
2025–26 State Infrastructure Plan

A 5-year plan for NSW

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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



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1 Introduction and context

The NSW Government's 2025–26 NSW Budget includes a \$118.3 billion infrastructure investment pipeline. Average annual investment is broadly in line with the 2024–25 NSW Budget at \$29.6 billion between 2025–26 and 2028–29.¹

Key infrastructure investment includes:²

- ▶ \$55.6 billion for public transport and roads
- ▶ \$12.4 billion for health infrastructure
- ▶ \$11.0 billion for education and skills
- ▶ \$7.1 billion to build stronger communities
- ▶ \$4.2 billion for energy, environment and water infrastructure.

The NSW Government is focused on repairing the budget and building resilience amid ongoing economic pressures. Investment continues to be driven by major infrastructure projects like Sydney Metro West, the Western Sydney Harbour Tunnel Upgrade, Sydney Metro – Western Sydney Airport, the Zero Emissions Buses Program, and Bankstown Hospital.

The 2025–26 NSW Budget also funds new initiatives, including 15 new schools, the largest courts infrastructure upgrade in a decade, major TAFE investments to expand access to education and training, and the construction of the Newcastle Logistics Precinct to support NSW's renewable energy transition.

The 2025–26 Plan

The 2025–26 State Infrastructure Plan (the Plan) outlines the infrastructure priorities for the NSW Government over the next 5 years, linked with the expenditure in the 2025–26 NSW Budget. The Plan is developed annually as required under the *Infrastructure NSW Act 2011*.

The Plan also outlines the current NSW Infrastructure Pipeline (projects over \$50 million), reflecting projects funded in the NSW Budget, including estimated cost and delivery timeframes.

Infrastructure NSW advises the NSW Government on prioritising the NSW Infrastructure Pipeline to deliver its commitments efficiently and meet future demand. This advice aligns with government priorities and the strategic directions in the [State Infrastructure Strategy 2022–2042: Staying Ahead](#) (the Strategy).

Box 1

Infrastructure Coordinator General

The NSW Government's infrastructure priorities remain aligned with those set out in the 2024–25 Plan.

In the lead-up to the 2025–26 NSW Budget, the Coordinator General provided advice to government on infrastructure-related investments and their alignment with strategic priorities.

Infrastructure NSW continues to support improved asset management across the public sector through its Asset Management Assurance process. This includes delivering strategic advice to strengthen accountability, enhance performance, and build capability.

Box 2

Strategic infrastructure objectives

The Strategy is Infrastructure NSW's independent advice on the state's needs and strategic infrastructure priorities over the long term.³ The Strategy made 57 recommendations across 9 long-term strategic objectives. The 2023–24 Plan identified a 10th long-term objective to respond to housing supply and affordability pressures.⁴

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

NSW, like much of Australia, is experiencing a housing supply shortage. The NSW Government has implemented a package of reforms to support its commitment to NSW's share of the National Housing Accord (around 75,000 new homes per year for 5 years).

The NSW Government has taken steps to reform the planning system and is encouraging more homes to be built in established areas. Increasing density through infill development is the most cost effective way to deliver housing, boosts supply in high-demand areas and makes better use of existing infrastructure and services.⁵

Prioritising well-located homes

The NSW Government continues to prioritise well-located housing near existing and planned infrastructure. This presents an opportunity to deliver increased dwelling supply with minimal additional infrastructure investment.⁶

The NSW Government sets housing targets by local government area to guide development and signal where infrastructure investment is planned. In 2025, it will release 10-year targets to support well-located housing. Infrastructure NSW will continue to advise on existing infrastructure capacity, in collaboration with the Department of Planning, Housing and Infrastructure.

The NSW Government's Transport Oriented Development (TOD) Program is prioritising key precincts that do not require major infrastructure investment to realise housing growth. The 2025–26 NSW Budget allocated \$209.9 million for open space projects in TOD accelerated precincts.

In addition, the [Low and Mid-Rise Housing Policy](#) aims to deliver up to 112,000 homes in well located areas around nominated town centres and stations over the next 5 years.⁷

Increased housing growth is being supported by investment in transport and social infrastructure. For example, the 2025–26 NSW Budget includes:

- ▶ \$55.6 billion for public transport and roads
- ▶ \$9.0 billion for new and upgraded schools
- ▶ \$3.4 billion for new and upgraded hospitals.

Box 3

Housing Delivery Authority

The NSW Government is committed to delivering the homes needed by young people, families, and essential workers through planning reforms that streamline approvals for major housing developments.

To accelerate housing supply and meet targets under the National Housing Accord, the NSW Government has established the Housing Delivery Authority (HDA).

The HDA is leading a new, streamlined state significant development (SSD) pathway. This includes a SSD process with concurrent rezoning, to fast-track the delivery of well-located homes across NSW.

As of August 2025, the HDA has progressed 79,094 potential homes for approval through the new streamlined SSD pathway.

Social housing as community infrastructure

As both a major investor and provider of social and affordable housing, the NSW Government plays a critical role in housing development. Delivering and maintaining social housing is a key lever to boost supply.

Sustained public investment in housing can help smooth the construction cycle, provide a more stable pipeline of work and support long-term workforce development.

Last year, the NSW Government committed to a record investment in social housing. The 2025–26 NSW Budget builds on this through:

- ▶ \$1.0 billion per year from 2028–29 to 2033–34 for additional social housing stock
- ▶ \$1.0 billion for capital maintenance of existing social housing
- ▶ \$152.4 million for continuing construction, upgrades and maintenance of the Aboriginal Housing Office's stock.

Greenfield areas backed by infrastructure

Infrastructure investment to support greenfield housing growth is focused on areas and precincts where growth has already occurred, and where further dwelling uplift can be achieved.

For example, the 2025–26 NSW Budget has committed to:

- ▶ \$5.5 billion for roads to better connect Western Sydney
- ▶ \$3.9 billion to maintain, upgrade and build new schools across Western Sydney
- ▶ \$756.9 million for the Prospect Pretreatment Plant to meet increasing demand and ensure water quality.

Box 4

Targeted infrastructure plans to increase confidence

Infrastructure NSW is developing the Greater Macarthur and Wilton Infrastructure Plan, expected to be released in late 2025.

This plan will provide clarity on NSW Government infrastructure delivery in the area relative to development thresholds. It will support informed decisions by landowners, industry, councils and the community.

The plan will focus on the infrastructure in already rezoned areas or those currently undergoing rezoning – including roads, public transport, water, wastewater, schools and emergency services.

3 Decarbonising the NSW economy

Decarbonising infrastructure

In April 2025, the NSW Government's [Decarbonising Infrastructure Delivery Policy](#) came into effect, establishing consistent requirements for measuring embodied emissions across infrastructure projects.⁸

To support this, Infrastructure NSW and Transport for NSW released an updated [Decarbonising Infrastructure Roadmap](#). The roadmap outlines key government initiatives to drive emissions reduction over the coming years.⁹

The NSW Sustainable Buildings State Environmental Planning Policy (SEPP) mandates embodied carbon reporting for new developments, using the National Australian Built Environment Rating System (NABERS) methodology. To ensure consistency in measurement, Infrastructure NSW has collaborated with NABERS to develop aligned tools, including an emissions calculator and the [NSW Embodied Carbon Databook](#).¹⁰

These efforts are further reinforced by the [Net Zero Government Operations Policy](#). This policy sets clear decarbonisation targets for government buildings through the application of NABERS and Green Star performance ratings.¹¹

Box 5

Updating the Decarbonising Infrastructure Delivery Policy

Infrastructure NSW is working with government agencies and industry to update the Decarbonising Infrastructure Delivery Policy to incorporate whole-of-life carbon (WLC) emissions, including operational and enabled carbon.

Since the policy's release in April 2024, other Australian jurisdictions have advanced policies and guidance. NSW Treasury's [TPG24-34 Carbon Emissions in the Investment Framework](#) also integrates WLC emissions valuation into government investment proposals.

The update will also revise embodied carbon guidance to better capture operational and enabled emissions.

Energy transition coordination

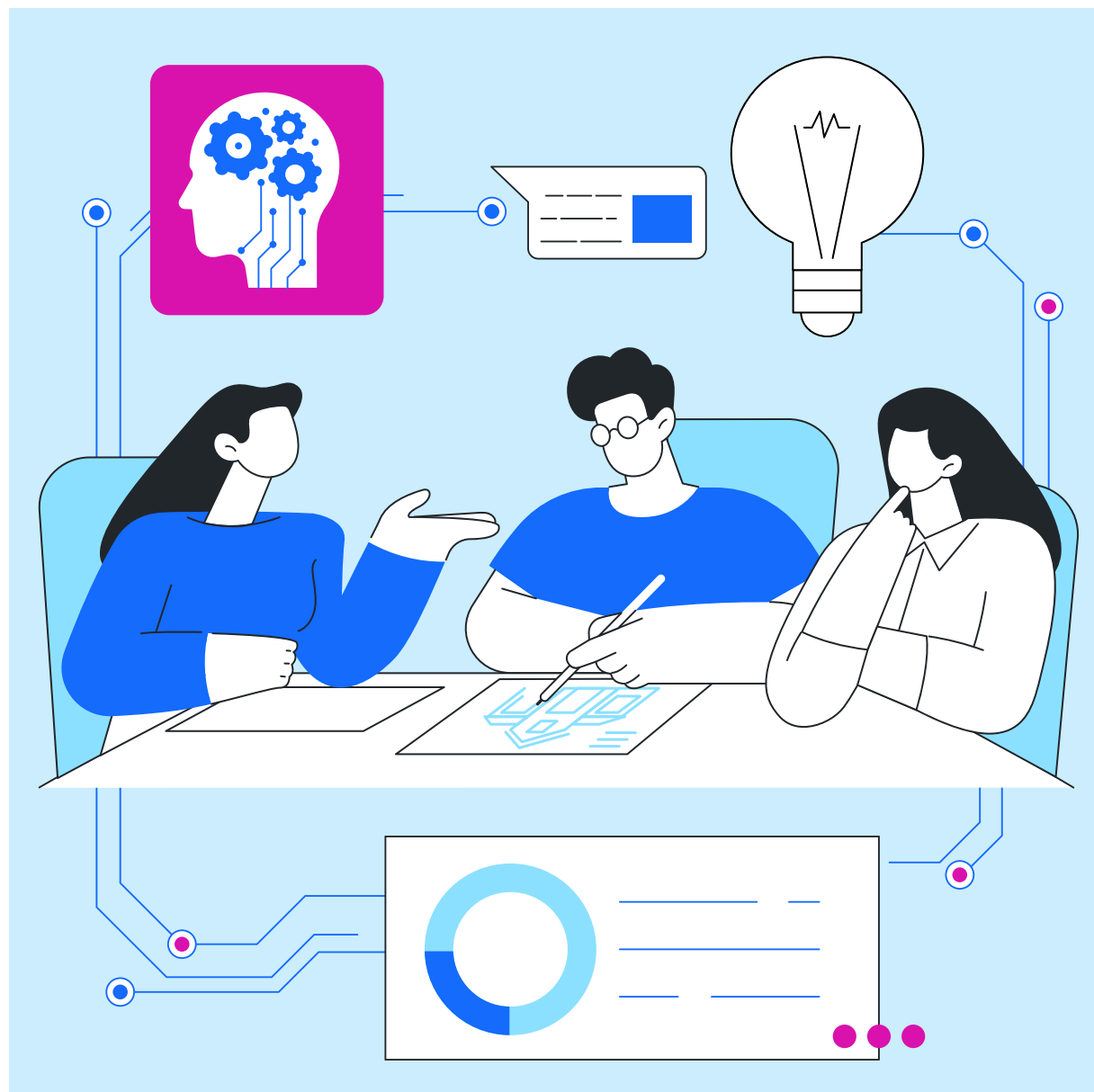
The Strategy highlighted the timely coordinated delivery of the Electricity Infrastructure Roadmap as critical to achieving net zero.¹² EnergyCo, under the *Electricity Infrastructure Investment Act 2020*, is working to deliver 5 Renewable Energy Zones (REZs).

The Electricity Infrastructure Roadmap is targeting infrastructure investments to support the construction of at least:

- ▶ 12 GW of generation capacity from the Central-West Orana, New England and South West REZs.
- ▶ Long duration storage (including pumped hydro and batteries) with 2 GW capacity before 2030.

The 2025–26 NSW Budget includes:

- ▶ continuing \$2.1 billion for the transmission acceleration facility to fast-track critical energy infrastructure and employment benefits programs
- ▶ allocating \$498.5 million for the construction of the Central-West Orana REZ, including land acquisitions, biodiversity offsets, and overseeing the network operator
- ▶ investing \$115.5 million for a logistics precinct at the Port of Newcastle
- ▶ continuing to deliver the \$91.4 million Port of Newcastle to REZ road upgrades that will help enable the movement of over-size over-mass construction components.



4 Local employment and investment

Western Sydney is Australia's third-largest economy and one of its fastest-growing population and employment centres.¹³ To realise the full economic potential in Western Sydney, significant, sustained, and staged investment is required.

Growing the Aerotropolis

The Western Sydney Aerotropolis is an 11,200-hectare area surrounding the future Western Sydney International Airport. It has attracted close to \$26 billion of private sector investment, focused on advanced manufacturing, technology, training and education, freight and logistics, agribusiness, and mixed use developments.

The NSW and Australian governments are laying the foundations for long-term economic growth, with over \$25 billion of investment in enabling infrastructure, including \$2 billion in the 2024–25 NSW Budget.¹⁴

Efficient transport and freight links will be critical to connect the Aerotropolis with Greater Sydney. The 2025–26 NSW Budget commits \$3.6 billion for the Western Sydney Airport Metro to provide a rail connection to the Aerotropolis.

These connections are essential to support workforce access, unlock future investment and ensure the precinct delivers on its job creation potential.

Box 6

The Aerotropolis Sector Plan

In February 2025, Infrastructure NSW released the [Aerotropolis Sector Plan](#). The Sector Plan outlines how critical transport and water infrastructure will be prioritised and sequenced to unlock development in the Aerotropolis.¹⁵

Prepared in collaboration with NSW Government agencies, the Aerotropolis Sector Plan:

- sets out a plan for how and when infrastructure delivery priorities will service land
- provides confidence to industry on when development can take place
- establishes a foundation for strong coordination across government and aligned delivery of infrastructure programs.

The Aerotropolis Sector Plan analyses and prioritises transport and water-related projects that will enable development across 3 time horizons: 2027 (2 years), 2030 (5 years) and 2040 (15 years).

The Aerotropolis Sector Plan also identifies the need for prioritising future projects that are in planning stages, including the Western Sydney Fuel Pipeline and connections with South West Sydney.

Investment to progress actions under the Aerotropolis Sector Plan

The Aerotropolis Sector Plan has directly shaped investment decisions in the 2025–26 NSW Budget. Funding has been targeted to priority projects that deliver on the region’s economic and planning objectives:

- ▶ \$644.1 million to deliver an integrated stormwater and recycled water scheme in the Mamre Road Precinct – one of Western Sydney’s key economic growth corridors. To be completed by 2030, this will reduce reliance on rainfall-dependent sources and support sustainable urban development.
- ▶ A joint \$1 billion investment between the NSW and Australian governments¹⁶ (\$634.4 million in the 2025–26 NSW Budget) will upgrade Fifteenth Avenue. This is a vital transit corridor linking Liverpool to the new airport, boosting regional connectivity and streamlining freight and passenger movement.
- ▶ A joint \$800 million investment will upgrade Elizabeth Drive¹⁷ (\$580.1 million in the 2025–26 NSW Budget). A key east-west arterial route connecting emerging precincts and employment hubs with major north-south growth corridors.
- ▶ \$313.8 million for new bus services across the Western Sydney Aerotropolis. This will expand public transport options and ensure reliable connections for residents and workers as the region grows.
- ▶ An additional \$52.6 million will fund road safety upgrades, preparing the transport network for the airport’s opening and ensuring safe, efficient access.

Increasing domestic manufacturing

Manufacturing is a vital part of the NSW economy, employing 288,000 people and generating \$135.6 billion annually. However, manufacturing’s share of gross state product is declining due to a small domestic market, rising costs, global competition, and geopolitical uncertainty.¹⁸

The NSW Government has a long-term vision to grow domestic manufacturing and strengthen local employment. This is embedded in key strategic frameworks, including the [Principles for Partnership with the Construction Industry](#) and the NSW Industry Policy.

Expanding domestic manufacturing will improve productivity, increase export revenue, and strengthen supply chain resilience.¹⁹ Manufacturing also plays a critical role in advancing broader policy objectives, including increasing housing supply, supporting the energy transition, and achieving net zero emissions targets.²⁰

Over the next 5 years, the NSW Government is targeting growth in NSW’s gross value added for manufacturing and a 50% minimum local content target for future rail rolling stock by 2035.²¹

Box 7

Increasing opportunities for domestic manufacturing

Modern methods of construction (MMC) present a key opportunity to improve productivity and support NSW's manufacturing commitments.

Modern methods of construction – such as offsite, prefabricated, and modular construction – can streamline the planning and delivery of housing and infrastructure.

To realise these benefits, the NSW Government is:

- expanding opportunities for MMC and supporting the growth of a local MMC industry
- upskilling manufacturers and decision-makers in MMC and advanced manufacturing.²²

Pilot MMC programs are already underway. For example, Homes NSW is trialling MMC to accelerate social housing delivery, with modular homes rolling out in Wollongong, Shellharbour and Lake Macquarie. School Infrastructure NSW is also using MMC to deliver new and upgraded schools.

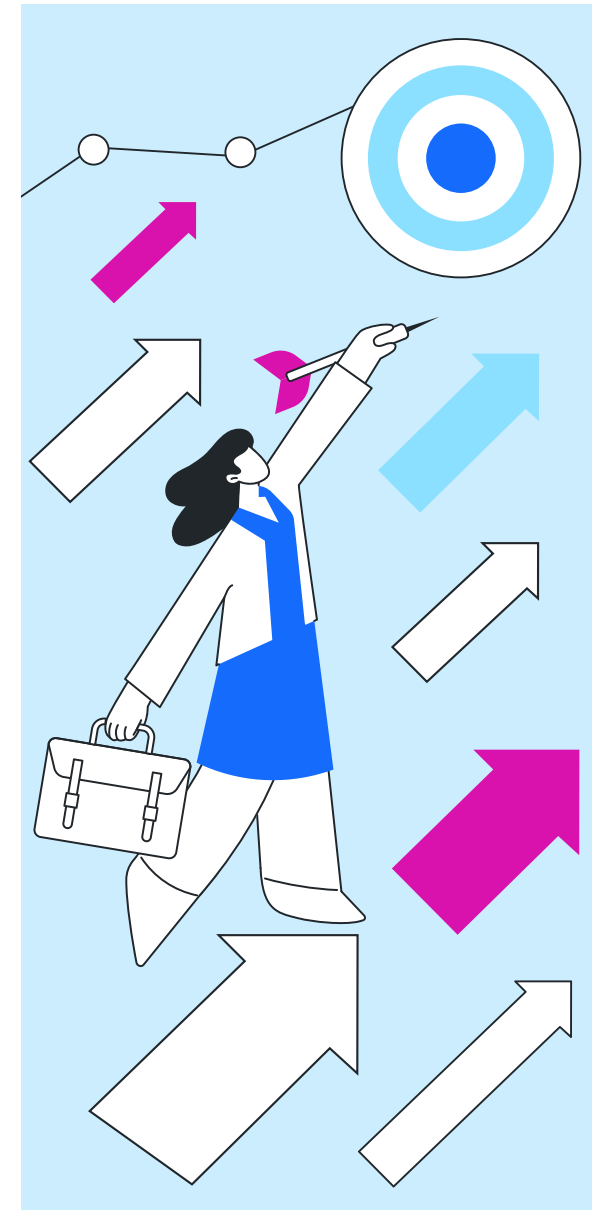
Other NSW Government initiatives to strengthen the state's manufacturing sector include:

- increasing opportunities for local content, local jobs, local manufacturing, and small business engagement in NSW Government infrastructure projects²³
- improving the supply chain to match services for regional manufacturing businesses.²⁴

Attracting private investment

The 2025–26 NSW Budget outlined the NSW Government's priority to attract private capital and accelerate the delivery of high-value projects. The NSW Government is establishing an Investment Delivery Authority, aimed at removing project bottlenecks.

Infrastructure NSW will support the Investment Delivery Authority, working with infrastructure delivery agencies for the planning and delivery of enabling infrastructure for major projects.



5 Investing and maintaining foundational infrastructure

Safe and reliable government infrastructure assets are critical to quality of life and service delivery. As the NSW Government's asset base grows, the investment required for maintenance also increases.

Maintenance as a critical investment

The NSW Government's asset portfolio is critical to delivering essential services to NSW communities. Maintaining these assets in a fit-for-purpose condition is fundamental to sustaining service delivery and maximising public value.

At the same time, the portfolio must evolve to meet population growth and support the government's strategic priorities. As the asset base grows, rebalancing investment from new assets to better use of existing assets is necessary.

The Strategy recommended that NSW Government budgets increase expenditure on infrastructure maintenance, upgrades, and the augmentation of existing assets and networks.²⁵

The 2025–26 NSW Budget includes investments focused on maintaining the asset portfolio and supporting high-quality service delivery. These include:

- ▶ \$91.3 million to renew and upgrade visitor infrastructure in national parks
- ▶ \$58.9 million for essential upgrades to the historic Pyrmont Bridge
- ▶ \$22.0 million for critical asset maintenance and rectification works for Warrawong sea walls
- ▶ \$10.0 million for priority infrastructure and asset maintenance in Sydney Olympic Park
- ▶ \$9.0 million for asset renewal throughout the Botanic Gardens of Sydney and Blue Mountains Botanic Garden.

Government capability is increasing

Since the introduction of the [Asset Management Policy for the NSW Public Sector](#) (the NSW AM Policy), NSW Government agencies have significantly increased their asset management capability.

This means agencies are:

- ▶ more informed on the risks and opportunities
- ▶ better equipped to prioritise asset investment
- ▶ able to balance cost, risk and performance.

Managing an increasingly complex asset portfolio

Agencies are becoming more attuned to the impacts of extreme weather, climate change, and cyber threats – factors that compound asset vulnerability and present long-term challenges beyond immediate service disruptions.

NSW Government agencies are managing an ageing and increasingly vulnerable asset portfolio. Ageing infrastructure is less adaptable to evolving customer needs and often incurs higher, more complex maintenance costs.

Investment and proactive lifecycle management is needed to mitigate growing risks to service delivery, safety, compliance, security and the broader economy.



6 Market capacity and deliverability

Over the next 5 years, the NSW Government's priorities require the delivery of significant transport projects. This is alongside almost doubling housing construction and accelerating the energy transition, both of which require significant enabling infrastructure.

Successfully delivering the 2025–26 Infrastructure Pipeline relies on the capacity of the market to simultaneously deliver on the NSW Government's priorities.

Collaborative and effective engagement is essential to manage risks

Infrastructure investment remains strong across Australia, though fewer new projects are being announced relative to previous years.²⁶

Construction is one of NSW's largest and most important sectors, but it faces challenges with financial sustainability and stagnant productivity, particularly in residential construction.²⁷

Productivity growth in the construction sector has lagged the broader economy for decades. This could have significant implications for housing and infrastructure delivery, including higher costs, slower project timelines, and reduced capacity to meet growing demand.²⁸

Major deliverability issues – such as skill shortages and cost escalation – have improved.²⁹ However, elevated operating costs, fixed-price contracts, and wage pressures continue to strain project budgets and timelines. These pressures are contributing to an elevated rate of business insolvencies.³⁰

Frequent and proactive industry engagement, as well as project sequencing, will help focus resources and capacity. The NSW Government has renewed its commitment to working with the construction industry through the new [Principles for Partnership with the Construction Industry](#).

Box 8

Principles for Partnership with the Construction Industry

The NSW Government's Principles for Partnership with the Construction Industry seeks to address current sector challenges and improve collaboration with industry to efficiently deliver the Infrastructure Pipeline.

The Principles for Partnership are:

1. strengthen domestic manufacturing
2. prioritise safety and wellbeing
3. drive productivity
4. invest in skills and local jobs
5. foster inclusive industry culture
6. improve financial sustainability
7. decarbonise to meet net zero targets.

Governments can influence construction sector sustainability through the way they contract. Approaches that prioritise long-term outcomes, provide pipeline certainty and allocate risk more effectively can help stabilise margins and reduce financial stress. Early contractor involvement supports risk identification and improves scope and design outcomes.



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 2025–26 NSW Budget).

The NSW Infrastructure Pipeline consists of 3 lists:

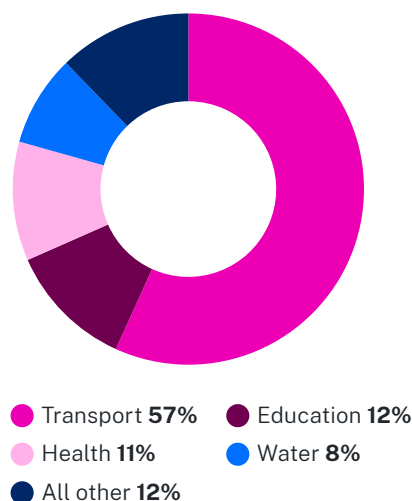
- ▶ capital projects funded for delivery (pipeline)
- ▶ capital projects with funds committed for planning (in planning)
- ▶ asset management projects funded for delivery (asset management).

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 2025–26 NSW Infrastructure Pipeline consists of 155 infrastructure projects, of which 42% have received a funding commitment for delivery and 58% are in planning.

The transport sector accounts for most projects (57%) followed by education (12%), health (11%) and water (8%) (see Figure 1).

Figure 1: NSW Infrastructure Pipeline, share of projects 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 or in procurement, and asset maintenance projects.

The NSW Infrastructure Pipeline is hosted on the Infrastructure NSW website and updated periodically throughout the year, during budget reviews, and as major contracts are awarded.³¹

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