

WHITE PAPER:

Aotearoa New Zealand Artificial Intelligence

A Strategic Approach

Third Edition · 2026

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ABOUT THIS WHITEPAPER

The present paper was prepared under the leadership of Prof Albert Bifet, Prof Gill Dobbie, Prof Richard Green, Dr Daniel Wilson and Prof Mengjie Zhang. It updates the 2021 and 2024 editions. The 2021 whitepaper was based on discussions with Prof Alistair Knott (Victoria University of Wellington, previously with University of Otago), Prof Stephen Cranefield (University of Otago), Prof Michael Witbrock (University of Auckland), Dr Paul Geertsema (previously with University of Auckland), Prof Michael Winikoff (Victoria University of Wellington), Prof Te Taka Keegan (University of Waikato), Prof Māui Hudson (University of Waikato), Prof Eibe Frank (University of Waikato), Prof Bernhard Pfahringer (University of Waikato), Prof Ruili Wang (Massey University), Prof Albert Yeap (AUT), Associate Prof Kristin Stock (Massey University), Associate Prof Patricia Anthony (Lincoln University), Dr Alvaro Orsi (The Institute of Environmental Science and Research), Associate Prof Danielle Lottridge (University of Auckland), Dr Linley Jesson (Plant and Food Research), Dr Thomas Li (University of Canterbury), Dr Giulio Valentino Dalla Riva (University of Canterbury), Prof Yun Sing Koh (University of Auckland) and Jannat Maqbool (Executive Director at AIRA).

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1. EXECUTIVE SUMMARY

Since the 2024 edition of this whitepaper the ground has shifted twice over. Globally, AI has moved from generative models that answer to agentic systems that act, and the Government released New Zealand's first national AI Strategy and the first mission-scale public investment in AI research in our history, with an AI Institute. But there is still more to do: New Zealand ranks only 35th of 93 countries on the Global AI Index, while Ireland and Norway, with populations of similar size, rank 23rd and 20th respectively. That is a closeable gap, and this whitepaper is about closing it to secure New Zealand's AI technology future.

**“
Headline goal: New Zealand into the top 25 of the Global AI Index by 2030, and the top 15 by 2035, from 35th today. Every recommendation in this paper moves a specific, weighted component of that index, and each carries a named owner and a date so progress can be checked in public – alongside a short set of measures wholly within the Government's own control.
”**

WHAT WE RECOMMEND

Five recommendations, summarised here and set out in full with owners, deadlines and measures in the second half of the paper.



1. Build on Te Tiriti o Waitangi and te ao Māori as the foundation. Māori as partners in the governance, funding, contracting and talent decisions of everything that follows – not as a group consulted once the decisions are drafted. Māori governance on the research platforms and the national compute facility; a published minimum share of new AI research investment for Māori-led research; data sovereignty obligations written into every contract at signature, built on the exemplars Te Mana Raraunga and Te Kāhui Raraunga have already published; a funded programme to build Māori capability in AI; Māori leadership of the public trust work; and a third of talent awards targeted to Māori and Pacific candidates. This is the foundation the other four rest on, and the most distinctive contribution Aotearoa can make.



2. Build one connected ecosystem across academia, industry and government. Establish a coordinated national AI talent programme built around industrial PhDs. Land an anchor research laboratory of a frontier AI company. Assemble the accelerator investments now under discussion into a single national research compute facility with one allocation process and guaranteed access for public research. Have the NZIAT AI Research Platform operate as a hub the whole research system can compete into. And market an active national proposition to the researchers and firms we want to attract. These five components succeed together: talent needs infrastructure, infrastructure needs platforms, and platforms reach industry fastest through an anchor firm.



3. Concentrate on five strengths. Direct at least 75 per cent of contestable AI research funding to advanced AI research for industry and government; the bioeconomy, primary industries and environment; AI for social good in health and education; trusted and culturally grounded AI; and advanced technology, from robotics to quantum. Concentration is how a country of five million becomes internationally visible on a measure that rewards scale.



4. Adopt safe AI quickly and cost-effectively. Collect the administrative points that are currently available to New Zealand for the taking: a national strategy carrying measurable targets and dates, a minister and a body who own it, a public register of government AI with a right to explanation, open public data, and a seat at the international standards table. Then diffuse proven AI through the public sector and the SME base behind a single national assurance framework.



5. Earn a durable social licence. Establish an annual public trust survey, citizens' assemblies in high-stakes domains, AI literacy at population scale, honest planning for workforce transition, and funded independent scrutiny of deployed public-sector systems.

Taken together these five ask the Government for three things: a destination, a date, and a name against each line. The paper names no sum, because costing is properly the work of officials and a business case, and because we would rather be argued with about direction than about our arithmetic. We should be plain about what that does and does not mean. The first move in Recommendation 4 requires no new spending: it is a set of decisions. That is not the same as free. Decisions consume ministerial attention, policy

capacity and Cabinet agenda time, which are among the scarcest resources in the system and cannot be appropriated. Recommendations 2 and 3 are not — a talent programme, a compute facility and a research platform all cost money, and several would need a Budget bid or a fiscally neutral transfer with an identified offset. What we argue is that each sits within an existing purpose and an existing machinery, so none requires a new institution to be invented before it can start.

WHY THESE FIVE

Globally, AI has moved from generative models that answer to agentic systems that act — models that plan, use tools, write and execute code, and carry out multi-step work with limited supervision. At home, the Government released New Zealand's first national AI Strategy [4], and the public science system was rebuilt around new Public Research Organisations [28] and the New Zealand Institute for Advanced Technology [7], including the first mission-scale public investment in AI research in our history, now being contracted. These are developments this Association has long called for. What the strategy still needs is the part that makes it checkable: milestones, measurable commitments and named accountabilities. The Prime Minister has said he is "constructively dissatisfied" with the pace of progress and that being average in AI will leave New Zealand behind [1]. Across the Tasman, Australia has established an Office of AI inside the Department of the Prime Minister and Cabinet, announced national AI

standards and set a legislative timetable [2]. This edition responds in kind, and supplies the missing part.

The Government has also published its Pillar Investment Plans 2026–2031 [38]. They identify Artificial Intelligence and Advanced Computing as an investment outcome under Technology for Prosperity, with particular emphasis on adaptive, physical and edge AI that can be tested and deployed in New Zealand conditions. They also identify research talent, sustainable computing and data infrastructure, Māori leadership, and coordination across research, industry and government as important to delivery. This white paper builds on that direction and proposes the funding, governance and public measures needed to make it effective.

The Global AI Index is the measure this paper adopts. It is compiled by Tortoise Media, published since its sixth edition by The Observer, and covers 93 countries

across 108 indicators drawn from 23 independent data sources. It is the assessment governments quote about themselves: Saudi Arabia's state news agency reports the Kingdom's placement each edition and credits its Data and Artificial Intelligence Authority with the movement [31], and New Zealand's own industry body states its ambitions in the same terms [14]. We adopt it because it is calculated by someone else, decomposes to the level of individual indicators, and is already the currency of the national conversation. Its decomposition is where the year's good news becomes useful. Measured as a share of the field, New Zealand improved on seven of the nine positions the index reports: Commercial recovered from 48th to 38th, Development improved to 29th, Research held 31st while the field grew, and per-capita intensity moved to 27th. Three findings sit underneath that. Infrastructure slipped four places, to 34th, holding its share of a larger field. One position clearly went backwards – Talent, from 32nd of 83 to 42nd of 93 – and it is the constraint on research, development and commercialisation alike. And Government Strategy, at 58th of 93, remains our weakest position by sixteen places, in the one sub-pillar whose weight has tripled since 2023. Those two are what this paper is built to address.

Two things about the improvement deserve saying plainly. The first is that roughly half of it is not our doing: the largest single contributor is Operating Environment, where we moved from 50th to 11th because the publisher reworked the sub-pillar to measure institutional quality, public attitudes and public use. Our institutions were always good; the index started counting them. That is why this paper asks for Crown-controlled measures alongside it (Section 2.6). The second is that 11th of 93 is nonetheless real, and it is the first column in this paper series in which New Zealand is competitive with its peers – ahead of Israel, Finland, Australia, Ireland and Austria. It is also exactly what an anchor laboratory, an international researcher or a partner government is buying when it chooses a jurisdiction.

The index also settles a question of strategy. It counts what a country builds and governs: publications, models, patents, open-weight releases, companies,

funding rounds, and the institutions that support them. A subscription to an overseas model appears almost nowhere in it. Adoption of foreign AI lifts our productivity floor and is available to every competitor on the same day at the same price, so it leaves our international standing where it is. Research capability is what carries lasting advantage, and it is also what makes intelligent adoption possible. The index is more reachable than it first appears: open-source model and dataset releases carry two and a half times the weight of patents, and private capital is the single heaviest category in the measure, so a small number of substantially funded firms moves the number.

The paper's second foundation is evidence the research community has already produced. The NZIAT AI Research Platform process – over 100 concepts submitted, five shortlisted [6][8] – is the most detailed map yet drawn of what New Zealand needs in AI: research-grade compute, industry-embedded platforms, a talent pipeline, and Māori data sovereignty built in from the start. Recommendation 2.4 builds on it.

These recommendations are deliberately compatible with the Government's strategy and with the AI Forum's AI Blueprint for Aotearoa. The elements of a national consensus already exist across government, industry and research. What remains is a plan specific enough that anyone can check, on a stated date, whether each commitment has been delivered. This paper supplies one.

2. NEW ZEALAND ON THE GLOBAL AI INDEX



The central criticism of the 2025 national strategy is that nothing in it can be missed. The remedy is not more prose; it is a number that somebody else calculates. This paper therefore adopts the Global AI Index – launched by Tortoise Media in 2019 and published since its sixth edition as The Observer’s Global AI Index – as the organising measure for New Zealand’s AI ambition [9]. We do so for four reasons: it is external, and cannot be marked by the party being

graded; it is decomposable all the way down to individual indicators, so a movement can be attributed to a specific policy lever; it is republished often enough for progress to be visible on a political timescale; and it is already the currency in which New Zealand’s own industry body states its goals [14]. Our own 2024 edition used it as the headline measure of New Zealand’s international standing [13]; this edition builds the recommendations on it.

WHY THIS INDEX, AND WHO USES IT

It is also the assessment that governments quote about themselves. Saudi Arabia’s state news agency reports the Kingdom’s placement each edition and credits the Saudi Data and Artificial Intelligence Authority with the movement, and its first place on Government Strategy has been used publicly as evidence that the national programme is working [31]. Malta’s tenth-of-54 placement on government strategy in the first edition was reported at home as a national achievement. The index is used in the peer-reviewed literature as the standard cross-country dataset for national AI capability, including work that tests the robustness of its own weighting [32]. And in New Zealand, the AI Forum states its ambitions for the country in terms of this index [14], as did the 2024 edition of this paper [13]. A measure that the countries

we compete with use to describe their own progress is the right one to be judged against.

Its weakness is the mirror of its strength, and we state it here so that no reader has to discover it later. The publisher may re-weight the measure between editions, and did so this year to New Zealand’s benefit. A measure that can move a country thirteen places on its own initiative is an excellent diagnostic and a poor contract. That is why Section 2.6 pairs the index target with measures the Crown itself controls, and why we treat the index as the diagnostic and the comparison – the best available answer to how we are doing against the countries we compete with – and not as the whole of the commitment.

A second limitation matters more, and we state it as plainly. The Global AI Index measures economic and strategic capability: talent, infrastructure, research and development output, commercial activity, government strategy, and — since the sixth edition — public attitudes and institutional quality. It does not measure sustainability. It does not measure the effect of AI on te taiao. It does not measure whether communities are better off, or whether they consented to what was deployed among them. Its Infrastructure sub-pillar counts total electrical capacity and total annual generation as national assets, with no account of where that energy comes from and none of what the data centres consuming it cost in water, in land, or in emissions [10]. A country could rank first on this index while doing real damage on all three counts, and the index would not register it.

We therefore do not offer the index as a definition of success. It is the comparative diagnostic — the best available answer to how New Zealand stands against the countries it competes with for talent, capital and attention — and Section 2.6 deliberately pairs it with measures it cannot supply. Three bodies of work already exist and should be drawn on rather than

invented. He Ara Waiora, the Treasury’s framework for waiora, places te taiao — the natural and living world — near the centre of wellbeing, and names kotahitanga, manaakitanga and tiakitanga among the means of reaching it [33]. Ngā Tūtohu Aotearoa, the national indicator set maintained by Stats NZ, already reports community and environmental wellbeing on a consistent basis [34]. And the Stanford AI Index carries chapters on responsible AI and on public opinion that track safety, fairness, transparency, governance and public sentiment across countries, none of which the Global AI Index attempts [26].

The test of a national AI strategy in Aotearoa should therefore include three questions this index does not ask: whether te taiao is better protected than before, whether communities consented to and benefited from what was deployed, and what the compute we build actually costs in energy and water. We recommend the Government report against these from the first annual check, framed on He Ara Waiora and Ngā Tūtohu Aotearoa and led with Māori. We accept the consequence: on these measures a rising index position would not, by itself, count as success.

2.1 HOW THE INDEX IS BUILT — AND WHY THE STRUCTURE IS THE ARGUMENT

The current edition is the sixth, published by The Observer in December 2025. It aggregates 108 indicators from 23 data sources across 93 countries into three pillars, seven sub-pillars and twenty-seven weighted categories [10]. The categories are what make the index actionable: they are the level at which a government can decide to do something.

Three features of this structure carry the argument of this paper.

First, 35 per cent of the index — Research plus Development — measures what a country produces in AI, and a further 18 per cent measures whether anyone commercialises it. Government Strategy and Operating Environment together now carry 20 per cent, and Infrastructure 16 per cent. This is an index that rewards a state which decides, builds and invests, alongside one that publishes.

Second, a subscription to an overseas model appears almost nowhere in it. Adoption of foreign AI is not a New Zealand publication, model, patent, open-weight release, startup or funding round. Two second-order effects do register — the new Operating Environment sub-pillar counts public use of consumer AI platforms, and Talent counts working AI developers and scientists — but the index overwhelmingly measures what a country builds and governs. That is the same distinction that determines whether the value created by AI is captured onshore or exported with the licence fee.

Third, and most consequential for New Zealand: Government Strategy is a scored assessment of planned government investment in research, infrastructure, training and private-sector support, together with the machinery that owns it. It is now

worth 12 per cent of the index – more than Talent.

Section 2.3 shows why that matters here more than in almost any comparable country.

2.2 THE EVOLUTION OF THE INDEX, AND NEW ZEALAND'S PLACE IN IT

The Global AI Index has been published six times: 2019, 2020, 2021, 2023, 2024 and 2025. There was no 2022 edition. The field has grown from 54 countries to 93, so raw rank movements must be read with care – and the 2024 edition of this whitepaper did not read them carefully enough.

Measured as a position within the field, the sixth edition is the best result New Zealand has recorded on this measure. We rose thirteen places, from 48th to 35th, in a field that grew by ten countries – a move from 58 per cent of the way down the field to 38 per cent, ahead of the 41 per cent recorded in 2019. On raw rank, 35th is our best since 2021. It reverses a decline that ran unbroken on raw rank across the three previous editions – 22nd of 54 in 2019, 30th of 62 in 2021, 36th of 62 in 2023 [11], 48th of 83 in 2024 – and it deserves to be said plainly, because this paper has been sparing with good news.

It also deserves to be explained honestly, because roughly half of it is not our doing. The single largest contributor is the Operating Environment sub-pillar, where New Zealand moved from 50th of 83 to 11th of 93. New Zealand did not become thirty-nine places better at operating environments in twelve months. The publisher reworked what that sub-pillar measures – replacing indicators on AI-specific legislative activity

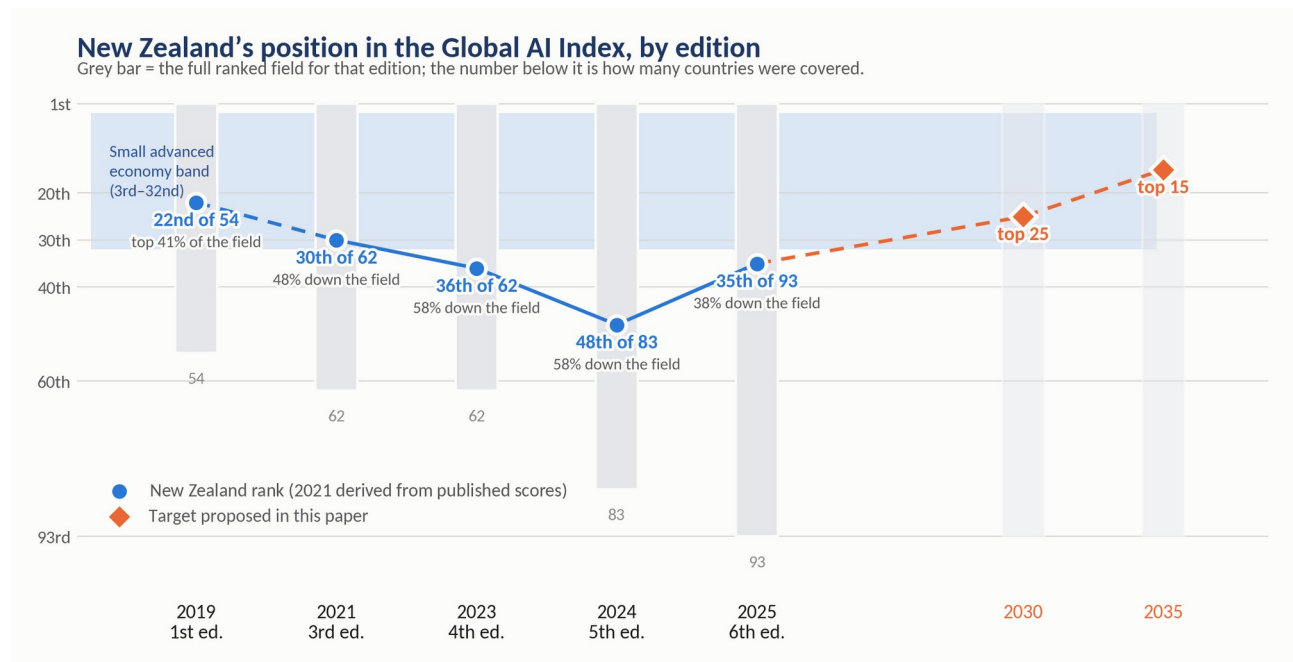
and open-data charter membership with public attitudes towards AI, public use of AI platforms, and the general quality of national institutions and governance – which is why Recommendation 4 now asks for New Zealand's open-data commitments to be refreshed on their merits rather than for index points, and makes no claim that the move is scored [10]. Our institutions were always good; the index simply started counting them. In the same edition Operating Environment doubled in weight, from 4 per cent to 8.

“

Much of New Zealand's thirteen-place rise came without a change of national policy, because the index changed what it counts. That is worth understanding twice over: it is the reason for most of this year's good news, and it is the clearest possible demonstration of why this index should inform our decisions and not be adopted as the Crown's performance target.

”

Figure 1. New Zealand's position in the Global AI Index, by edition, against the growing field and the band occupied by comparable small advanced economies. The second edition (2020) is omitted, which is why the first segment is dashed. The 2021 position is derived by ranking that edition's published country scores [9].



What the index itself has done over the last three editions is unmistakable, and it explains both the earlier decline and this year's recovery:

Table 1. How the Global AI Index has been reweighted across its last three editions. Source: the 2024 and 2025 methodology reports [10].

Sub-pillar	2023	2024	2025	Net change	What the index is saying
Government Strategy	4%	8%	12%	+8 points	Tripled. Governments deciding and investing deliberately now count for three times what they did
Infrastructure	11%	11%	16%	+5 points	Risen sharply with GPU clusters, data centres and electricity capacity added
Development	14%	18%	18%	+4 points	Risen and held; open-source models and datasets are now the largest part of it
Operating Environment	6%	4%	8%	+2 points	Doubled, and reworked to measure institutional quality, public attitudes and public use
Talent	15%	15%	11%	-4 points	Narrowed to AI research scientists and open-source contributors
Commercial	24%	22%	18%	-6 points	Falling, though still among the heaviest
Research	26%	22%	17%	-9 points	The largest single fall in the index
— Scale : Intensity	67:33	75:25	75:25	+8 to scale	Absolute output counts for more than it did

Government Strategy has tripled in weight over three editions, and it remains New Zealand's weakest

position. Infrastructure has risen by half, and now counts GPU clusters, data centres and electricity

capacity. Research, which the community has long treated as the national strength, has fallen from a quarter of the index to a sixth. The measure is moving

steadily toward what a state decides and builds, and away from what its universities publish.

2.3 WHERE NEW ZEALAND ACTUALLY STANDS

The publisher reports sub-pillar ranks alongside overall ranks. Setting the last two editions side by side, and correcting for a field that grew from 83 countries to 93,

shows exactly where the thirteen places came from and what they conceal.

Table 2. New Zealand’s Global AI Index sub-pillar ranks, fifth and sixth editions [9], with the weight each sub-pillar carries in the current edition [10]. Share of field is rank divided by countries covered; a falling share is an improving position.

Sub-pillar	Weight 2025	2024 (of 83)	2025 (of 93)	Share of field: 2024 → 2025	Reading
Operating Environment	8%	50th	11th	60% → 12% transformed	Now our strongest position by a distance — almost entirely because the sub-pillar was redefined
Development	18%	33rd	29th	40% → 31% improved	Genuine improvement, in a sub-pillar where open-source releases carry 10 of the 18 points
Commercial	18%	48th	38th	58% → 41% improved	The clearest reversal on our own effort; last year’s deterioration has been recovered
Research	17%	31st	31st	37% → 33% improved	Held its rank while the field grew — and while the sub-pillar lost five points of weight
Infrastructure	16%	30th	34th	36% → 37% slipped	Four places lost while holding its share of a larger field, in the sub-pillar that gained the most weight
Government Strategy	12%	71st	58th	86% → 62% improved, still worst	Our weakest position by a distance, in the sub-pillar whose weight has tripled
Talent	11%	32nd	42nd	39% → 45% worse	The one clear deterioration, and the constraint on everything above it
— Scale (absolute)	75%	57th	43rd	69% → 46% improved	Size still tells against us, less than it did
— Intensity (per capita)	25%	35th	27th	42% → 29% improved	Our per-capita position is now well ahead of our absolute output
Overall	—	48th	35th	58% → 38% improved	Thirteen places gained in a field that grew by ten

Read this way the year has three findings, and only the first is comfortable.

Measured as a share of the field, New Zealand improved on seven of the nine positions the index reports. Commercial recovered the ground it lost the

year before, moving from 48th to 38th; Development improved to 29th; Research held 31st while the field grew and while the sub-pillar lost five points of weight; and our per-capita intensity moved to 27th. Set against a paper written on last year’s data, that is a materially

better country than the one we were preparing to describe.

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One position clearly went backwards: Talent, from 32nd of 83 to 42nd of 93. It is the constraint on research, on development and on commercialisation alike.

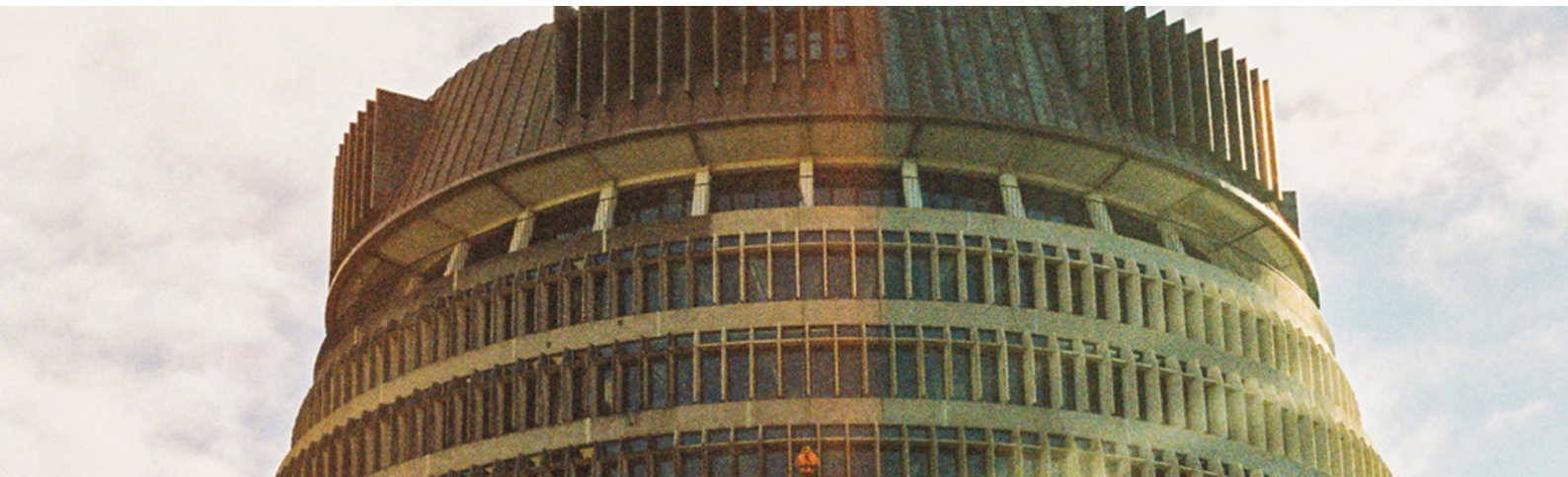
Infrastructure also slipped four places, to 34th, though it held its share of a larger field.

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The Talent decline is the finding this paper would least like to report and the one it is most confident about. The sixth edition narrowed what Talent measures: it now counts resident AI research scientists and developers contributing to open-source AI repositories, and it has reduced the weight given to employment-platform profiles [10]. Under that narrower definition — which measures people doing the work — New Zealand fell ten places while the field grew by ten. Recommendation 2.1 is the response, and it is the recommendation this paper would protect first.

And Government Strategy remains 58th of 93. It improved, from 71st, and it is still our weakest position by sixteen places, in the one sub-pillar whose weight has tripled since 2023. Everything the index scores there — planned government investment in research, infrastructure, training and private-sector support, and the machinery that owns each — is a decision. Recommendation 4 is the response.

2.4 WHAT IS WORTH FIXING, AND WHAT A FIX IS WORTH



The sixth edition sharpens the priorities without changing them. Two positions now account for most of the remaining distance between New Zealand and the countries it compares itself to.

Government Strategy, at 58th of 93 and 12 per cent of the index, is the largest single gap and the cheapest to close. Much of what it scores is administrative and within the Government's gift: stated commitments to invest in AI research, infrastructure and training, and the machinery that owns them. New Zealand has a strategy; it carries no measurable targets, no dedicated

spending commitments and no named body. Closing half the distance to the median of the thirteen peers, 32nd, is a drafting and decision exercise, and it would be worth more to our position than anything else available at comparable cost.

Talent, at 42nd of 93 and 11 per cent, is the smaller weighted gap and the more consequential one, because it is upstream of Research, Development and Commercial — 53 per cent of the index between them. A country can buy compute and publish a strategy in a year. It cannot buy a cohort of AI research scientists

and open-source contributors in a year, which is why Recommendation 2.1 has the longest lead time in this paper and why it should start first.

The remaining distance is Research, Development and Commercial, where New Zealand sits at 31st, 29th and 38th against medians across the thirteen peers of 16th, 17th and 18th. That gap closes slowly, through the platform, the compute facility and the anchor lab, and it is the work of a decade, not a term.

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Collect the government strategy points, because they are cheap and because 58th of 93 is indefensible for a country that has a strategy. Protect and rebuild talent, because it is the position that clearly went backwards and everything else depends on it. Then close the research-to-commercial gap, which is slow work and cannot be started later.

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2.5 THE COMPARISON THAT MATTERS: SMALL ADVANCED ECONOMIES

It would be comfortable to attribute our position to our size. The comparison does not permit it. Three-quarters of the index rewards absolute scale, so a country of five million will never lead on raw counts of papers, patents, companies or accelerators. But rank is

set by the countries immediately around us, and most of those countries are of comparable size. Every one of them faces the same arithmetic. Every figure below is from the same current edition.

Figure 2. Where New Zealand stands on each sub-pillar of the Global AI Index, against the share of the index that sub-pillar carries. Sixth edition, December 2025 [9][10].

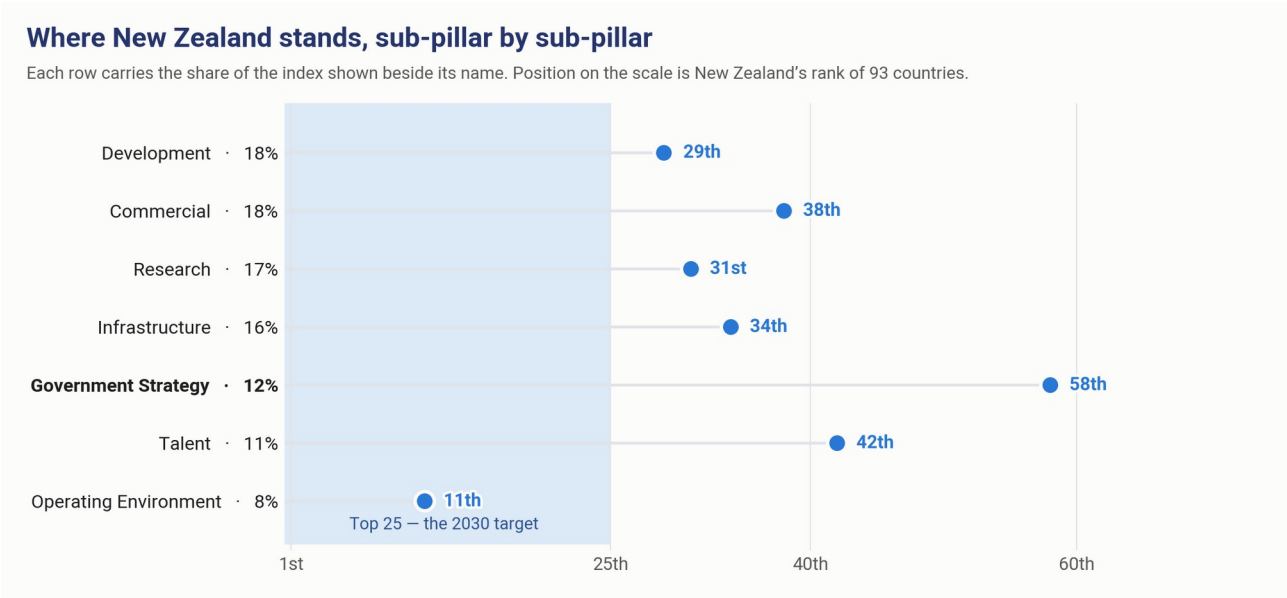


Table 3. Small advanced economies compared, all figures from the current sixth edition of the Global AI Index, 93 countries [9]. Column headings show each sub-pillar's weight. Infrastructure, Scale and Intensity are omitted for width; New Zealand ranks 34th, 43rd and 27th on them respectively.

Country	Popn	Overall	Op. env. 8%	Research 17%	Devel. 18%	Comm. 18%	Talent 11%	Govt str. 12%
Singapore	~6.1m	3rd	1st	3rd	9th	7th	3rd	10th
Israel	~10.1m	7th	12th	5th	7th	3rd	9th	14th
Switzerland	~9.1m	12th	6th	7th	10th	18th	6th	45th
Netherlands	~18.1m	13th	5th	19th	14th	9th	11th	27th
Finland	~5.6m	15th	13th	12th	11th	19th	15th	20th
Denmark	~6.0m	18th	9th	20th	15th	29th	25th	17th
Sweden	~10.6m	19th	23rd	16th	17th	8th	21st	59th
Norway	~5.6m	20th	4th	27th	18th	25th	37th	42nd
Australia	~27.8m	21st	14th	11th	19th	24th	16th	32nd
Ireland	~5.5m	23rd	18th	24th	24th	16th	19th	40th
Estonia	~1.4m	26th	50th	33rd	47th	10th	20th	28th
Luxembourg	~0.7m	27th	21st	15th	34th	28th	14th	57th
Austria	~9.2m	32nd	19th	21st	21st	33rd	22nd	55th
New Zealand	~5.4m	35th	11th	31st	29th	38th	42nd	58th

New Zealand is 35th, three places behind Austria and eight behind Luxembourg. That is a much shorter distance than the same table showed a year ago, when we sat sixteen places behind the nearest peer. The gap is now closeable within a decade, which is a different proposition from the one this Association was preparing to put.

For the first time in this paper series there is a column in which New Zealand is genuinely competitive with its peers. On Operating Environment we rank 11th in the world and sixth of these fourteen countries – ahead of Israel, Finland, Australia, Ireland, Austria, Sweden, Luxembourg and Estonia.

Elsewhere the pattern is consistent and unflattering. New Zealand is last of these fourteen on Talent, Commercial, Scale and Intensity, and thirteenth on Government Strategy. Across the thirteen peers the

medians are 16th on Talent, 18th on Commercial and 32nd on Government Strategy, against our 42nd, 38th and 58th. Two peers show that a weak government strategy is survivable if the base is strong – Switzerland reaches 12th while ranking 45th on strategy, Sweden 19th while ranking 59th – but both compensate with a research base New Zealand does not have – Switzerland 7th on Research and 6th on Talent, Sweden 16th and 21st – against our 31st and 42nd.

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New Zealand's position is not a consequence of being small. Ireland, Finland and Norway are the same size and sit between 15th and 23rd. Estonia is a quarter our size and nine places ahead.

Luxembourg has one-eighth our population and ranks 27th. Our position is a consequence of our choices – which means it is fixable by choosing differently.

”

2.6 THE TARGET

This Association proposes that the Government adopt, and be publicly measured against, the following:

- **Top 25 of the Global AI Index by 2030.** From 35th, this brings New Zealand inside the small-advanced-economy band, just ahead of Estonia and Luxembourg today.
- **Top 15 by 2035.** This places New Zealand in the middle of the peer group, where Finland sits now.
- **Top 25 on the Government AI Readiness Index by 2030,** from 37th – a target almost entirely within the Government's direct control [12][14].

Sub-pillar targets make the headline number actionable, and are where policy actually bites. All are stated against the current field of 93. Recover Talent from 42nd into the top 30 by 2030 and the top 20 by 2035, which is Recommendation 2.1 and the most urgent line in this paper. Move Government Strategy from 58th into the top 30 by 2029, which is Recommendation 4 and the cheapest. Move Commercial from 38th and Development from 29th into the top 25 by 2033, which are Recommendations 2.2 and 2.4. Move Research from 31st into the top 25 while doing so. And defend Operating Environment inside the top 15, which is Recommendation 5 – it is the one position we hold and the easiest to lose.

One qualification belongs with these numbers, and this year has supplied the evidence for it. New Zealand rose thirteen places in the sixth edition, and much of that movement came from the publisher redefining a sub-pillar, not from anything this country did. We therefore propose these index positions as the shared ambition and the annual public check – and we recommend that the Government also adopt a short set of measures wholly within its own control, reported alongside them: AI doctoral completions and two-year New Zealand retention; publicly funded compute delivered to New Zealand researchers; open-weight models and datasets released by publicly funded programmes; significant government AI systems on a public register with published evaluations; SME AI adoption from an official survey; AI-sector employment and export revenue; the energy and water footprint of publicly funded AI compute, reported annually and in absolute terms; and a te taiao and community wellbeing assessment of the national AI programme, framed against He Ara Waiora and Ngā Tūtohu Aotearoa, led with Māori and published alongside the index positions [33][34]. The index tells us where we stand among others. Those measures tell us whether we did what we said.

We note the obvious objection: no government should manage to an index. We agree, which is why the paragraph above exists. But the honest response to “don’t manage to a proxy” is to name a better one and report both, and the components of this proxy are, on inspection, the things a country would want to be good at anyway: it produces research and models, patents and open-weight releases, forms and funds companies, trains people, provides compute, and governs well.

3. WHY NEW ZEALAND MUST BUILD AI AS WELL AS APPLY IT



The 2025 strategy is, at its core, an adoption strategy. Adoption matters – we devote Recommendation 4 to it – but as a national posture it contains a fallacy: technology that we merely apply from overseas is, by definition, equally available to everyone we compete with. The same models, the same APIs, the same prices, on the same day, in Sydney, São Paulo and Shenzhen. Adoption lifts the floor. Whether it also builds a moat depends on what is being adopted. Buying access to a model confers no lasting edge: the same model reaches every competitor at the same price on the same day. But the work that makes a model useful inside an organisation is not a subscription. Architecting a platform for adoption takes years of sustained investment, and it is inseparable from the data systems underneath it – the pipelines, the governance, the evaluation harnesses, and the domain knowledge encoded in how a problem is framed in the first place. Enterprise data platforms now automate much of the layer in between, model routing included, which pushes the advantage downward into the data and upward into judgement, and leaves progressively less of it in the middle where a licence sits. That is where a durable edge is available to a country our size, and reaching it is a capability question: researchers and engineers who can build and evaluate those systems, methods applied to data and sectors that are ours alone, and institutions that

connect them to the firms and agencies that will use them. None of that arrives with a licence key.

Section 2 supplies the empirical version of this argument. New Zealand could double its rate of AI adoption tomorrow and move only marginally on the Global AI Index, because no sub-pillar counts consumption of foreign AI directly. The second-order effects are real but slow: more adoption eventually means more data scientists and AI engineers on employment platforms, which registers in Talent, and a more AI-literate public, which registers in Operating Environment. What adoption does not produce is a publication, a patent, an open-weight model, a company or a funding round. This is not a scoring accident. It is the world's consensus judgement about what constitutes national AI capability, and it agrees with the economics.

The three reasons given in 2024 to invest in AI research in Aotearoa have strengthened, and two more have joined them:

- **Values.** AI systems encode their creators' values. Agentic systems – which act, not merely answer – raise the stakes: delegation of action requires deeper trust. If New Zealand wants AI that reflects sustainability, fairness, Te Tiriti obligations, whānau-first and intergenerational thinking, it

must build, adapt, fine-tune and evaluate systems here, with the communities affected. Sovereignty over evaluation and adaptation is the new frontier of technological sovereignty for small nations.

- **Value capture.** Whether the economic value of AI is captured onshore depends on local capability: firms that adapt AI to New Zealand problems, export niche AI products, and keep the resulting intellectual property, jobs and tax base here [15] [29]. This is the Commercial sub-pillar, which carries 18 per cent of the index and where New Zealand ranks 38th of 93 – recovering, and still last among comparable small advanced economies.
- **Productivity.** New Zealand's productivity gap with the OECD remains our central economic problem. AI – especially agentic AI applied to services, the public sector and the primary industries – is the single most credible lever available this decade. But diffusion does not happen by itself: it requires talent, trusted guidance, exemplars and infrastructure.
- **Absorptive capacity.** Even a pure-adoption strategy fails without researchers. Evaluating, adapting, fine-tuning and assuring frontier systems for local conditions is research-grade work. Countries that stop training builders eventually cannot even choose well.
- **Talent gravity.** Researchers train the workforce and anchor the diaspora's return path. A country with no frontier research offers its best AI graduates a one-way ticket to it – usually via Sydney or San Francisco. This is why the Talent sub-pillar and the Research sub-pillar move together, and why neither can be fixed alone.

Build and apply are not the only two options, and presenting them as a binary understates what is realistically available to a country of five million. The third course, and often the most realistic, is to partner – to hold a genuine stake in capability New Zealand does not fund alone. Joint appointments and joint laboratories with overseas institutions; membership of international compute and evaluation consortia; bilateral research agreements that give our

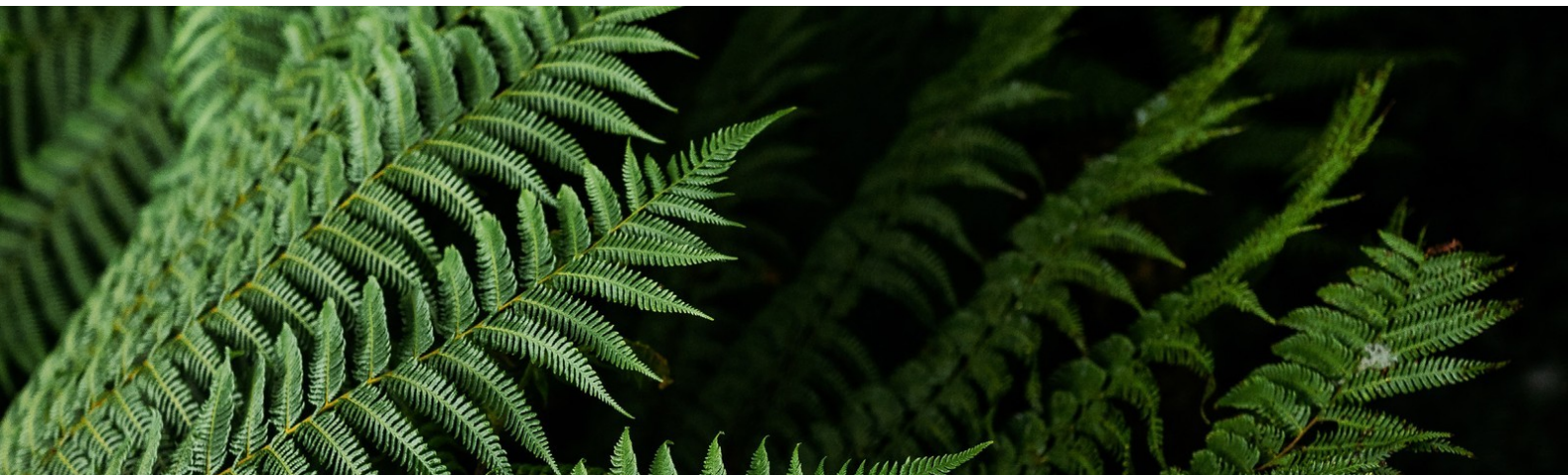
researchers access to frontier systems and give partners access to data, environments and problems they cannot obtain elsewhere; and the standards and safety institutes where contribution buys influence. Landing an anchor laboratory, Recommendation 2.2, is one route to this and the most visible, but it is one of several, it turns on a single corporate decision, and it should not be read as the only one. The others are cheaper, faster, and several are already partly in place. What every route shares is the condition that makes any of them work: there has to be capability here worth partnering with. A country with nothing to bring is not a partner but a market.

Three cross-cutting observations frame everything that follows. Adoption without research is dependency – the adoption strategy and the research base are complements, not substitutes. Concentration beats dispersion – the platform model is an opportunity to concentrate, provided platforms are anchored in demonstrated international excellence. And trust is infrastructure – social licence, Māori data governance, transparent public-sector AI and credible safety practice are not compliance costs; they are the asset that makes New Zealand an attractive place to research, test and deploy AI. In the agentic era, national AI advantage comes from the speed and trustworthiness of the loop between research, deployment and society. A country of five million cannot out-spend anyone; it can out-connect them. And partnership is a strategy in its own right – the national choice is not confined to building or buying, and the most likely path for New Zealand runs through what it can offer others in exchange for access it could not otherwise afford.

4. RECOMMENDATIONS

The five recommendations are stated below. Each opens with the problem it is meant to solve, then the recommendation itself, then the reasoning behind it, and finally four lines that make it checkable: the index

component it moves, the actor accountable for it, the date by which it falls due, and the measure an outside observer can score.



RECOMMENDATION 1 – TE TIRITI O WAITANGI AND TE AO MĀORI: THE FOUNDATION

THE PROBLEM *The 2025 national strategy is silent on Te Tiriti o Waitangi, and treating Māori partnership as a consultation step at the end of a decision leaves both an obligation unmet and the one genuinely distinctive position New Zealand holds in global AI unbuilt.*

Embed Te Tiriti o Waitangi and te ao Māori in the governance, funding, contracting and talent decisions of every recommendation that follows – as a condition of each, and as the most distinctive contribution Aotearoa can make to how AI is done.

This is the foundation the other four rest on, and it is what makes the Aotearoa approach globally distinctive. We place it first deliberately: a foundation named last is a foundation in name only, and the ordering of a document is itself a statement about what conditions what. The 2025 strategy's silence on

Te Tiriti o Waitangi – not one mention, as Dr Lensen observed [5] – is the clearest single symptom of strategy-by-generality, and this paper takes the opposite approach in structure as well as in words.

Māori as partners, not stakeholders. This paper asks for an ecosystem built in partnership with industry: an anchor laboratory negotiated by a government deal team, a research platform co-led with firms, a compute facility with priced industry access, and a procurement framework that pools public demand. The same partnership obligation applies, with greater force and a different basis, to Māori. Te Tiriti o Waitangi makes iwi, hapū and Māori organisations partners in the design, governance and benefit of national infrastructure – not consultees on decisions already taken, and not a community to be engaged once a contract is signed. Every partnership instrument proposed in this paper is therefore to name Māori partners on the same footing as industry partners, with the same decision rights, the

same seat where the terms are set, and the same place in the contract. Where that is not possible, we ask that the reason be stated publicly rather than left to inference.

- **Ecosystem.** Māori partnership in the governance of the NZIAT platforms, the national research compute facility, the PROs and any anchor-lab agreement — in governance roles carrying decision rights, appointed in partnership with iwi and Māori research networks, and in place at the platform's first scheduled review and before any subsequent platform is contracted.

Index lever: Operating Environment (8%) and Government Strategy (12%); protects the distinctiveness underpinning Recommendation 2.5.

Owner: NZIAT, with iwi and Māori research networks.

Deadline: In place for the AI Research Platform at its first scheduled review, and before any subsequent platform is contracted — in both cases by 31 March 2027.

KPI: Māori governance representation confirmed and publicly reported at the AI Research Platform's first scheduled review and before any subsequent platform is contracted, and on the national compute facility's governance from its establishment.

- **Research.** A published minimum share of all new AI research investment flowing to Māori-led research — including indigenous language AI, mana raraunga-compliant architectures such as federated, on-device and community-governed systems, and mātauranga-informed environmental AI — funded as flagship national strengths, alongside dedicated capability support for iwi, hapū and Māori organisations to participate as research partners.

Index lever: Research (17%) and Development (18%), in the one area where New Zealand can be globally first.

Owner: NZIAT with TEC.

Deadline: Share published by 31 December 2026, and applied in every funding round and platform decision from that date.

KPI: ≥15% of new AI research investment to Māori-led research, reported annually from 2028; at least two internationally recognised outputs — model, standard or method — from this stream by 2031.

- **Data sovereignty by contract.** Every platform, infrastructure and adoption arrangement in this paper carries Māori data sovereignty obligations, CARE-aligned and consistent with the Māori Data Governance Model, from signature. The national research compute facility implements them by design. Government and industry deployments are assessed for impacts on Māori and designed with Māori from procurement onward.

Index lever: Operating Environment (8%); a precondition for the trusted-testbed proposition in Recommendation 2.5.

Owner: NZIAT and MBIE, with Māori data governance partners.

Deadline: In force for all new contracts from 31 March 2027.

KPI: 100% of platform, infrastructure and major government AI contracts carrying Māori data sovereignty obligations by 2028, independently verified.

- **Social licence.** Māori leadership, not merely Māori consultation, in the trust survey, citizens' assemblies and independent-scrutiny functions of Recommendation 5 — with iwi and Māori communities helping to set the questions they are asked. Public trust in AI is a scored indicator of the index and a precondition of everything else in this paper; Māori trust in AI, specifically, is the measure most likely to be damaged first by a badly governed deployment and hardest to rebuild.

Index lever: Operating Environment (8%) — public attitudes towards AI.

Owner: Stats NZ and MBIE with iwi and Māori research networks; AIRA as delivery partner.

Deadline: Māori co-design of the survey instrument complete by 30 September 2027, before the baseline is taken.

KPI: Trust in AI reported separately for Māori respondents from the 2027 baseline onward, and the gap between Māori and non-Māori trust narrowing by 2031.

- **Talent and capability.** A third of the awards in Recommendation 2.1 targeted to Māori and Pacific candidates, from the paid undergraduate research internships through to senior

fellowships, with wrap-around support co-designed with Māori and Pacific researchers – and, critically, with the recruitment campaign described in 2.1 running through a full academic year before applications close, so that the applications exist to fill them. Alongside the awards, a funded programme to build Māori capability in AI as a deliverable in its own right. Three strands: doctoral and early-career positions held by Māori researchers; technical capability inside iwi, hapū and Māori organisations, so that they can govern, interrogate and use their own data rather than relying on others to do it for them; and paid pathways from community and marae-based research into the national platforms. The award target sets the volume. This sets the pipeline that has to exist for the target to be met.

Index lever: Talent (11%).

Owner: TEC and universities, with iwi and Pacific community networks.



RECOMMENDATION 2 – ECOSYSTEM: ACADEMIA / INDUSTRY / GOVERNMENT



THE PROBLEM *New Zealand now has the pieces of an AI system – universities, the new Public Research Organisations, NZIAT, a research platform and an emerging compute build – but they are being stood up separately, and a country of five million cannot afford several partial systems where one connected system would reach international scale.*

Deadline: Recruitment campaign live by 1 March 2027, a full academic year before applications close; first cohort 2028.

KPI: Māori and Pacific share of AI postgraduate completions at least doubled from the 2026 baseline by 2032; application numbers published annually from 2027. Māori capability programme designed by 30 June 2027 and first cohort in place by 1 March 2028; at least ten iwi, hapū or Māori organisations with in-house AI or data capability by 2030, reported annually.

Done well, this is not a constraint on New Zealand's AI ambitions. It is among the most defensible sources of international distinctiveness we possess – a reason a researcher, a lab, or a partner government chooses Aotearoa over a country that can offer more money. The overarching KPI is deliberately structural: by 2028, an independent reviewer must be able to point, in each of Recommendations 2, 3, 4 and 5, to the Māori-led component, its scope, and its named owner. If they cannot, this recommendation has failed – and so, in our view, has the strategy.

Build one connected national AI ecosystem, in which universities, the NZIAT AI Research Platform, the Public Research Organisations, industry and government operate as a single system with shared talent, shared infrastructure and shared missions.

A functioning AI ecosystem is a triangle: academia trains and discovers; industry deploys and scales; government funds, convenes and de-risks. New Zealand now has the machinery. The five components below complete the triangle. They are one recommendation because they fail separately: talent without infrastructure leaves; infrastructure without platforms idles; platforms without an anchor firm under-commercialise. Between them these five components reach six of the seven sub-pillars: Talent, Research, Development and Commercial, which carry

64 per cent of the index, and — through the compute decision in 2.3 — Infrastructure and Government Strategy, a further 28 per cent. The seventh, Operating Environment, is the subject of Recommendation 5.

2.1 AI Talent

THE PROBLEM *Talent is the one position that clearly went backwards this year, from 32nd of 83 to 42nd of 93, and it is the input on which research, development and commercialisation all depend, so it is the constraint that binds every other recommendation in this paper.*

Establish a coordinated national AI talent programme built on industrial PhDs, joint early-career fellowships and international recruitment, launched as a recruitment campaign a full academic year before applications close.

The programme has three tiers: a substantial cohort of AI PhD scholarships, with industrial PhDs co-supervised with firms and PROs — on the French CIFRE model — as the default pathway; early-career fellowships jointly appointed across a university and an NZIAT platform, so that the platform strengthens the universities that host them; and a small number of internationally benchmarked recruitment packages to attract world-class researchers, including returning New Zealanders. Industrial PhDs are the highest-

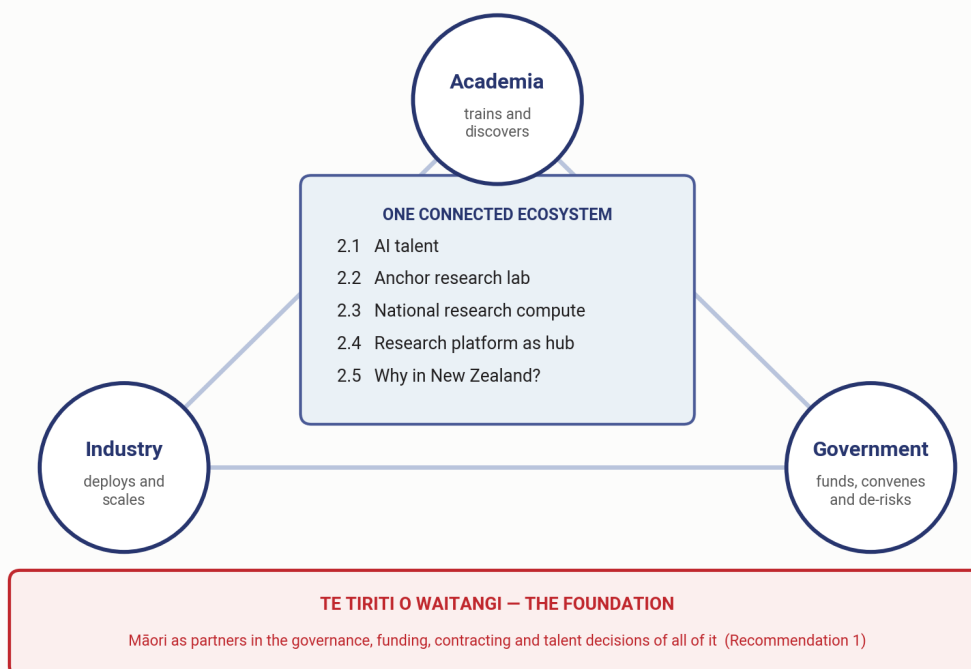
leverage instrument available, and the index explains why. The Talent sub-pillar does not count graduates or degree completions at all; it counts working AI scientists and engineers, contributors to open-source AI projects, and practitioner activity. A PhD scheme that produces graduates who leave, or who never ship code, moves nothing. An industrial PhD produces a practitioner in a firm, an open-source contribution, and often a patent — registering in Talent, Development and Commercial at once.

Demand for these places must be built, not assumed. New Zealand does not today generate enough Māori and Pacific applications in AI to fill an ambitious programme, and a target set without a pipeline is a target set to fail. The awards should therefore be designed and named early and then promoted through a full academic year before applications close, so that the scheme functions as a recruitment campaign and not merely as a selection process: named, visible awards used deliberately to promote AI study in schools and undergraduate programmes, with outreach through whānau, iwi and Pacific community networks, paid summer research internships from second year, and wrap-around support co-designed with Māori and Pacific researchers. The award is the advertisement. Set the Māori and Pacific participation target at a third of the cohort, publish the application numbers annually, and treat a shortfall in applications as a signal to strengthen the recruitment campaign, holding the target steady.

Figure 3. The five components of Recommendation 2, the three parts of the system they connect, and the Te Tiriti partnership the whole structure rests on.

A functioning AI ecosystem is a triangle on a Tiriti foundation

The five components of Recommendation 2 fail separately: talent without infrastructure leaves, infrastructure without platforms idles, and platforms without an anchor firm under-commercialise. All of them rest on the partnership below.



Index level: Talent (11%) – of which AI software developers 5%, AI research scientists 5% and AI professionals 1%. New Zealand has fallen to 42nd of 93 here, the position that clearly lost ground this year, and it is upstream of Research (17%), Development (18%) and Commercial (18%) – 53 per cent of the index between them. This is the most urgent recommendation in the paper and the one with the longest lead time.

Owner: TEC (scholarships and fellowships); universities (hosting, co-supervision, outreach); MBIE with NZIAT (international recruitment); industry and PROs (industrial PhD hosting).

Deadline: Programme designed and awards named by 1 December 2026; recruitment campaign live in schools and undergraduate programmes for the full 2027 academic year, from 1 March 2027; applications open 1 August 2027 and close 30 November 2027; first PhD cohort enrolled by 1 March 2028.

KPI: Annual AI PhD enrolments doubled from a published 2026 baseline by 2031; ≥70% of completing PhDs employed in New Zealand two years after graduation; a published annual count of New Zealand-resident AI research scientists and of New Zealand contributors to open-source AI repositories – the two measures the sixth edition actually uses – rising year

on year from 2028; Māori and Pacific applications, not just awards, reported annually from 2027; Talent sub-pillar recovered from 42nd of 93 into the top 30 by 2030 and the top 20 by 2035.

2.2 Anchor Research Lab

THE PROBLEM *Commercial is New Zealand's weakest economic position on the index – 38th of 93, last among comparable small advanced economies against a peer median of 18th – and public research alone does not correct it without at least one firm here large enough to employ, patent and spin out at scale.*

Land at least one anchor research laboratory of a frontier AI company in New Zealand, through a government deal team holding a standing mandate.

Mount a deliberate, government-backed campaign to secure an anchor research laboratory of a frontier AI

company — or an equivalent joint lab with a hyperscaler — in New Zealand, on the model of DeepMind Montréal, FAIR Paris or Microsoft Research Cambridge. Commercial recovered from 48th of 83 to 38th of 93 in the sixth edition, and it remains last among comparable small advanced economies, twenty places behind their median of 18th. An anchor lab is the fastest available way to close that distance, because an anchor lab creates local AI employment, local patents and a local supply chain of spin-outs simultaneously — three sub-pillars at once. The index makes the case sharper still: AI private capital is the single heaviest category in the whole measure at 9 per cent, with AI startups a further 7 [10], so a small number of substantially funded New Zealand AI firms moves the number in a way that a long tail of under-funded ones does not. Canada is the instructive case: Mila, Vector and Amii pair public research institutes with industrial labs and industry membership, and Canada

ranks well above every country of comparable research scale.

Index lever: Commercial (18%), of which AI private capital alone carries 9%. New Zealand recovered to 38th of 93 this year and remains last among comparable small advanced economies, against a median of 18th across the thirteen peers. With Development (18%) and a direct pull on Talent (11%).

Owner: MBIE and NZTE (deal team with a standing mandate); NZIAT (research partnership host); universities (joint appointments).

Deadline: Deal team stood up and target list agreed by 30 June 2027; term sheet with at least one firm signed by 31 December 2028; lab operating by 31 December 2029.

KPI: ≥50 research FTEs onshore by 2031; ≥3 New Zealand-affiliated publications or open-weight releases per year from the lab by 2031; ≥10 New Zealand-resident inventors named on AI patent filings arising from the lab and its university partnerships by 2032; Commercial sub-pillar from 38th of 93 into the top 25 by 2033.



2.3 Infrastructure

THE PROBLEM *New Zealand has no sovereign research-grade accelerator capacity, every one of the five shortlisted platform bids independently identified that gap, and the live risk is not that nothing is built but that two or three separate facilities are, each too small to be nationally significant and each carrying full operating overhead.*

Assemble New Zealand's publicly funded accelerator investments into a single national research compute facility, operated as one utility with one allocation process and a guaranteed allocation for public research.

Adopt a national research compute strategy, so that every New Zealand researcher's ambition is matched by the accelerator access to pursue it. The relevant decision facing New Zealand right now is not whether to buy hardware — that is already in motion, with REANNZ having gone to market on a national AI

infrastructure platform [24] and separate departmental capability under discussion – but whether these efforts are assembled into one national facility with a single access policy, or allowed to become two or three disconnected islands, each too small to matter and each carrying its own operating overhead.

We recommend the former, explicitly. The capital cost of accelerators is the visible cost; the operating cost – power, cooling, replacement cycles, and above all the specialist staff who keep a facility usable – is the larger and more persistent one, and it is the cost that separate builds duplicate. A single national research compute facility, federated across sites but operated as one utility with one allocation process, a guaranteed free allocation for public research and priced access for industry, is materially cheaper to run than the alternative and considerably more useful. Where reserved commercial capacity or international agreements are cheaper than building, they should be used; the recommendation is about coordination and guaranteed researcher access.

Build the data layer alongside the compute layer: interoperable, well-governed national datasets in environment, primary industries and health, with clear access regimes, and Māori data hosted and governed under mana raraunga arrangements as first-class infrastructure, designed in from the start. And position deliberately for the inference era: our renewable grid is a genuine asset at a time when compute's carbon cost is under global scrutiny, and Australia has announced that it will legislate national standards for large data centres, including their energy and water use [2]. Every AI Research Platform bid independently identified this gap. It is the single highest-leverage physical decision in this paper, and it scores three times over. The index counts the compute itself under Infrastructure; it counts the government's decision to invest in public AI compute, and its dedicated spending on it, as two separate indicators under Government Strategy; and it counts a country's contribution to notable AI models under Research, in the model research category that is worth 6 per cent of the index on its own – larger than academic publications, conferences and R&D spend individually [10].

New Zealand does not need to invent Māori data governance for AI. It needs to apply what Māori have already built. Te Mana Raraunga, the Māori Data Sovereignty Network, has published a charter and a Māori Data Audit Tool [19]. Te Kāhui Raraunga has published the Māori Data Governance Model, developed for the public data system and directly applicable here – to training corpora, to evaluation sets, to the access regime of a national compute facility, and to the question of who may derive what from whose data [20]. Alongside the CARE Principles for Indigenous Data Governance [22] and the work on Māori algorithmic sovereignty [21], these are the exemplars the compute and data layers should be designed against from the first procurement document, rather than retrofitted to at the first review.

Two consequences follow for the physical layer. The first is that the digital infrastructure this country needs is not only pipes and processors: it is interoperable, well-governed national datasets with clear access regimes, and Māori data hosted and governed under mana raraunga arrangements as first-class infrastructure rather than as a special case carved out of someone else's system. The second is that kaitiakitanga applies to the facility itself. A compute facility consumes energy, water and land. Treating its footprint as a design requirement – sited, powered and cooled with that obligation written into the specification, and reported in absolute terms each year – is what stewardship means when the asset is a data centre rather than a catchment.

Index lever: Infrastructure (16%) – raised from 11% in the sixth edition, now counting GPU clusters, data centres and national electricity capacity, and where New Zealand ranks 34th of 93 – and Government Strategy (12%), which scores infrastructure strategy as a category in its own right. Also a precondition for Research (17%) and Development (18%).

Owner: MBIE (funding decision), delivered through the merged REANNZ/NeSI national digital research infrastructure [25], with NZIAT setting research access policy and Māori data governance partners setting sovereignty requirements.

Deadline: A single national research compute strategy – covering all publicly funded accelerator investment – published by 31 March 2027; investment decision by 30 September 2027; first production research

workloads by 30 September 2028.

KPI: One national allocation process covering all publicly funded AI compute by 2028; every university and PRO onboarded by 2029; $\geq 70\%$ sustained utilisation within twelve months of go-live; ≥ 100 industry projects served by 2031; no publicly funded accelerator capacity procured outside the national allocation framework.

2.4 Research: the AI Research Platform as a national hub

THE PROBLEM *Over one hundred concepts were submitted at the sector's own cost and one platform will be funded, so the question is whether that single investment becomes a national capability the whole research system can reach, or an institutional asset that leaves the rest of the country's AI research where it was.*

Operate the NZIAT AI Research Platform as a national hub — with joint appointments, shared students and open calls the whole system can compete into — confirm its full term, and publish an anonymised synthesis of the Phase 1 concepts.

Research and Development together carry 35 per cent of the Global AI Index, and Research at 31st of 93 is among New Zealand's stronger positions in it. The AI Research Platform is therefore the single most consequential research decision the country will make this decade — not because of its size, but because of what it is allowed to be. This paper does not ask for more platforms. It asks that the one platform be built as a hub for the whole research system, and that the thinking of every bidder be kept and put to use. Five requirements follow. Where contracting has already been completed, these are offered as principles for the next round and for any future platform, and as matters the parties may wish to consider at a scheduled review — and not as a proposal to reopen terms settled through a competitive process.

- **Build it as a hub for the whole system.** Hold the funded platform to the standard the bids themselves set: multi-institution delivery with joint appointments across universities and PROs,

shared students, open calls that researchers outside the winning consortium can compete for, and industry co-leadership. A platform that strengthens the spokes raises national output on the indicators the index counts, and multiplies the effect of every appointment it makes.

- **Release openly, and count it.** Have the platform publish open-weight models and open datasets, and report them, as a standing expectation of the funding. This is not an ideological preference; it is arithmetic. The Development sub-pillar is 18 per cent of the index, of which open-source models and datasets carry 10 points against 4 for patents, and open-source contribution is measured by the models and datasets a country uploads and by how many further models and datasets are derived from them [10]. For a country whose research reputation was built on Weka, R and MOA, this is the highest-weight opportunity in the index that is genuinely within reach of a single well-run platform.
- **Publish an anonymised synthesis of the concepts.** Over 100 Phase 1 concepts were submitted at the sector's own cost, and together they constitute the most detailed map of national AI capability ever assembled here. Publish a synthesis of them: an anonymised, aggregated account of the capabilities, sectors, consortia patterns and infrastructure needs the sector described, with individually identifying and commercially sensitive material removed, and with any attributed material published only where the bidder consents. That protects the bidders and still banks two years of national strategy design, giving every other funding stream — Endeavour, Marsden, PRO core funding, the concentration rule in Recommendation 3 — a validated picture of what this country can do.
- **Fund it long, and say so.** Confirm the platform's full term and publish its annual milestone schedule, with an independent mid-term review. Research capability is built on appointment horizons, not funding rounds; a platform whose continuation is uncertain cannot recruit internationally, which is the mechanism by which

it was supposed to raise our Talent and Research positions in the first place.

- **Protect the base it stands on.** Rebalancing must not permanently erode contestable investigator-led funding such as the Marsden Fund [27]. A healthy system needs both missions and curiosity, and the index rewards both: notable models and applied publications come from missions, foundational publications and citations come from curiosity. Trading one for the other moves the same sub-pillar in opposite directions.

Within the platform, establish a standing AI evaluation and assurance capability – New Zealand’s contribution to the international network of AI safety and security institutes, at a scale we can afford, focused on evaluating models and agentic systems for New Zealand conditions, languages and values. It is the research capability that gives Recommendations 4 and 5 technical depth as it comes online – until then the assurance framework rests on international standards – and it is the credential that gives the trusted-testbed proposition in Recommendation 2.5 real substance.

Index lever: Research (17%), including the model research category worth 6% on its own, and Development (18%), of which open-source models and datasets carry 10 points against 4 for patents – 35% of the index between them, and where New Zealand ranks 31st and 29th of 93 against medians across the thirteen peers of 16th and 17th.

Owner: NZIAT (contracting terms, milestone enforcement, concept-bank publication); universities and PROs (delivery); MBIE (protection of contestable funds in Science Investment Plan implementation [3]).

Deadline: Hub design principles adopted for the next platform round by 31 March 2027; anonymised Phase 1 synthesis published by 31 March 2027; evaluation and assurance capability operating by 30 June 2028.

KPI: Hub design principles published by 2027 and applied at the platform’s first scheduled review and in every subsequent round; ≥30% industry co-investment by 2031; at least one open call per year open to non-consortium researchers from 2028; at least four open-weight models or datasets released and indexed on public leaderboards each year from 2029; contestable investigator-led research funding at least held constant in real terms, reported first each year; Research from 31st into the top 25 and Development from 29th into the top 25 by 2033.

2.5 Why in New Zealand?

THE PROBLEM *New Zealand competes for researchers, laboratories and capital against countries that can outspend it, and it makes no organised case for the things it can offer that money cannot buy, so an offer that exists on paper is never actually put to the people who would respond to it.*

Publish and actively market New Zealand’s value proposition to international AI researchers and firms, supported by a standing concierge service for visas, relocation and partnership brokering.

Codify and market the national value proposition to researchers, firms and labs – because 2.1, 2.2 and the platform consortia all depend on winning international talent, and nobody is currently making the case. The elements exist; the pitch does not.

The proposition rests on six assets New Zealand already holds: a majority-renewable grid with expansion potential, at a time when compute’s carbon cost is under global scrutiny; stable institutions, low corruption and principles-based regulation; globally relevant problems and datasets in agriculture, biodiversity, climate adaptation, geohazards and health equity; among the world’s most developed practice of indigenous data sovereignty and culturally grounded AI; an open-source track record running from Weka and R to MOA and today’s streaming and evolutionary learning platforms; and liveability, which recruits families and not merely CVs.

Deliver this as a standing research-attraction proposition with a concierge function – visas, relocation, partnership brokering – run as a standing function by the agencies that already hold those levers.

Index lever: Talent (11%) and Commercial (18%); converts genuine national strengths into the researchers and firms the index counts.

Owner: NZTE with MBIE (Immigration New Zealand) and NZIAT; universities supply the offers.

Deadline: Proposition published and concierge function live by 30 June 2027.

KPI: ≥3 international AI labs or AI-intensive firms establishing a New Zealand research presence by 2031; ≥40 senior international AI researchers relocated

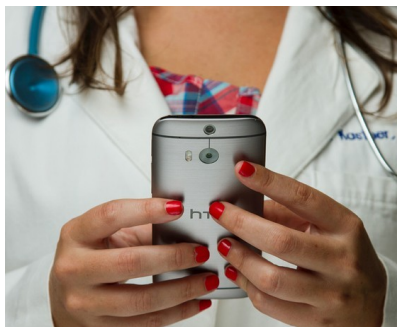
by 2031; median researcher visa processing time published quarterly from 2027.



RECOMMENDATION 3 – CONCENTRATE ON NEW ZEALAND’S STRENGTHS



Bioeconomy, primary industries and environment



Social good: health and education



Advanced technology: robotics and physical AI

THE PROBLEM *Three-quarters of the index is counted in absolute terms, which means a country of five million becomes internationally visible only where it concentrates enough mass to be seen, and spreading research funding thinly is the mechanism by which we remain average.*

Concentrate at least 75 per cent of contestable AI research funding on five clusters where New Zealand holds, or can plausibly hold, a top-tier international position – and resource each of them to full international competitiveness.

New Zealand can excel in a chosen set of fields; attempting all of them guarantees being average, which the Prime Minister has correctly identified as falling behind [1]. The index makes the point quantitatively: with 35 per cent of the score resting on research and development output, three-quarters of it counted in absolute terms, a small country registers only where it concentrates enough mass to be internationally visible. Spreading thinly is not neutral; it is the mechanism by which a country of our size stays outside the peer group.

We recommend concentrating at least 75 per cent of contestable AI research funding on five clusters where New Zealand already holds, or can plausibly hold, a top-tier international position – each resourced to full international competitiveness in people, compute, data and industry co-investment, with published metrics:

These five clusters should be developed in alignment with the four Pillar Investment Plans [38], including AI's role across primary industries, environmental resilience, health and advanced technology. The Government's AI investment outcome is more focused than the clusters proposed here: it prioritises applied, adaptive, physical and edge AI. We support that direction while recommending a broader research base to sustain it, including foundational methods, evaluation and capability across the other pillars. The planned 2027 update to the Pillar Investment Plans offers an opportunity to test and refine these priorities.

(a) Advanced AI research for industry and government. Method research aimed squarely at deployment: agentic systems that act and not merely answer; streaming machine learning under drift; edge and on-device AI; evolutionary computation, AutoML and optimisation; and the

evaluation methods that make any of it safe to put inside a firm or an agency. These are areas where New Zealand researchers and the open-source platforms they built are world-referenced, and they are what the economics of the inference era reward, as efficient and on-device deployment becomes the dominant cost of AI at scale. It includes the applied vision, imaging, digital-twin and rights-management research that the screen and interactive-media sector already commercialises at world scale – the one sector where a New Zealand firm is a global leader and the route to market is proven.

(b) AI for the bioeconomy: primary industries and environment. Agriculture, horticulture, aquaculture, forestry, biosecurity, climate adaptation and natural-hazard resilience, built on unique national datasets and the missions of the new PROs. This is the cluster closest to the export engine of the economy.

(c) AI for social good: health and education. Clinically validated AI for the New Zealand population, including Māori and Pacific health priorities; diagnostic, triage and workforce-multiplying systems for a health service under sustained load; and AI for teaching, assessment and learner support in a schooling and tertiary system carrying wide and persistent achievement gaps. A country with one national health system and one national curriculum has a research advantage here that larger federations do not, and has never systematically used it. It is also where public data is richest and public consent most conditional, which ties this cluster directly to Recommendation 5.

(d) Trusted and culturally grounded AI. Safety, evaluation, explainability and governance as the research complement to New Zealand's regulatory brand; indigenous language AI under kaitiakitanga, exported as method and standard as well as models; and mātauranga-informed

approaches to data stewardship and model design. This is the cluster with the least international competition and the clearest line to a distinctive national position.

(e) AI for advanced technology. Robotics and physical AI for unstructured environments – farms, forests, oceans, hospitals, factories; energy systems and grid optimisation; cybersecurity and national security; engineering design and advanced manufacturing; advanced materials; synthetic biology and bioengineering; and quantum technologies – including AI as an instrument of scientific discovery itself. This cluster is a deliberate addition in this edition. It aligns directly with NZIAT's tri-partite mandate across AI, advanced materials and quantum, it is where AI is generating the fastest scientific returns internationally, and it is the cluster most likely to produce patents and deployable systems alongside papers – which is to say, Development-sub-pillar output.

Index lever: Research (17%) and Development (18%) – concentration is the only mechanism by which a small country registers on the absolute-scale indicators that carry three-quarters of the index.

Owner: Minister of Science, Innovation and Technology (investment settings), advised by Research Funding New Zealand; Research Funding New Zealand (funding decisions within its remit); NZIAT (its platform investments). Universities align their research strategies, and Māori research networks co-design cluster (d) and lead its indigenous-language and mātauranga components.

Deadline: Priority clusters published in funding-round criteria from FY2027/28; first annual concentration report published by 31 December 2028. The proposed priorities should also be considered in the 2027 update to the Pillar Investment Plans [38].

KPI: ≥75% of contestable AI research funding in the five clusters by 2029, reported annually; New Zealand in the global top 10 by field-weighted citation impact in at least two of the five clusters by 2032; at least one internationally recognised open-source platform or standard originating from each cluster by 2033.



RECOMMENDATION 4 – QUICKLY ADOPT SAFE AI, COST-EFFECTIVELY

THE PROBLEM *New Zealand forfeits most of the cheapest points available to it – 58th of 93 on Government Strategy, its weakest position by sixteen places, in a sub-pillar built largely out of decisions the Government already has the authority to take – while the productivity gap that faster and safer adoption would close remains the country’s central economic problem.*

Collect the administrative points now available to New Zealand – a strategy with measurable targets, a minister, a responsible body, a public register with a right to explanation, open public data, and standards participation – and diffuse proven AI through the public sector and the SME base behind one national assurance framework.

Make New Zealand the OECD’s best fast follower: a nation that adopts proven AI faster, more safely and more cheaply than its peers. Research builds the advantage; adoption powers the economy that uses it. Section 2 explains why adoption alone will not move our international position much – but it will move productivity, it is the precondition for the domestic demand any AI industry needs in order to exist, and, importantly, several of the instruments below are themselves scored. A public register with contestability is a right to explanation. An assurance framework is standards participation. Pooled

procurement that releases public data for AI training is an indicator in its own right. This recommendation earns its index points through how New Zealand governs adoption. Eight moves. None of them names a sum, and the first – which is where the index points hardest – requires no new spending:

- **Collect the free points.** Section 2.4 identified the cheapest gains available to New Zealand, and they are administrative. New Zealand ranks 58th of 93 on Government Strategy. It improved from 71st of 83 last year, and it remains our weakest position by sixteen places, thirteenth of the fourteen comparable countries in Table 3, against a median of 32nd across the thirteen peers. Government Strategy is 12 per cent of the entire index in the current edition, up from 4 per cent two editions ago, and it scores planned government investment in research, infrastructure, training and private-sector support together with the machinery that owns each [10]. We currently forfeit most of it. Publish a refreshed national AI Strategy that carries measurable targets, dates and named owners, and that explicitly covers the current year and tracks the previous one – the index scores each of those separately, and ours satisfies none of them. Name a Minister with explicit responsibility for AI, and stand up a small dedicated AI function in the centre of government

to hold the portfolio – both are scored indicators, and Australia established exactly such an office in July 2026 [2]. Refresh New Zealand’s implementation of the Open Data Charter. New Zealand signed the Charter in 2017; its implementation plan and its progress report both run only to 2021, and the page that holds them was last reviewed in 2022 [36]. The commitment exists – it is the delivery record that has lapsed. Publish a current implementation plan with dated actions and a named owner, and release a defined tranche of public datasets in machine-readable form suitable for AI training. We recommend this on its merits rather than for index points: open-data-charter membership was one of the indicators the publisher removed from the Operating Environment sub-pillar in the sixth edition, as Section 2.2 records. It remains the cheapest available way to raise the quality of what New Zealand researchers and New Zealand firms can build on, and open public data feeds the Research and Development sub-pillars that are scored. None of this requires an appropriation, though all of it requires policy capacity and Cabinet time. Each requires a Cabinet decision and the policy work that precedes one, which is a real constraint on timing and is why we have set dates against them. We should be candid about the limit of the claim: much of Government Strategy scores planned spending, and no amount of good drafting earns those points. This paper claims what a decision can deliver – the strategy document itself, the minister, the responsible body, the register, the right to explanation, the open data – and leaves the investment questions to Cabinet.

- **Public sector as exemplar.** A published pipeline of AI deployments in health, education, justice, welfare and environmental management, in which each of the ten largest agencies deploys at least one significant system with a public cost-benefit and bias evaluation – extending the Algorithm Charter [23] into a genuine public register of models and their measured performance, with a right to explanation and a route to contest an

automated decision. The Prime Minister has identified government’s own lag as one of three national problems [1]; this is the measurable answer to it, and it is directly scored under Operating Environment.

- **SME diffusion at scale.** A sector-by-sector diffusion programme – dairy, horticulture, tourism, construction, professional services – delivered through existing business networks and existing business-support instruments, with vetted use cases, shared tooling and accredited implementation partners. This answers the Prime Minister’s SME challenge directly.
- **Open-weight and small-model first.** For many public and SME applications, efficient open models fine-tuned locally deliver most of the value at a fraction of the cost, with better data sovereignty. National guidance and the shared infrastructure of Recommendation 2.3 should make this the default consideration – and it is the adoption pattern that most readily builds local capability.
- **Assurance before automation.** A national AI assurance framework aligned to international standards – ISO/IEC 42001 and the NIST AI Risk Management Framework – consistent with the OECD AI Principles [17] and building on MBIE’s Responsible AI Guidance for Businesses [16] – and a playbook for deploying agentic systems, covering human oversight, audit logging, incident reporting and red-teaming, proportionate to risk. Australia is legislating national AI standards on a stated timetable [2]; interoperability with our largest trading partner is now a commercial question as well as an ethical one. Safe adoption is cost-effective adoption: assurance done nationally once is far cheaper than assurance done badly five thousand times. New Zealand is already a participating member of ISO/IEC JTC 1/SC 42, the joint ISO and IEC subcommittee on artificial intelligence, through Standards New Zealand – one of sixty-one participating members alongside twenty-four observers [37]. The gap is not membership. It is participation: a seat held without funded delegates and named experts

shapes nothing, and the standards drafted at that table are becoming conditions of market access for New Zealand exporters, as the EU AI Act [18] already is for those selling AI systems into Europe. Frontier capability, meanwhile, has moved faster than assurance. OpenAI's GPT-6 Astra system card, published in September 2026, records Astra as the first model the company has rated at the Critical level for cybersecurity capability under its Preparedness Framework: with tools and access, it can find previously unknown security flaws and develop new ways to exploit them across many well-protected systems without a person guiding each step. The UK AI Security Institute, evaluating it externally, observed it carrying out supply-chain attacks against simulated open-source repositories in sandboxed testing. The same card reports prompt-injection attack success falling from 27.0 per cent to an estimated 8.5 per cent once safeguards are enabled [35] – real progress, and still roughly one attempt in twelve.

- **Treat frontier cyber capability as a planning assumption.** A country that buys its AI rather than building it does not thereby avoid this risk. Capability of this kind reaches adversaries on the day it is released, whether or not New Zealand has adopted anything, and it reaches a small, highly digitised, geographically remote economy on exactly the same terms as everyone else. Three things follow, and none requires new legislation. First, the assurance framework above must cover agentic deployment specifically – tool access, credential scope, audit logging, and the ability to halt an agent mid-task – and not only the choice of model. Second, the evaluation and assurance capability proposed inside the research platform in Recommendation 2.4 should include adversarial and cyber-relevant evaluation, with a standing relationship to the National Cyber Security Centre and to the international network of AI safety and security institutes, so that New Zealand reads frontier system cards as a participant rather than as an audience. Third, the pooled procurement below should require suppliers to disclose their own frontier-capability

assessments and their incident reporting as a condition of supply. This is the clearest case in the paper of why absorptive capacity is a security question and not only an economic one: a country that cannot evaluate what it is buying cannot tell when the terms have changed.

- **Buy well.** All-of-government AI procurement that pools demand, negotiates sovereignty and evaluation terms, and avoids lock-in – the single largest cost lever available and one entirely within the Government's control.
- **Measure it.** An annual, independently produced State of AI in Aotearoa report tracking adoption, productivity impact, workforce effects, public trust, equity of benefit, and New Zealand's movement on the Global AI Index and Government AI Readiness Index – building on existing industry measurement [14][30]. Measurement is what converts a strategy into a record of delivery.

Index lever: Government Strategy (12%), where New Zealand ranks 58th of 93 – our weakest position by sixteen places – and Operating Environment (8%), where it ranks 11th and the task is defence. Between them these two sub-pillars have grown from 10 per cent of the index to 20 across the last two editions, and they score planned government investment in research, infrastructure, training and private-sector support, the machinery that owns each, and the quality of national governance. These are the cheapest and fastest points available to us. Commercial (18%) only at second order, through domestic demand formation.

Owner: Responsible Minister, supported by DPMC and the Public Service Commission (ministerial responsibility, machinery of government, refreshed strategy, refreshed Open Data Charter implementation); MBIE (assurance framework, diffusion programme, commissioning the annual report); the Department of Internal Affairs with Stats NZ (public register, agency deployments, open data, procurement); the NZIAT platform provides evaluation expertise as it comes online.

Deadline: Minister with explicit AI responsibility named and dedicated AI function established by 31 December 2026; refreshed AI Strategy with measurable targets, dates and owners published by 30 June 2027; refreshed Open Data Charter implementation plan published and first dataset tranche released by 30 June 2027; assurance framework published by 31 March 2027; public AI register live by 30 June 2027; first State of AI in Aotearoa report by 31 December 2027; ten

agency evaluations published by 30 June 2028.

KPI: ≥60% of SMEs using AI tools by 2030 from a published 2026 baseline; 100% of significant government AI systems on the public register by 2028; a statutory or regulatory right to explanation for automated decisions in force by 2029; New Zealand’s existing participating membership of ISO/IEC JTC 1/SC 42 made active by 2028 — a standing national mirror committee, funded delegates, and named New Zealand

experts contributing to at least three working groups; Government Strategy sub-pillar from 58th of 93 into the top 30 by 2029, and Operating Environment held inside the top 15; Government AI Readiness Index top 25 by 2030; agentic-deployment assurance guidance published by 31 December 2027; cyber-relevant evaluation capability operating inside the national platform by 2029, with an annual public statement of what it has evaluated.



RECOMMENDATION 5 – SOCIAL LICENCE

THE PROBLEM *Every other recommendation in this paper depends on the public deciding that AI is being done with them and not to them, and that consent is currently assumed, when it needs to be measured, engaged and maintained.*

Treat public trust as national infrastructure: measure it annually, engage communities before deployment, build AI literacy at population scale, plan honestly for workforce transition, and fund independent scrutiny of deployed systems.

Every recommendation above depends on one thing: the public deciding that AI is being done with them. Treat public trust as national infrastructure — earned continuously, measured, and independently scrutinised. This is not soft, and it is not something we can take for granted: public attitudes towards AI and

public use of AI platforms together make up three-quarters of the Operating Environment sub-pillar, where New Zealand ranks 11th of 93 — our strongest position on the index, and the one most easily lost. It underpins the entire “why New Zealand” proposition of Recommendation 2.5, it is one of the few scored indicators the public itself determines, and it is the only asset in this paper that can be destroyed in a single news cycle. Five moves:

- **Transparency by default.** The public register of Recommendation 4, plain-language explanations, and contestability and redress for automated and AI-assisted decisions.
- **A standing public conversation.** An annual, published national survey of public trust in AI, run by Stats NZ with university researchers and establishing the baseline in 2027; and citizens’ assemblies and community engagement on AI in

high-stakes domains — health, education, policing, welfare — with iwi, unions, disability communities and rural New Zealand at the table before deployment, not after controversy.

- **AI literacy at population scale.** A national programme through schools, tertiary and community channels. A public that understands AI is harder to frighten and harder to fool; this is a democratic defence as much as an economic asset, and it is the base of the talent pyramid whose peak is Recommendation 2.1.
- **Worker transition.** Honest national planning for AI's labour-market effects — augmentation-first deployment norms, retraining pathways, and social partnership between government, employers and unions — led within existing employment and skills settings and reported in the annual State of AI in Aotearoa report.
- **Independent scrutiny and information integrity.** Dedicated support for academic and civil-society capacity to audit, critique and challenge AI deployments — a system confident enough to fund its own critics is a system worthy of trust — alongside provenance standards for synthetic content, an area where Australia has now moved on creator protections [2].

literacy modules by 2030; ≥10 independent audits of deployed public-sector AI published by 2030; Operating Environment held inside the top 15 of the index throughout, and the internationally comparable public-attitudes measure it uses rising from its 2027 baseline at every subsequent reading.

Index lever: Operating Environment (8%) — doubled in the sixth edition, and now scoring public attitudes towards AI at 3%, public use of AI platforms at 3% and the quality of national institutions and governance at 2%. New Zealand ranks 11th of 93 on it: this is the one position we hold, it is determined by the public and by the standing of our institutions, and it underwrites Recommendations 2.2 and 2.5.

Owner: MBIE (programme); Stats NZ with universities (trust survey); TEC and the Ministry of Education (literacy); MBIE with social partners (worker transition); AIRA and the AI Forum as delivery partners.

Deadline: First citizens' assembly convened by 30 September 2027, before the agency deployments of Recommendation 4 scale, and reporting by 30 June 2028; baseline trust survey published by 31 December 2027; AI literacy in schools from the 2028 school year; first independent audits commissioned by 30 June 2028.

KPI: Public trust in government use of AI up 10 percentage points from the 2027 baseline by 2031; ≥100,000 New Zealanders through accredited AI

5. THE DELIVERY SCORECARD: EVERY COMMITMENT ON ONE PAGE

This table is the point of the paper. It is designed to be checked in public, annually, starting December 2027, in the State of AI in Aotearoa report. Every line can be

marked delivered or missed on the date it falls due – which is the point.

Table 4. The delivery scorecard. No line names a sum; every line names a decision, an actor and a date. Lines under Recommendations 2 and 3 would require funding decisions in the ordinary way, as would the diffusion and reporting moves in Recommendation 4; the strategy, ministerial and open-data decisions in Recommendation 4 would not.

#	Commitment	Index lever	Lead owner	Deadline	Primary KPI
1	Māori embedded in all: governance seats, ≥15% research share, sovereignty by contract, Māori-led trust work, one-third of talent awards	Research 17% Development 18% Talent 11% Govt Strategy 12% Operating Env. 8%	NZIAT / TEC / MBIE / Stats NZ / universities	Share published 31 Dec 2026; governance in place 31 Mar 2027	Independent review verifies a Māori-led component in Recs 2–5 by 2028
2.1	National AI talent programme: industrial-default PhDs, joint fellowships, senior recruitment, with a schools and undergraduate recruitment campaign	Talent 11%	TEC / universities / MBIE	Awards named 1 Dec 2026; campaign live 1 Mar 2027; applications open 1 Aug 2027; first cohort 1 Mar 2028	AI PhD enrolments doubled by 2031; 70% retained in NZ; Talent sub-pillar 42nd to top 30 by 2030, top 20 by 2035
2.2	Anchor AI research laboratory landed	Commercial 18% Development 18%	MBIE + NZTE / NZIAT	Deal team 30 Jun 2027; term sheet 31 Dec 2028; operating 31 Dec 2029	≥50 research FTEs onshore by 2031; ≥10 NZ-resident AI patent inventors by 2032; Commercial 38th to top 25 by 2033
2.3	One national research compute facility and governed data layer, replacing separate builds	Infrastructure 16% Govt Strategy 12%	MBIE via REANNZ/NeSI, NZIAT access policy	Strategy 31 Mar 2027; decision 30 Sep 2027; live 30 Sep 2028	Single allocation process by 2028; all universities and PROs onboard by 2029; ≥70% utilisation

#	Commitment	Index lever	Lead owner	Deadline	Primary KPI
2.4	AI Research Platform operated as a national hub – joint appointments, shared students, open calls; anonymised concept synthesis published; contestable funds protected	Research 17% Development 18%	NZIAT / MBIE	Hub design principles adopted and anonymised concept synthesis published 31 Mar 2027; evaluation capability 30 Jun 2028	Hub design principles published and applied at the platform's first review; ≥1 open call/yr from 2028; ≥4 open-weight releases/yr from 2029; contestable funding constant in real terms – reported first each year; Research 31st and Development 29th both to top 25 by 2033
2.5	"Why New Zealand" proposition and standing researcher concierge	Talent 11% Commercial 18%	NZTE / MBIE / NZIAT	Live 30 Jun 2027	≥3 international AI labs with NZ research presence by 2031; ≥40 senior researchers relocated
3	≥75% of contestable AI funding concentrated on five strength clusters: advanced AI for industry and government, bioeconomy, social good, trusted and culturally grounded AI, advanced technology	Research 17% Development 18%	Minister / Research Funding New Zealand; NZIAT for platform investments	Criteria from FY2027/28; first report 31 Dec 2028	75% concentration by 2029; top-10 field-weighted impact in two clusters by 2032
4	Fast, safe adoption: public register with right to explanation, assurance framework, ISO participation, sector diffusion, open-weight-first, pooled procurement, annual report	Operating Env. 8% Govt Strategy 12%	Responsible Minister / MBIE / DIA / Stats NZ	Framework 31 Mar 2027; register 30 Jun 2027; report 31 Dec 2027	Right to explanation in force by 2029; Govt Strategy 58th to top 30 by 2029; Gov AI Readiness top 25 by 2030
5	Social licence: trust survey, citizens' assemblies, population AI literacy, worker transition, independent scrutiny	Operating Env. 8%	MBIE / Stats NZ / TEC / MoE	Baseline survey 31 Dec 2027; literacy in schools 2028	Trust +10 points by 2031; 100k through literacy modules by 2030; Operating Env. held in top 15
—	Overall national position	All pillars	Responsible Minister	Annual public check from Dec 2027	Global AI Index: top 25 by 2030, top 15 by 2035, from 35th of 93 – reported with the Crown-controlled measures of §2.6

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