TECH POLICY DESIGN INSTITUTE

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ANALYSIS OF AUSTRALIA'S 2025 AI AGENCY ASSESSMENT AND THE AUSTRALIAN GOVERNMENT NATIONAL AI PLAN

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TPDi collaborates with all stakeholders in the tech ecosystem.

Our mission is to shape technology for the benefit of humanity through rigorous research, innovative education, evidence-based public commentary, and community building.

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We acknowledge the Ngunnawal and Ngambri people who are the Traditional Owners of the land upon which this report was prepared in Canberra, Australia. We pay our respects to Elders past and present.

The authors affirm that sovereignty has never been ceded by First Nations peoples living on the continent now known as Australia. We recognise Indigenous Sovereignty as enduring and inherent, as well as fundamentally different to the new concept of 'AI sovereignty' (to which this report is responding).

FOREWORD

Everyone, it seems, *wants* 'AI sovereignty'. But what most need is 'agency' to shape their future.

The term 'AI sovereignty' dominates policy discussions and drives investment decisions but is used to mean everything from strategic self-reliance to cultural preservation and individual autonomy. Its use as a binary – where AI is sovereign, or it is not – leaves most countries disempowered. There are also more practical confusions. AI is not one thing, so exactly what AI capabilities are we talking about? How do you measure them? What would sovereignty really mean in each case?

Since we published our discussion paper in November 2025, *From AI Sovereignty to AI Agency*, the debate has gained momentum. Binary notions of AI and sovereignty are increasingly seen as reductive in today's strategic landscape. Indeed, it is increasingly accepted that, for most countries, pursuing absolute AI sovereignty is an unattainable, and frankly unhelpful, goal.

TPDi's AI Agency Tool, presented here in its final form, offers a practical solution. Instead of only asking if a country possesses sovereign control, the tool assesses whether a country has AI agency to steer outcomes, protect and promote national interests, and capture value in a globally connected system.

The tool was informed by consultation with more than 250 experts across government, industry, research and civil society. It breaks down 'AI' into 103 possible AI capabilities. It provides a structured method to assess the maturity of each capability, maps the capability on a sovereignty spectrum (that spans access, control, choice and leverage), and considers the global scarcity of each capability. These assessments are then combined into a single view to arrive at an AI agency score.

We applied the tool to produce **Australia's 2025 AI Agency Assessment: the first comprehensive, independent, evidence-based, expert-led assessment of Australia's AI capabilities at the national level.** We then mapped this assessment against the government's 2025 National AI Plan.

This assessment finds that Australia has emerging maturity across most AI capabilities, but high agency. Empirically, this means Australia has the power to shape the impact of AI on our future – if we make the right strategic decisions today.

This analysis of the plan reveals every significant commitment in the plan aligns with the assessment's recommendation to lean into those capabilities. The analysis shows that strategic silences in the plan align with areas of low national agency such as accelerators and foundation models.

The analysis highlights priority areas for future government attention include untapped potential in very high agency areas including critical minerals, unlocking data assets through lifecycle capabilities, and certain models such as computer vision.

There are also critical gaps that need to be filled in inclusive adoption; public sector and public interest compute; culturally and nationally inclusive models, adaptation and alignment; AI skills and regulatory oversight.

The aim is not to control or excel in all 103 capabilities – but, rather, to understand our strengths, reduce critical dependencies, and build leverage where national advantages exist. **The AI Agency Tool provides an evidence-based framework to do this, grounded in data rather than instinct or spin.**

The tool is adaptable and scalable. The right mix of strategic capabilities will differ country to country. Like a music mixing deck, the tool brings together many different inputs into one frame, empowering the user to adjust the composition, and leverage the instruments at hand to shape the most impactful song.

We invite you to apply the tool so that your country, region, sector, community or organisation to identify your agency and help to proactively shape a technology that is already shaping our world.

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OVERVIEW: AI AGENCY TOOL

AI is reshaping global power, prosperity and security but debates about AI sovereignty are often binary, conflated, lacking evidence, and disconnected from the complex trade-offs leaders face.

What is it?

The AI Agency Tool is a structured and repeatable method to assess a nation's AI maturity, sovereignty and agency across 103 AI capabilities, producing prioritised recommended actions.

Why does it matter?

The tool equips decision-makers to pursue AI agency: the capacity to steer outcomes, protect and promote national interests, and capture value in a globally connected system. Used well, the tool enables nuanced strategies, better-targeted investment, and deeper understandings of trade-offs.

Who is it for?

- **Policymakers** of countries of all sizes and stages of AI maturity, particularly where strategic dependence is high, and choices are constrained
- **Business leaders** navigating geopolitical risk, supply chains and long-term investment decisions
- **Researchers** conducting national assessments, tracking progress over time and holding governments accountable

What does the tool do?

The tool presents a step-by-step process to gather evidence and make assessments to both inform and analyse strategy. Part 2 of the companion report describes in detail how to use the tool. Table 1 summarises its 3 steps and 6 outcomes. Figure 1 explains the concepts in the tool.

Tool applications

- Measure national AI agency over time via an updated, interactive AI Agency Tool
- Develop national strategies that leverage high agency capabilities (which represent national competitive advantages) to offset international dependency in other capabilities
- Compare AI maturity, sovereignty, agency and recommended actions across countries, for international benchmarking
- Conduct regional AI agency assessments and strategy development (for example, at the European Union level)
- Conduct organisational AI agency assessments and strategy development (for example, large enterprises)
- Undertake market concentration analysis for regulatory bodies

Table 1: Uses of the AI Agency Tool

Step	Use	Function	Outcome
1 **Define**	**A common language**	Defines 103 AI capabilities across 6 layers: **the typology**	**Shared language** that brings precision and comparability to national debates
2 **Assess today**	**Assess maturity**	**Stocktakes** current capability across the 6 layers and 103 capabilities	**Maturity ratings** that produce a curated snapshot of existing national strengths, areas for development and missing information
	Assess sovereignty	Maps international access, sovereign control, resilient choice and export leverage over AI capabilities through the **sovereignty spectrum**	**Sovereignty ratings** that move from a binary notion of sovereignty to a nuanced spectrum of sovereignty, delivering greater optionality for decision-makers
	Identify agency	Integrates maturity and sovereignty ratings, and global scarcity, into a single view in the **agency score**	Areas of **competitive advantage** that can be leveraged to compensate for areas of greater dependency
3 **Prioritise tomorrow**	**Plan next steps**	Combines maturity, sovereignty, agency, scarcity and public interest considerations to identify **recommended actions**	**Transparent disclosure** of analysis that underpins identification of most important areas for future attention
	Inform and analyse strategy	Connects all components into one **coherent policy design and assessment** method	**Grounds decisions in evidence.** Comprehensive national strategies. Strengthens accountability, and trust

AI TYPOLOGY

6 layers and 103 capabilities

The tool's typology sits across the entire AI ecosystem, defined here as a system of 6 layers.

Before you can assess national AI capabilities, you need to define them.

In AI policy, stakeholders often talk past one another, using the same terms to mean very different things. Without specific shared language, policymakers risk undervaluing entire segments. By distinguishing between fields – such as computer vision, forecasting, optimisation and generative AI – it becomes easier to see where strengths and emerging capabilities lie.

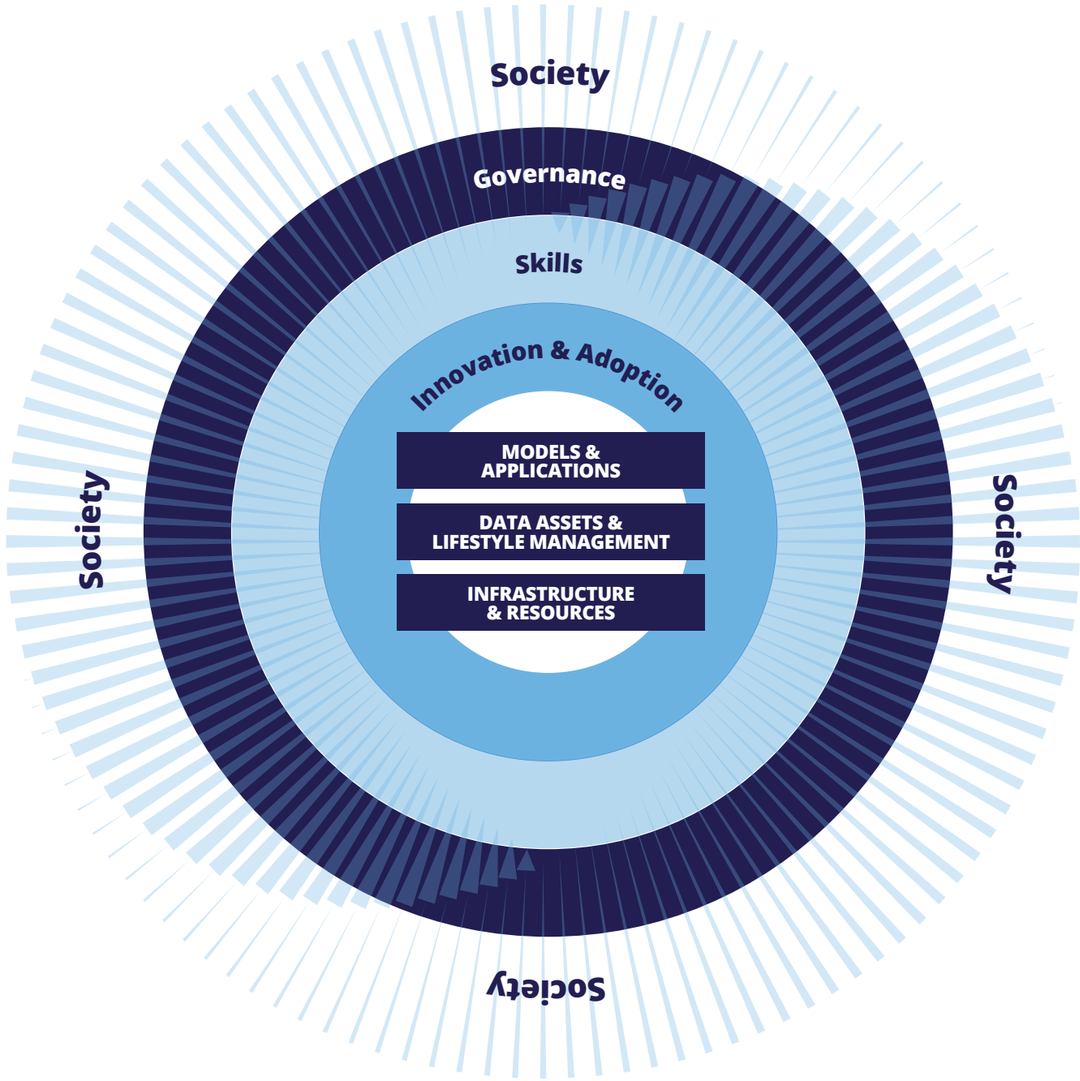
The AI Typology brings clarity by defining national AI capability, giving policymakers and practitioners a shared language.

Developed in consultation with over 250 experts, the typology defines the AI ecosystem as a system of 103 capabilities across 6 layers:

- 3 technical layers that form the AI stack (infrastructure and resources; data assets and lifecycle management; and models and applications)
- 3 enabling layers that encircle it (innovation and adoption; skills; and governance) (Figure 1).

These layers work as a complex system. Data powers models, governance shapes adoption, and skills determine how safely AI is used. Each layer is deeply intertwined with the others and with society itself. When aligned, they amplify progress; when disconnected, they slow it down.

Figure 1: The 6 layers of the AI typology



OVERVIEW: NATIONAL AI AGENCY ASSESSMENT PROCESS

The AI Agency Tool starts by conducting a national stocktake to produce a **maturity rating** for all 103 AI capabilities in the **AI typology**.

It then situates the traditional binary objective of *sovereign control* over those capabilities within an expanded spectrum that is fit for purpose in today's strategic landscape. The traditional control framing is expanded to also consider the management of international partnerships (*access*), the importance of resilience (*choice*) and pursuit of competitive advantage (*leverage*). We call this the **sovereignty spectrum**. An assessment of each element of the spectrum produces a *sovereignty rating*. The maturity and sovereignty ratings, and an assessment of a capability's global scarcity, are then combined into a single view to produce an **AI agency score** – a measure of national competitive advantage for each AI capability.

The final step of the Tool produces **recommended actions** by combining maturity, sovereignty, scarcity and subjective considerations of public interest importance. This enables leaders to prioritise next steps and maximise international leverage where agency is high, or to close critical gaps in the public interest.

This process produces a national AI agency assessment. This document is an analysis of Australia's 2025 AI Agency Assessment and the National AI Plan.

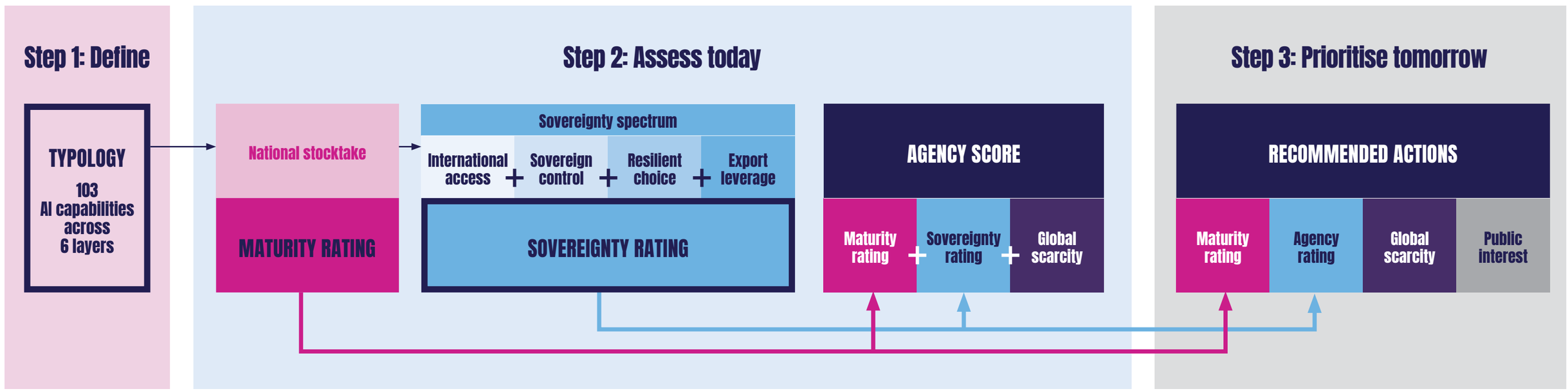


Figure 2: Concepts and steps of the AI Agency Tool, including the AI typology, maturity rating, sovereignty rating, agency score and recommended actions

STEP 1

Define

The AI Typology: defining 103 national AI capabilities

Before you can assess national AI capabilities, you need to define them.

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STEP 2

Assess today

The maturity rating: a national stocktake

To make informed policy choices, you first need to know where you stand. The stocktake consolidates evidence to measure maturity across all 103 capabilities in the typology. It brings together fragmented evaluations of the AI ecosystem into a single comparable picture. The tool provides the framework to collate credible insights, and highlights areas that are under-evaluated or poorly measured.

Conducting the stocktake produces a **maturity rating** for each AI capability, revealing whether a capability is established, emerging or advanced.

Importantly, the stocktake is descriptive, not prescriptive. Measuring a capability's existence or maturity does not imply:

1. **a value judgement** – whether having more or less of a capability is inherently good or bad
2. **a fixed trajectory** – some capabilities may plateau, evolve or become obsolete as technologies and business models change
3. **uniform maturity** – capability levels vary widely across sectors. Additionally, some areas that appear less mature may be globally scarce, creating leverage and strategic advantage.

In the tool:

- the stocktake appears in the **pink section** of the analysis below
- supporting data and references can be found in each layer's corresponding 'stocktake sheet'.

The sovereignty rating: spectrum, not binary

The AI sovereignty spectrum breaks down the traditional sovereignty binary into a measurable sovereignty rating for each capability.

TPDi's **sovereignty spectrum** situates the traditional binary objective of *sovereign control* within an expanded spectrum that is fit for purpose in today's strategic landscape. The traditional **control** framing is expanded to also consider the management of international partnerships (**access**), the importance of resilience (**choice**), and pursuit of competitive advantage (**leverage**). An assessment of each element of the spectrum produces a **sovereignty rating**.

The spectrum recognises that power comes from balance, building domestic strength while using interdependence as a source of agency. It consists of 4 elements: international access, sovereign control, resilient choice and export leverage. The sovereignty rating is higher when more of these elements apply to a capability.

The spectrum captures the overlapping capability ownership models that co-exist within a country (international, private, public and hybrid). Rather than presenting these as distinct capability rows, the tool layers and weights these relationships to reveal the cumulative strategic landscape in a compact and succinct way.

International access

Access defines a country's ability to utilise and benefit from international capabilities made available within its jurisdiction (for example, foreign models, cloud, chips). Under these conditions, a country can participate in and benefit from AI capabilities. But that country may be dependent on others and have limited ability to shape others' behaviour. In a globally networked AI economy, access can both be a strength and a vulnerability. Total dependence on foreign systems for critical functions risks exposure to external pressure, while strategic, diversified partnerships can create resilience.
The sovereignty spectrum distinguishes between types of access. For instance, a country may gain access to AI capabilities from jurisdictions that are governed by the *rule of law* or those where authority is exercised *extrajudicially*, such as leaders whose decisions are not subject to independent or judicial review. While both increase agency by increasing choice and resilience, access via rule-of-law jurisdictions is worth twice as many points in the model to reflect its greater reliability.

For example, as it currently stands, access to international capabilities from China or Hong Kong would be represented in the 'extrajudicial reach' column, while those from Five Eyes countries would be noted in the rule-of-law column. However, **none of these classifications are set and forget**. The benefit of this tool is in its ability to be adjusted, increasing or decreasing sovereignty in line with changes in national capability or geopolitical circumstances (for example, if a rule-of-law country suddenly became subject to extrajudicial reach).

Sovereign control

The traditional conceptualisation of 'AI sovereignty' is carried forward most directly in the category of 'control'. Control refers to a country's domestic ownership and authority over key capabilities within its jurisdiction. Control captures AI capabilities that are onshore and subject to a government's ability to directly compel actors within its jurisdiction – whether research institutions, civil society or private enterprise – to act a certain way. Different governments will have different preferences regarding the level of domestic control, in part depending on the capability's strategic importance.

Assess today (continued)

For example, public interest compute, regulation or AI safety research may warrant direct domestic stewardship, while commercial applications may be more suited to mixed ownership models.

In this manner, having 'control' may mean that public interest research organisations possess their own AI compute training resources, and that domestic AI companies are being established and grown; or that government has control of a capability (for example, regulation).

Defining what constitutes a 'local business' is often contentious. For consistency, this application of the tool uses the Australian Government's definition of an Australian business for procurement purposes.

> **An Australian business** is 'a business, including any parent business, that has 50% or more Australian ownership, or is principally traded on an Australian equities market; and is an Australian resident for tax purposes; and is a business that has its principal place of business in Australia.'

Articulating the gradient of national control is complex and central to AI sovereignty debates. The AI Agency Tool's sovereignty spectrum provides a structured way to articulate and measure these differences.

Resilient choice

Choice refers to the ability to manage unavoidable dependencies on others' capabilities through a mix of international and sovereign capability. It is the product of a balance of access and control. Choice involves having diversity in access to capabilities, and the resilience to sustain continuity of capability under disruption. A diverse and well-managed mix of capability sources creates flexibility, enabling fast pivots under pressure, and self-determination and adaptation as required.

In this manner, cumulative choice aids sovereignty: the broader the options, the stronger a nation's resilience and independence.

Export leverage

Leverage refers to having excess capability domestically and/or others depending on your AI capabilities in foreign jurisdictions. This enables governments to shape outcomes and what others do, with or without direct coercion, by leveraging dependencies across a globally connected system. If international partners rely on a country's capability for their own AI ecosystem, this creates further leverage, bolstering the national negotiating position to secure or maintain access to other essential capabilities. Such dependencies amplify negotiating power and position a country as an indispensable partner in the global system.

For example, leverage may involve other countries depending on one nation for the supply of critical and strategic minerals that underpin AI technologies, or commercial applications made in one country but being used in international markets, or one country training another country's population in particular AI-related skills.

In the tool:

- the AI sovereignty spectrum appears in the **blue section** of the analysis below
- each layer applies the elements of the spectrum within its own context differently (for example, accessing infrastructure versus accessing skills). The logic remains constant: the sovereignty rating increases when access, control, choice and leverage are collectively as high as possible.

AI agency score: identifying competitive advantage

> **'AI agency'** is a nation's power to shape its AI future. It is the capacity to steer outcomes, protect and promote national interests, and capture value in a globally connected technological system. It is determined by the strength of its AI capabilities (*maturity*), its capacity to access, control, choose and leverage the capabilities (*sovereignty spectrum*), and the scarcity of those capabilities worldwide. It shows not just what a nation can do, but how independently it can act, and the leverage it gains when others depend on its strengths.

Power is not derived from capability alone. The AI agency score integrates the maturity, sovereignty, and global scarcity of a country's capability. It measures not only what a country can do, but how rare that ability is in an international context. This allows the tool to highlight where a country may possess strategic leverage.

- Maturity rating: current capability levels, drawn from the stocktake (pink column)
- Sovereignty rating: access, control, choice and leverage drawn from the sovereignty spectrum (blue column)
- Scarcity: how common or rare the capability is globally, identifying potential sources of strategic advantage (which diminish in line with the number of alternate sources of that capability)

Scores are weighted to emphasise capability over scarcity, combining maturity and sovereignty (up to 12 points) with relative global scarcity (up to 3 points) for a total possible score of 15.

In the tool:

- the AI agency score appears in the **purple section** of the analysis below on the far right of the 'Assess today' section.

Prioritise tomorrow

Recommended actions: decision-makers tool

The final step in the AI Agency Tool enables decision-makers to look ahead, showing where agency should be fostered next through recommended actions.

Recommended actions are best next steps based on a capability's current maturity rating, sovereignty rating, global scarcity and public interest considerations. Recommendations range from building advantage for international leverage, to closing critical gaps in the public interest, and maintaining and monitoring existing advantage.

- **Public interest:** is the only normative assessment in the tool. It considers the public importance of increasing AI agency in a particular capability.
- In *Australia's 2025 AI Agency Assessment*, the public interest assessment was completed by TPDi (prioritising capabilities that support 'People & Planet', as defined in TPDi's report *Tetris for Australia's Future*). Different actors will disagree with TPDi's assessment of public interest, and that is the point. The score invites scrutiny and transparency by making explicit the value judgments that are embedded in decision-making processes, opening them to interrogation and challenge.

Taken together, the recommended actions help decision-makers prioritise their finite resources. They also reveal how agency in certain capabilities should be leveraged to secure international access to other capabilities where there is lower national agency.

In the tool:

- the recommended actions appear in the **dark grey** section of the analysis below.

With these steps combined, the AI Agency Tool helps decision-makers to identify what they have, where to build, where to partner and where to lead, reinforcing the shift from a binary concept of sovereignty to a dynamic concept of AI agency.

OVERVIEW: ANALYSIS OF ASSESSMENT & PLAN

Australia's 2025 AI Agency Assessment is the first application of the AI Agency Tool. It assesses Australia's AI maturity, sovereignty, agency, and produces recommended actions across 103 capabilities. The AI Agency Tool also provides an evidence-based framework for assessing government priorities and measuring national progress over time.

To demonstrate this, TPDi mapped commitments in the Australian Government's 2025 National AI Plan (the plan),[i] against Australia's 2025 AI Agency Assessment (the assessment). The resulting analysis identifies where government commitments align with the evidence-based assessment. It also identifies areas where increased attention, coordination or evidence is warranted to strengthen Australia's agency, increase leverage internationally; or to address critical gaps domestically.

Australia's assessment

Australia has emerging AI maturity but high AI sovereignty and high AI agency.

The assessment reveals:

- **Australia predominantly has emerging maturity in AI capability** with 51 of 103 AI capabilities found to be emerging, 33 are established, with only 11 advanced and 2 with no maturity at all (6 not enough data)
- **Australia's AI sovereignty is predominantly high**, with 85 capabilities assessed as high sovereignty and 15 as medium, with only 2 at low (1 not enough data)
- When also factoring in how globally scarce capabilities are, **Australia's agency is high**: 58 are high, 29 moderate, and 8 very high agency, with only 2 scoring low (6 not enough data).

Australia has the baseline AI maturity and sovereignty required to increase our AI agency – provided that we strategically prioritise.

Australia is well placed to build and leverage our areas of competitive advantage in our national interests. The assessment provides the independent, expert-led, evidence base to inform such prioritisation. We have the power to shape our AI trajectory, we just need to use it.

Australia's highest and lowest areas of agency

The assessment found Australia has 8 capabilities that fall within the highest band: very high agency. This includes:

- our rich endowment in strategic and critical minerals
- 5 domain specific datasets (medical, geospatial, environment and resources, demographic and infrastructure)
- our expertise in developing computer vision models
- our proven impact in international engagement (influence and norm shaping).

The assessment found only 2 capabilities in which Australia has the lowest level of agency, these being manufacturing and packaging of accelerators (AI chips).

AI Plan analysis

TPDi's analysis compares recommended actions in the assessment against the government's commitments in the National AI Plan. Across the 103 AI capabilities, the analysis shows:

- 44 government commitments align with recommended actions in the assessment
- 20 misalign where there is agency to be built and leveraged
- 28 misalign where there is a critical gap to close
- 5 require greater coordination to better harness agency
- 6 require more evidence to make a proper assessment.

What the National AI Plan gets right

Every significant commitment in the plan aligns with the assessment's recommendation to lean into those capabilities.

Governments have finite resources and must make tough decisions about what to prioritise. It is noteworthy that every significant commitment by government in the plan aligns with a recommendation in the assessment to take action to leverage, build, or maintain Australia's current agency.

- **Data centres and supporting infrastructure:** the assessment finds Australia has high agency in data centres (1.1.1) and the plan signals significant focus here, positioning Australia as a data centre hub. Complementary maturity in subsea cable infrastructure (1.3.2.1) and data storage (1.1.4) provide a coherent enabling cluster that supports this ambition. Natural advantages such as land availability (1.3.4), high potential for clean energy generation (1.3.1.1), and available – if not abundant – water supply (1.3.3), combined with a commitment to streamlining permitting and approvals processes (1.3.5), underpin the competitiveness of Australia's position globally.
- **Public cloud and AI applications:** the plan also makes significant commitment to public cloud training and inferencing compute infrastructure as a service (1.1.2.1.1 and 1.1.3.1.1), rightly recognising these as foundational capabilities. The plan also leans into Australia's strength in AI applications (3.2.1), a capability in which the assessment finds Australia has advanced maturity. This represents a logical decision by government to focus initial efforts and limited resources on harvesting low hanging fruit with force multiplier benefits for the public and for the economy.
- **Government and SME adoption of AI:** adoption of AI by the public service (4.2.2.1), building trust in the public sector (4.3.2.1), and building public sector intuitional capacity (6.3.1), are all rightly recipients of signification commitments in the plan, indicating the government recognises the imperative to close what the assessment found to be critical gaps and lift emerging maturity in these capabilities. Likewise, a focus on supporting SME adoption (4.2.1.3) signals a clear intent to build agency in this area with a view to unlocking productivity.
- **International engagement:** the plan makes a significant commitment to international influence and norms shaping (6.5.1), as well as access and partnerships (6.5.2) reflecting a welcome awareness of the leverage value of Australia's uncommonly advanced maturity and very high agency in these capabilities. This also subtly signals an intent to proactively manage today's complex geostrategic environment, which directly impacts Australia's agency to access all 103 capabilities in the AI stack.

Strategic silences in the National AI Plan align with areas of low national agency.

Not all omissions from the plan necessarily reflect oversights or ambition shortfall. The typology includes all possible AI capabilities. It is not a prescription for concerted action and investment in all areas. The spirit of AI agency is to be intentionally selective and strategic with the benefit of the big picture. The plan is silent on the following areas.

- **Accelerators (AI chips):** the assessment finds that Australia has low maturity and low agency over the manufacturing of AI accelerators (1.2.2). The plan does not pursue a domestic capability in this area, instead referring to Australia's 'access' to advanced chips through global supply chains. While there are arguments for further investment in this area,[ii] it is reasonable to assume the government has intentionally deprioritised this area given the difficulty and cost of specialisation, and Australia's existing low comparative advantage. Given this finding, review of the government's level of commitment to international agreement for accelerator supply (1.2.3) warrants attention, as does harnessing Australia's potential agency in designing accelerators (fabless) (1.2.2.1). Both represent opportunities to hedge against this critical dependency.

- **Foundation models:** the assessment finds that Australia's capabilities across model development are uneven, predominantly emerging maturity with some established and advanced. The plan does not pursue domestic frontier model development as a national priority. Like accelerators, this likely reflects the government deprioritising this area in favour of other strategic interventions – domain specific models and applications are examples assessed to be high agency for Australia.
- **Private sector capability:** except for SMEs, the plan does not make any significant commitments to increase maturity in private sector capability (for example, private compute clusters (1.1.2.1.2), commercial edge inferencing deployments (1.1.3.1.2), and private inference compute deployments (1.1.3.1.3)). This is a reasonable policy choice. Government effort is appropriately focused on enabling infrastructure and foundational capabilities, while allowing the market to lead on commercial deployment, adoption and use.

The capabilities listed so far represent capabilities the government has chosen to prioritise, or not prioritise, in the plan. The assessment (and its extensive evidence base) supports those decisions. Capabilities that have been prioritised in the plan score highly against the criteria used in the assessment to identify strategic opportunities for Australia, while the areas highlighted above that receive limited attention in the plan are areas in which the assessment finds Australia has low agency, or in which the government is reasonably leaving the private sector to lead.

However, there are other capabilities that also meet these thresholds for prioritisation, and areas where the assessment identifies a stronger case for action than put forward in the plan.

The analysis that follows highlights capabilities that warrant prioritised future attention as Australia builds on the strong foundations established in the plan.

Priority areas for future attention

> **There is untapped potential in Australia's highest agency capabilities.**

While the prioritisation by the government of the capabilities listed above align with the assessment's recommended actions, there are a number of other capabilities in which Australia has very high agency that remain untapped.

- **Critical minerals:** despite being a well-known and established area of very high agency for Australia, the plan makes only passing reference to critical minerals. On the one hand this makes sense, as it is dealt with in other government documents (including the Critical Minerals Strategy).[iii] But not including it in the National AI Plan represents a missed opportunity to leverage our national wealth in critical minerals to address critical capability gaps elsewhere in the AI stack. This is the equivalent of the Australian Government announcing a plan to shore up supplies of globally scarce petrol without reference to Australian's abundant gas reserves (the latter being the leverage with which we use to secure the former). **Australia should better coordinate and communicate intent to leverage our very high agency in critical minerals to secure access to capabilities in which Australia has low agency, including accelerators (AI chips).**
- **Data assets and lifecycle management:** 5 of Australia's 8 very high agency capabilities are in the data layer. Geospatial data (2.2.3) is supported by a significant commitment in the plan, but Australia also has very high agency in medical data (2.2.2), environmental and resource data (2.2.4), demographic data (2.2.9) and infrastructure data (2.2.10), which the plan does not specifically prioritise. The assessment also reveals a substantial disconnect between Australia's strengths in these domain specific datasets and our maturity in data life cycle management (2.3), where the assessment identifies many critical gaps including in data access and use (2.3.3) and data stewardship and assurance (2.3.4). The full benefit of Australia's very high agency data assets is unlikely to be realised until these gaps are addressed. **Australia's high agency domain specific datasets should be leveraged by addressing critical gaps elsewhere in the AI stack, including in data lifecycle management. Doing so would unlock greater value from these existing national data assets while also strengthening the foundations of an AI industry that is uniquely Australian.**
- **Models & applications:** while Australia does not currently lead the world in many areas of AI model development, we are globally competitive in computer vision (3.1.1.1). Despite Australia's very high agency in this field, the plan makes no specific reference to this capability. **Australia's strength in computer vision should be recognised and leveraged to help increase maturity in other areas of model development, including those in which Australia already has existing high agency like computer linguistics (3.1.1.3), robotics and physical AI (3.1.1.4), forecasting (3.1.1.5), and domain adaption (3.1.2.1), but also to fill critical gaps in existing Australian capability – such as culturally and nationally inclusive models (3.1.1.9) or cultural and linguistic alignment (3.1.2.2). The latter 2 are particularly important to prioritise if Australia chooses not to prioritise development of general purpose and frontier models.**
- **Defence and national Security:** the plan makes general references to AI defence technologies but is otherwise silent. Like with critical minerals, on the one hand this is understandable, given that the 2026 National Defence Strategy and 2026 Integrated Investment Program was released after the plan and have placed an increased focus on technological innovation. However, **the lack of public national coordination between defence and national security community and the broader AI ecosystem represents a strategic missed opportunity to use the significant government investments in the defence and national security domain as force multipliers. It will not always be appropriate to combine defence and civilian efforts, however, greater public coordination between defence and national security portfolios and the industry and innovation portfolios will deliver broad benefits across the economy.**

There are critical gaps that need to be filled in the public interest.

While in many instances it makes sense to lean into capabilities in which Australia has established maturity, in some cases it is also strategic to build low maturity capabilities, especially where those capabilities are globally scarce and in the public interest. The assessment identifies a number of capabilities that fall into this category but that are not prioritised in the plan.

Inclusive, discerning and trusting AI adoption, underpinned by democratic legitimacy: these capabilities represent the ability of individuals and organisation to make informed and discerning choices to adopt AI (4.2.4–4.3.1), to trust AI (4.3.2), to live with AI (5.4.1) and to ensure AI enhances our democracy (6.4). The assessment found each of these capabilities currently had only emerging maturity. **Understandably, there is a strong narrative focus on these capabilities the plan. However, except for trust in public sector (4.3.2.1), this is not backed up by any substantive whole-of-nation initiatives in the plan to lift maturity. This requires urgent attention to ensure that 'all Australians, regardless of background or location, share the advantages of AI' (one of the plan's 3 stated goals).[iv] Without intervention, this goal will not be achieved.**

- **Public sector and public interest compute:** the assessment finds that Australia's public sector and public interest compute capabilities are predominantly emerging maturity (1.1.2.2, 1.1.3.2). The plan commits to mapping compute infrastructure but provides limited detail on follow up action. It is silent also on data storage infrastructure (1.1.4). The lack of commitment to increase Australia's maturity in this foundational public infrastructure has already drawn well founded criticism.[v] **This warrants a fast-follow by government to raise maturity across these foundational public interest compute capabilities, as well as to foster AI adoption by research and academic communities (4.2.3.2), recognising the force multiplier effect this will have across the public interests sector (including, for example, in emergency management). The assessment also supports greater priority being given to international agreements for cross border access to training compute (1.1.2.2.3).**
- **Culturally and nationally inclusive models, adaption and alignment:** Australia's values and many cultures define our national identity. **If Australia does not invest in uplifting predominantly emerging maturity in culturally and national inclusive models (3.1.1.9), domain adaption (3.1.2.1), cultural and linguistic alignment (3. 1.2.2), safety and values alignment (3.1.5), at best, we risk flattening of our national culture. At worst, we risk the erosion of our national identity. Government attention is recommended to lift maturity and fill these critical gaps in the public interest.** This is particularly important if Australia chooses not to invest in foundational models.
- **Skills:** the assessment finds that Australia has high agency across most of the skills layer. These strengths should be built and strategically leveraged to offset areas of lower agency. Australia's established maturity and high agency in cyber security and technical robustness (5.3.2) should be valued and leveraged more deliberately. However, there are notable exceptions to Australia's high agency skills. **AI development and application skills (5.1.4), research translation (5.1.5) and international talent collaborations (5.1.6) are assessed to be critical gaps. Despite high agency, each is assessed as having only emerging maturity, suggesting a clear need for government action to lift maturity and fill these critical skills gaps.**
- **Regulatory frameworks and oversight:** there was a moderate commitment to legal and regulatory frameworks (6.2.1) and a limited commitment to regulatory and oversight capability (6.2.3) in the plan. Both capabilities are assessed to require additional attention. Regulatory frameworks because they provide an enabling environment for all capabilities, and regulatory oversight because the entire system is undermined if regulators do not have the capability and capacity to enforce the law. **Government action to pass long overdue legislative reforms (including but not limited to privacy), and to appropriately fund regulators are 2 urgent measures recommended for prioritisation.**

The detailed analysis below incorporates key findings from the assessment, available in full on TPDi's website at techpolicy.au/aiagency.

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i Department of Industry, Science and Resources, *National AI Plan*, Australian Government, 2 December 2025. https://www.industry.gov.au/publications/national-ai-plan

ii A Capri and R Clark, *Australia's semiconductor national moonshot*, Australian Strategic Policy Institute, 21 September 2022. https://www.aspi.org.au/report/australias-semiconductor-national-moonshot; Semiconductor Sector Service Bureau, *National Semiconductor Roadmap*, Semiconductor Sector Service Bureau, 18 March 2026. https://s3b.au/news/national-semiconductor-roadmap/

iii Australian Government, *Critical Minerals Strategy 2023–2030*, 2023, Department of Industry, Science and Resources. https://www.industry.gov.au/publications/critical-minerals-strategy-2023-2030

iv Department of Industry, Science and Resources, *National AI Plan*, page 7

v Science & Technology Australia, 'Australia must invest in sovereign AI capability to seize this moment', *Science & Technology Australia*, 2 December 2025. https://scienceandtechnologyaustralia.org.au/australia-must-invest-in-sovereign-ai-capability-to-seize-this-moment; Australian Academy of Science, 'National AI plan highlights the critical role of Australian science', *Australian Academy of Science*, 2 December 2025. https://science.org.au/news-events/news-views/national-ai-plan-highlights-critical-role-australian-science

ANALYSIS: AUSTRALIA'S 2025 AI ASSESSMENT & NATIONAL AI PLAN

Key to the analysis table

Assess today

Maturity rating

Existence and sophistication of specific capability in the jurisdiction, based on national stocktake of existing assessments

- **Not enough data**
- **No maturity**
- **Emerging**
- **Established**
- **Advanced**

Sovereignty rating

Derived from a weighted sovereignty spectrum taking into account extent of international access, sovereign control, resilient choice and export leverage for each capability

- **Not enough data**
- **Low**
- **Medium**
- **High**

Agency score

Objective competitive advantage a country has over a capability, based on compilation of maturity rating, sovereignty rating and the scarcity of that capability globally

- **Not enough data**
- **Low**
- **Moderate**
- **High**
- **Very High**

Prioritise tomorrow

Recommended action

Strategic imperative to increase current agency over a capability, taking into account current maturity, sovereignty, scarcity and public interest (the latter of which is inherently subjective)

The recommended actions prioritise capabilities where agency should be increased, either to seize an international leadership opportunity, advance public interest or close a critical domestic gap. Taken together, the recommended actions aid prioritisation by revealing how agency in certain capabilities should be leveraged to secure international access to other capabilities where there is lower advantage.

- **Gather more evidence**
- **Maintain & monitor**
- **Build**
- **Close critical gap**
- **Prioritise building**
- **Leverage & maintain**

Note: Maturity, sovereignty, agency and recommended actions are extracted below, but the composite inputs to each are not (national stocktake, international access, sovereign control, resilient choice, export leverage, global scarcity and public interest). For full details and data see *Australia's 2025 AI Agency Assessment*. An overview of the assessment process and its inputs is below.

Government committments

Significant: clearly defined as a major policy priority in the plan with significant existing funding or new substantial investment to support large-scale initiatives or system-level reform with a clearly defined implementation pathway.

Moderate: identified as a priority in the plan, supported by programs, funding, policies or commitments, but with light implementation detail.

Limited: general recognition in the plan narrative, but with minimal resourcing or implementation detail.

No commitment: not mentioned in the plan, and no observable narrative, policy or action.

Note: This document takes into account Australian Government commitments made in the plan, or announced before 15 May 2026. Government commitment or initiatives not referenced in the National AI Plan are outside the scope of this analysis (on the basis that the purpose of the plan is national coordination and policy coherence). The significance of any financial commitments is assessed with reference to similar investments by governments in like jurisdictions. This document assesses government commitment only. The private sector also plays a significant role in building Australia's AI ecosystem, but this is outside the scope of the analysis except where government action influences, enables or incentivises private sector participation.

Alignment with assessment

✔	Alignment between the assessment's recommended action and the government's commitment in the plan.
	Misalignment between the assessment's recommended action and the government's commitment in the plan; attention recommended to close a critical domestic gap in a globally scarce capability with high public interest value.
	Misalignment between the assessment's recommended action and the government's commitment in the plan; attention recommended to build on existing national agency in capabilities that are globally scarce, in pursuit of the public interest as well as international leverage (to offset capability gaps in other areas).
	Coordination required to better harness agency in certain national capabilities as force multipliers or leverage to offset gaps in other capabilities across the ecosystem.
	Evidence required given not enough data is available to make an evidence-based assessment and identify recommended actions: gather more evidence.

1 Infrastructure & resources

The physical underpinning of AI power (compute, data centres, supply chains and natural resources)

Define					Assess today			Prioritise tomorrow	Analysis against Australia's National AI Plan		
Category I	**Category II**	**Category III**	**Category IV**	**Definition**	**Maturity rating** National stocktake	**Sovereignty rating** International access, sovereign control, resilient choice, export leverage	**Agency score** Maturity rating, sovereignty rating, global scarcity	**Recommended action** considering maturity rating, sovereignty rating, global scarcity, and domestic public-interest	**Government commitments** Assessment of the level Government commitment in the Plan	**Alignment** of Government commitments to recommended actions	**Notes**
1.1 Compute & Data Infrastructure	**1.1.1 Data Centres**			The secure, efficient physical infrastructure, including cooling systems and redundant power, that houses and supports large-scale inferencing and training compute (defined below).	Established	High	High	Build	Significant	✓	Plan prioritises positioning Australia as a data centre hub, attracting foreign investment, developing national data centre principles, coordinating approvals and energy planning (Action 1, Action 3). Includes development of the Data Centre Expectations, which were released in March 2026. **Significant commitment in the plan aligns with recommended action to build agency.**
	1.1.2 Training Compute Large-scale computing power required to train AI models by processing large amounts of data over extended periods, housed within a data centre.	**1.1.2.1 Private Sector Training Compute**	**1.1.2.1.1 Cloud Training Compute Infrastructure as a Service** (public cloud)	Large-scale compute clusters made available locally as Infrastructure as a Service (IaaS). Individuals, companies or organisations can rent computing capacity remotely and on demand for AI model training, often using specialised chips (accelerators) such as Graphics Processing Units (GPUs) and Tensor Processing Units (TPUs).	Established	Medium	High	Prioritise building	Significant	✓	**General:** Commits to mapping compute infrastructure to identify gaps and guide future investment (Action 1), but unclear if or how mapping exercise will capture the different types of compute articulated in this layer and no details on when mapping will occur. The Data Centre Expectations (a deliverable under Action 1 of the plan) include an expectation that 'enabling access to compute for Australian start-ups, innovative small businesses, researchers and not-for-profits on favourable terms' but the type of compute is not specified. **Specific:** Australian Government and Anthropic memorandum of understanding (MOU) (signed 1 April 2026) includes a provision that 'Anthropic intends to take steps towards ensuring benefits to local industry and researchers through access to its infrastructure ...'. In the Australian Government and Microsoft MOU (signed 23 April 2026), Microsoft commits to meeting the Australian Government's expectations for data centres and AI infrastructure developers, which include the expectation that (unspecified) compute be provided for Australian start-ups, innovative small businesses, researchers and not-for-profits on favourable terms. **Significant commitment in the plan strongly aligns with recommended action to prioritise building agaency in this enabling capability.**
			1.1.2.1.2 Private Training Compute Clusters	Dedicated training infrastructure owned and operated by companies for proprietary AI development (not available on demand). Typically used for confidential or long-term projects where compute cannot be shared or outsourced. May include in-house or dedicated, long-term private co-located compute supply in third-party data centres.	Emerging	High	High	Maintain and monitor	Limited	✓	See general comment at 1.1.2.1.1 (Cloud Training Compute Infrastructure as a Service (public cloud)). **Limited commitment by government in the plan aligns with the recommendation to maintain and monitor. To maintain high agency, investment by the private sector will be required.**
			1.1.2.2.1 Public Sector & Public Interest AI Training Infrastructure	High Performance Computing (HPC) systems optimised for AI training, owned and operated by government, universities or research agencies. These systems may combine traditional Central Processing Unit (CPU) based HPC with AI accelerator enhanced architecture.	Emerging	Medium	Moderate	Close critical gap	Limited		See general comment at 1.1.2.1.1 (Cloud Training Compute Infrastructure as a Service (public cloud)). **Given the high public interest in fostering this capability, clarification and review of the government's current commitment is recommended.**

1 Infrastructure & resources

The physical underpinning of AI power (compute, data centres, supply chains and natural resources)

Define					Assess today			Prioritise tomorrow	Analysis against Australia's National AI Plan		
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1.1 Compute & Data Infrastructure	**1.1.2 Training Compute** Large-scale computing power required to train AI models by processing large amounts of data over extended periods, housed within a data centre.	**1.1.2.2 Public Sector & Public Interest Training Compute**	**1.1.2.2.2 General-purpose Public Sector & Public Interest High-Performance Compute Infrastructure**	National or institutional HPC systems supporting scientific, environmental and data-intensive computation, which indirectly enable AI by hosting data pre-processing, simulation or more validation tasks. This complements AI-specific infrastructure and ensures continuity of high-performance research capacity.	Emerging	Medium	Moderate	Close critical gap	Limited	⚠	See general comment at 1.1.2.1.1 (Cloud Training Compute Infrastructure as a Service (public cloud)). **Given the high public interest in fostering this capability, clarification and review of the government's current commitment is recommended.**
			1.1.2.2.3 International Agreements for Cross-border Access to Training Compute	Bilateral or multilateral agreements enabling shared access to AI training compute infrastructure across national boundaries.	Emerging	High	High	Close critical gap	Limited	⚠	Generally emphasises international cooperation and being 'the partner of choice' for the Indo-Pacific, including with respect to data centre infrastructure (Action 1, Action 9). Commitment to work towards collaborative arrangements with leading international and domestic AI companies (as evidenced by agreements with Anthropic and Microsoft) (Action 1, Action 2) but no specific details of international agreements with other countries for inbound or outbound **cross-border** access to training compute. Microsoft MOU contains commitment to 'explore' opportunities to collaborate on forecasting infrastructure needs for frontier AI development and deployment in Australia and the broader region, and on sustainable solutions that can establish Australia as a trusted regional hub, but no specific action or commitment. **Given the high public interest in fostering this capability, and its global scarcity, review of the government's current commitment is recommended.**
	1.1.3 Inferencing Compute Computing power used to run pre-trained AI models in real time – processing new data to generate outputs, housed within a data centre.	**1.1.3.1 Private Sector Inferencing Compute**	**1.1.3.1.1 Cloud Inferencing Compute Infrastructure as a Service** (public cloud)	Cloud-based compute resources used to run AI models – rather than train them – offered as an on-demand commercial service. This includes national edge zones and micro data centres positioned close to the use case to reduce latency (time delay).	Established	High	High	Prioritise building	Significant	✓	See general and specific comment at 1.1.2.1.1 (Cloud Training Compute Infrastructure as a Service (public cloud)). **Significant commitment in the plan strongly aligns with recommended action to prioritise building agency in this enabling capability.**
			1.1.3.1.2 Commercial Edge Inferencing Compute Deployments	Compute resources positioned close to data sources or end users/customers – such as telecommunications nodes or Internet of Things (IoT) networks – to enable rapid, low latency AI inferencing. Typically owned or managed by private firms.	Emerging	High	Moderate	Maintain and monitor	Limited	✓	See general comment at 1.1.2.1.1 (Cloud Training Compute Infrastructure as a Service (public cloud)). Limited government commitment is appropriate given it is a private sector capability. **Limited commitment by government in the plan aligns with the recommendation to maintain and monitor. To maintain agency, investment by the private sector will be required.**
			1.1.3.1.3 Private Inferencing Compute Deployments	Dedicated inferencing infrastructure owned and operated by companies for ongoing operational use (not available on demand). Typically used for confidential or long-term projects where compute cannot be shared or outsourced. May include in-house or dedicated, long-term private co-located compute supply in third-party data centres.	Emerging	High	Moderate	Maintain and monitor	Limited	✓	See general comment at 1.1.2.1.1 (Cloud Training Compute Infrastructure as a Service (public cloud)). Limited government commitment is appropriate given it is a private sector capability. Limited commitment by government in the p**lan aligns with the recommendation to maintain and monitor. To maintain agency, investment by the private sector will be required.**

1 Infrastructure & resources

The physical underpinning of AI power (compute, data centres, supply chains and natural resources)

Define					Assess today			Prioritise tomorrow	Analysis against Australia's National AI Plan		
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1.1 Compute & Data Infrastructure	**1.1.3 Inferencing Compute** Computing power used to run pre-trained AI models in real time – processing new data to generate outputs, housed within a data centre.	**1.1.3.2 Public Sector & Public Interest Inferencing Compute**	**1.1.3.2.1 Public Sector & Public Interest Inferencing Compute Clusters**	Compute clusters equipped for large-scale public sector or public interest inferencing, typically used in research, environmental modelling or national security contexts, including HPC systems.	Emerging	High	Moderate	Close critical gap	Moderate		See general comment at 1.1.2.1.1 (Cloud Training Compute Infrastructure as a Service (public cloud)). Plan recommits to scaling of public sector AI capability through GovAI infrastructure, which has existing committed funding of $225.2 million (Action 2, Action 6, Action 7). Marked as a moderate commitment given size of this whole-of-government investment in comparison to equivalent private sector investments and investments in other jurisdictions. **Given the high public interest in fostering this capability, review of the government's current commitment is recommended.**
			1.1.3.2.2 Public Sector & Public Interest Edge Inferencing Compute Deployments	Compute resources positioned close to end users/citizens enabling real-time AI decision-making for infrastructure, emergency management, or IoT sensor networks.	Established	Medium	Moderate	Prioritise building	Limited		See comment at 1.1.3.2.1 (Public Sector & Public Interest Inferencing Compute Clusters). There is no indication that GovAI infrastructure will include edge inferencing, therefore commitment is assessed to be limited. **Given the high public interest in fostering this capability, and its leverage potential given global scarcity, review of the government's current commitment is recommended.**
		1.1.3.3 Consumer or Personal AI Inferencing Devices		Everyday devices (e.g. smartphones, laptops) that perform on-device inferencing, typically using small or compressed models. While not significant for model training, these systems contribute to widespread AI use and local data processing.	Advanced	High	High	Prioritise building	Limited		Limited focus on consumer or personal devices, aside from recognition that Australian consumer are early adopters (Action 4). **Limited commitment by government in the plan is assessed to be appropriate given this is a consumer capability that is already advanced. However, this should be monitored given its enabling role in inclusive adoption (see 4.2.4).**
	1.1.4 Data Storage Infrastructure			Infrastructure for storing, managing and transferring large-scale datasets required for AI model training and inferencing. Emphasises scalability, throughput, and high speed interconnects (e.g. InfiniBan) for data intensive workloads across research, government and industry.	Established	High	High	Build	Limited		Strong focus on data centres but no discussion of the role of data storage infrastructure. **Limited commitment by government is a missed opportunity to build agency in this enabling capability.**
1.2 Hardware Supply Chain Non-exhaustive, focused on critical and limited hardware inputs for AI infrastructure.	**1.2.1 Strategic & Critical Minerals**	**1.2.1.1 Natural Resources**		In-ground reserves of minerals – including critical minerals (lithium, rare earth elements and tantalum) and strategic minerals (copper, high-purity silica) that underpin the production of accelerators and construction of data centres.	Advanced	High	Very high	Leverage and maintain	Limited		Recognises Australia's strong natural resource endowment (including water and renewable energy inputs) as an enabling advantage for AI infrastructure (Action 1, p10–12, Action 2, p13). Whilst acknowledging that there are initiatives outside the plan to foster this capability (for example, the Critical Minerals Strategy 2023–2030 or Pax Silica Declaration (2025), to which Australia is a signatory), this assessment is of the plan only and commitment is therefore assessed to be limited. **Limited commitment by government in the plan represents a strategic missed opportunity. More should be done to leverage this very high agency. This is one of 8 capabilities over which Australia wields very high agency; national priority should be given to maintaining this agency and increasing whole of government coordination to leverage it internationally to more deliberately offset gaps in other capabilities of low agency.**

Infrastructure & resources

The physical underpinning of AI power (compute, data centres, supply chains and natural resources)

Define					Assess today			Prioritise tomorrow	Analysis against Australia's National AI Plan		
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1.2 Hardware Supply Chain Non-exhaustive, focused on critical and limited hardware inputs for AI infrastructure.	**1.2.1 Strategic & Critical Minerals**	**1.2.1.2 Extraction**		Mining and concentrating critical and strategic minerals into usable ores, with appropriate consultations and approvals from First Nations owners.	Established	High	High	Build	No commitment		See comment at 1.2.1.1 (Natural Resources). **No national coordination of this capability by government in the plan represents a strategic missed opportunity to build agency and leverage, given its global scarcity.**
		1.2.1.3 Refinement & Processing		Converting raw ores into high-purity materials (metals, oxides, rare-earth compounds) that can actually be used in accelerators and data centre construction.	Emerging	High	High	Maintain and monitor	No commitment		See comment at 1.2.1.1 (Natural Resources). **Notwithstanding the recommendation to maintain and monitor, no national coordination of this capability by government in the plan represents a strategic missed opportunity to build agency and leverage, given national emerging maturity and its global scarcity.**
	1.2.2 Producing Accelerators (AI Chips)	**1.2.2.1 Designing Accelerators** (Fabless)		Designing accelerator architectures using Electronic Design Automation (EDA) software. 'Fabless' means a company that designs accelerators but contracts out the fabrication (rather than owning and operating the manufacturing themselves).	Emerging	Medium	Moderate	Maintain and monitor	No commitment		No reference in the plan. **No national coordination of this capability by government in the plan represents a strategic missed opportunity to build highly targeted agency, given national emerging maturity and global scarcity. Future plans would benefit from recognising the role of this capability in the ecosystem.**
		1.2.2.2 Manufacturing Accelerators		The physical fabrication and assembly and testing of the chips and memory units that power AI systems. This includes processes such as wafer production, photolithography, etching, doping, and component integration within fabrication plants (fabs).	No Maturity	Low	Low	Maintain and monitor	No commitment	✓	No reference in the plan. **No government commitment in the plan aligns with evidence-based recommendation to maintain and monitor (notwithstanding global scarcity). Future plans would benefit from recognising the role of this capability in the ecosystem.**
		1.2.2.3 Packaging Accelerators		The post-fabrication stage where chips are tested, packaged, and assembled into modules or systems ready for integration into AI hardware. Packaging protects chips, enables electrical connectivity, and influences performance characteristics such as latency and thermal efficiency.	No Maturity	Low	Low	Maintain and monitor	No commitment	✓	No reference in the plan. **No government commitment in the plan aligns with evidence-based recommendation to maintain and monitor (notwithstanding global scarcity). Future plans would benefit from recognising the role of this capability in the ecosystem.**
	1.2.3 International Agreements for Accelerator Supply			Bilateral, multilateral or commercial agreements that secure access to advanced accelerators from trusted global suppliers.	Not enough data	Not enough data	Not enough data	Gather more evidence	Limited		Refers to Australia's access to advanced chips (as a positive attribute) (Action1), but no specific details of international agreements for accelerator supply. General references throughout to importance of international cooperation and partnership pathways to access general global AI capability and infrastructure. **Warrants attention to identify data (given this capability could generate very high agency and leverage).**
	1.2.4 Other Critical Data Centre Hardware & Construction Inputs			Supporting hardware and systems required to build and operate AI-ready data centres, including transformers that are prone to shocks, long lead times, or dominated by a few global suppliers.	Established	Medium	Moderate	Maintain and monitor	Limited	✓	Commits to positioning Australia as a data centre hub, attracting foreign investment, developing national data centre principles, coordinating approvals and energy planning (Action 1, Action 3). Includes short reference to workforce development initiatives such as the Key Apprenticeship Program (including for AI infrastructure) but the plan contains no specifics on hardware and construction inputs to data centres. **Limited government commitment in the plan aligns with recommendation to maintain and monitor.**

1 Infrastructure & resources

The physical underpinning of AI power (compute, data centres, supply chains and natural resources)

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1.3 Supporting Infrastructure & Resources	**1.3.1 Electricity**	**1.3.1.1 Clean Electricity Generation**		Availability of reliable, low-carbon power to operate AI data centres and HPC facilities. Includes renewables (solar, wind) and other dispatchable sources – generation that can be adjusted as needed to meet 24/7 energy demands (e.g. gas and battery storage).	Established	Medium	High	Prioritise building	Moderate	✓	Acknowledges importance of clean electricity and renewable energy, with the government working with states and territories, energy service providers and data centre industry on renewable energy investment opportunities linked to data centres (Action 1, Action 3, Action 5). The 2026 expectations of data centres and AI infrastructure developers, include 'Expectation 2 – Supporting Australia's energy transition'. Plan includes no details on working across government to leverage this advantage to fill capability gaps elsewhere in the AI ecosystem. **Moderate commitment by government in the plan aligns roughly with the recommendation to prioritise building agency, although greater attention is recommended.**
		1.3.1.2 Electricity Transmission & Distribution		The national and regional networks that deliver power to data centre and compute hubs. Reliable, high-capacity transmission is essential to support large-scale AI clusters. Advanced maturity includes transmission & distrbution clean energy.	Established	Medium	Moderate	Maintain and monitor	Limited	✓	Acknowledges priority for electricity to remain affordable for Australians and exploration of options to enhance investment in renewable energy, but no specific detail on transmission and distribution aspects. Plan includes limited specific details on working across government to leverage this advantage to fill capability gaps elsewhere in the AI ecosystem. **Limited commitment by government in the plan aligns with the recommendation to maintain and monitor.**
	1.3.2 Network & Connectivity	**1.3.2.1 Broadband Capacity**		National internet bandwidth and latency performance, supporting connectivity between data centres, research institutions and end users.	Established	High	High	Maintain and monitor	Significant	✓	References (without dollar figures) the government's existing investments in upgrading the NBN to support adoption of AI, emphasising digital connectivity is the backbone for AI development and adoption (see Action 1). That is, the $3 billion NBN expansion announced in January 2025 by the Prime Minister. **Significant commitment by government in the plan exceeds the recommendation to maintain and monitor, by coordinating existing commitments to sustain this enabling infrastructure.**
		1.3.2.2 Subsea Cables		International and interregional subsea fibre optic connections enabling high-speed data exchange and cloud access, important for cross-border AI collaboration and redundancy.	Established	Medium	Moderate	Build	Limited		Highlights Australia's geographical position in the subsea cable ecosystem, as well as ongoing laying of new subsea cables by private sector (Action 1) but no new funding or initiatives. Existing Australian Government initiatives focus on pacific cables (not Australian connectivity, which this metric measures). Plan includes no details on working across government to leverage this advantage to fill capability gaps elsewhere in the AI ecosystem. **Limited commitment by government in the plan represents a strategic missed opportunity. More should be done to coordinate and build agency, including in partnership with the private sector.**

1 Infrastructure & resources

The physical underpinning of AI power (compute, data centres, supply chains and natural resources)

Define					Assess today			Prioritise tomorrow	Analysis against Australia's National AI Plan		
Category I	**Category II**	**Category III**	**Category IV**	**Definition**	**Maturity rating** National stocktake	**Sovereignty rating** International access, sovereign control, resilient choice, export leverage	**Agency score** Maturity rating, sovereignty rating, global scarcity	**Recommended action** considering maturity rating, sovereignty rating, global scarcity, and domestic public-interest	**Government commitments** Assessment of the level Government commitment in the Plan	**Alignment** of Government commitments to recommended actions	**Notes**
1.3 Supporting Infrastructure & Resources	**1.3.3 Water Supply**			The availability, reliability and sustainability of water resources and innovation in water usage, with First Nations water rights and cultural values recognised in regional planning and resource management.	Emerging	High	Moderate	Maintain and monitor	Moderate	✓	Recognises importance of water supply and water conservation efforts but doesn't include any specific details (Action 1, p12). The 2026 expectations of data centres and AI infrastructure developers (Action 1) include 'Expectation 3 – Sustainable and efficient water usage'. **Moderate commitment by government in the plan exceeds the recommendation to maintain and monitor by encouraging sustainable private sector activity.**
	1.3.4 Suitable Land			Availability of appropriately zoned, infrastructure-ready land for AI compute or data centre development. This needs to involve appropriate approvals from First Nations owners, consider proximity to power, connectivity and cooling resources, and note the differentiated AI training and AI inferencing latency constraints on land location.	Established	High	High	Maintain and monitor	Limited	✓	Highlights Australia's land as an asset (Action 1), but no specific commitments. Plan includes no details on working across government to leverage this advantage to fill capability gaps elsewhere in the AI ecosystem. **Limited commitment by government in the plan aligns with recommendation to maintain and monitor.**
	1.3.5 Permitting & Approvals Process			Efficiency and clarity of planning and environmental approvals for predictable and timely permitting of large-scale infrastructure that enables compute.	Established	High	High	Build	Moderate	✓	Where investments align with the data centre principles, the plan commits to exploring opportunities to coordinate data centre approval processes with states and territories (Action 1, Action 3) but no specific implementation details. The 2026 expectations of data centres and AI infrastructure developers (Action 1) include 'Expectation 2 – Supporting Australia's energy transition' with a commitment by government to work with industry and networks on improving energy connection approvals. **Moderate commitment by government in the plan is aligns with the recommendation to build agency, although greater attention is recommended.**

2 Data assets & lifecycle management

Data capabilities required to support AI development and use (availability and quality of data, access arrangement and data sovereignty practices)

Define				Assess today			Prioritise tomorrow	Analysis against Australia's National AI Plan		
Category I	**Category II**	**Category III**	**Definition**	**Maturity rating** National stocktake	**Sovereignty rating** International access, sovereign control, resilient choice, export leverage	**Agency score** Maturity rating, sovereignty rating, global scarcity	**Recommended action** considering maturity rating, sovereignty rating, global scarcity, and domestic public-interest	**Government commitments** Assessment of the level Government commitment in the Plan	**Alignment** of Government commitments to recommended actions	**Notes**
2.1 Commitment to Indigenous Data Sovereignty			The right of First Nations people to exercise ownership over Indigenous data. Ownership of data can be expressed through the creation, collection, access, analysis, interpretation, management, dissemination and reuse of Indigenous data.	Emerging	High	High	Close critical gap	Significant	✓	Commits to upholding the principles of the Framework for Governance of Indigenous Data (NIAA 2024) in actions taken under the plan (Action 4). Commitment to Indigenous Data Sovereignty is also referenced in relation to supporting and training Australians, the public service and AI harms (Action 5, Action 6, Action 7). **Significant commitment by government in the plan aligns with the recommendation to close a critical gap.**
2.2 Domain Specific Datasets Assesses the availability, coverage, representativeness, domain depth, and quality of datasets across key sectors that underpin national AI capability. *This can include non-Australian data that is a valuable input for the development and deployment of AI capabilities.*	**2.2.1 Language, Arts, Culture & History**		Datasets capturing linguistic, creative, cultural, multicultural, ethnic and historical expression, including large-scale text and speech corpora, First Nations and other low resource language materials, audiovisual and heritage archives, social media, and media subtitling or transcription data.	Established	High	High	Prioritise building	Limited		General: Recognises the value of Australian datasets, their importance to developing and training AI models that are locally relevant, and commits to exploring opportunities and pilot use cases to unlock high value datasets, including to build on existing programs of work to improve Australian Public Sector (APS) data and data maturity, consistent data standards and metadata, build trusted and secure approaches to data sharing, and identify high value, non-sensitive datasets (Action 2).Given the commitment is to 'explore opportunities' with no specific detail on implementation or funding, this is assessed to be limited. **This capability:** No specific commitments relating to Language, Arts, Culture & History (beyond that referred to in 2.1). Limited commitment by government in the plan r**epresents a missed opportunity. More should be done to build agency and leverage to offset capability gaps elsewhere in the ecosystem.**
	2.2.2 Medical		Health and biomedical datasets encompassing clinical records, clinical trials data, medical imaging, pharmaceutical data, service utilisation data, and population-scale genomic or epidemiological information.	Advanced	High	Very high	Leverage and maintain	Limited		See general comment at 2.2.1 (Language, Arts, Culture & History). Recognises the importance of data to support healthcare AI through broad references, including public service use cases in health and review of regulation for healthcare and medical device software (Action 6, Action 7). **Limited commitment by government in the plan represents a missed opportunity. More should be done to leverage this very high agency to offset capability gaps elsewhere in the ecosystem. This is one of 8 capabilities over which Australia wields very high agency; national priority should be given to maintaining this agency and leveraging it internationally to offset gaps in other capabilities of low agency.**

Data assets & lifecycle management

Data capabilities required to support AI development and use (availability and quality of data, access arrangement and data sovereignty practices)

Define				Assess today			Prioritise tomorrow	Analysis against Australia's National AI Plan		
Category I	**Category II**	**Category III**	**Definition**	**Maturity rating** National stocktake	**Sovereignty rating** International access, sovereign control, resilient choice, export leverage	**Agency score** Maturity rating, sovereignty rating, global scarcity	**Recommended action** considering maturity rating, sovereignty rating, global scarcity, and domestic public-interest	**Government commitments** Assessment of the level Government commitment in the Plan	**Alignment** of Government commitments to recommended actions	**Notes**
2.2 Domain Specific Datasets	**2.2.3 Geospatial**		Earth observation and location-based datasets, including satellite and aerial imagery, LiDAR, cadastral maps, topographical data, and real-time positioning feeds used in logistics, mobility and urban systems.	Advanced	High	Very high	Leverage and maintain	Significant	✓	See general comment at 2.2.1 (Language, Arts, Culture & History). Supports geospatial data for AI through Geoscience Australia's Earth Observation Program and the Australia–United States Partnership in Landsat Next. References existing funding of $440 million to enable access to next-generation satellite missions and standards for verification of earth observation data for AI applications in sectors including agriculture and mining (Action 6). **Significant commitment by government in the plan aligns with the recommendation to leverage and maintain agency. This is one of 8 capabilities over which Australia wields very high agency; national priority should be given to maintaining this agency and leveraging it internationally to offset gaps in other capabilities of low agency.**
	2.2.4 Environment & Resources		Data describing natural systems and resource use, including meteorological, biodiversity, water, air quality, agricultural, mining, and utilities datasets used for energy and resource optimisation.	Advanced	High	Very high	Leverage and maintain	Limited		See general comment at 2.2.1 (Language, Arts, Culture & History). Supports environmental and natural resource data through earth observation data investments (see 2.3.3 Geospatial) and environmental monitoring case studies, including Kakadu wetlands (p15) and Tiwi Islands ranger programs (p26), but does not include targeted policy initiatives specific to environmental and natural resource datasets despite Australia's high advantage. Limited commitment by government in the plan r**epresents a missed opportunity. More should be done to leverage this very high agency. This is one of 8 capabilities over which Australia wields very high agency; national priority should be given to maintaining this agency and leveraging it internationally to offset gaps in other capabilities of low agency.**
	2.2.5 Economic		Transaction, market and labour-force datasets, including financial flows, securities trading, customs, payments, productivity; and workforce microdata supporting macroeconomic modelling and AI-driven forecasting.	Established	High	High	Maintain and monitor	Limited	✓	See general comment at 2.2.1 (Language, Arts, Culture & History). Notes the government may consider expanded access to the Australian Bureau of Statistics (ABS) economic datasets for AI training (Action 2), but does not include broader or system-level initiatives for economic data. **Limited commitment by government in the plan aligns with recommendation to maintain and monitor.**
	2.2.6 Enterprise & Business		Proprietary datasets held by private companies for in-house AI training, modelling and deployment. Includes operational, customer and sensor data across sectors, such as mining, telecommunications and finance.	Not enough data	High	Not enough data	Gather more evidence	Limited		See general comment at 2.2.1 (Language, Arts, Culture & History). Links AI adoption in business to the use of high-quality, trusted data (Action 4, p18), but does not include specific initiatives to unlock enterprise and business data, with references remaining broad and adoption-focused. **Warrants attention to work with the private sector to better understand current maturity (given this capability could generate very high agency and leverage).**

2 Data assets & lifecycle management

Data capabilities required to support AI development and use (availability and quality of data, access arrangement and data sovereignty practices)

Define				Assess today			Prioritise tomorrow	Analysis against Australia's National AI Plan		
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2.2 Domain Specific Datasets	**2.2.7 Scientific, Synthetic & Simulated Research**		Datasets generated through academic, industrial or government research via experiment, observation, simulation or instrumentation across disciplines, such as physics, chemistry, materials, biology and computing. Includes open-access repositories, laboratory automation data, and synthetic or simulated datasets created to model, test or validate AI systems.	Not enough data	High	Not enough data	Gather more evidence	Limited		See general comment at 2.2.1 (Language, Arts, Culture & History). Recognises through earth observation investments providing access to scientific datasets for AI applications (Action 6), but does not include specific initiatives relating to synthetic or simulated research data. **Warrants attention to identify current maturity (given this capability could generate very high agency and leverage).**
	2.2.8 Community & Citizen Science		Data generated by individuals, families and community groups through participation in scientific, civic, cultural or recreational activities. Includes contributions from citizen science projects, local environmental monitoring, sports and hobby groups, cultural associations, and neighbourhood initiatives.	Not enough data	High	Not enough data	Gather more evidence	No commitment		No specific reference to community or citizen science datasets as a distinct dataset category in the plan. **Warrants attention to identify current maturity (given this capability could generate very high agency and leverage).**
	2.2.9 Demographic		Population and household datasets including Census microdata, vital statistics, migration, education and longitudinal household surveys.	Advanced	High	Very high	Leverage and maintain	Limited		Identifies the ABS as a national data source used to monitor adoption and skills development (p8), and notes that ABS datasets may be made available to support AI training (Action 2), but does not include targeted initiatives relating specifically to demographic data or any system-level improvements. **Limited commitment by government in the plan represents a missed opportunity. More should be done to leverage this very high agency. This is one of 8 capabilities over which Australia wields very high agency; national priority should be given to maintaining this agency and leveraging it internationally to offset gaps in other capabilities of low agency.**
	2.2.10 Infrastructure		Operational and asset data from transport, energy, telecommunications, water and digital networks, including sensor feeds, traffic and mobility data, grid telemetry, maintenance logs; asset inventories critical for national resilience and automation.	Advanced	High	Very high	Leverage and maintain	Limited		See general comment at 2.2.1 (Language, Arts, Culture & History). No specific reference to infrastructure datasets, including operational and asset data from transport, energy, telecommunications, water or digital networks, as inputs to AI systems in the plan. **Limited commitment by government in the plan represents a missed opportunity. More should be done to leverage this very high agency. This is one of 8 capabilities over which Australia wields very high agency; national priority should be given to maintaining this advantage and leveraging it internationally to offset gaps in other capabilities of low agency.**
	2.2.11 Public Administration		Administrative and institutional datasets generated by government operations, including defence, emergency and security data, as well as decision logs, tax and benefits records, service delivery data and procurement registers.	Emerging	High	High	Close critical gap	Moderate		See general comment at 2.2.1 (Language, Arts, Culture & History). Non-specific and conditional commitment to explore ways to expand access to some government datasets (Action 2) and to improve APS data maturity and scale public service AI via GovAI, capability uplift and agency-level adoption (Action 6). **Moderate commitment by government in the plan aligns roughly with the recommendation to close a critical gap, although greater attention is recommended.**

2 Data assets & lifecycle management

Data capabilities required to support AI development and use (availability and quality of data, access arrangement and data sovereignty practices)

Define				Assess today			Prioritise tomorrow	Analysis against Australia's National AI Plan		
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2.3 Data Lifecycle Management	**2.3.1 Data Creation & Sourcing**	**2.3.1.1 Standards & Provenance**	Development and enforcement by government or the private sector of interoperable data and metadata standards, quality frameworks and provenance systems that ensure datasets are accurate, traceable and validated throughout their lifecycle.	Established	High	High	Prioritise building	Limited		Recognises the value of Australian datasets, their importance to developing and training AI models that are locally relevant, and commits to exploring opportunities and pilot use cases to unlock high value datasets, including to build on existing programs of work to improve APS data and data maturity, consistent data standards and metadata, build trusted and secure approaches to data sharing, and identify high value, non-sensitive datasets (Action 2). Refers to verification standards for earth observation data (Action 6), includes updates to privacy laws as part of AI harms mitigation (Action 7), and responsible AI practices in the APS, including documentation, metadata recording and transparency measures (Action 8), but does not include details on implementation or funding, therefore, commitment is assessed to be limited. **Limited commitment by government in the plan represents a missed opportunity. More should be done build agency and leverage to offset capability gaps elsewhere in the ecosystem.**
		2.3.1.2 Responsible Data Sourcing	Ensuring all data collection, generation and acquisition processes uphold privacy, autonomy, human rights, community rights, and principles of FAIR, CARE, data sovereignty, and Indigenous Cultural and Intellectual Property (ICIP).	Emerging	High	High	Close critical gap	Limited		See 2.3.1.1 (Standards & Provenance). **Limited commitment by government is a missed opportunity to increase domestic maturity in a globally scarce capability with high public interest value.**
	2.3.2 Data Preparation & Curation	**2.3.2.1 Data Quality & Validation**	Processes, tools and standards for verifying accuracy, completeness, representativeness and integrity of data prior to reuse, sharing or publication, and data engineering maturity for data use across the model lifecyle.	Emerging	High	High	Close critical gap	Limited		See 2.3.1.1 (Standards & Provenance). **Limited commitment by government is a missed opportunity to increase domestic maturity in a globally scarce capability with high public interest value.**
		2.3.2.2 Annotation & Curation (for reusability)	Processes, tools and standards for verifying accuracy, completeness, representativeness and integrity of data prior to reuse, sharing or publication, and data engineering maturity for data use across the model lifecyle.	Emerging	High	High	Close critical gap	Limited		See 2.3.1.1 (Standards & Provenance). **Limited commitment by government is a missed opportunity to increase domestic maturity in a globally scarce capability with high public interest value.**
	2.3.3 Data Access & Use	**2.3.3.1 General Use Access**	Regulatory and territorial controls defining how and where data can be processed, stored or accessed within the jurisdiction.	Emerging	High	High	Close critical gap	Limited		Recognises the importance of responsible data access and use through broader commitments to governance, transparency and trusted data practices (Action 8, Action 9), but does not include details of specific action or policies related to general use access. **Limited commitment by government is a missed opportunity to increase domestic maturity in a globally scarce capability with high public interest value.**

2 Data assets & lifecycle management

Data capabilities required to support AI development and use (availability and quality of data, access arrangement and data sovereignty practices)

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2.3 Data Lifecycle Management	**2.3.3 Data Access & Use**	**2.3.3.2 Availability of Government Data**	Publication of jurisdiction's government or publicly funded datasets under open, machine-readable and legally reusable licences to support transparency, innovation and reuse. Enablement through the existence and use of data sharing frameworks.	Established	High	High	Prioritise building	Limited		Heavy reliance in the plan to ABS data. Includes a non-specific and conditional commitment to explore ways to expand access to some government datasets (Action 2) and to improve APS data maturity (Action 6), and identifies ABS as a key source for monitoring adoption and skills development (p8). Does not include comprehensive reforms to public data access frameworks or system-level mechanisms to improve the availability and usability of government data. **Limited commitment by government in the plan represents a missed opportunity. More should be done build agency and leverage to offset capability gaps elsewhere in the ecosystem.**
		2.3.3.3 Restricted Access – Copyright/IP	Legal and licensing frameworks that determine if and who may mine, reproduce or use datasets, particularly for AI training, model fine-tuning and commercial reuse. As well as any licensing and compensation regimes for creators.	Emerging	High	High	Close critical gap	Moderate		The plan includes a clear reaffirmation that the government has ruled out a text and data mining exception in Australian copyright law. It also refers to ongoing reviews of legal and licensing frameworks governing data use for AI through consideration of copyright law in AI contexts – but contains no specific details of timelines, resulting in uncertainty about plans to reform this critical enabling capability. **Moderate government commitment in the plan roughly aligns with the recommendation to close a critical gap; however, this is marked for prioritised attention given ongoing uncertainty about the copyright review and noting these settings will shape the conditions for all of 2.3.3 (Data Access & Use) and, arguably, every capability across all 6 layers.**
		2.3.3.4 Offshore Data Access (trusted transfers)	Frameworks ensuring that any transfer, storage or processing of local data offshore or by foreign entities occurs under reciprocal, privacy-compliant and sovereign-assured arrangements.	Established	High	High	Prioritise building	Limited		Signals intent to support international data and technology cooperation through global norms, partnerships and work to strengthen digital and data governance (Action 9), but does not reference commitment to develop specific frameworks for trusted offshore data transfers. **Limited commitment by government in the plan represents a missed opportunity. More should be done to build agency and leverage to offset capability gaps elsewhere in the ecosystem.**
		2.3.3.5 Operational Data Access & Interfaces ('In-Life')	Data sources, interfaces and access arrangements that enable AI systems, during real-world operation, to retrieve current information from external data sources and systems to support context-aware, accurate and safe performance (complements Section 2.2, which assesses the availability and quality of domain datasets).	Established	High	High	Prioritise building	No commitment		No specific reference to operational or in-life data provision as a capability or integration of AI into live systems needed to unlock Australia's AI capability. **No commitment by Government in the Plan represents a missed opportunity. More should be done to build agency and leverage to offset capability gaps elsewhere in the ecosystem.**

2 Data assets & lifecycle management

Data capabilities required to support AI development and use (availability and quality of data, access arrangement and data sovereignty practices)

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2.3 Data Lifecycle Management	**2.3.4 Data Stewardship & Assurance**	**2.3.4.1 Data Retention & Archiving**	Preserve safely and sustainably with secure, compliant and accessible long-term storage of datasets, including model-training archives and data generated by research, governed by clear retention schedules and provenance metadata to retain only what's necessary, for as short a time as necessary – supporting the 'right to delete'.	Emerging	High	High	Close critical gap	Limited		Includes limited reference to data preservation through public sector use cases such as AI-enabled transcription of oral history collections (Action 6), but does not enhance national capability for data retention and archiving of AI datasets with no AI-specific frameworks for long-term storage, retention or deletion that are needed to unlock Australia's AI capability. **Limited commitment by government is a missed opportunity to increase domestic maturity in a globally scarce capability with high public interest value.**
		2.3.4.2 Data Deletion & Oversight	Remove or decommission securely with formal oversight and validation of data destruction, anonymisation, or off-ramping from systems, including verification of deletion from backups and derived models.	Emerging	High	High	Close critical gap	Limited		Supports responsible AI governance, privacy law reform and oversight of AI harms (Action 7, Action 8), but does not develop national AI capability for Data Deletion & Oversight, including secure destruction, anonymisation or verification of removal from systems and derived models needed to unlock Australia's AI capability. **Limited commitment by government is a missed opportunity to increase domestic maturity in a globally scarce capability with high public interest value.**

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3.1 Models A core component of an AI system that processes data to recognise patterns, make predictions, generate new content or take actions in digital or physical environments.	**3.1.1 Model Development** The process of establishing and training a new model informed by local context and cultural data. **Using the European Institute of Innovation and Technology's Taxonomy for the European AI Ecosystem.*	**3.1.1.1 Computer Vision**	Models that interpret visual inputs (images, video, sensor data) for detection, classification or understanding.	Advanced	High	Very high	Leverage and maintain	Limited		**General:** The government is considering the role of Australian-developed models. References $460 million in existing funding already available or committed to AI and related initiatives; notes existing and general $1 billion commitment for critical technologies in the national interest under the National Reconstruction Fund; notes applicability of Research and Development Tax Incentive Program to AI (Action 2) as well as intention to attract investment (Action 3) and for government to invest in sovereign AI for public service (Action 3), but no specific programs for model development in general, nor this specific category. **This capability:** No specific focus, but the plan recognises the value of AI in agriculture, resources and environmental monitoring, where computer vision capability is relevant. Limited commitment by government in the plan repr**esents a missed opportunity. More should be done to leverage this very high agency. This is one of 8 capabilities over which Australia wields very high advantage; national priority should be given to maintaining this agency and leveraging it internationally to offset gaps in other capabilities of low agency.**
		3.1.1.2 Computer Audition	Models that process, recognise and interpret sound, speech or acoustic signals.	Emerging	Medium	Moderate	Maintain and monitor	Limited	✓	See 3.1.1 (Computer Vision (General)). **Limited commitment by government in the plan aligns with recommendation to maintain and monitor.**
		3.1.1.3 Computer Linguistics	Models for text understanding, translation and generation, including in the national semantic context.	Established	Medium	High	Build	Limited		See 3.1.1 (Computer Vision (General)). **Limited commitment by government is a missed opportunity to build leverage with this existing high agency capability.**
		3.1.1.4 Robotics & Physical AI	Models that perceive, act and learn in physical environments, including autonomous mobility, manipulation and human–robot interaction.	Established	High	High	Build	Limited		See 3.1.1 (Computer Vision (General)). The plan places implied emphasis on this capability, with references to sectors such as advanced manufacturing, mining and agriculture where robotics integration is relevant. **Limited commitment by government is a missed opportunity to build leverage with this existing high agency capability.**
		3.1.1.5 Forecasting	Models that predict future outcomes or trends based on historical and real-time data, including climate, economic, health and energy forecasting.	Established	High	High	Build	Limited		See 3.1.1 (Computer Vision (General)). **Limited commitment by government is a missed opportunity to build leverage with this existing high agency capability.**
		3.1.1.6 Discovery	Models to identify new patterns, hypotheses or designs – often in science, health or materials research.	Emerging	Medium	Moderate	Maintain and monitor	Limited	✓	See 3.1.1 (Computer Vision (General)). **Limited commitment by government in the plan aligns with recommendation to maintain and monitor.**
		3.1.1.7 Planning / Optimisation	Models for optimisation, scheduling and decision-support in dynamic environments.	Emerging	Medium	Moderate	Maintain and monitor	Limited	✓	See 3.1.1 (Computer Vision (General)). The plan recognises demand for AI optimisation tools in logistics and service delivery contexts as part of broader adoption and productivity initiatives (Action 4) but no specific initiatives. **Limited commitment by government in the plan aligns with recommendation to maintain and monitor.**

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3.1 Models	**3.1.1 Model Development**	**3.1.1.8 Creation / Generative**	Models that generate new content – text, image, audio or design artefacts including multimodal – consistent with cultural, linguistic and ethical norms.	Emerging	Medium	Moderate	Maintain and monitor	Limited	✓	See 3.1.1 Computer Vision (General). **Limited commitment by Government in the Plan aligns with recommendation to maintain and monitor.**
		3.1.1.9 Culturally & Nationally Inclusive Models	Models trained on nationally significant datasets, including national language(s)/ dialects, flora and fauna, and on weightings that encode local cultural, social and ethical values into the system, while maintaining Indigenous data sovereignty and guarding against exploitation.	Emerging	High	High	Close critical gap	Limited	🔍⚠	See 3.1.1 (Computer Vision (General)). The plan acknowledges importance of inclusive AI development and culturally appropriate datasets (Action 2) but no specific commitments. **Limited commitment by government is a missed opportunity to increase domestic maturity in a globally scarce capability with high public interest value. It is particularly important to increase agency in this capability if investments are not made in General Purpose & Frontier Models (3.1.1.10).**
		3.1.1.10 General Purpose & Frontier Model	Models that perform across multiple domains, tasks and modalities. This includes foundation and multimodal models, modular and routed architectures (such as a mixture-of-experts and routing systems), and models capable of interacting with (or being used by software systems for them to interact with) external tools, data sources or other agents to perform complex or multi-step tasks (linked to 2.3.3.5).	Emerging	Medium	Moderate	Maintain and monitor	Limited	✓	See 3.1.1 (Computer Vision (General)). **Limited commitment by government in the plan aligns with recommendation to maintain and monitor.**
	3.1.2 Model Adaptation & Alignment Refining models to reflect specific domains or behavioural values.	**3.1.2.1 Domain Adaptation**	Refining a pre-trained model using sector-specific or locally sourced datasets so it performs better in a specific domain, language or operational context.	Established	High	High	Build	Limited	🔍🚀	Acknowledges the importance of models being trained on locally relevant data and the value of sector-specific models (Action 2), but no specific domain adaption references, action or funding. **Limited commitment by government is a missed opportunity to build leverage with this existing high agency capability. It is particularly important to increase agency in this capability if investments are not made in General Purpose & Frontier Models (3.1.1.10).**
		3.1.2.2 Cultural and Linguistic Alignment	Refining models so they accurately reflect diverse local languages and First Nations communities, while guarding against exploitation and respecting cultural norms and Indigenous data rights.	Emerging	High	Moderate	Close critical gap	Limited	🔍⚠	Acknowledges importance of inclusive AI development and culturally appropriate datasets – and signals intent to explore unlocking local data (Action 2) – but doesn't have specific commitments on model adaption and alignment. L**imited commitment by government is a missed opportunity to increase domestic maturity in a globally scarce capability with high public interest value. It is particularly important to increase agency in this capability if investments are not made in General Purpose & Frontier Models (3.1.1.10).**
	3.1.3 Model Tooling		AI-enabling system software that improves model training, deployment and lifecycle management. This includes Machine Learning Operations (MLOps) platforms, monitoring tools feature stores, hardware-optimised runtimes (to speed up inferencing) that operate at the model–infrastructure interface.	Emerging	High	Moderate	Maintain and monitor	No commitment	✓	No reference in the plan. **No commitment by government in the plan aligns with recommendation to maintain and monitor, however future plans would benefit from recognising the role of this capability in the ecosystem.**

Models & applications

The development and adaptation of models from computer vision to optimisation, and the applications that build on top of them

Define				Assess today			Prioritise tomorrow	Analysis against Australia's National AI Plan		
Category I	**Category II**	**Category III**	**Definition**	**Maturity rating** National stocktake	**Sovereignty rating** International access, sovereign control, resilient choice, export leverage	**Agency score** Maturity rating, sovereignty rating, global scarcity	**Recommended action** considering maturity rating, sovereignty rating, global scarcity, and domestic public-interest	**Government commitments** Assessment of the level Government commitment in the Plan	**Alignment** of Government commitments to recommended actions	**Notes**
3.1 Models	**3.1.4 Model & Agent Orchestration**		The capability to connect and coordinate multiple AI models, tools or agents into cohesive systems. This includes orchestration layers, middleware and agent frameworks that ensure secure interoperability, routing and governance of AI operations.	Emerging	High	Moderate	Maintain and monitor	No commitment	✓	No reference in the plan. **No commitment by government in the plan aligns with recommendation to maintain and monitor, however future plans would benefit from recognising the role of this capability in the ecosystem.**
	3.1.5 Safety and Value Alignment		Models, or model ecosystems with multiple AI models, tools or agents, that comply with local ethics principles, privacy and safety regulations and societal expectations. This may entail developing an AI fabric with embedded guardrails as code.	Not enough data	High	Not enough data	Gather more evidence	Moderate	🔍 📊	Prioritises safe AI development and deployment through establishment of the AI Safety Institute (AISI), assurance guidance and risk management initiatives (Action 7); also prioritises AI in line with democratic values (Action 9). Given the value of committed funding for AISI (as compared to other jurisdictions), commitment is assessed as moderate. **Warrants attention to identify data (given this capability could generate very high agency and leverage). It is particularly important to increase agency in this capability if investments are not made in General Purpose & Frontier Models (3.1.1.10).**
3.2 Applications	**3.2.1 General Applications**		Widely used AI-enabled software systems with cross-sectoral relevance (productivity, communication, creativity, decision support).	Advanced	High	High	Prioritise building	Significant	✓	Articulates intent to lead in AI innovations and applications. Strongly focuses on broad AI deployment across Australian society, with specific measures and funding to encourage adoption and deployment (Action 4, 5). **Significant commitment in the plan strongly aligns with recommended action to prioritise building agency in this enabling capability.**
	3.2.2 Sector-specific Applications		AI applications designed for a particular industry or domain, embedding domain expertise and sectoral priorities.	Established	High	High	Maintain and monitor	Limited	✓	Recognises the value of supporting targeted AI application development in various sectors including healthcare, agriculture, resources and advanced manufacturing (Action 2) but no specific initiatives to support (beyond the general initiatives listed in 3.1.1 (Computer Vision (General)). **Limited commitment by government in the plan aligns with recommendation to maintain and monitor.**

4 Innovation & adoption

The ecosystem of support and investment that drives AI innovation and commercialisation, as well as levels and culture of adoption across society

Define				Assess today			Prioritise tomorrow	Analysis against Australia's National AI Plan		
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4.1 Innovation	**4.1.1 Support & Investment Availability**		The strength of the national AI innovation ecosystem (including startups, investors, incubators and accelerators) to support and scale commercially viable products and services, including the ability to convert Research and Development (R&D) into market-ready offerings.	Emerging	High	Moderate	Close critical gap	Moderate	⚠	Recognises $460 million in existing funding already available or committed to AI and related initiatives, commitment to an AI accelerator Coorporative Research Centre (CRC) round (no specifics on funding), commits $39.9 million to strengthen Australia's AI ecosystem, which includes expanding the National AI Centre (NAIC), recognises existing broader technology-related commitments, including $1 billion through the National Reconstruction Fund and notes availability of the Research and Development Tax Incentive Program (Action 2). Commits to attracting investment to Australia, recent Anthropic and Microsoft MOUs are examples of implementation (Action 3). Despite the size of these funding commitments, this is assessed to be moderate commitment by the government in the plan (as compared to investment in other jurisdictions, especially by government), indicating a preference for maturation of this capability to be driven by market forces. **Moderate commitment by government in the plan aligns roughly with the recommendation to close this critical gap. Greater and ongoing attention is warranted given this capability provides the enabling environment for all other capabilities.**
	4.1.1.2 AI Native Companies		National companies developing, building, scaling and operating AI technologies, products and services at all layers of the stack.	Emerging	High	Moderate	Maintain and monitor	Limited	✓	See 4.1.1 (Support & Investment Availability). Recognises the role of Australian AI native companies, and refers to Austrade role in ecosystem development programs as well as support to scale internationally, such as the Austrade Landing Pads program (Action 2), but limited firm commitments or specifics on how this will support AI native companies, indicating a preference for maturation of this capability to be driven by market forces. **Limited commitment by government in the plan aligns with recommendation to maintain and monitor.**
4.2 Rate of Adoption	**4.2.1 Private sector adoption**	**4.2.1.1 Large Enterprises**	The extent to which large enterprises adopt and integrate AI across operations, decision-making and product development.	Emerging	High	Moderate	Maintain and monitor	Limited	✓	Broadly encourages large-scale AI uptake across major industries, including via NAIC guidance on AI adoption, but no specific initiatives to support this for large enterprises. This likely reflects a decision to direct government resources to where they are most needed. **Limited commitment by government in the plan aligns with recommendation to maintain and monitor. To build agency, private sector investment will be required.**
		4.2.1.2 SMEs & Startups	The extent to which small and medium enterprises and early stage ventures adopt and integrate AI across operations, decision-making and product development.	Emerging	High	Moderate	Maintain and monitor	Significant	✓	Strong focus on small and medium enterprise (SME) AI adoption through AI Adopt Centres ($17 million), and expansion of the NAIC ($39.9 million) (Action 2, Action 4). As well as the Future Skills Organisation (FSO) Skills Accelerator and Digital Knowledge Exchange (Action 5). **Significant commitment by government in the plan exceeds the recommendation to maintain and monitor, signalling clear intent to build agency.**

4 Innovation & adoption

The ecosystem of support and investment that drives AI innovation and commercialisation, as well as levels and culture of adoption across society

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4.2 Rate of Adoption	**4.2.2 Public Sector Adoption**	**4.2.2.1 Government Adoption**	The extent to which government adopts and integrates AI across operations and service delivery.	Emerging	High	High	Maintain and monitor	Significant	✓	Prioritises adoption of AI by government via GovAI Infrastructure (Action 2), the Data and Digital Government Strategy, the AI Plan for the Australian Public Service, and commitments to embed AI in government operations (Action 6). **Significant commitment by government in the plan exceeds the recommendation to maintain and monitor, signalling clear intent to build agency.**
		4.2.2.2 Defence & National Security	National Intelligence Community and Department of Defence (including the Defence Force) adoption and integration of AI across decision-making, operations and deployment of capabilities, as well as investment and support for R&D.	Established	High	High	Build	Limited		General reference to AI defence technologies (p17), but otherwise a limited focus in the plan (noting that 2026 National Defence Strategy and 2026 Integrated Investment Program have subsequently been released and have an increased focus on technological innovation). **No national coordination of this capability by government in the plan represents a strategic missed opportunity to use investments in this capability as force multipliers across the ecosystem.**
	4.2.3 Public Interest Adoption	**4.2.3.1 Civil Society Adoption**	The extent to which not-for-profits and community organisations adopt AI to conduct their activities.	Emerging	High	Moderate	Close critical gap	Moderate		Emphasises importance of inclusive AI deployment and public benefit use cases, including collaboration between NAIC, Infoxchange, philanthropy and industry to support not-for-profit adoption (Action 6). **Moderate commitment by government in the plan aligns with recommendation to close this critical gap, although greater attention is recommended.**
		4.2.3.2 Research & Academia Adoption	The extent to which research and academic communities adopt AI to conduct their activities.	Established	High	High	Prioritise building	Limited		Narrative focus on strengthening research sector AI capability and enhancing investment in research and development, but no explicit reference to adoption. **Given the high public interest in fostering this capability, and its leverage potential given global scarcity, review of the government's current commitment is recommended.**
	4.2.4 Inclusive AI Adoption		Extent to which individuals have access to, and have the choice to adopt and integrate AI products and services into their lives.	Emerging	High	High	Close critical gap	Limited		A narrative focus on inclusion and spreading AI benefits to all Australians, including First Nations peoples, women, people with disability, and regional communities, including case studies on First Nations and with Good Things Australia, and reference to Digital Inclusion Index (Action 5). But no specific initiatives or funding to support. Limited commitment by government is a missed opportunity to increase domestic maturity in a globally scarce capability with high public interest value. If action is not taken to close this gap, the Plan's goal to spread the benefits of AI will not be achieved (likewise with the 4 capabilities below).

4 Innovation & adoption

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4.3 Culture of Adoption	**4.3.1 Discerning Adoption**		Extent to which individuals and organisations approach and choose to adopt AI in an informed, critical and responsible way.	Emerging	High	High	Close critical gap	Limited		The plan includes differentiated commitment to support discerning AI adoption, with strongest commitments for SME and government (see 4.2 (Rate of Adoption)). However, the plan includes minimal commitments of strategic initiatives (beyond narrative) for discerning adoption by individual or marginalised communities. **Limited commitment by government is a missed opportunity to increase domestic maturity in a globally scarce capability with high public interest value.**
	4.3.2 Trust & Confidence in AI Deployment	**4.3.2.1 Trust & Confidence in Public Sector**	Public confidence that government use of AI will be fit for purpose, safe, reliable, easy to use, convenient and accessible, and public trust in the integrity, accountability and governance of government institutions deploying AI.	Emerging	High	High	Close critical gap	Significant	✓	Strong narrative focus on building trust in government AI use, supported by specific policies and initiatives including training, and requirement for APS agencies to appoint Chief AI Officers. The AI Plan for the Australian Public Service has a pillar on 'Trust: Transparency, Ethics and Governance' (Acton 6, 7, 8). **Significant commitment by government aligns with recommendation to close this critical gap, although given the foundational importance of this capability, greater and ongoing attention is recommended.**
		4.3.2.2 Trust & Confidence in Private Sector	Consumer confidence that private sector AI systems will be transparent, fit for purpose, safe, reliable, easy to use, convenient and accessible, and trust in companies to deploy AI responsibly, ethically and in the interests of customers and society.	Emerging	High	High	Close critical gap	Limited		Narrative focus on promoting responsible practice, including via guidance, transparency measures and international standards. Refers to voluntary standards participation and assurance guidance to enable trusted deployment (Action 8), but no specific initiatives to increase public trust in deployment of AI in the private sector. Noting that the responsibility to close this gap sits with the private sector. **Limited commitment by government is a missed opportunity to engage with the private sector to increase domestic maturity in a globally scarce capability with high public interest value.**
		4.3.2.3 Trust & Confidence in Public Interest Sector	Public confidence that academic, not-for-profit and media institutions use AI in ways that are transparent, fit for purpose, safe, reliable, easy to use, convenient and accessible, and trust in those institutions to deploy AI independently, responsibly and in the public interest.	Emerging	High	Moderate	Close critical gap	Limited		See 4.2.4.1 (Civil Society Adoption) and 4.2.3.2 (Research & Academia Adoption). But no specific initiatives to increase public trust in public interest AI deployment, despite the strong narrative focus. **Limited commitment by government is a missed opportunity to engage with the public interest sector to increase domestic maturity in a globally scarce capability with high public interest value.**

5 Skills

The skills required for all elements of the AI ecosystem, from building and developing, to governing and living with AI

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5.1 Skills for building AI infrastructure and developing AI	**5.1.1 Skills for Building Physical AI Infrastructure**		Specialised technical skills to design, build and maintain the physical backbone of AI, from data centres and high-performance computing clusters to the networking and power systems that sustain them.	Advanced	High	High	Prioritise building	Moderate	✓	**General:** Strong narrative commitment to supporting and training Australians (Action 5), including though the Vocational Education and Training (VET) focused National Skills Agreement and efforts by the Jobs and Skills Councils to align workforce development with industry needs. The plan also references the FSO AI Skills Accelerator, Digital Knowledge Exchange program, initiatives by the TAFE sector, as well as efforts to engage with unions and professional associations. Whilst undoubtably valuable, when spread across the entire economy and workforce these initiatives are assessed to be limited. **This capability:** Links AI infrastructure development to workforce capability, including the need to equip Australians with skills to build and support physical AI infrastructure (Action 1), and references workforce development initiatives such as the Key Apprenticeship Program for priority sectors supporting AI infrastructure (Action 5); commitment for this specific capability is therefore assessed to be moderate. **Moderate commitment by government in the plan aligns roughly with the recommendation to prioritise building agency, although greater attention is recommended.**
	5.1.2 Skills for Building Accelerators (AI Chips)		Specialised skills to design, fabricate, assemble and optimise the accelerator hardware that powers AI computation – across chip design, fabrication, cooling, packaging and integration into large-scale compute clusters.	Emerging	High	High	Maintain and monitor	No commitment	✓	Refers to access to advanced chips as an enabling infrastructure factor (Action 1), but does not include specific programs or capability development for designing, fabricating or integrating AI accelerator hardware domestically, reflecting reliance on global supply chains. Note this capability could be a point of leverage to increase assessments of Advantage for 1.2.2.1– 1.2.2.3 (Designing, Manufacturing & Packaging Accelerators). **No government commitment in the plan aligns with recommendation to maintain and monitor. However, noting the global scarcity and leverage potential of this capability, particular attention should be paid to sustain existing high agency.**
	5.1.3 AI Research Skills		Expert knowledge needed to develop new AI methods and technologies, from algorithms and architectures to safety and interpretability. These skills drive frontier research and strengthen scientific leadership in AI. Individual researcher capability. Fundamental science.	Established	High	High	Build	Moderate	✓	Highlights Australia's strong AI research base and refers to support for AI research capability through existing funding and programs, including over $362 million in research grants and $47 million for the Next Generation Graduates Program to build a pipeline of highly skilled professionals in AI and emerging tech (Action 2, Action 5). Marked as moderate commitment (as compared to the size of investments made in other jurisdictions). **Moderate commitment by government in the plan aligns with recommendation to build agency, although greater attention is recommended.**

5 Skills

The skills required for all elements of the AI ecosystem, from building and developing, to governing and living with AI

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5.1 Skills for building AI infrastructure and developing AI	**5.1.4 AI Development & Application Skills**		Technical expertise to turn AI research into real-world, reliable systems. Building and developing AI systems. This includes machine learning engineering, data pipelines, testing and verification, continuous delivery, and human-centred, secure-by-design approaches. Engineering practice.	Emerging	High	Moderate	Close critical gap	Limited		Treats AI skills as a workforce priority, supporting lifelong learning, digital literacy, technical AI capability and specialised expertise through national skills and training systems (Action 5), including the National Skills Agreement, Jobs and Skills Councils, vocational education pathways and the FSO AI Skills Accelerator. Includes a brief mention of specialist skills, but no specific initiatives to support AI development and application skills. **Limited commitment by government is a missed opportunity to increase domestic maturity in a globally scarce capability with high public interest value.**
	5.1.5 Research & Development Capabilities (translation)		Skills for scaling and translating AI into impact, the ability to convert AI research into industrial, social or policy value. Including managing collaborative R&D, navigating funding, compliance and ethics, and scaling technology through Technology Readiness Levels. Innovation and commercialisation.	Emerging	High	Moderate	Close critical gap	Limited		Launches an AI accelerator funding round of the CRC program to accelerate the development and commercialisation of AI (Action 2), but does not establish broader national capability for translating AI research into scalable industrial, social or policy outcomes, hence commitment is assessed to be limited. **Limited commitment by government is a missed opportunity to increase domestic maturity in a globally scarce capability with high public interest value.**
	5.1.6 International AI Talent Collaborations		Skills and frameworks that enable trusted global research and workforce partnerships while safeguarding Australia's intellectual property, data and strategic interests. These collaborations build capability through shared standards, research exchange and secure mobility programs.	Emerging	High	Moderate	Close critical gap	Limited		Recognises the importance of international collaboration through existing global partnerships and norms-shaping activities (Action 9), but no reference to international AI talent collaboration or secure mobility programs, hence marked as limited commitment. **Limited commitment by government is a missed opportunity, as increasing maturity in this capability would boost skills across this layer.**
5.2 Skills for Deploying & Maintaining AI	**5.2.1 Business Transformation & Commercial Skills**		Commercial and operational skills that turn AI prototypes into real, compliant and scalable products or services. These skills cover product management, procurement, vendor governance and change management to support safe and effective adoption.	Established	High	High	Maintain and monitor	Limited	✓	Supports business and commercial AI capability through national programs and advisory services, including the NAIC, the $17 million AI Adopt Program, the Digital Solutions Program and tailored support for SMEs and not-for-profits adopting AI (Action 4), but no specific recognition of the need to build commercial capabilities that turn AI prototypes into real, compliant and scalable products or services. **Limited commitment by government in the plan aligns with recommendation to maintain and monitor.**
	5.2.2 Interdisciplinary & Domain Expertise		Skills to combine deep sector knowledge with cross-disciplinary insight, bringing together experts in fields like law, health, engineering, environment and social science to design AI systems that are ethical, effective and compliant. This ensures AI decisions are context-aware and grounded in real-world understanding.	Not enough data	High	Not enough data	Gather more evidence	Limited		General commitments building AI workforce capability (Action 5), but no specific reference to policies on interdisciplinary AI expertise that combines deep sector knowledge with cross-disciplinary insight. **Warrants attention to identify data (given this capability could generate very high agency and leverage).**

5 Skills

The skills required for all elements of the AI ecosystem, from building and developing, to governing and living with AI

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5.3 Skills for Governing & Securing AI	**5.3.1 Assurance & Risk Management** (safety, bias, explainability)		Skills to test, monitor and certify AI systems throughout their lifecycle, ensuring they are safe, fair, transparent, and compliant with laws and standards. This includes risk management, bias detection, safety testing and explainability audits.	Emerging	High	High	Close critical gap	Moderate		Supports safety, bias, explainability through AI safety research, establishment of the AISI and guidance on responsible AI adoption, transparency and governance (Action 7, Action 8). Investment is modest compared to other jurisdictions, and the plan includes nothing specific on skills in this domain. **Moderate commitment by government in the plan aligns roughly with the recommendation to close this critical gap, although greater attention is recommended.**
	5.3.2 Cybersecurity & Technical Robustness		Skills to keep AI systems secure, resilient, and compliant with national and international security standards. This includes secure-by-design development, data protection, threat modelling and adversarial testing to guard against attacks and misuse.	Established	High	High	Build	Limited		Addresses through broader national cybersecurity and critical infrastructure initiatives and AI-related security considerations (Action 1; Action 7, Action 8), but does not establish or refer to skilling programs to securing AI systems, including secure-by-design development or adversarial testing, hence assessed to be limited commitment. See also 5.3.1 (Assurance & Risk Management). **Limited commitment by government is a missed opportunity to build leverage with this existing high agency capability.**
	5.3.3 Policy, Legal & Leadership Skills		Skills in technology policy, privacy, intellectual property, safety and administrative law to ensure AI is governed responsibly and in line with global best practice. These skills enable rights-based, accountable policymaking and regulation across sectors, as well as effective leadership and coordination of AI governance efforts, and underpin the strategic capability required for system design, foresight or public-interest governance of AI.	Established	High	High	Build	Moderate		Supports some relevant governance and regulatory activity (Action 7, Action 8). The plan emphasises public service capability uplift, AI training and guidance for every public servant, Chief AI Officer roles, work on automated decision-making frameworks, and workplace relations / work, health and safety reviews relevant to AI use (Action 5, Action 6). But no wider recognition of the need to develop skills and expertise in technology policy, privacy, intellectual property, safety or administrative law, or the strategic capability required for system design, foresight or public interest governance of AI. **Moderate commitment by government in the plan aligns roughly with the recommendation to close this critical gap, although greater attention is recommended.**
5.4 Skills for Living with AI	**5.4.1 General Public AI Literacy & Engagement**		Skills for people to understand and use AI safely and confidently. This includes skills to teach AI literacy and education, awareness of bias and privacy, and the intergenerational capacity to question, engage with and refuse AI in daily life and at work (as appropriate).	Emerging	High	High	Close critical gap	Limited		Recognises the need for general public AI literacy, including example of Good Things Australia (Action 5), but no clear system-level ownership or national framework for building consistent AI literacy capability across the population. **Limited commitment by government is a missed opportunity to increase domestic maturity in a globally scarce capability with high public interest value. If action is not taken to close this gap, the plan's goal to spread the benefits of AI will not be achieved.**

Governance

Strategies, frameworks and policies across government and the entire ecosystem that support national AI capability

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6.1 Government Strategy	**6.1.1 National AI Strategy & Leadership**		Existence and maturity of national AI strategy (vision, funding, implementation).	Established	High	High	Maintain and monitor	Significant	✓	**The publication of the plan represents a significant commitment to this capability.**
	6.1.2 Policy Coherence & Coordination		Whole-of-government policy coordination; effective integration of AI across government strategies (cyber, industrial, education, defence, foreign policy).	Emerging	High	High	Close critical gap	Moderate	🔍⚠	The plan delivers some policy coherence, and signals intent to improve coordination across government, but includes no specific measures to improve coordination (hence moderate rating). **Moderate commitment by government in the plan aligns roughly with the recommendation to close this critical gap, however this is marked for attention noting policy coherence and coordination provide the enabling environment for all capabilities.**
6.2 Legal, Regulatory, Standards & Assurance Frameworks & Capabilities	**6.2.1 Legal & Regulatory Frameworks**		The existence and clarity of national laws and regulations that establish the legal obligations of AI developers, deployers and users. Includes (but not limited to) provisions for privacy, cybersecurity, safety, discrimination, accountability, liability, and mitigating systemic and catastrophic risks.	Established	High	High	Prioritise building	Moderate	🔍🚀	Provides policy coherence by noting that 'Agencies and regulators will retain responsibility for identifying, assessing, and addressing potential AI-related harms within their respective policy and regulatory domains' (Action 7). Commits to continuing to assess the suitability of existing laws in the context of AI, while taking targeted action against specific harms (privacy, consumer harms, online safety, copyright, healthcare, medical device software) (Action 7) and that 'if more regulation is needed to address bad actors or broader harms, the government will not hesitate to intervene', but includes no timelines and few specific details on targeted actions or specific gaps, hence marked as moderate. **Moderate commitment by government in the plan aligns roughly with the recommendation to close this critical gap, however this is marked for attention given longstanding delays in highly relevant regulatory reforms that pre-date the plan (e.g. privacy). Greater and ongoing attenttion is warranted given this capabilty provides the enabling environment for all capabilities.**
	6.2.2 Ethics, Standards & Assurance Frameworks		The technical and procedural mechanisms through which AI systems demonstrate compliance with laws, standards and ethical principles. Includes the development and adoption of national or international AI principles, standards, certification schemes and assurance testing capabilities.	Established	High	High	Prioritise building	Significant	✓	Strong commitment to support responsible adoption of AI via guidance, transparency measures and alignment to international standards (Action 8, Action 7). **Significant commitment by government aligns with recommendation to prioritise building agency.**
	6.2.3 Regulatory & Oversight Capability		The institutional capacity of regulators and oversight bodies to implement, monitor and enforce AI-related laws and standards. Encompasses skills, resources, coordination mechanisms, and innovation-friendly approaches such as regulatory sandboxes.	Emerging	High	High	Close critical gap	Limited	🔍⚠	Commits to Australia's existing laws being 'actively enforced' and to the establishment of the AISI, including to support informed, timely and cohesive regulatory action, including by supporting existing regulators to ensure AI companies are compliant with Australian law and uphold legal standards of fairness and transparency (Action 7). **But includes no new funding for already stretched regulators. Limited commitment by government is a missed opportunity to increase domestic maturity in a globally scarce capability with high public interest value.**

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Category I	**Category II**	**Category III**	**Definition**	**Maturity rating** National stocktake	**Sovereignty rating** International access, sovereign control, resilient choice, export leverage	**Agency score** Maturity rating, sovereignty rating, global scarcity	**Recommended action** considering maturity rating, sovereignty rating, global scarcity, and domestic public-interest	**Government commitments** Assessment of the level Government commitment in the Plan	**Alignment** of Government commitments to recommended actions	**Notes**
6.3 Institutional Capacity to Govern AI Deployment	**6.3.1 Public Sector & Public Interest Institutional Capacity**		The ability of public sector and public interest institutions to design, procure and deploy AI systems responsibly, supported by clear governance structures, dedicated leadership and ethical oversight. Includes coordination, procurement standards and workforce readiness for AI governance.	Emerging	High	High	Close critical gap	Significant	✓	Strong focus in the plan on building APS institutional capacity. Enhances government capability to deploy AI through the AI Plan for the Australian Public Service, GovAI infrastructure, Chief AI Officer roles and workforce training initiatives (Action 6). Focuses on skill building, capacity building, whole-of-government coherence, and coordination (Action 6). **Significant commitment by government aligns with recommendation to close this critical gap, although greater and ongoing attenttion is recomended.**
	6.3.2 Private Sector Institutional Capacity		The ability of the private sector and industry bodies to implement, monitor and self-govern AI systems responsibly. Includes organisational AI ethics boards, risk assessment processes, and transparency or impact reporting practices.	Emerging	High	Moderate	Maintain and monitor	Limited	✓	Priority to promote responsible practices of AI, including for private sector and public interest organisations (Action 8), but no specific focus on institutional capacity. Focus on working with industry, civil society and unions to support AI being used appropriately and safely, and in accordance with relevant legislation and regulation, but again lacking institutional focus, hence limited rating. **Limited commitment by government in the plan aligns with recommendation to maintain and monitor. To maintain agency, investment by the private sector will be required.**
6.4 Civic Engagement & Democratic Legitimacy			Mechanisms ensuring that citizens, civil society and academia can meaningfully participate in shaping AI policy, governance and oversight, strengthening democratic legitimacy and accountability.	Emerging	High	High	Close critical gap	Limited	⚠	Cross-cutting emphasis throughout the plan on building public trust, transparency and inclusive AI development across multiple action areas, but contains no details of specific mechanisms to enhance civic participation or democratic legitimacy. **Limited commitment by government is a missed opportunity to increase domestic maturity in a globally scarce capability with high public interest value. If action is not taken to close this gap, the plan's goal to spread the benefits of AI will not be achieved.**
6.5 International Engagement	**6.5.1 Influence & Norm Shaping**		Capacity to influence – not merely absorb – international rules, standards and governance practices for AI. Encompasses active participation and leadership in multilateral, regional and bilateral forums; contributions to global safety, research and standards initiatives; and the ability to forge strategic partnerships for compute, data and technology access through trade, diplomatic and scientific cooperation.	Advanced	High	Very high	Leverage and maintain	Significant	✓	Articulates an intent to position Australia as an AI leader internationally and a partner of choice (Action 1, Action 9). Commits to partnering on global norms, including through standards engagement and multilateral cooperation (Action 9). Commits to development of Australian Government Strategy for International Engagement and Regional Leadership on Artificial Intelligence (Action 9). **Significant commitment by government in the plan aligns with recommendation to leverage and maintain agency. This is one of 8 capabilities over which Australia wields very high agency; national priority should be given to maintaining this agency and leveraging it internationally to offset gaps in other capabilities of low agency.**
	6.5.2 Access & Partnerships		Strategic partnerships for data, research and development, and technology access and export forged through trade, diplomatic and scientific cooperation.	Emerging	High	High	Maintain and monitor	Significant	✓	Articulates an intent to position Australia as an AI leader internationally and a partner of choice (Action 1, Action 9). Commits to development of Australian Government Strategy for International Engagement and Regional Leadership on Artificial Intelligence (Action 9). Notes a number of bilateral agreements (UK, US, Indian, Singapore, Korea, India). **Significant commitment by government in the plan exceeds recommendation to maintain and monitor, signalling clear intent to build agency.**

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