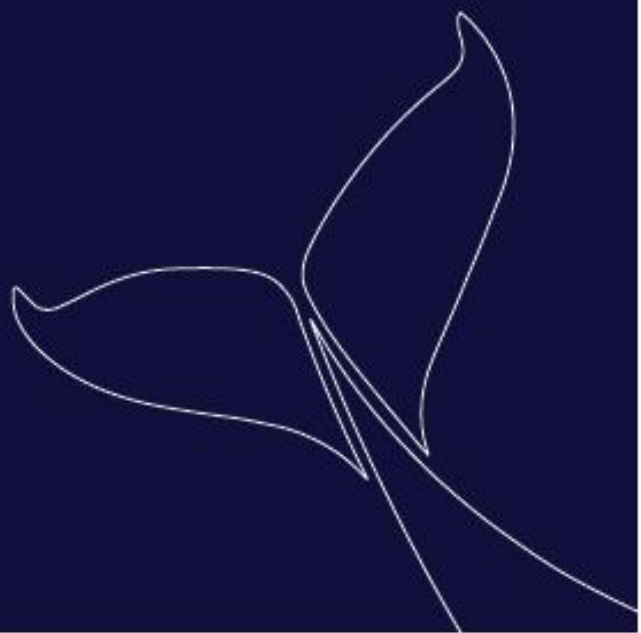




Aotearoa New Zealand's Maritime Security

Five-year outlook 2025 – 2030



Te Kāwanatanga o Aotearoa
New Zealand Government

Aotearoa New Zealand's Maritime Security

1. This assessment provides a five-year outlook for Aotearoa New Zealand's maritime security out to 2030.
2. New Zealand's maritime security strategy defines maritime security as preventing, detecting, mitigating and responding to risks introduced by malicious, unregulated, negligent or harmful (or potentially harmful) activities at sea. These measures seek to reduce the capability of malicious actors to use the maritime domain to undermine national security interests and objectives.
3. New Zealand's extensive maritime domain includes the territorial sea, the contiguous zone (belt of water adjacent to the territorial sea), the Exclusive Economic Zone (EEZ) and the continental shelf (see annex).
4. New Zealand's maritime area of interest includes our maritime domain, as well as:
 - a. the maritime domains of the New Zealand Realm countries: the Cook Islands, Niue and Tokelau.
 - b. the Southern Ocean.
 - c. the New Zealand Search and Rescue Region.
 - d. Maritime areas governed by international and regional organisations, including Pacific fisheries forums, the Antarctic Treaty System and the Convention for the Conservation of Antarctic Marine Living Resources.
5. Strategic competition has increased threats to New Zealand's maritime security as foreign states compete for influence. This is likely to continue over the next five years, with increased efforts to test the current maritime rules based international system leading to a more contested maritime environment.
6. Simultaneously, New Zealand's maritime security system will see growing threats from

maritime crime, changes to the maritime environment and to our blue economy, at a time when prevention and response capabilities are under pressure.

7. Assessments are made with medium confidence and are based on a range of public or government data sources and reporting, and consultation with subject matter experts.

Challenges to the Maritime Rules Based International System

8. Strategic competition in the Indo-Pacific is likely to present maritime security challenges due to:
 - a. Challenges to the global maritime rules based international system and resulting decline in regional maritime stability and cohesion.
 - b. Concurrent maritime security issues, such as illegal fishing, environmental degradation, reclamation activities or future seabed mining, and diverging international responses to them.
 - c. Declining influence in international maritime security governance regimes.
9. Foreign powers are highly likely testing the limits of the global rules-based international system and enhancing their influence in these systems, to promote their own vision. This is likely to see growing divergence in addressing collective maritime security issues, such as illegal fishing. Overlapping maritime boundary claims, overly expansive claims under UNCLOS and activities that undermine other states rights will likely remain a feature of the maritime security environment.

10. Growing geopolitical tensions are likely to continue putting pressure on the ability of Antarctic Treaty System bodies including CCAMLR, to reach consensus on matters such as protected areas, Emperor penguin protection, and regulation of krill fisheries.¹
11. Foreign military and dual use vessel activity in our maritime area is likely to continue. While these vessels are entitled to freedom of navigation, such activity has the potential to disrupt routine use of air and sea routes through increased congestion, or short-term closures due to military operations and exercises.
12. Maritime law enforcement activities are likely to continue occurring throughout the Pacific. Multiple countries support Pacific maritime law enforcement activities and increasing patrols. Such activities will lead to an increasingly congested strategic space.
13. Strategic competition and disagreements in international law will likely see grey zone activities occur on New Zealand's maritime trade routes. Tactics employed are likely to evolve in response to changing technology, economic and geopolitical conditions. Recent tactics globally have included damage to underwater infrastructure, attacks against military and commercial vessels in the Red Sea, and disruption of maritime navigation systems. Grey zone activities occur on a spectrum that are neither peaceful nor overtly aggressive, and seek to create or exploit uncertainty. Growing instances of grey zone activities, difficulties in attribution, and the legal area they operate in will challenge global international maritime regulatory and response systems.

Environment and Maritime Security

14. The effects of climate change are likely to intersect with other security challenges through changes to the marine environment. Increasing sea-level rise will likely continue threatening infrastructure and placing further demand on economic resources such as fish and minerals. Increasing maritime security concerns resulting from climate change will possibly drive greater climate response efforts from external partners, further adding to an increasingly crowded strategic environment.
15. Rising sea-levels are likely to remain a security concern for Pacific countries, which will seek to further broaden international support for the 2021 Pacific Islands Forum (PIF) Declaration on Preserving Maritime Boundaries in the Face of Climate Change Related Sea-Level Rise and the 2023 PIF Declaration on the Continuity of Statehood and the Protection of Persons in the Face of Climate Change-Related Sea-Level Rise.
16. New Zealand's maritime sector is likely to see changing vessel and fuel sources which will possibly require changes to safety and security systems, particularly to manage threats from pollution. The costs of climate adaptation efforts and limited green fuel availability will possibly see shipowners retain older vessels, increasing safety threats and limiting the effectiveness of climate change efforts.
17. Rising sea levels and the projected increase in the magnitude and frequency of severe weather events will almost certainly impact maritime infrastructure and safety equipment. Equipment near the current sea level is at particular risk and will require relocation or protection to ensure continued operation.

¹ The Commission for the Conservation of Antarctic Marine Living Resources (CCAMLR) is a 27-member commission with the objective of conserving Antarctic marine life.

Threats to underwater infrastructure

New Zealand maintains underwater infrastructure essential to external connectivity and being a maritime trading nation. Currently this infrastructure includes telecommunications cables, electricity cables, and energy pipelines.

Globally, there are around 150-200 cable failures per year with the vast majority of these occurring during fishing, dredging or due to natural hazards. However, undersea cables are at risk of theft, interference or deliberate damage by state or non-state actors as highlighted by recent failures in the Baltic Sea. Repairing damaged cables will be challenged by globally limited cable repair capabilities.

18. Space weather events are likely to impact satellite communication systems, search and rescue services and navigation systems. While these events are not new, the growing prevalence of navigation equipment vulnerable to space weather events increases maritime safety threats and potential for disruption.

Blue Economy

19. Maritime trade routes remain our largest enabler of trade with the rest of the world. Global maritime trade is projected to grow at an annual average of 2.4% to 2029, supported by technological advancements, clean energy and infrastructure developments. However, global maritime trade routes are highly likely to be vulnerable to climate change, or military operations and economic decisions driven by strategic competition.
20. Fisheries will almost certainly remain economically important to Pacific economies. Foreign assistance to Pacific fishery industries is likely to continue, possibly adding to competition in the region. Diverging approaches to fisheries management and shared benefits from high-seas fisheries will likely test regional cohesion.

21. Growing interest in seabed resources is likely to test conservation goals in the Pacific region. Deep sea mining will likely remain contentious as approaches to mining permits vary between countries. The level of human activity in the Antarctic is likely to continue to increase, particularly given the rapid growth and diversification of Antarctic tourism, along with increasing interest in Antarctic research and fishing in the Southern Ocean. This growth emphasizes the importance of governance, through the Antarctic Treaty System,² and will possibly increase demand for search and rescue resource.

Foreign ownership of ports

Strategic competition is driving increased foreign ownership or control of ports and shipping companies in the Indo-Pacific. Two companies control 12.6% of global port throughput, with interests in 129 overseas ports including in Pacific countries (Fiji, Solomon Islands, Vanuatu), along with interests in shipping companies and logistics companies. Companies linked to India and the United Arab Emirates linked companies are also growing their interests in the Indo-Pacific region.

Maritime Crime

22. The threat posed by Transnational, Serious and Organised Crime (TSOC) in New Zealand has increased, driven by demand for illicit goods and immigration crime (among other markets), combined with the challenge of monitoring a large maritime area of interest. As with legitimate trade, New Zealand's maritime domain is likely to be a vector for illicit goods and TSOC activities, and will highly likely continue due to growing demand for these goods. The methods used by these networks throughout the Pacific are likely to continue evolving, including the use of submersibles and other vessels.

² The Antarctic Treaty Consultative Meeting has commenced negotiations to develop a comprehensive framework for the regulation of tourism.

Deceptive shipping practices

Deceptive shipping practices are activities used to evade detection, sanctions and regulations while engaging in illegal operations such as illegal oil trading. They include fraudulent use of shipping registries, manipulating Automatic Identification System data to display incorrect location information, falsifying documents, unreported ship-to-ship transfers, altering vessel names and false flags.

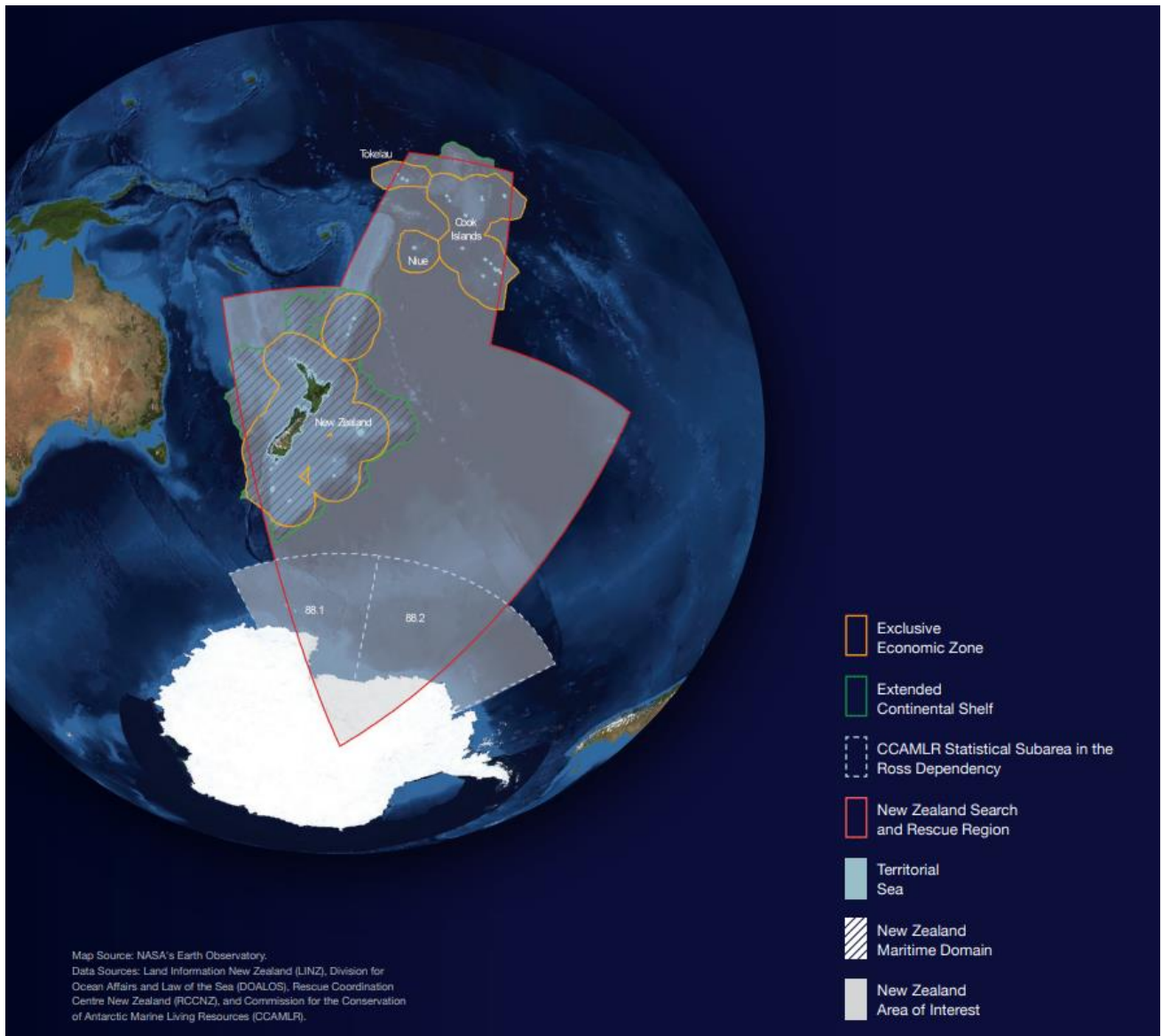
New Zealand has endorsed a [call to action on the shadow fleet](#) and is committed to the International Maritime Resolution A.1192(33) aimed at preventing illegal operations in the maritime sector.

23. Globally, trusted insider threats are increasing and those working in ports and the supply chain are almost certainly key enablers for smuggling activities. At other points on the maritime supply chain, insider threats will likely enable other criminal activities such as cargo theft.
24. Illegal, unregulated and unreported (IUU) and other fisheries crime³ is highly likely to remain a threat to New Zealand's conservation and economic objectives throughout the Pacific and Southern Ocean. Global demand for fisheries remains high and will likely increase as global food security concerns rise and climate change puts pressure on fish stocks. Additionally, unreported catch is likely to remain a key IUU issue.
25. The global maritime sector will highly likely be affected by cyber incidents either directly, or indirectly by incidents in other parts of the supply chain or through technology providers. As automation and technology grows within the maritime sector, the threat of cyber incidents will almost certainly grow with it, without mitigations that keep pace. Cybercrimes, such as ransomware, will likely affect the maritime sector or critical marine infrastructure.
26. The illegal wildlife trade via global maritime supply chains is likely to continue, including those connecting to New Zealand and Pacific countries.
27. Illegal movement of wildlife likely influences the movement of biosecurity threats through the spread of pests and diseases to New Zealand, or Pacific countries.
28. Deceptive shipping practices will almost certainly increase in prevalence globally presenting further challenges to the maritime rules based international system. The use of these deceptive practices is growing due to sanctions or price caps on Russian oil. These practices undermine the maritime rules based international system, threaten vessel and seafarer safety, increase the risk of pollution and illegal activities at sea.
29. Maritime theft, robbery and piracy will likely remain an enduring threat to international maritime trade, but is unlikely to occur within our maritime area of interest. Piracy and armed robbery remain a threat in Southeast Asian waters, particularly in the Straits of Malacca where half of all incidents in the region have occurred. Global piracy rates are influenced by economic challenges, conflict and poor governance; locations where these conditions exist are likely to see increases in piracy, particularly where enforcement is limited.
30. The potential for maritime irregular migration is likely to remain an enduring challenge for New Zealand's maritime security. The UNODC⁴ reports that the Pacific has become a source, transit and destination, linked to economic challenges, political instability and constrained border control.

³ [Fisheries crime](#) is an umbrella term used by Interpol covering money laundering, document fraud, human trafficking and modern-day slavery.

⁴ United Nations Office on Drugs and Crime is a UN body working to combat illicit drugs, international crime and terrorism.

Annex: New Zealand's full maritime area of interest.



Probabilistic Language and Confidence Levels

Probabilistic language is used through this assessment to assist in communicating the likelihood an event or outcome will or will not occur. The scale is not continuous in order to make a clear distinction between ranges and avoid a false sense of numerical precision. Confidence levels are used to provide transparency of assessments.

Probabilistic Language

Highly Unlikely	Unlikely	Possible/ly	Likely	Highly Likely	Almost Certain
<20%	25%-35%	40%-50%	55%-75%	80%-90%	>95%

Confidence Levels

Confidence Level	General Criteria
High Confidence	<ul style="list-style-type: none">• The underlying information is well corroborated by proven sources. A strong understanding of the issue exists. There is a negligible risk of deception.• There are minimal assumptions used.• There is a mix of strong logical inferences developed through multiple analytic techniques or methodologies.
Moderate Confidence	<ul style="list-style-type: none">• The underlying information is partially corroborated by good sources. A moderate understanding of the issue exists. There is some risk of deception.• Several assumptions are made; some are critical to the analysis.• There is a mix of strong and weak inferences developed through a single analytic technique or methodology.
Low Confidence	<ul style="list-style-type: none">• The underlying information is uncorroborated by good or marginal sources. There is a limited understanding of the issue. There is a considerable risk of deception.• Many assumptions are made; most are critical to the analysis.• The reasoning is dominated by weak inferences developed through few analytic techniques or methodologies.