains the strongest example of whole-of-society flexibility in peacetime.

Technological innovation

Ukraine demonstrates the highest level of technological innovation in practice, rapidly adapting systems and tactics under battlefield conditions through domestic weapons development, defence-tech innovation, digital tools and fast procurement changes. China represents the most integrated state-led innovation system, with its 2025 national security white paper, *China's National Security in the New Era*,¹⁵ setting out a holistic approach that spans politics, the economy, technology, military affairs and system modernisation. The *2026 U.S. National Defense Strategy* emphasises defending the homeland, deterring China in the Indo-Pacific, strengthening alliances, and reshaping the defence industrial base, while maintaining a decisive technological advantage.¹⁶ Singapore stands out for integrating capability across society itself, combining deterrence and diplomacy with mandatory military service, embedding national security across the entire

society rather than confining it to the armed forces, and public readiness exercises that embed technology into civilian and national resilience systems.¹⁷ These differences between countries show that technological innovation is no longer a single metric; it is now best understood as a combination of speed, scale, adaptation and system integration.

Large capital assets

The most striking divide across the 12 countries is not between large and small armed forces, but between those investing in long-lived, capital-intensive platforms and those shifting toward distributed, replaceable and rapidly adaptable systems. Ukraine has demonstrated the effectiveness of agile, low-cost innovation at scale, rapidly expanding domestic weapons production, drone capabilities and digital defence tools under wartime conditions. By contrast, countries such as the United States, United Kingdom and Australia remain heavily invested in large strategic assets such as high-end air platforms, naval capability and long-term defence investment programmes, supported by multi-decade procurement cycles and integrated capability planning. Increasingly, however, the most advanced systems, including China and Singapore, are blending both approaches, combining high-end platforms with distributed, technology-enabled capabilities through holistic national security strategies and whole-of-society defence models that integrate digital, economic and social resilience alongside military capability.

Geography

The countries with the most coherent and resilient strategies are often those whose strategy is most explicitly designed around that country's location, exposure and size. Smaller or more exposed states, such as Singapore, Norway, Finland and Taiwan, have built highly tailored strategies that reflect structural constraints; their official strategies are explicitly designed around vulnerability, proximity, maritime exposure, borders, territorial depth or population limits. Australia, New Zealand and Ukraine also score relatively highly because their current strategies are strongly influenced by distance, maritime or regional position, and exposure to conflict or disruption. By contrast, the United States, China and Russia score differently on this measure because their strategies are less tightly constrained by size, exposure and location. Arguably, their defence strategies are driven more by ideology and foundational beliefs than by purely operational or practical considerations. As a result, actions often centre on projecting power and reinforcing narratives of national ambition. Decision-making tends to follow a top-down model, with power, authority and control concentrated at the centre, a framework commonly described as centralised state logic.

Key to Figure 2

Agility: The bars indicate the extent to which a country's strategy, relative to the other 11 countries, emphasises flexibility and the ability to adapt.

Technological innovation: The bars indicate the extent to which a country's strategy, relative to the other 11 countries, emphasises innovation and the adoption of emerging technologies.

Large capital assets: The bars indicate the extent to which a country's strategy, relative to the other 11 countries, emphasises large, capital-intensive platforms over smaller, more agile or distributed systems.

Geography: The bars indicate the extent to which a country's strategy, relative to the other 11 countries, is designed to reflect and respond to the country's geographic context.

Table 1: Statistics: Strategy pyramid assessment from Figure 2 alongside traditional physical defence measures

Grouping	Country	McGuinness Institute strategy pyramid assessment using Microsoft 365 Copilot	Mandatory military service (MMS) 2026 data, World Population Review ¹⁸	Armed forces personnel 2020 data, International Institute for Strategic Studies (IISS) ¹⁹	Military expenditure 2025 data, Stockholm International Peace Research Institute (SIPRI) ²⁰	
					3.0% of GDP (rank 5)	US\$2,980 per capita (rank 2)
Top group	Singapore	(rank 1)	✓	1.7% of total labour force (rank 2)	3.0% of GDP (rank 5)	US\$2,980 per capita (rank 2)
	Norway	(rank 2)	✓	0.9% of total labour force (rank 4)	3.3% of GDP (rank 3)	US\$3,040 per capita (rank 1)
	Finland	(rank 3)	✓	0.8% of total labour force (rank 5=)	2.6% of GDP (rank 6)	US\$1,437 per capita (rank 5)
	Australia	(rank 4)	✗	0.4% of total labour force (rank 7=)	1.9% of GDP (rank 9)	US\$1,316 per capita (rank 7)
Middle group	China	(rank 5)	✓	0.3% of total labour force (rank 10=)	1.7% of GDP (rank 10)	US\$237 per capita (rank 12)
	Taiwan	(rank 6)	✓	Not available	2.1% of GDP (rank 8)	US\$785 per capita (rank 10)
	United Kingdom	(rank 7)	✗	0.4% of total labour force (rank 7=)	2.4% of GDP (rank 7)	US\$1,283 per capita (rank 8)
	United States	(rank 8)	✗	0.8% of total labour force (rank 5=)	3.1% of GDP (rank 4)	US\$2,755 per capita (rank 3)
	Canada	(rank 9)	✗	0.4% of total labour force (rank 7=)	1.6% of GDP (rank 11)	US\$939 per capita (rank 9)
Outliers	Ukraine	(rank 10)	✓	1.4% of total labour force (rank 3)	39.6% of GDP (rank 1)	US\$2,197 per capita (rank 4)
	New Zealand	(rank 11)	✗	0.3% of total labour force (rank 10=)	1.1% of GDP (rank 12)	US\$546 per capita (rank 11)
	Russia	(rank 12)	✓	2.0% of total labour force (rank 1)	7.5% of GDP (rank 2)	US\$1,318 per capita (rank 6)

Hidden patterns¹⁸

In foresight, hidden patterns are the underlying dynamics, signals or relationships that shape the future but are not immediately visible on the surface. Although some of the following insights are obvious, a few were reinforced as a result of undertaking this analysis. Seven key patterns were identified:

Purpose

- War, defence, military and security are being redefined**
Rather than viewing war as a physical confrontation, many strategies now recognise a grey zone, where adversaries seek to achieve strategic impacts without triggering open warfare. Grey-zone tactics are diverse and include unauthorised incursions into another country's airspace or maritime zones, cable mapping, cyber-attacks, disinformation, election interference and infrastructure sabotage.
- Whole-of-society 'security' is gaining prominence**
Notably, this approach addresses both traditional and non-traditional risks, including extreme climate events, cyber threats, pandemics, oil shocks and terrorism.

The purpose must be clearly defined, in particular whether the strategy and its execution are intended to prepare for military conflict, to prevent it, or both, and whether the focus is narrow (primarily military) or broader, encompassing grey-zone activity and wider security and safety risks.

Strategy (approach)

- Scale is both strength and vulnerability**
Larger countries possess a broader range of strategic options due to their scale, but this advantage carries inherent long-term risks. This dynamic highlights a

fundamental distinction between larger and smaller states. With greater populations and more substantial resources, larger countries can, at least in the short term, absorb higher levels of personnel and financial losses than smaller states. Although scale may enable more ambitious, expansive and attritional strategies (approaches that wear down an opponent over time), such strategies can encourage overextension, are rarely optimal and are seldom politically sustainable over extended periods.

- Constraints are driving sophistication**
Smaller countries are forced to think smarter, prioritising agility, innovation and replaceable capabilities over scale. They do not always have the level of funds and/or population and/or space to support a large military machine. As a result, they tend to focus on smaller, more replaceable capabilities, invest in innovative technological solutions rather than placing large numbers of people at risk, and prioritise agility, adaptability and relationships (e.g. NATO).
- Threats are driving investment, strategic alignment and a whole-of-society approach**
Countries facing real or imminent threats tend to demonstrate the strongest alignment between purpose, strategy and execution. They are also more likely to embed security and defence across society rather than confining responsibility to the military alone. Notably, those at war, or living under constant risk of conflict, ensure that their purpose, strategy and execution are clear, focused and concise, while also equipping citizens to be informed, responsible and capable of self-reliance during crises. As in the corporate world, maintaining a social licence increasingly extends to how military activity is justified to, communicated to and supported by the population.

6. **Deterrence is increasingly a part of the strategic solution**
This reflects a broader trend towards preventing conflict through readiness, interoperability, national resilience and international treaties, agreements and relationships rather than relying solely on the response after aggression has occurred.

The strategy must strike a careful balance: it needs to be sufficiently specific to articulate a clear and distinctive approach (i.e. one that is recognisably different from alternative options), while remaining broad enough to allow those responsible for implementation to act with agility and adapt as circumstances evolve. Above all, the chosen strategy must be demonstrably ‘fit for purpose’.

Execution

7. **Poor strategy often begins with weak execution**
Poor strategy consistently reveals itself in poor execution (e.g. see the shape of the pyramids in Figure 2). Conversely, weak execution is underpinned by either a lack of clarity over the purpose and/or the selected strategic approach, or poor project management.

The challenge is to actively monitor developments, draw on independent intelligence, and engage with a diversity of perspectives, while remaining both flexible and proactive as new insights emerge. Above all, those responsible for execution must ensure the purpose is clearly understood across all stakeholders and key milestones are delivered. In this evolving environment, success will depend on bringing together a wide range of relationships (both domestic and international), alongside diverse skills and novel talents, and a blend of new and established resources. Expectations, including those of officials accustomed to working in silos, will need to be actively managed.

What specific lessons exist for New Zealand?

New Zealand must not only align purpose, strategy and execution more clearly, but also build the wider institutional, societal and resilience architecture that lifts overall system quality. In practice, that means a clearer public mission, a more explicit geography-driven strategy, far stronger execution mechanisms, and a whole-of-society approach to preparedness that connects defence to infrastructure, supply chains, civil resilience and public accountability. To ensure the strategy is durable Government ministers should seek a non-partisan approach on how the recent funding announcements should be spent over the long term.¹⁹ To create a durable and cost-effective defence and security strategy, New Zealand needs to:

Purpose

1. **Clarify New Zealand’s national security purpose in accessible language.**
At present, *Aotearoa New Zealand’s National Security Strategy: Secure Together Tō Tātou Korowai Manaaki*²⁰ and the Ministry of Defence’s 2025 defence documents²¹ are much clearer than previous settings, but the country still lacks a short organising phrase equivalent to Australia’s strategy of denial or Singapore’s ‘Total Defence’. A concise statement focused on protecting sovereignty, trade routes, critical systems and Pacific stability would make the strategic purpose easier to understand across government and society.

2. **Develop a more explicit, geography-driven purpose built around New Zealand’s unique circumstances as:**
- a small island trading state
 - a country with huge maritime and Antarctic responsibilities
 - a nation deeply dependent on digital systems, supply chains and secure sea routes
 - a country whose security is closely bound to Australia and the Pacific.

Strategy

3. **Prioritise maritime security.**
4. **Put critical infrastructure at the centre of national security.**
5. **Assign the responsibility for setting the strategy more clearly with government (led by the Minister of Defence), rather than with policy advice from the Ministry of Defence (MoD) alone or implementation by the New Zealand Defence Force (NZDF) alone.**
The final strategy should require Cabinet approval and be established as a multi-use, whole-of-society defence, security and emergency framework, developed in consultation with the private sector and the public. The focus needs to be on cyber security, critical infrastructure and civil preparedness. A practical whole-of-society security model could include:

- public preparedness education
- clear expectations for local government, essential service providers and emergency management teams
- stronger civil-defence-to-national-security integration
- regular resilience exercises involving infrastructure operators, logistics firms and communities.

This would not need to replicate Singapore’s Total Defence exactly, but it should move beyond a defence-only mindset and embed security more broadly across society.

6. **Foster stronger partnerships with the private sector, and participate in military exercises and arrangements with nations that share similar goals and ambitions.**

Execution

7. **Build a much stronger execution architecture with update cycles, defence and security exercises, national and international exercises.**
This means building on exercises like the Five Power Defence Arrangements (FPDA), KPIs and delivery mechanisms. New Zealand still lacks the strong routines, metrics and public accountability mechanisms seen in better strategies, such as naming lead agencies for each major national security objective and public accountability for major delivery delays, capability gaps or procurement failures.
8. **Treat the *Defence Capability Plan*²² as the start of a more formal strategy-to-investment system and report regularly on how investments directly advance national priorities.**
This includes strengthening maritime security and enhancing of cyber resilience.
9. **Increase adaptability and innovation.**
This means seeking more diverse and up-to-date intelligence and regularly red teaming our latest strategy (i.e. when a designated group [the red team] challenges

the organisation [the blue team] by simulating adversary behaviour, real-world attack methods and alternative strategic perspectives).

10. **Align assets with purpose, combining strategic enablers with smaller agile systems.**
This could include building a multi-purpose integrated and interconnected AI drone ecosystem, alongside a complementary satellite communications system. See our *Think Piece 44 – Building an integrated and interconnected AI drone system*.²³
11. **Improve how Australia and New Zealand can work together on defence so their systems, people and strategies connect and operate seamlessly.**
12. **Create a strategy map and position execution as the central reform priority, supported by public milestones, clear agency accountability, and regular reporting.**

Recent developments

There is growing pressure on the New Zealand Government to treat defence spending as a primary indicator of strategic success. This is reflected in recent remarks by US Secretary of War Pete Hegseth on 30 May 2026 at the Shangri-La Dialogue, held in Singapore: ‘We demand 3.5% [as a percentage of GDP] from our allies and partners, and we are going well beyond that number.’²⁴

The ongoing debate over what percentage of GDP is acceptable is, in our view, fundamentally flawed. These measures, and other similar measures, have a number of recognised limitations and should be interpreted and compared with caution.²⁵ Furthermore, every country operates within a distinct strategic, regional and economic context. While it is entirely the United States’ prerogative to advocate for defence spending of 3.5% of GDP or more, financial inputs alone do not define the appropriateness of a country’s security and defence strategy. New Zealand should not purchase military assets or employ more personnel simply to satisfy the expectations of the United States. Instead, it must define its own clear objectives and articulate what success looks like within its unique strategic context.

Our profile is unique. History shows that New Zealand does not initiate conflict. However, it has supported allies in combat operations and, when called upon, has provided training, peacekeeping and stabilisation assistance.²⁶

Furthermore, New Zealand does not border any other country; we have a natural buffer in the form of the EEZ. However, that is not the full story. Unlike many other countries, New Zealand must think and act proactively beyond its borders, particularly in contributing to the long-term stability and resilience of the Oceania region and the continent of Antarctica, and all the waters between. It is a huge responsibility, and we need to think very carefully about our priorities and manage our responsibilities across this broader domain in a transparent and cost-effective manner.

Rather than being drawn into a debate over the percentage of defence spending of GDP, New Zealand should focus on developing a cohesive multi-purpose strategy that fits our unique profile and is strategically beneficial to our neighbours and allies. New Zealand can, and should, prioritise the delivery of strong situational awareness through enhanced maritime, coastal and Antarctica observation capabilities, not just for New Zealand but to contribute to our broader role in

the South Pacific and Antarctica.

In practice, Australia is New Zealand’s only fully operational defence ally. New Zealand’s formal defence arrangements are limited, with the United States suspending the US–New Zealand arm of the ANZUS treaty in 1986 following New Zealand’s adoption of a nuclear-free policy. However, New Zealand remains embedded in a highly valued intelligence and security partnership with Australia, the United States, Canada and the United Kingdom (Five Eyes), and participates in a range of formal and semi-formal defence arrangements. These include multilateral forums such as the United Nations and the ASEAN Regional Forum, as well as a programme of joint exercises and cooperative frameworks with like-minded partners, such as the Five Power Defence Arrangements (FPDA).

In line with approaches adopted by leading strategic partnerships and pacts, such as the European Union, New Zealand must identify and invest in its centre(s) of excellence to make a meaningful contribution to its allies and partners. This requires clear agreement with key partners, including Australia and the Five Eyes network, on the respective areas in which each country will lead. It is neither realistic nor efficient for small nations such as New Zealand to excel across all areas; instead, small nations must define and commit to their distinctive, world-class strategic contributions, and prioritise sustaining excellence in those areas over the long term.

To conclude, Hegseth’s comments serve as a timely reminder that our strategy must be fit for purpose and shaped by our unique needs and democratic processes, rather than influenced by isolated voices, whether domestic or international. It is time for New Zealanders, across both the public and private sectors, to discuss how we can develop a multi-purpose strategy that focuses on durable outcomes for New Zealand, Australia, the South Pacific and Antarctica, while also generating strategic benefits for our wider network, including trading partners, the 56 member countries of the Commonwealth, and other nations with which we maintain cooperative agreements and strong working relationships.

Next steps

The aim of this think piece was to understand what can be learned from comparing global defence strategies and to identify the lessons that can be applied to New Zealand. While the exercise was never expected to be perfect, it has nevertheless revealed patterns and insights that shed light on the way forward.

In July 2026 the Institute intends to publish the *2025 GDS Index*, which will include a transparency-based ranking of all government department strategies, including those relating to defence and national security.

In addition, the Institute is currently developing a potential deterrence-focused defence and security strategy map for New Zealand, incorporating a strong emphasis on the private sector and a whole-of-society approach. Alongside this, we have in press three supporting think pieces: one examining satellite communications as a critical enabling capability; another exploring the potential for New Zealand to host a ‘Dronathon’; and a third considering how a multi-use, whole-of-society framework for defence, security and emergency management might operate in practice, what we call the ‘green dome’.

Limitations

(i) Disclaimer

This think piece is subject to a number of limitations, some of which are clear, others of which may be less visible. The points outlined below reflect our understanding of these limitations, but may not be exhaustive. The results should therefore be treated as exploratory and used to support discussion and further research, rather than decision-making.

Countries were assessed using their most recent primary defence or national security strategy document, supplemented where necessary with other material from websites. In some cases, particularly where countries are in active conflict or where documentation is evolving, comparable sources are limited, and the analysis may draw more heavily on secondary material. For example, Ukraine does not have a single primary document outlining its current security and defence strategy. As a result, findings should be interpreted with caution, and differences in how countries publish and structure their strategies may affect comparability.

The research findings are comparative, meaning the results depend on the specific group of countries included in the analysis. The Institute has selected a diverse mix of countries – large and small, some with a purely national focus and others with a regional focus, some at war and others at peace, and some that are democratic while others are not. China and Russia have been included for comparative reasons; however, their more limited transparency means it was more difficult to analyse them, which may explain their ranking. A different selection of countries would produce different results.

This think piece relies on publicly available documents, which favours English-speaking and more transparent democratic systems. It assesses alignment between purpose, strategy and execution rather than military power, and uses comparative judgements that necessarily involve interpretation. For example, it can be argued that transparency in terms of a country's defence strategy may not be a good thing. Mandatory military service (MMS), GDP, armed forces personnel and population data are not fully standardised across countries, and wartime systems are not directly comparable with peacetime systems. Australia and New Zealand have regional defence strategies that include supporting neighbouring Pacific Islands, whereas other countries, such as Singapore, do not have similar responsibilities. In addition, differences in geography and regional responsibilities limit comparability.

(ii) Context and timing

Context is critical when assessing defence strategies. During periods of heightened conflict or instability, countries tend to refresh their strategies and often require rapid access to military capability and equipment. This can influence comparative results. Examples include:

- Russia's invasion of Ukraine has placed both countries on a wartime footing. It is possible that countries engaged in conflict may view transparency as less desirable, making them more difficult to assess and rank. This also explains their exceptionally high military expenditure as a percentage of GDP shown in Table 1, with Ukraine ranked first and Russia second. Lastly, the inclusion of these two countries in the group of 12 raises questions about the gap between strategy as articulated on paper and real-world outcomes, as well as how countries can effectively transition from a wartime footing to functioning as peaceful neighbours.
- Australia's ranking reflects the clarity and focus of its updated 2026 strategy, which places greater emphasis on deterrence, capability and readiness. This also raises the possibility that countries with more recent strategy documents may be ranked higher than those with older documents.
- The United States plays a pivotal role in driving higher levels of military investment globally, while also serving as the world's largest exporter of military assets. The US currently accounts for approximately 43% of global arms exports,²⁷ and thereby shapes the ability of countries to access capability and respond to emerging threats in the short term. However, this is likely to change as countries focus on becoming more independent.

(iii) Use of Microsoft 365 Copilot in Figure 2

The Institute is currently trialling a range of AI tools; for the purposes of this exercise, Microsoft 365 Copilot was selected.

McGuinness Institute's strategy pyramid assessment

Figure 2 was generated using Microsoft 365 Copilot. The process of shaping the country's strategy pyramid, determining rankings, and assessing the extent to which each country's strategy focuses on four key characteristics.

We acknowledge the limitations of using AI for research purposes. A number of these were previously outlined in *Think Piece 43 – Unlocking Government Documents with AI*.²⁸

(a) The shaping of the strategy pyramids and country rankings

The Microsoft 365 Copilot analysis favoured whole-of-society defence approaches (as shown in the prompt below), suggesting an inherent bias toward systems where strategy is widely understood and embedded across government and society. On reflection, countries tend to be ranked as stronger and more resilient where citizens, institutions and leadership are aligned, share a common understanding of risks, and take collective responsibility for addressing them.

Following our review of sources used by Microsoft 365 Copilot (subsequent to the Figure 2 exercise), we identified three additional documents that we consider should have been included in the analysis. It is likely that others exist. The three documents are:

Finland: *Government Defence Report 2024*. See <https://julkaisut.valtionneuvosto.fi/items/d0eaa6a1-5f35-402d-a452-440329eb27ee>

Taiwan: *2025 Quadrennial Defense Review (QDR) and National Defense Report 2023*. See <https://www.ustaiwandefense.com/taiwan-ministry-of-national-defense-mnd-reports/>

In two cases, Microsoft 365 Copilot provided us with references that we did not open due to the security message, meaning those sources and their quality could not be assessed by the team at the Institute.

The Microsoft 365 Copilot prompt was:

Can you apply the McGuinness Institute Strategy Pyramid to the current government defence and security strategy [of each of the 12 countries] by answering each of the [nine] questions?

The response from the prompt was:
The ranking is based on the three levels of the McGuinness Institute Strategy Pyramid:

Purpose — clarity of mission, values, and vision
Strategy — clarity of strategic intent, drivers, and enablers
Execution — clarity of targets/initiatives, performance indicators, and strategy map

A country ranks more highly when it demonstrates:

- clear strategic purpose;
- system-wide integration across military, civil, economic, and societal domains;
- credible execution architecture, including funding pathways, institutional mechanisms, regular exercises, or public reporting; and
- good line-of-sight between national purpose and practical delivery.

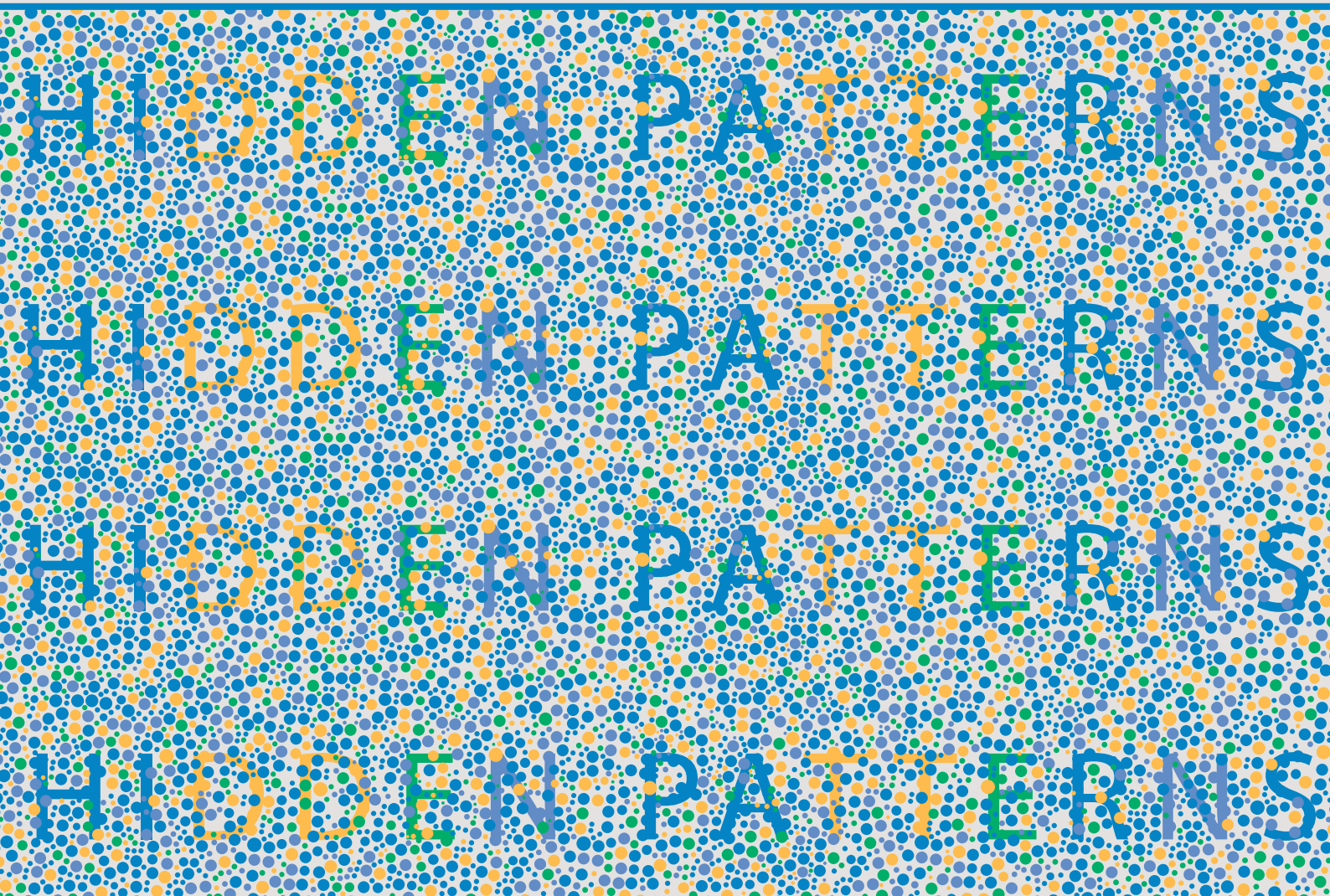
(b) Strategy focus indicators: agility, technological innovation, large capital assets and geography

Indicators such as agility, geography, technological innovation and large capital assets are comparative analytical constructs rather than official government metrics. These indicators were generated using Microsoft 365 Copilot, drawing on the McGuinness Institute's strategy pyramid assessment and associated defence and security documents. While Institute staff have reviewed the scores for any obvious errors, a comprehensive verification process has not been undertaken. As a result, the judgements are not always directly attributable to specific statements in official documents and should be interpreted as indicative rather than definitive.

Endnotes

- 1 McGuinness Institute (2025). *The Origins of the Strategy Pyramid*. [online] Available at: <https://www.mcguinnessinstitute.org/strategy-nz/the-origins-of-the-strategy-pyramid/> [Accessed 2 Jun. 2026].
- 2 Singapore: The following documents were referenced by Microsoft Copilot 365:
Ministry of Defence (Singapore) (2025). *Total Defence*. [online] Available at: <https://www.mindef.gov.sg/defence-matters/defence-topics/total-defence/> [Accessed 26 May 2026].
Ministry of Defence (Singapore) (2026). *Defence Policy and Diplomacy*. [online] Available at: <https://www.mindef.gov.sg/defence-matters/defence-topics/defence-policy-and-diplomacy/> [Accessed 26 May 2026].
Total Defence Singapore (2026). *Exercise SG Ready*. [online] Available at: <https://www.totaldefence.gov.sg/exercise-sg-ready/> [Accessed 28 May 2026].
- 3 Norway: These documents were referenced by Microsoft Copilot 365:
Norwegian Armed Forces (2022). *Armed Forces in numbers*. [online] Available at: <https://www.forsvaret.no/en/about-us/armed-forces-in-numbers> [Accessed 26 May 2026].
Norwegian Armed Forces (2026). *Total Defence Year 2026*. [online] Available at: <https://www.forsvaret.no/en/news/articles/total-defence> [Accessed 28 May 2026].
- 4 Finland: The following documents were referenced by Microsoft Copilot 365:
Finnish Government (2025). *Security Strategy for Society*. [online] Available at: <https://turvallisuuskomitea.fi/en/security-strategy-for-society/> [Accessed 26 May 2026].
Government of Finland / Ministry of Finance (2025). *Central government personnel 2025*. [online] Available at: https://vm.fi/documents/10623/2413886/Valtion_henkilosto_2025_EN.pdf [Accessed 26 May 2026].
Please also refer to the note in the limitations concerning a document that may have been missed.
- 5 Australia: The following documents were referenced by Microsoft Copilot 365:
Australia Department of Defence (2024). *2024 National Defence Strategy*. [online] Available at: <https://www.defence.gov.au/about/strategic-planning/2024-national-defence-strategy-2024-integrated-investment-program> [Accessed 26 May 2026].
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Australia Department of Defence / Defence Ministers (2025). *ADF recruitment surge the biggest in 15 years*. [online] Available at: <https://www.minister.defence.gov.au/media-releases/2025-08-04/adf-recruitment-surge-biggest-15-years> [Accessed 26 May 2026].
- 6 China: The following documents were referenced by Microsoft Copilot 365:
State Council Information Office of the People's Republic of China (2019). *China's National Defense in the New Era*. [online] Available at: https://english.www.gov.cn/archive/whitepaper/201907/24/content_WS5d3941ddc6d08408f502283d.html [Accessed 26 May 2026].
State Council Information Office of the People's Republic of China (2019). *China keeps active military force at 2 mln after downsizing: white paper*. [online] Available at: https://www.xinhuanet.com/english/2019-07/24/c_138253511.htm [Accessed 26 May 2026].
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- 7 Taiwan: The following documents were referenced by Microsoft Copilot 365:
Office of the President of the Republic of China (Taiwan) (2024). *Whole-of-Society Defense Resilience Committee: About the Committee*. [online] Available at: <https://english.president.gov.tw/Page/670> [Accessed 26 May 2026].
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National Statistics, Republic of China (Taiwan) (2026) *National Statistics, Republic of China (Taiwan)*. [online] Available at: <https://eng.stat.gov.tw/> [Accessed 26 May 2026].
Please also refer to the note in the limitations concerning two documents that may have been missed.
- 8 United Kingdom: The following documents were referenced by Microsoft Copilot 365:
UK Ministry of Defence (2025). *The Strategic Defence Review 2025: Making Britain Safer – secure at home, strong abroad*. [online] Available at: <https://www.gov.uk/government/publications/the-strategic-defence-review-2025-making-britain-safer-secure-at-home-strong-abroad> [Accessed 26 May 2026].
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- 9 United States: The following documents were referenced by Microsoft Copilot 365:
The White House (2025). *National Security Strategy of the United States of America*. [online] Available at: <https://www.whitehouse.gov/wp-content/uploads/2025/12/2025-National-Security-Strategy.pdf> [Accessed 26 May 2026].
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U.S. Department of Defense / Defense Manpower Data Center (2025) *Military Personnel and Demographic Reports*. [online] Available at: <https://www.war.gov/Contact/Help-Center/Article/Article/2763145/military-personnel-and-demographic-reports/> [Accessed 26 May 2026]

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- 10 Canada: The following documents were referenced by Microsoft Copilot 365:
- Government of Canada (2026) *State of the Canadian Armed Forces*. [online] Available at: <https://www.canada.ca/en/department-national-defence/corporate/organizational-structure/military-personnel-command/state-of-the-canadian-armed-forces.html> [Accessed 26 May 2026].
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- 11 Ukraine: This website was referenced by Microsoft Copilot 365:
- Ministry of Defence of Ukraine (2026). *Ministry of Defence of Ukraine*. [online] Available at: <https://mod.gov.ua/en> [Accessed 26 May 2026].
- Note: The assessment of Ukraine relied primarily on secondary material generated by Microsoft 365 Copilot in response to structured questions aligned with the Institute's strategy pyramid framework. This material synthesises publicly available information but is not based on a single primary strategy document published by government. An understandable constraint given Ukraine's wartime context.
- 12 New Zealand: The following documents were referenced by Microsoft Copilot 365:
- Business.Scoop (2025). *Multi-billion Dollar Defence Plan Unveiled*. [online] Available at: <https://business.scoop.co.nz/2025/04/07/multi-billion-dollar-defence-plan-unveiled> [Accessed 26 May 2026].
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- 14 Australia Department of Defence (2024). *2024 National Defence Strategy*. [online] Available at: <https://www.defence.gov.au/about/strategic-planning/2024-national-defence-strategy-2024-integrated-investment-program> [Accessed 26 May 2026].
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- 15 State Council Information Office of the People's Republic of China (2025). *China's National Security in the New Era*. [online] Available at: <https://english.scio.gov.cn/whitepapers/> [Accessed 26 May 2026].
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- 17 Ministry of Defence (Singapore) (2025). *Total Defence*. [online] Available at: <https://www.mindef.gov.sg/defence-matters/defence-topics/total-defence/> [Accessed 26 May 2026].
- 18 Notes on Table 1: Statistical data are not defined consistently across countries, and comparisons should therefore be interpreted with caution. Given the wide range of sources available, each employing different data sets, methodologies and terminology, we have opted to use a single source for each data type, in the expectation that this approach will support more consistent and reliable comparisons.
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- World Population Review (2026). *Countries With Mandatory Military Service 2024*. [online] Available at: <https://worldpopulationreview.com/country-rankings/countries-with-mandatory-military-service> [Accessed 29 May 2026].
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- 24 'President Trump is setting the gold standard. We demand 3.5% [as a percentage of GDP] from our allies and partners, and we are going well beyond that number. We expect every single ally and partner to match that kind of resolve. For those nations that rise to this challenge that embrace responsibility as true partners, the benefits will be clear. As our strategy states, we will prioritize working with model allies those nations who are most capable, clear-eyed and ready to defend their national interests. For those nations, we are moving them to the front of the line, expedited arms sales, deep industrial base collaboration, expanded intelligence sharing, the list goes on that benefits many.'
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