

PULSE CHECK
X

AUSTRALIA'S AGENDA

Australia's top 130+ non-government foreign affairs experts give their advice to the returning government



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FOREWORD.

In times of upheaval, sometimes the best thing we can do is ask the right questions—and listen carefully to the answers. That's what this Pulse Check has done. It convened 132 of Australia's top non-government foreign policy and development minds and asked a deceptively simple question: What must the Government prepare for?

The answers offer both warning and wisdom. The spectre of a Chinese military base in the Pacific might dominate headlines. But our expert community tells us that Australia is far less prepared for what is already unfolding: a cascade of climate-driven disasters, and the fallout of major US policy shifts in the region. The rate of change in global affairs is accelerating. Australia and its low- and middle-income neighbours must keep pace—together.

This expert community concludes that the development conditions in Southeast Asia and the Pacific—the state of safety, health, climate resilience and governance—are central to Australia's ability to advance its national interests. This is not just sentiment, it's clarity about the strategic imperatives facing the Government.

As a returned Australian Government steps back into office, the Lab offers this publication as both a compass and a catalyst—so that Australia can step forward in one of the most consequential decades of our regional story.

Thanks as ever to the generosity of Pulse Check participants, and the Lab's team for bringing this project to life.



Bridi Rice
CEO

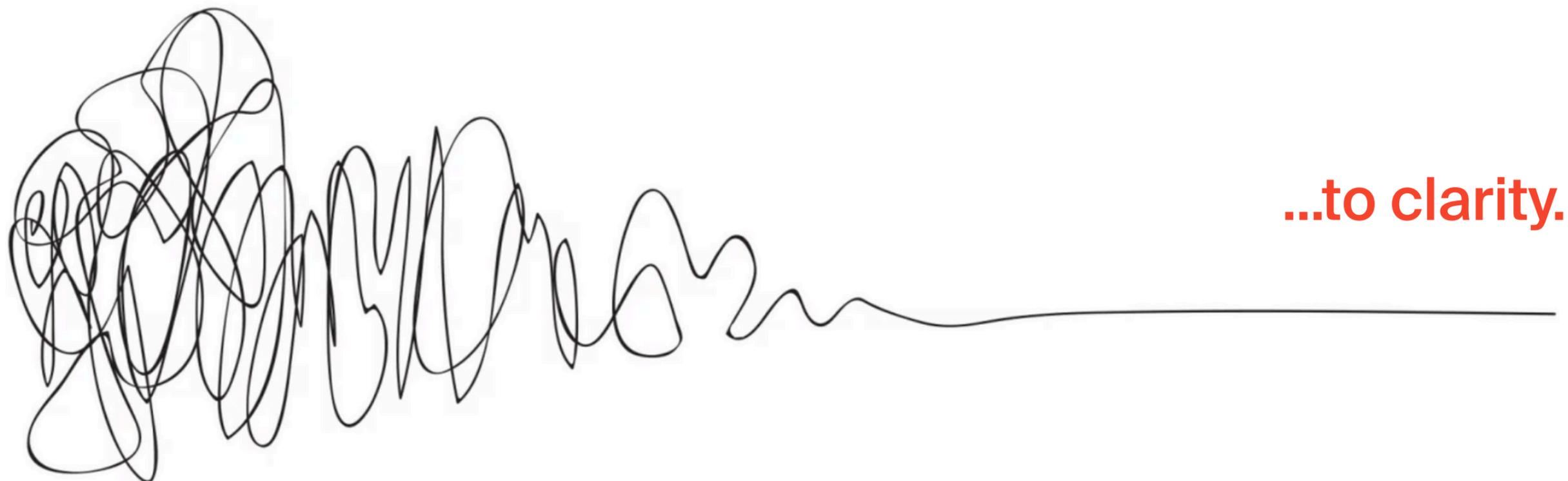
CONTEXT.

The region is as **dynamic as ever**.

In Australia, we have a **returned Government** with a decisive majority.

But our leaders face **tough choices** about where to focus efforts.

The Pulse Check's job is to help leaders move from complexity...



WHAT WE DID.

We asked Australia's top 130+ non-government foreign affairs experts what advice they would give to the returning Australian Government.

Who?

130+ of
Australia's top
foreign affairs
thinkers.

What?

A methodology
that forces tough
choices.

Why?

To surface views,
at scale, on what
matters most.

WHAT WE DID.

We asked Australia's top 130+ non-government foreign affairs experts three questions and forced them to prioritise their responses.

Q1

Australia's
national interests.

Q2

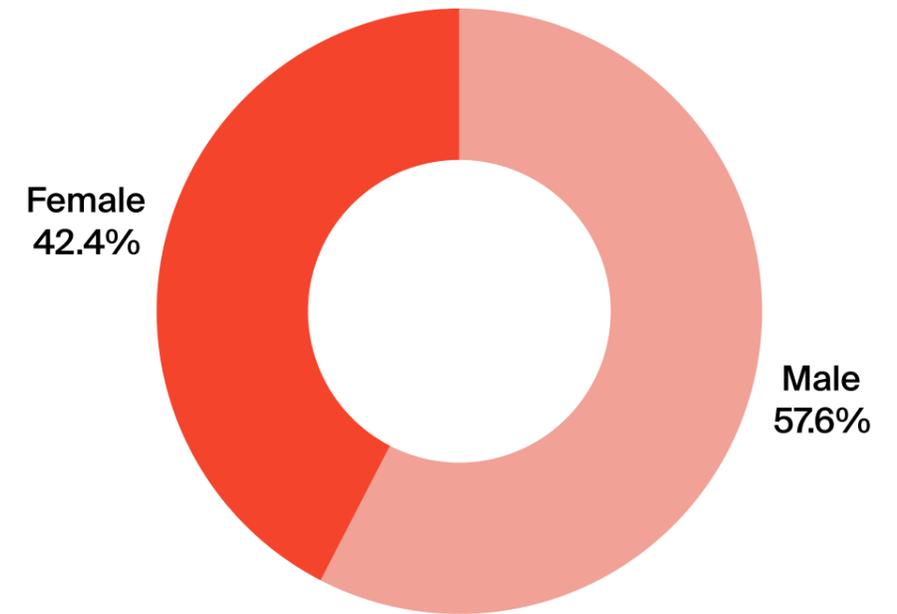
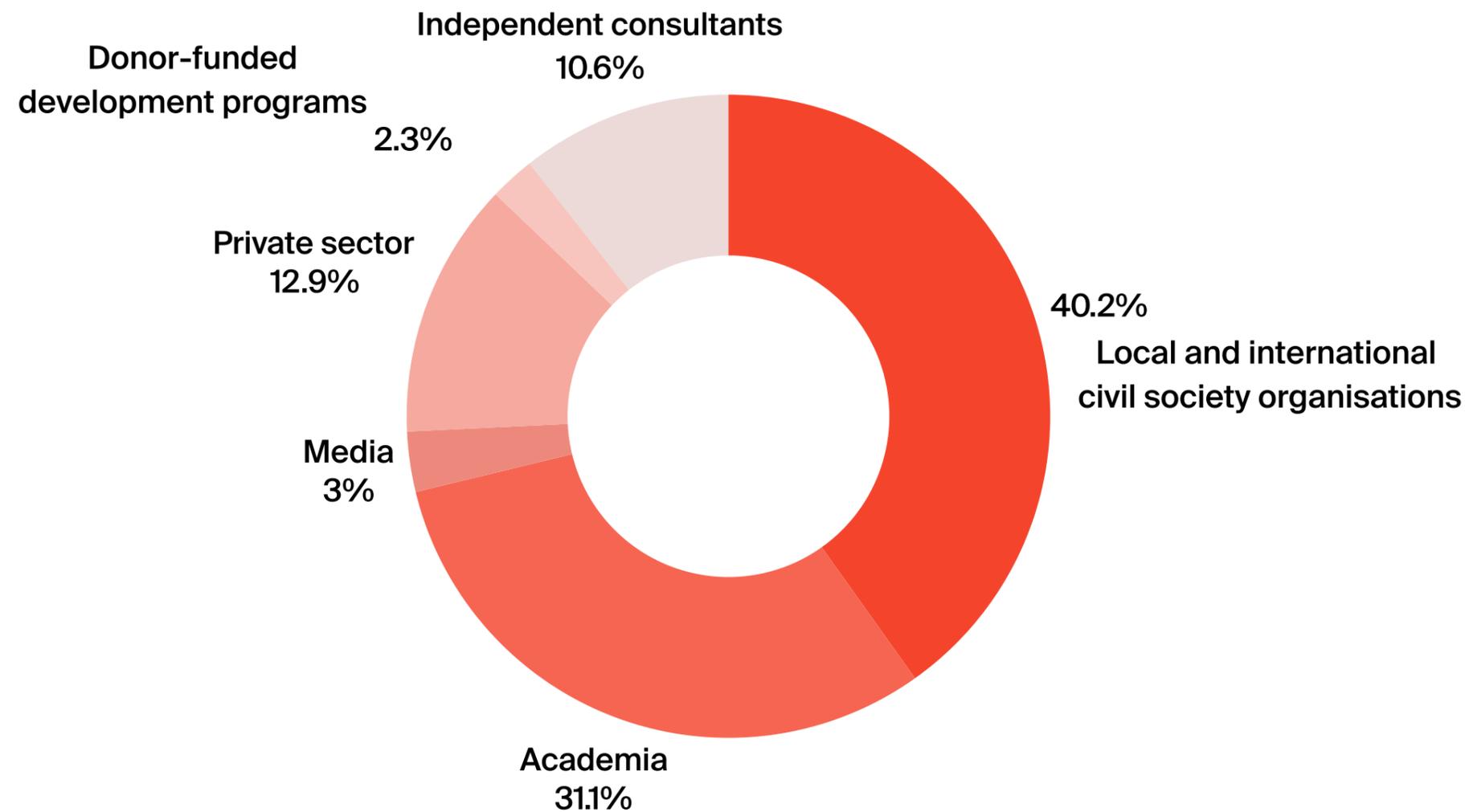
Future scenarios
to prepare for.

Q3

Guidance for the
returning
Government.

PARTICIPANTS.

The Lab extends our deep gratitude to the diverse group of experts who shared their views. Below is a snapshot of who participated. These 132 thinkers represent a depth of Australian development expertise alongside a breadth of foreign affairs and defence leaders.



PARTICIPANTS.

Dr Adam Burke	The Asia Foundation	Clancy Moore	Transparency International Australia
Adrian Morrice	Independent	Daniel Hyslop	Interpeace
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*Some participated anonymously. These are the experts who were happy to be named.

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*Some participated anonymously. These are the experts who were happy to be named.

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*Some participated anonymously. These are the experts who were happy to be named.

QUESTION ONE | WHAT WE ASKED.

Australia is an active and involved partner in Southeast Asia and the Pacific. But with finite resources and influence, a new Government must prioritise its efforts based on what matters most to Australia's national interests.

Which vision of the region best serves Australia's national interests in the Pacific and Southeast Asia?

Select the top three:

CATEGORIES | NATIONAL INTEREST.

A region where **technology** empowers, not destabilises

Where AI, surveillance and digital platforms foster development—and are not used to manipulate, hack or allow one state to harm another.

A region where **climate shocks** don't compound crises or become humanitarian disasters

Where states can respond to floods, droughts and rising seas—before lives, communities and livelihoods are lost.

A region where countries can navigate **strategic competition** on their own terms

Where governments can manage external pressures and competing interests without being coerced, and make sovereign choices in line with their own national priorities.

A region where **people** are safe, healthy, and empowered

Where communities can meet their basic needs—with access to food, healthcare, education, safety from violence, and free from discrimination.

A region where **economies** are strong, open and resilient to shocks

Where trade and investment support jobs and resilience—and openness promotes shared economic prosperity between countries.

A region where **governments** are accountable, press is free, and private enterprises and civil society thrive

Where governance systems serve people, enable entrepreneurialism and perform in transparent ways.

A region where **regional institutions** and cooperation are strong

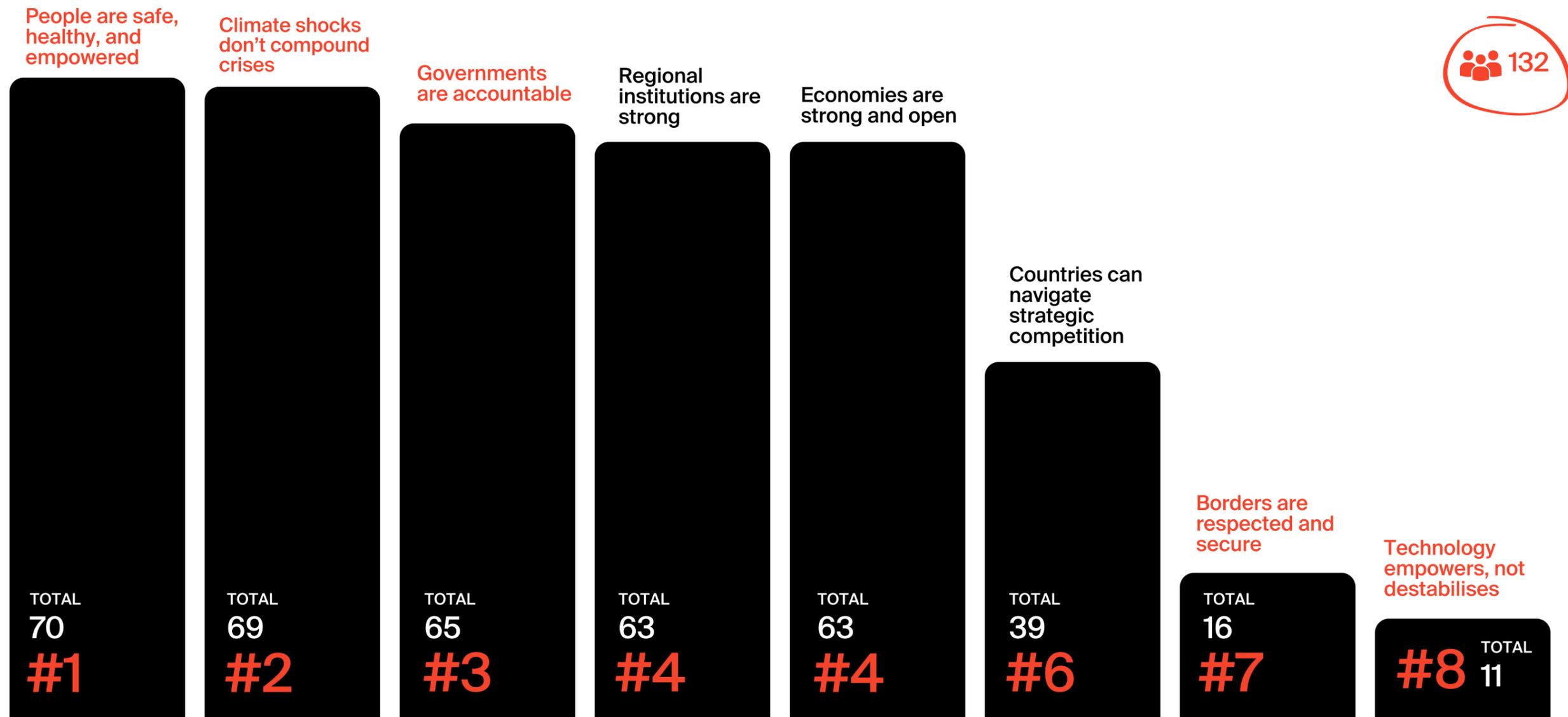
Where countries solve shared problems together—through robust norms, diplomacy, and regional organisations.

A region where **borders** are respected and secure

Where territorial integrity is maintained, preventing crime, trafficking, irregular migration, and violent conflict.

RESULTS | NATIONAL INTEREST.

When asked to prioritise, 130+ experts said Australia's national interests are best served by a region where...



Instructions: Select the top three visions that best serve Australia's national interests.

KEY TAKEAWAYS | NATIONAL INTEREST.

We asked: which vision of the region best serves Australia's national interests in the Pacific and Southeast Asia?

Development conditions in the region are core to Australia's national interests

The top five responses were closely grouped. Experts felt that Australia's national interests are best served by a region where:

- People are safe, healthy and empowered
- Climate shocks don't compound crises
- Governments are accountable
- Regional institutions are strong, and
- Economies are strong and open.

While experts saw these priorities as deeply interconnected, it was clear that experts emphasised different visions of development.

A technology blind spot?

Only 11 out of 132 experts ranked technology that empowers, not destabilises, in their top three. We found this result striking and a potential blind spot to be aware of given the extent and pace of possible disruption. 13.

EXPERT QUOTES | NATIONAL INTEREST.



‘Some of the more aspirational goals are not going to be achievable in the world order we are entering. Our primary objective must be to prevent backsliding...’

‘We are watching the emergence of a new general purpose technology, the most significant since the internet. And like the internet, the societies we see today are not the societies we will have tomorrow...’

‘In the context of the dismantling of USAID, there is an urgent need to support strong civil societies given the limited number of other supporters.’



QUESTION TWO | WHAT WE ASKED.

There are many possible future scenarios in Southeast Asia and the Pacific. For Australia to be a responsive partner, a new Government will need to be prepared for a range of possibilities. Below is a list of undesirable situations.

What does Australia most need to prepare for?

Please imagine you are the new Government. Select the top three scenarios you would direct your portfolio to prepare for, based on your understanding of their likelihood and impact on Australia's national interests.

CATEGORIES | PREPAREDNESS.

Gender-based violence surges amid rising fragility

Conflict, economic stress, and weak legal protections lead to rising rates of gender-based violence, undermining inclusion goals and increasing demand for Australian support.

AI and disinformation destabilise political systems

Governments and foreign actors in Southeast Asia and the Pacific use AI and disinformation to suppress dissent and polarise societies, undermining democratic norms and complicating Australia's regional partnerships.

Major US policy shifts fracture regional partnerships

Consecutive major shifts in US foreign policy undermines regional trust in the Global North, weakening Australia's alignment with key partners in Southeast Asia and the Pacific.

Debt distress derails essential development spending

Rising debt burdens force Southeast Asian and Pacific governments to cut health, education, and infrastructure budgets, increasing dependence on development assistance and debt relief.

A new Chinese military base is established in the Pacific

A permanent Chinese military installation is opened in a Pacific Island country, directly threatening Australia's strategic access and regional defence planning.

Regional economic crisis strikes Southeast Asia

Financial shocks destabilise multiple Southeast Asian economies, disrupting Australian trade and inviting greater external influence in the region.

Climate-driven disasters displace and overwhelm communities

Rising seas, storms, or seismic events kill thousands and force mass relocations, placing pressure on Australia to support humanitarian and adaptation responses.

Multilateral institutions fail in Southeast Asia and the Pacific

Breakdowns in regional or global institutions prevent coordinated responses to shared crises, isolating Australia and weakening regional problem-solving.

Religious nationalism sparks violence in Southeast Asia

Escalating communal unrest destabilises a Southeast Asian country, complicating Australian diplomacy and straining diaspora and aid relationships.

Pandemic overwhelms Pacific health systems

A new infectious disease collapses public health systems, increasing demand for Australian health assistance and raising biosecurity risks.

Digital authoritarianism entrenches in democracy

A major Southeast Asian democracy cracks down through censorship and surveillance, limiting Australian engagement and challenging regional democratic norms.

Food and water insecurity drives regional instability

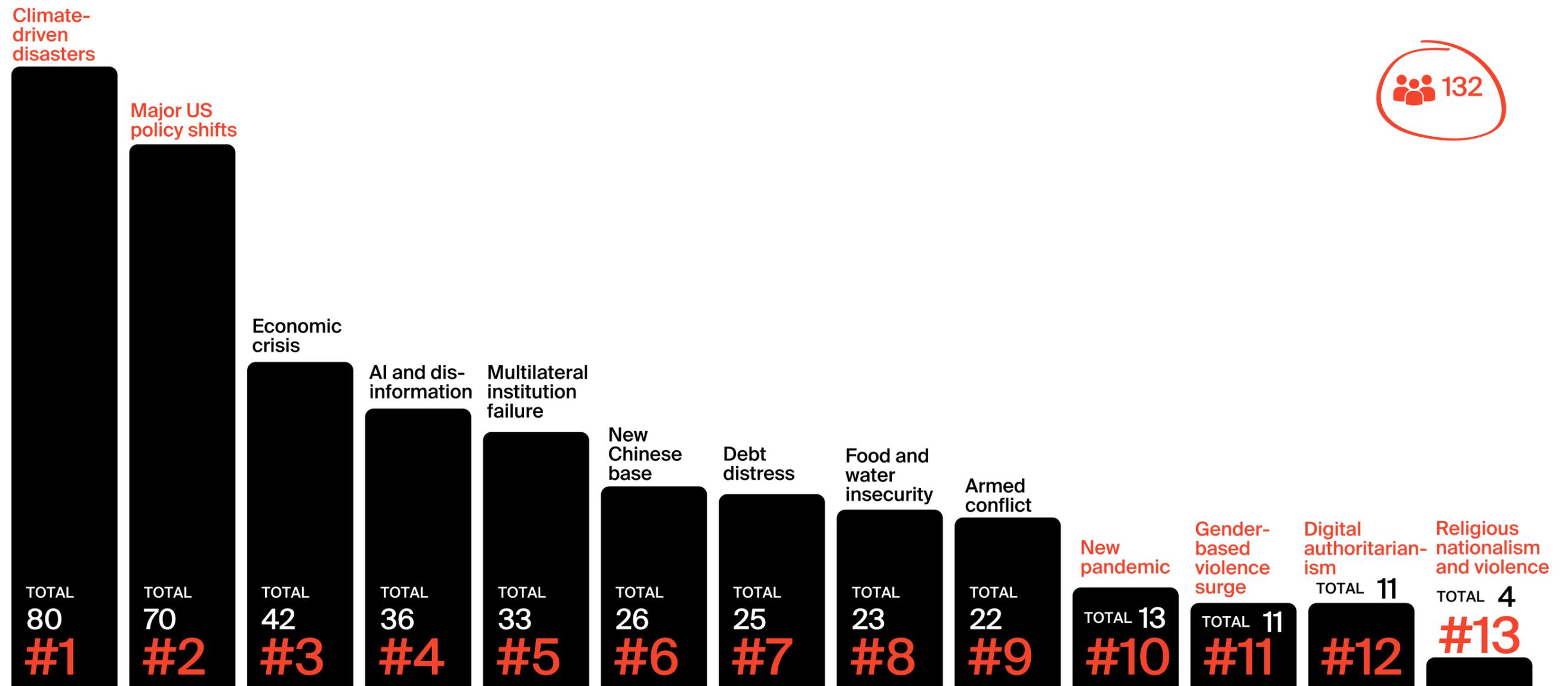
Breakdowns in access to food or water trigger unrest and humanitarian crises, threatening livelihoods and complicating regional stability.

Armed conflict erupts in a previously stable part of the Pacific

Fighting breaks out in the Pacific, threatening regional security and potentially requiring Australian intervention.

RESULTS | PREPAREDNESS.

When faced with regional hypotheticals, 130+ experts thought Australia most needed to prepare for scenarios like...



Instructions: Select the top three scenarios you would direct your portfolio to prepare for.

KEY TAKEAWAYS | PREPAREDNESS.

We asked: There are many possible future scenarios in Southeast Asia and the Pacific. What does Australia most need to prepare for? Faced with a set of regional hypotheticals, the strongest messages from experts were:

Climate must be treated as a systemic issue

Experts were unambiguous that this is a top priority. Climate change is already a stated priority in Australian foreign policy. Nonetheless, experts thought Australia needs to shift its response to treat climate as a systemic rather than a sectoral issue.

US shifts are rewriting regional dynamics

Experts saw unpredictable US policy shifts as the second most critical scenario for Australia to prepare for. Some focused on US foreign assistance withdrawal. Others emphasised questions about the US-Australia relationship, and a third cohort focused on what these shifts mean for Australia's other regional relationships.

Economic crisis, AI and disinformation, and multilateralism need a sharper focus

Economic crisis, AI and disinformation, and multilateral institution failure were all scenarios that experts considered Australia must also prepare for. For each area, experts argued that Australia's focus needs to be sharpened, picking fewer things to do well.

EXPERT QUOTES | PREPAREDNESS.



‘The most serious threat scenario is the effective departure of the US from the region... This will make China the de facto hegemon. Australia needs to come to terms with this by finding a new working relationship with China, but also by filling some of the spaces left by the US, such as in aid and development.’

‘Ensure that Australia's whole-of-government engagement in countries across the region supports rather than undermines stability and better governed societies... DFAT needs experts to anchor the task.’

‘Australia must be prepared for whatever crisis emerges... the various institutions of the state that are responsible for crisis management need to be appropriately resourced for an all-hazards approach to risk management.’



QUESTION THREE | WHAT WE ASKED.

A hypothetical: You find yourself standing beside Australia's next Foreign Minister. They tell you that global circumstances call for a refresh of Australia's agenda in lower- and middle-income countries. They ask you for one idea.

What immediate policy, priority, program or partnership change would you recommend and why?

Consider what Australia may need to do more or less of.

RESULTS | ADVICE TO THE GOVERNMENT.

We asked 130+ experts what advice they would give to the returning Australian Government. These were open-ended responses. The following four areas were a focus for experts, with a sample of the advice given in each area:

1 | Climate action & resilience



'A regional partnership for climate action, facilitating climate adaptation and promoting green economies would send a clear signal: Australia is part of this region and we will work together with you to solve the biggest challenge of our time.'

2 | Aid budget & reform

'We need to reintroduce rigorous assessments of development programs. The Australian public's trust of foreign aid programs has eroded... Proven, cost-effective programs should be prioritised.'



3 | Geostrategy & regional diplomacy



'Visibly differentiate Australia from the US and the Global North as a genuine, committed partner—both bilaterally and through regional institutions.'

4 | Multilateralism & global public goods

'To prevent possible debt distress leading to outbreak of instability, conflict and one-sided dependencies from Chinese lending, Australia should develop a dedicated development/diplomatic and peace finance strategy to alleviate debt distress...'



RESULTS | OTHER ADVICE.

A taste of other expert advice for the returning Australian Government includes:

“ ‘Place further resources into integrating the Australian and Indonesian economies.’

‘Australia should identify countries in our region where political and civil rights are most eroded or deteriorating, then develop a strategy to support local actors working in these countries to strengthen democratic norms.’ ”

“ ‘I think we may be spending too many resources holding the hand of the Australian private sector in the hopes of increasing investment in the region. Firms know how to seek out commercial opportunity.’

‘Australia needs to build on its leadership in gender. A flagship program across the Pacific and Southeast Asia aimed at assuring safe access to police and justice services for women and other vulnerable people would be extremely valuable.’ ”

“ ‘Start reinvesting in democracy promotion work in the region.’

‘Minister, many of these countries are graduating up the economic ladder and don't feel attached to the institutions that we consider to be central to the so-called 'rules-based order'. We should work to co-create new institutions that look and sound like the region.’ ”

THE LAB'S TAKE.

Our assessment: There is no time to waste

- Disruptions that once felt distant are now reshaping the region—and some will likely hit during this term of government. Climate shocks are accelerating, economic risks are rising, and AI is beginning to transform how societies function and how influence is exercised.
- US presence in the region is receding and US policy is increasingly unpredictable. That makes Australia's relationships—particularly in the Pacific and Southeast Asia—central to our national interest, more so than ever. These partnerships must be able to stand independently, and development cooperation is key to this. Supporting partners to manage their own strategic choices, including with China, is crucial.
- It's getting harder for any Australian Government to keep pace.

So what: The status quo is sticky—but isn't an option

Australian development in 2025 will not be fit for the demands of 2030. Significant work was undertaken during the Government's first term, but that reform must continue in order for Australia to be prepared for the disruptions experts foresee, outlined in this Pulse Check.

So much good work has already been done. But now is an opportune time to refine the breadth of the existing program and create space for innovation that will serve Government well in the years ahead.

THE LAB'S TAKE.

The way forward.

We know it's all well and good to say that the status quo won't suffice. It's harder to find viable ways to deliver change.

The Lab's focus for the rest of 2025?

Further analysis of trends, new proposals and more debate for Australian development, in close partnership with the development ecosystem, government, and broader Australian foreign affairs community.

Stay tuned.

ABOUT THE PULSE CHECK.

A note on the survey

A Pulse Check is a survey that delivers data designed to inform key policy and reform processes. It collects this data by placing top local, non-government experts in the shoes of policymakers and challenging them to grapple with difficult trade-offs facing the Australian development program. While the Lab receives a portion of its funding from the Australian Department of Foreign Affairs and Trade, this is an independent process, and all research and analysis reflect participants' views and Lab analysis.

A note on the methodology

Participants were asked to choose the top three categories provided for each question, explain their choices and trade-offs, and provide direct advice to Government. In addition, participants were asked why they prioritised in the way that they did. Full analysis of the results, including the qualitative findings, are available via devintelligencelab.com. Participants are listed, though their specific answers remain anonymised.

Acknowledgements

The Lab's work would not be possible without the time, generosity, and deep insight of the 132 experts who participated in the Pulse Check. We thank you wholeheartedly.

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