
2024-25 State Infrastructure Plan

A 5-year plan for major infrastructure for NSW

Infrastructure NSW | February 2025

ISSN: 2653-6927

Acknowledgment of Country

Infrastructure NSW acknowledges the Traditional Custodians of the lands where we walk, work and live, and pays respect to their Elders past and present.

We acknowledge and respect their continuing connection to the land, seas and waterways of NSW, and the continuation of their cultural, spiritual and educational practices.

In preparing the State Infrastructure Plan, we acknowledge the importance of Aboriginal and Torres Strait Islander people's unique history of land and water management, and of art, culture and society, that began over 65,000 years ago.

Image: Infrastructure NSW



Contents

1 Introduction and context	2	5 Investing in existing infrastructure	8
The 2024-25 Plan	2	Maintenance as a critical investment	8
NSW's infrastructure strategy is on track	3	Annual assessment of infrastructure supports decision-making	9
		Embedding resilience into decision-making	9
2 Infrastructure to unlock housing growth	4	6 Market capacity, feasibility, and delivery challenges	11
Densification in well-located areas	4	Market capacity	11
Social and affordable housing as community infrastructure	4	Skills shortages	11
Housing capacity created by connectivity, productivity, and service delivery	5	Feasibility challenges in residential housing	12
		Rethinking government's role in housing construction	12
3 Decarbonising the NSW economy	6	Modern methods of construction can improve efficiency, but challenges remain	13
Delivering Renewable Energy Zones	6	Digital capability can support productivity	14
Decarbonising infrastructure delivery	6		
4 Prioritising employment through targeted infrastructure	7	7 NSW infrastructure pipeline	15
Growing Western Sydney's economy	7	Endnotes	16
Increasing domestic manufacturing and regional competitiveness	7		

1 Introduction and context

The NSW Government's 2024-25 Budget Half-Yearly Review includes a \$118.3 billion infrastructure investment pipeline, broadly in line with forecast expenditure in the Budget. Average annual investment is \$29.6 billion between 2024-25 and 2027-28.¹

The significant infrastructure expenditure is driven by the continued delivery of several large projects, including Sydney Metro projects and the Western Harbour Tunnel Upgrade. The NSW Government has also committed to several new projects, including Parramatta Light Rail Stage 2, Elizabeth Drive and Mamre Road upgrades, and the Tangara Fleet Life Extension.

The delivery of this pipeline, alongside increasing needs in the energy, housing, and water infrastructure sectors, will be challenged by the constrained market capacity.

The 2024-25 Plan

The 2024-25 State Infrastructure Plan (the Plan), outlines the infrastructure priorities for the NSW Government over the next 5 years linked with the expenditure in the NSW Budget. The Plan is developed annually as required under the *Infrastructure NSW Act 2011*.

The 2024-25 Plan also outlines the current NSW Infrastructure Pipeline (projects with a minimum capital value of \$50 million), reflecting projects funded in the NSW Budget.

Box 1

Infrastructure Co-ordinator General

In June 2024, the NSW Government expanded the responsibilities of the Infrastructure NSW Co-ordinator General to coordinate infrastructure across government in 4 areas:

- 1. Budget and funding:** increased oversight on infrastructure-related expenditure and advice on the alignment with government priorities.
- 2. Housing delivery:** coordination of infrastructure necessary for NSW housing targets, reforms, and the National Housing Accord.
- 3. Energy:** continued coordination and implementation of the Electricity Infrastructure Roadmap.
- 4. Employment priorities:** coordination of infrastructure for freight logistics and employment related development in Western Sydney and the Aerotropolis.

NSW's infrastructure strategy is on track

NSW remains broadly on track in its progress towards the long-term objectives highlighted in the State Infrastructure Strategy 2022-2024 (the Strategy). There continues to be strong alignment between government priorities and the Strategy.

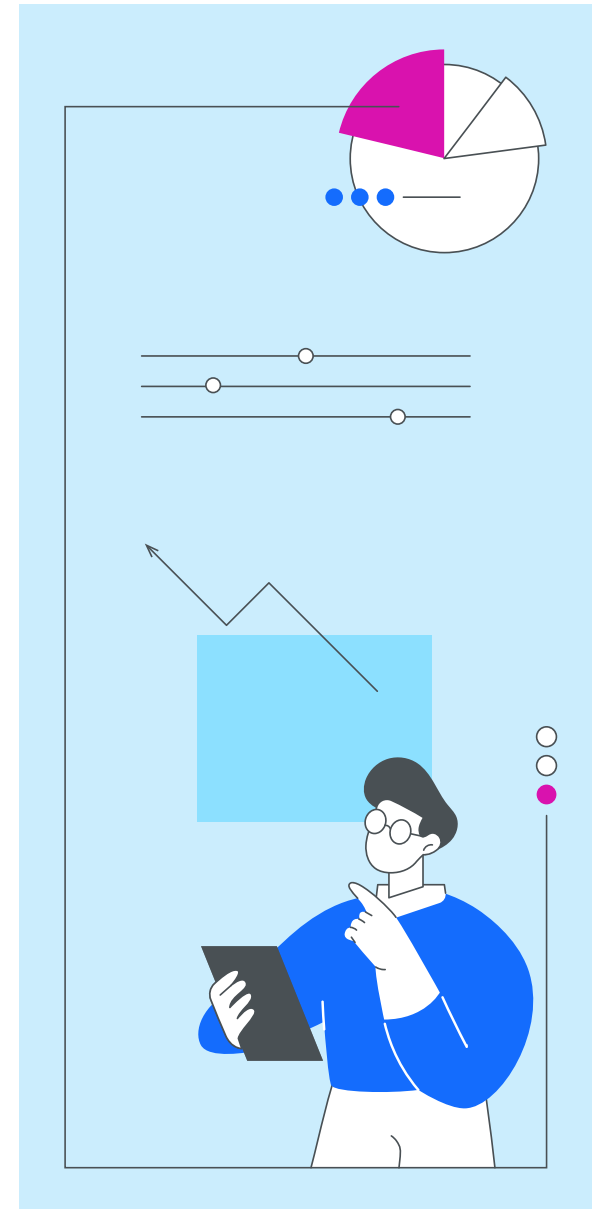
Timely and cost-efficient delivery of the full pipeline and the Strategy will require whole-of-government coordination.

Box 2

10 Strategic Infrastructure Objectives

The 2022 State Infrastructure Strategy is Infrastructure NSW's independent advice on the state's needs and strategic infrastructure priorities over the long term.² The Strategy made 57 recommendations across 9 long-term objectives. The 2023-24 Plan identified a 10th long-term objective to respond to housing supply and affordability pressures.³

1. Boost economy-wide productivity and competitiveness.
2. Service growing communities.
3. Embed reliability and resilience.
4. Achieve an orderly and efficient transition to Net Zero.
5. Enhance long-term water security.
6. Protect our natural endowments.
7. Harness the power of data and digital technology.
8. Integrate infrastructure, land use and service planning.
9. Design the investment program to endure.
10. Unlock housing supply through enabling infrastructure.



2 Infrastructure to unlock housing growth

Australia is experiencing a housing supply shortage. Australia's number of homes built as a proportion of the population is well below the Organisation for Economic Co-operation and Development (OECD) average.⁴

The number of dwellings completed in NSW has been declining for the last several years.

To address this, the NSW Government has committed to the National Housing Accord target to deliver 1.2 million new homes by July 2029. NSW's share of this target is an average of 75,400 new homes per year.⁵

Densification in well-located areas

The NSW Government intends to leverage existing and planned infrastructure capacity for housing growth, specifically to increase density in well located areas in the east and north of Sydney.⁶

The NSW Productivity Commission has noted that increasing density through infill development is the most cost-effective and in-demand form of housing.⁷ Density 'done well' can be encouraged by investing in infrastructure that will increase liveability, social equity, and productivity.⁸

The 2023-24 Plan recommended that government focus on a limited number of priority precincts, apply a whole-of-government approach to housing, and adopt a simplified and transparent process for funding housing-related infrastructure.⁹

This recommendation is being applied, as new investment is targeted at key priority precincts and growth areas that will deliver maximum dwelling uplift for the least infrastructure expenditure, through the government's Transport Oriented Development (TOD) program.¹⁰ The TOD sites were chosen as they do not require major new infrastructure investment to realise housing growth.

To complement the TOD program and achieve better destiny outcomes the NSW 2024-25 Budget includes \$520 million for community infrastructure across seven priority precincts.¹¹

The NSW Budget also includes \$200 million in grants for local councils to fund increased investment in community infrastructure, green spaces and maintenance of local streets and footpaths.¹²

Social and affordable housing as community infrastructure

Delivering and maintaining social and affordable housing is a significant way the NSW Government can increase housing supply.

In the early 1990s, social housing as a share of total housing was around 6%. Today it is around 4%.¹³ The 2018 Strategy,¹⁴ the 2022 Strategy and the 2023-24 Plan all called for increased investment in social housing, and its benefits.

The 2024-25 NSW Budget committed a record investment in social housing across NSW:

- ▶ \$5.1 billion for 8,400 social homes (6,200 new and 2,200 replacement) with focus on women and children fleeing domestic violence
- ▶ \$1.0 billion to repair and maintain 33,500 existing social homes
- ▶ \$202.6 million to the Aboriginal Housing Office to support critical capital maintenance of First Nations social housing
- ▶ introduced a new state-led rezoning pathway to accelerate rezoning proposals from Homes NSW and Landcom.¹⁵

A strong social and affordable housing model supports government commitments. It is also likely to reduce pressure on future state and federal service provision.¹⁶ If workers and families cannot afford to live close to where they work, it reduces their quality of life, places additional pressure on transport infrastructure, and risks critical service workers leaving NSW.¹⁷

Affordable housing investments in the 2024-25 NSW Budget include:

- ▶ \$450.0 million equity injection to Landcom for a Key Worker Build to Rent Program in metropolitan areas of NSW
- ▶ \$200.1 million for Key Health Worker Accommodation Program in rural and regional areas.

Housing capacity created by connectivity, productivity, and service delivery

Increased housing growth is being accompanied by investment in important transport, social and community infrastructure.

Investment in transport projects increases Greater Sydney's capacity for new housing and supports increased density. Such projects are complicated, expensive, and come with significant delivery risks. The 2024-25 NSW Budget allocated the following funds:

- ▶ \$13.4 billion for Sydney Metro West
- ▶ \$5.5 billion for Sydney Metro – Western Sydney Airport
- ▶ \$4.2 billion for Western Harbour Tunnel Upgrade
- ▶ \$1.2 billion for Sydney Metro City and Southwest
- ▶ \$2.1 billion for Parramatta Light Rail Stage 2.

Investment in frequent and rapid bus services aims to unlock growth in well located areas outside the rail network.¹⁸ For example, the NSW Budget has committed to:

- ▶ \$1.9 billion for the Zero Emissions Buses Program
- ▶ \$327.1 million for buses and new services to connect Campbelltown, Liverpool, and Penrith to the new Western Sydney Airport.

Health and education investments in the 2024-25 NSW Budget include:

- ▶ \$395.3 million for hospital redevelopments at Cessnock, Eurobodalla, Liverpool, Moree, Nepean, Ryde, Shellharbour, Temora, and the Westmead Mental Health Complex
- ▶ \$265.0 million to upgrade Port Macquarie Hospital
- ▶ 130 new and upgraded schools, including \$1.4 billion for schools across regional NSW.

\$246.7 million has also been committed to enabling infrastructure, conservation activities and land acquisitions to accelerate the delivery of more housing in Western Sydney and across regional NSW.

3 Decarbonising the NSW economy

The NSW Government has legislated emissions reduction targets through the *Climate Change (Net Zero Future) Act 2023*, demonstrating a commitment to achieving Net Zero by 2050 and interim emissions reduction targets of 50% and 70% by 2030 and 2035, respectively.

Delivering Renewable Energy Zones

The Electricity Infrastructure Roadmap is a strategic priority for the NSW Government. In the Strategy, timely coordinated delivery of the roadmap was critical to achieving Net Zero.¹⁹ EnergyCo, under the *Electricity and Infrastructure Investment Act 2020*, is working to deliver 5 Renewable Energy Zones (REZs) across regional NSW.

A REZ enables the coordinated development of new energy transmission, generation, and storage infrastructure in energy rich areas. The development of the REZs is intended to support the continued supply of reliable, secure, and affordable energy as most NSW coal-fired power stations are decommissioned by 2033.

The first REZ to be delivered is in the Central West Orana, which has an intended network capacity of 6 gigawatts by 2038.²⁰

Investments in the 2024 25 NSW Budget include:

- ▶ \$4.4 billion in temporary funding for the Transmission Acceleration Facility
- ▶ \$128.5 million towards the Port to REZ Project – Road Upgrades and the Newcastle Port Logistics Precinct to accelerate REZ development.

The delivery of the REZs will require whole-of-government coordination to de-risk planning and delivery. Infrastructure NSW is working closely with EnergyCo, the Premier’s Department and key infrastructure delivery agencies to coordinate the enabling infrastructure required to deliver the REZs.²¹

Decarbonising infrastructure delivery

Infrastructure NSW is working to accelerate decarbonisation efforts across the sector. Infrastructure NSW has released the *Decarbonising infrastructure delivery policy*²² and *Technical Guidance: Embodied Carbon Measurement for Infrastructure*.²³

Codesigned between government and industry, this policy mandates that embodied emissions are considered across the infrastructure lifecycle, and that measurement is consistent across projects.

Embracing the policy and measurement guidance at a national level will also help drive industry decarbonisation. The measurement guidance was approved for national use by infrastructure and transport ministers in June 2024.

4 Prioritising employment through targeted infrastructure

Growing Western Sydney's economy

Western Sydney is Australia's third-largest economy and one of the fastest-growing population and employment centres.²⁴

The Western Sydney International (Nancy-Bird Walton) Airport is due to commence operation in late 2026. The area around the airport is attracting significant investment in industrial and logistics assets.

The Aerotropolis will focus on advanced manufacturing, technology, research, training and education, freight and logistics, agribusiness, and mixed-use development.²⁵

Investments in the 2024-25 NSW Budget are aligned to the Strategy²⁶ and include:

- ▶ \$5.2 billion for Western Sydney Roads, including \$1.0 billion to upgrade Mamre Road (stage 2)
- ▶ \$800.0 million to widen Elizabeth Drive.

To realise the full economic potential in Western Sydney, significant, sustained, and staged investment is required to ensure momentum. This includes a sustained pipeline of productivity enhancing investments in freight, transport, water, and wastewater infrastructure.²⁷

Infrastructure NSW (through the Infrastructure Co-ordinator General) is working with agencies to ensure the whole-of-government coordination of infrastructure to support employment, freight, and logistics.

Increasing domestic manufacturing and regional competitiveness

The NSW Government is increasing the state's manufacturing industry to accelerate economic growth and create local job opportunities.²⁸

There are significant opportunities for regional NSW, as the government works towards decarbonisation and increasing domestic manufacturing.

For example, the 2024-25 NSW Budget includes:

- ▶ \$332.2 million to transform Parkes into a national freight and logistics hub
- ▶ \$224.8 million to support Moree to become a northern gateway to diversify the agricultural and technology sectors.

Transport networks and roads are critical to NSW's regional and rural communities for travel, work, freight, and accessing education and healthcare facilities. The 2024-25 NSW Budget includes:

- ▶ \$1.4 billion for the construction of the M1 to Raymond Terrace extension and Hexham Straight Widening projects
- ▶ \$1.2 billion to continue delivering a new rail fleet to replace the ageing regional fleets
- ▶ \$1.1 billion for Princes Highway projects.

5 Investing in existing infrastructure

Maintenance as a critical investment

Safe and reliable government infrastructure assets are critical to quality of life and service delivery. A focus on large-scale infrastructure projects often overshadows the need for routine asset maintenance. As the NSW Government asset base grows, rebalancing investment from new assets to better use of existing assets is necessary.

The 2024-25 NSW Budget identifies an average of \$5.1 billion in maintenance per year. This will optimise value from the state's existing asset portfolio, particularly critical infrastructure.

For example:

- ▶ \$1.0 Billion for the Department of Education's Schools Maintenance Blitz
- ▶ \$319.0 million for replacement and maintenance for TAFE campuses
- ▶ \$250.0 million across NSW hospitals under the Critical Asset Maintenance Program.

The Strategy recommended that NSW Government increase expenditure on infrastructure maintenance, upgrades, and the augmentation of existing assets and networks.²⁹

The 2024-25 NSW Budget includes an average estimated infrastructure investment that is 12% higher than the previous 4 year investment average. This level of capital investment adds to the growing maintenance liability as the new assets become operational.³⁰

Significant improvements in asset management practices have increased focus on the importance of maintenance investment.

Box 3

NSW Government Asset Management approach

Infrastructure NSW provides independent assurance and support to agencies as they move towards compliance with the *Asset Management Policy for the NSW Public Sector* (NSW AM Policy).³¹

To manage the asset portfolio effectively, NSW Government is:

1. enhancing asset management practices
2. standardising maintenance liability measurements
3. integrating advanced technology to improve asset longevity and functionality.

Infrastructure NSW has finalised the *Maintenance and Renewals Funding Liability Methodology* for use by agencies. This methodology outlines a standardised approach to measuring and reporting maintenance liabilities to support better decision-making and financial planning, ensuring that investments are both strategic and sustainable.

Annual assessment of infrastructure supports decision-making

The 2022-23 State of Infrastructure Report identified several key challenges affecting the management and utilisation of the state's assets:³²

- ▶ **Ageing infrastructure:** Significant portions of the asset base are ageing (e.g. heritage-listed courthouses over 100-years old) and pose challenges in maintenance and suitability for modern use.
- ▶ **Maintenance liability:** The increasing maintenance liability suggests that greater investment in maintenance is needed to uphold asset functionality and service delivery standards. The rollout of the maintenance methodology should assist agencies to quantify and manage these risks.
- ▶ **Environmental impacts:** Extreme weather events have increasingly affected asset condition, necessitating robust resilience measures and proactive maintenance strategies.
- ▶ **Data and decision-making:** Effective asset management is hindered by inadequate data quality and availability. The lack of comprehensive and reliable data impacts strategic decision-making, particularly in asset utilisation and capacity management.

As natural hazards and disasters increase in prevalence and severity, the fiscal challenge of recovery maintenance is growing. The NSW Reconstruction Authority found that the 2022 flood events alone impacted 98 out of 128 local government areas, causing \$5.1 billion of insured damages, and significant impacts to regional NSW communities.³³ Average annual financial losses to the built environment from natural hazards is expected to increase to an estimated \$9.1 billion by 2060.³⁴

NSW is making significant recovery investments with \$3.3 billion for restoration works to repair local and state roads damaged in major flood events. In addition, the government is also committing \$2.0 billion for other disaster relief and recovery programs through the Disaster Relief Account, including \$303.5 million for repair and rebuild of water, sewerage, and community infrastructure, and to improve the resilience of infrastructure for future disasters.

These planning and fiscal challenges necessitate a strategic focus on enhancing resilience and maintaining the reliability of critical infrastructure. By leveraging government agency Strategic Asset Management Plans (SAMPs) and Asset Management Plans (AMPs), the annual budget can be prioritised to drive proactive investment through to support investment for infrastructure resilience.³⁵

NSW should also continue to explore opportunities for 'build back better' initiatives when managing both immediate recovery and addressing the underlying resilience needs.

Embedding resilience into decision-making

Since the release of the Strategy, progress has been made to incorporate resilience considerations in key decision-making processes. The NSW Government is developing a consistent methodology for vulnerability assessments. This will enable agencies to assess their asset base and support more accurate maintenance scheduling, more cost-effective resource allocation, and more informed investment decision-making.³⁶

NSW Treasury is also updating its Business Case Guidelines to better consider resilience, and natural and human shocks, early in the business case process. Agencies will be required to identify and, where material, quantify the potential risks and consequences to the proposed asset. This will support decisions that consider resilience.

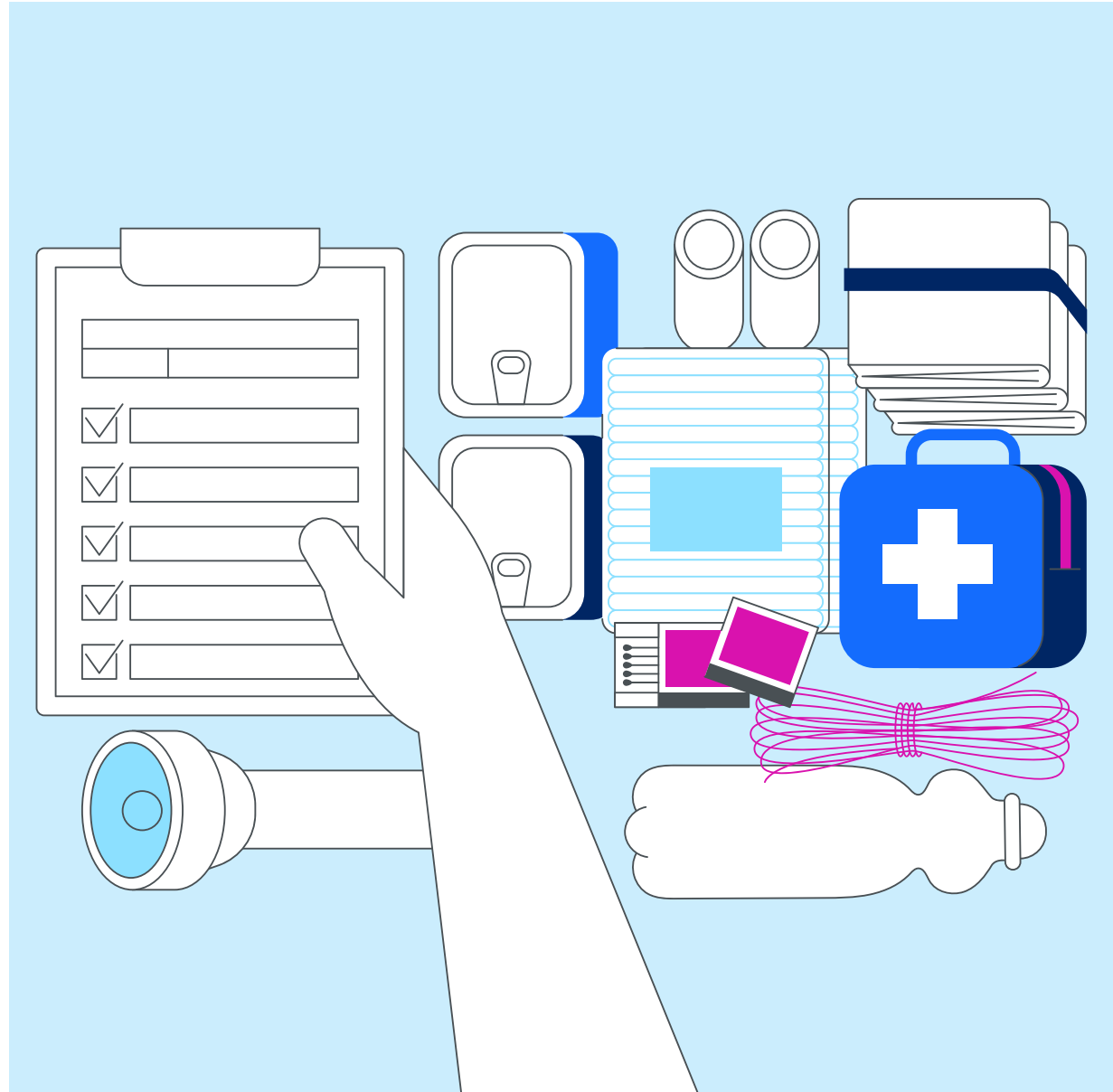
Box 4

State Disaster Mitigation Plan

The NSW Government has developed the State Disaster Mitigation Plan (SDMP),³⁷ following the 2022 NSW Independent Flood Inquiry.³⁸ Led by the NSW Reconstruction Authority, the SDMP identifies NSW's exposure to a range of natural risks, and how it may change over time.

The SDMP outlines 37 short to medium term actions, across government and industry, to increase investment in asset resilience. These include preparedness campaigns, local disaster adaptation plans, early warning systems and review of building codes and insurance levy arrangements.

Disaster Adaptation Plan guidelines and frameworks are being delivered to model localised, place-based resilience.³⁹



6 Market capacity, feasibility, and delivery challenges

Market capacity

The NSW Government has committed to an ambitious infrastructure agenda and pipeline of construction activity. This will increase demand for construction services at a time when parts of the industry are already constrained.

The NSW Government is focused on addressing several infrastructure challenges concurrently. These include an emerging public and private pipeline of work across energy, housing, water, and wastewater. This is in addition to the delivery of \$62.9 billion in transport projects.⁴⁰ Continued investment in critical and enabling infrastructure is required to support an increased housing supply.

Relatively high levels of procurement activity are already impacting the market's ability to respond to government procurement opportunities. In addition, NSW faces increased competition from the expanding infrastructure pipelines of other Australian jurisdictions. Increased coordination of procurement activity and

breaking up large contracts into smaller packages of work will increase the market's ability to respond to government procurement opportunities.

Realising the 2024-25 infrastructure pipeline relies on the capacity of the market to deliver. Frequent and proactive industry engagement, as well as project sequencing will help focus the resources and capacity.

Projects costs are increasing. Material costs remain high across a range of inputs, with particularly high demand for concrete, steel, and quarry inputs.⁴¹ While material escalation rates have eased, this remains an issue for project budget planning and delivery.

Skills shortages

Skills shortages represent a particular challenge for the infrastructure sector and the wider NSW economy; they are exacerbated by worldwide competition for construction skills.⁴² The estimated shortage across the Australian infrastructure

sector is around 197,000 workers, with key shortages for architects, engineers, labourers, planners, scientists, and trades.⁴³

There is a need to upskill the existing workforce with new skillsets and capabilities, especially in the areas of digitalisation and Net Zero. It is crucial to accelerate domestic rates of training and apprenticeships to ensure NSW remains competitive over the longer term.⁴⁴

The NSW Budget includes a record \$2.5 billion investment in TAFE NSW to train apprentices and trainees, and to re-skill existing workers.⁴⁵ \$252.2 million is also being invested to employ an additional 1,300 apprentices and trainees in the local government sector across NSW.⁴⁶

Increasing opportunities and incentives to encourage people of non traditional backgrounds to take up apprenticeships, and efforts to improve retention, will be helpful to address industry challenges.

Box 6

Attracting and retaining women in construction

Women currently make up approximately 12% of the construction industry. The NSW Government's Women in Construction Program aims to improve gender diversity in the industry. Attracting and retaining more people is critical to mitigate the skilled labour shortage.

Preliminary reporting, on projects piloting increased targets, indicates that the number of women in trades and non-traditional roles is increasing. But sustained improvements require continued focus and investment.

Feasibility challenges in residential housing

Addressing housing supply is a key priority of government. Under the National Housing Accord targets, NSW's annual housing construction will need to nearly double. Infrastructure NSW undertook industry consultation in May 2024 to better understand the challenges facing the residential construction industry.

Industry participants have indicated that there are significant challenges to the feasibility of residential construction projects. This is driven by a range of factors, including access to finance, assessment timeframes and other regulation, cost escalation, lack of suitable sites, and skills shortages.

Feasibility challenges represent a major risk to the realisation of the government's housing targets. Many factors that undermine project feasibility are beyond the control of the NSW Government, but there may be scope for government to take on a more active role in housing delivery, such as streamlining regulation and rethinking its role in the industry.

Industry participants have indicated that uncertain assessment pathways increase project risks and negatively impact project feasibility. Industry feedback suggests that residential development approval often takes much longer in NSW than in other jurisdictions. This feedback suggests that there are many avenues by which housing developments can be stopped or delayed.

Simplifying the planning assessment process and using a risk based approach to ensure appropriate scrutiny will reduce project risk and improve feasibility.

Rethinking government's role in housing construction

The NSW Government plays a key role in the housing industry, both as an investor and in the provision of social and affordable housing.⁴⁷ Industry participants have suggested that there are opportunities for government to take a more active role to incentivise institutional investment or as a housing developer in the general market. Sustained government investment could smooth housing delivery between the peaks and troughs of construction cycles, and increase industry resilience by providing a consistent pipeline of work and enabling consistent investment in training and apprenticeships.

Box 7

NSW Government Initiatives to Boost Housing Supply

In August 2024, the NSW Productivity and Equality Commission released its review on the barriers impacting housing supply in New South Wales.⁴⁸ Since the release of the review, the NSW Government has taken additional steps. These include:

The **Housing Taskforce** has been established to address post consent requirements. This taskforce coordinates multiple NSW Government agencies and departments to rapidly address conflicting government requirements and unblock development applications.⁴⁹

The **Housing Delivery Authority** has been launched to oversee a new state-led approval pathway for major residential housing projects above an estimated development cost of \$60 million (100 or more homes) in Greater Sydney, and \$30 million (40 or more homes) in regional NSW.⁵⁰

These initiatives are designed to streamline and better coordinate the assessment of development applications, as well as critical infrastructure necessary to increase housing supply.

Modern methods of construction can improve efficiency, but challenges remain

Modern Methods of Construction (MMC) includes offsite, prefabrication and 3D modular construction options as well as streamlining planning, design, and delivery of infrastructure and housing.⁵¹ The Australian MMC industry is still developing – government should explore opportunities to leverage current capabilities (i.e. standardisation at scale).⁵²

Increased uptake of MMC presents an opportunity to mitigate supply constraints and improve productivity, but how to best use and focus MMC in NSW must be further investigated. Homes NSW has invested \$10 million to trial using MMCs to speed up delivery of permanent social housing. Wollongong and Lake Macquarie have been identified as suitable locations for the first modular social homes. Completion is expected in mid 2025.⁵³ School Infrastructure NSW has also committed to delivering dozens of new and upgraded public schools and preschools using MMC.⁵⁴

Box 8

NSW Government Principles for Partnership with the Construction Industry

The *NSW Government Principles for Partnership with the Construction Industry* (released December 2024) highlights priority areas to enable the successful delivery of high quality infrastructure for the people of NSW. The policy highlights how industry participants should work together to improve productivity, encourage industry financial sustainability, and enhance worker safety and wellbeing.

Digital capability can support productivity

Workforce education and digital skills capability in the infrastructure sector is a key enabler of productivity.⁵⁵ To support this, the government has established the *NSW Digital Skills & Workforce Compact (2023-30)*.⁵⁶

As infrastructure and digital spheres become increasingly intertwined, NSW should continue to build agencies' digital maturity and capabilities.⁵⁷ Benefits of data and digital technologies are maximised when considered across the whole asset lifecycle, embedded in agency processes, and deployed at scale.

Greater policy coordination and better cyber security and data management across the infrastructure lifecycle is crucial for embedding digital tools and practices.⁵⁸ In delivering on the infrastructure pipeline, a key focus is to increase digital capability uplift across government agencies. Increased digital practices will mitigate cost, delivery, and planning risks. Critical to these efforts will be a common data governance framework to ensure data accuracy and more efficient decision-making.⁵⁹



7 NSW infrastructure pipeline

The NSW Infrastructure Pipeline provides a forward view of NSW Government infrastructure projects valued over \$50 million that are expected to come to market (included in the 2024–25 NSW Budget).

It consists of 3 lists:

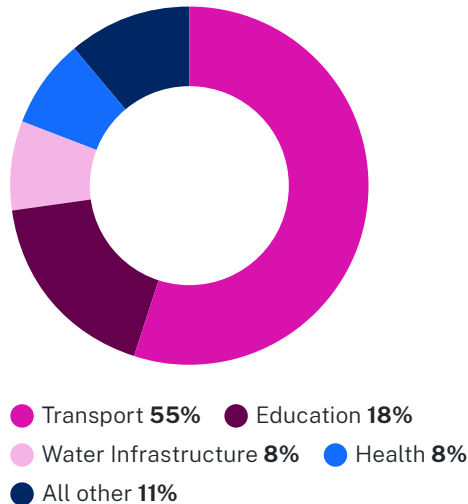
- ▶ Capital projects funded for delivery (pipeline).
- ▶ Capital projects with funds committed for planning (in planning).
- ▶ Asset management projects funded for delivery (asset management).

The purpose of the NSW Infrastructure Pipeline is to increase transparency of upcoming work and allow industry to plan resourcing and capacity. It also enables industry to target projects they may be better suited to deliver, from a capacity and time perspective.

The 2024–25 Pipeline consists of 179 infrastructure projects, of which 41% have received a funding commitment for delivery and 59% are in planning.

The transport sector accounts for most of the NSW Infrastructure Pipeline 55% of projects. This is followed by the education (18%), water (8%) and health (8%) sectors (Figure 1). Regional projects account for 44% of the NSW Infrastructure Pipeline.

Figure 1: NSW Infrastructure Pipeline, share by sector



Source: Infrastructure NSW

Note: Excludes projects under \$50 million. Shares may not add up to 100% due to rounding.

The [NSW Infrastructure Pipeline](#) includes major infrastructure projects in planning, upcoming for procurement, and asset maintenance projects. The pipeline is hosted on the Infrastructure NSW website and updated periodically throughout the year, during budget reviews and as major contracts are awarded.⁶⁰

Endnotes

- 1 [NSW Government, 2024-25 Half-Yearly Review, December 2024](#). NSW Government, [NSW Budget 2024-25 – Budget Paper No. 3 Infrastructure Statement](#), June 2024. Infrastructure NSW, [2023-24 State Infrastructure Plan](#), NSW Government, November 2023.
- 2 Infrastructure NSW, [Staying Ahead: State Infrastructure Strategy 2022-2042](#), NSW Government, May 2022.
- 3 Infrastructure NSW, [2023-24 State Infrastructure Plan](#), NSW Government, November 2023.
- 4 Organisation for Economic Co-operation and Development (OECD). Australian Treasury, [Federal Budget Paper 1 – Statement 4: Meeting Australia’s Housing Challenge](#), Australian Government, May 2024.
- 5 Department of Planning, Housing and Infrastructure, [Quarterly Pipeline Progress](#), NSW Government, July 2023.
- 6 As outlined in recommendation 44 of the Strategy.
- 7 NSW Productivity Commission, [Building More Homes Where People Want to Live](#), NSW Government, May 2023. NSW Productivity Commission, [Building more homes where infrastructure costs less](#), NSW Government, August 2023.
- 8 NSW Productivity Commission, [Building More Homes Where People Want to Live](#), NSW Government, May 2023. NSW Productivity Commission, [What We Gain by Building More Homes in the Right Places](#), NSW Government, February 2024.
- 9 Infrastructure NSW, [2023-24 State Infrastructure Plan](#), NSW Government, November 2023.
- 10 Department of Planning, Housing and Infrastructure, [Transport Oriented Development](#), NSW Government, April 2024.
- 11 Department of Planning, Housing and Infrastructure, [Transport Oriented Development – Accelerated Precincts](#), NSW Government, December 2023.
- 12 NSW Government, Chris Minns & Paul Scully – media release – fairer housing targets announced with incentives to councils to build better communities for NSW – Wednesday, NSW Government, May 2024.
- 13 Coates, B., [A place to call home: it’s time for a Social Housing Future Fund](#), Grattan Institute, November 2021.
- 14 Infrastructure NSW, [State Infrastructure Strategy 2018](#), NSW Government February 2018.
- 15 NSW Government, media release – Paul Scully & Rose Jackson – Development assessment timeframes for social and affordable housing to be halved under Labor, NSW Government, May 2024.
- 16 Australian Housing and Urban Research Institute, [The case for social housing as infrastructure: Social housing as infrastructure: rationale, prioritisation and investment pathway](#), June 2019. SGS Economics and Planning, [Give Me Shelter The long-term costs of underproviding public, social and affordable housing, cost-benefit analysis report](#), June 2022. Pawson, H., Randolph, B., Leishman, C., Gurrin, N., Mares, P., Phibbs, P., Milligan, V., [The market has failed to give Australians affordable housing, so don’t expect it to solve the crisis](#), University of NSW, October 2022.
- 17 NSW Productivity Commission, [What We Gain by Building More Homes in the Right Places](#), NSW Government, February 2024.
- 18 As outlined in recommendation 1 of the Strategy.
- 19 As outlined in recommendations 22, 23, 24, and 25 of the Strategy.
- 20 NSW Government, [Schedule – Amendment to the CWO REZ declaration](#), Renewable Energy Zone (Central West Orana) Order 2023, 14 December 2023.
- 21 C O’Reilly and V Nemes, [NSW Electricity Supply and Reliability Check Up](#), prepared for NSW Treasury – Office of Energy & Climate Change, Marsden Jacob, August 2023.
- 22 Infrastructure NSW, [Decarbonising infrastructure delivery policy](#), NSW Government, April 2024.
- 23 As outlined in recommendation 27 of the Strategy. Infrastructure NSW, [Technical Guidance: Embodied Carbon Measurement for Infrastructure](#), April 2024.
- 24 Morrison, N., Cmielewski, C., O’Neill, P., Pfautsch, S., and Power, E., [Wicked Urban Challenges in Western Sydney: Researchers Respond](#), 2022.
- 25 Infrastructure NSW, [Staying Ahead: State Infrastructure Strategy 2022-2042](#), NSW Government, May 2022.
- 26 As outlined in recommendation 3 of the Strategy.
- 27 Infrastructure NSW, [Staying Ahead: State Infrastructure Strategy 2022-2042](#), NSW Government, May 2022.

- 28 NSW Government, Media release – [NSW Government asserts focus on rebuilding domestic manufacturing capability](#), NSW Government, February 2024.
- 29 Infrastructure NSW, [Staying Ahead: State Infrastructure Strategy 2022–2042](#), NSW Government, May 2022.
- 30 NSW Government, [NSW Budget 2024-25 – Budget Paper No. 3 Infrastructure Statement](#), June 2024.
- 31 NSW Treasury, [Asset Management Policy](#), NSW Government, October 2019.
- 32 Infrastructure NSW, [State of Infrastructure Report](#), NSW Government, June 2023.
- 33 NSW Reconstruction Authority, [State Disaster Mitigation Plan 2024-2026](#), NSW Government, February 2024.
- 34 NSW Reconstruction Authority, [State Disaster Mitigation Plan 2024-2026](#), NSW Government, February 2024.
- 35 As outlined in recommendations 18, 20 and 21 of the Strategy.
- 36 Infrastructure NSW, [2022-23 State of Infrastructure Report](#), NSW Government, June 2023.
- 37 NSW Reconstruction Authority, [State Disaster Mitigation Plan 2024-2026](#), NSW Government, February 2024.
- 38 NSW Government, [2022 Flood Inquiry Volume 2: Full report](#), July 2022.
- 39 As outlined in recommendation 17 of the Strategy.
- 40 Across Sydney Metro West, Sydney Metro – Western Sydney Airport, Western Harbour Tunnel Upgrade, Sydney Metro City and Southwest, and Parramatta Light Rail State 2.
- 41 Australian Bureau of Statistics, [catalogue 6427.0 Producer Price Indexes, Australia](#), Australian Government, December 2024.
- 42 Infrastructure NSW, [2023-24 State Infrastructure Plan](#), NSW Government, May 2022.
- 43 Infrastructure Australia, [2024 Infrastructure Market Capacity report](#), Australian Government, December 2024.
- 44 Infrastructure NSW, [2023-24 State Infrastructure Plan](#), NSW Government, May 2022.
- 45 NSW Government, Steve Whan – media release – NSW Budget 2024-25, NSW Government, June 2024.
- 46 NSW Government, Chris Minns – media release – \$252 million boost set to deliver 1,300 new apprentices and trainees, NSW Government, July 2024.
- 47 Infrastructure NSW, [Staying Ahead: State Infrastructure Strategy 2022–2042](#), NSW Government, May 2022.
- 48 NSW Productivity and Equality Commission, [Review of housing supply challenges and policy options for New South Wales](#), NSW Government, August 2024.
- 49 NSW Government, [Housing Taskforce speeding up the delivery of more homes](#), NSW Government, November 2024.
- 50 NSW Government, Chris Minns and Paul Scully – media release – NSW Government to launch new Housing Delivery Authority to boost housing supply, NSW Government, November 2025.
- 51 Land and Housing Corporation, [Modern Methods of Construction](#), NSW Government.
- 52 Ziaesaeidi, P., [Prefabs and the 'missing middle': how to get Australia back on track to build 1.2 million homes in the next 5 years](#), The Conversation, 13 June 2024.
- 53 NSW Government, [Modular homes to deliver more social housing, sooner](#), NSW Government, July 2024.
- 54 NSW Department of Education: School Infrastructure NSW, [New manufacturing program for building NSW public schools](#), NSW Government, February 2024.
- 55 Centre for Digital Built Britain, [BIM Interoperability Expert Group Report](#), Construction Innovation Hub March 2020.
- 56 Department of Education Training Services NSW, [The NSW Digital Skills and Workforce Compact 2023-30](#), NSW Government 28 November 2023.
- 57 As outlined in recommendation 38 of the Strategy.
- 58 As outlined in recommendation 38, 42 and 49 of the Strategy.
- 59 As outlined in recommendations 41, 42 and 50 of the Strategy. Infrastructure NSW, [State of Infrastructure Report](#), NSW Government, June 2023.
- 60 Infrastructure NSW, [The NSW Infrastructure Pipeline](#), NSW Government, February 2025.

© February 2025. *2024-25 State Infrastructure Plan*.

This document was prepared by Infrastructure NSW. It contains information, data and images ('material') prepared by Infrastructure NSW. The material is subject to copyright under the Copyright Act 1968 (Cth), and is owned by the State of New South Wales through Infrastructure NSW. This material may be reproduced in whole or in part for educational and non-commercial use, providing the meaning is unchanged and its source, publisher and authorship are clearly and correctly acknowledged.

DISCLAIMER

While every reasonable effort has been made to ensure that this document is correct at the time of publication, Infrastructure NSW, its agents and employees, disclaim any liability to any person in response of anything or the consequences of anything done or omitted to be done in reliance upon the whole or any part of this document. Please also note that material may change without notice and you should use the current material from the Infrastructure NSW website and not rely on material previously printed or stored by you.

For enquiries please contact mail@insw.com