
2023-24 State Infrastructure Plan

A 5-year plan for major infrastructure for NSW

Infrastructure NSW | November 2023

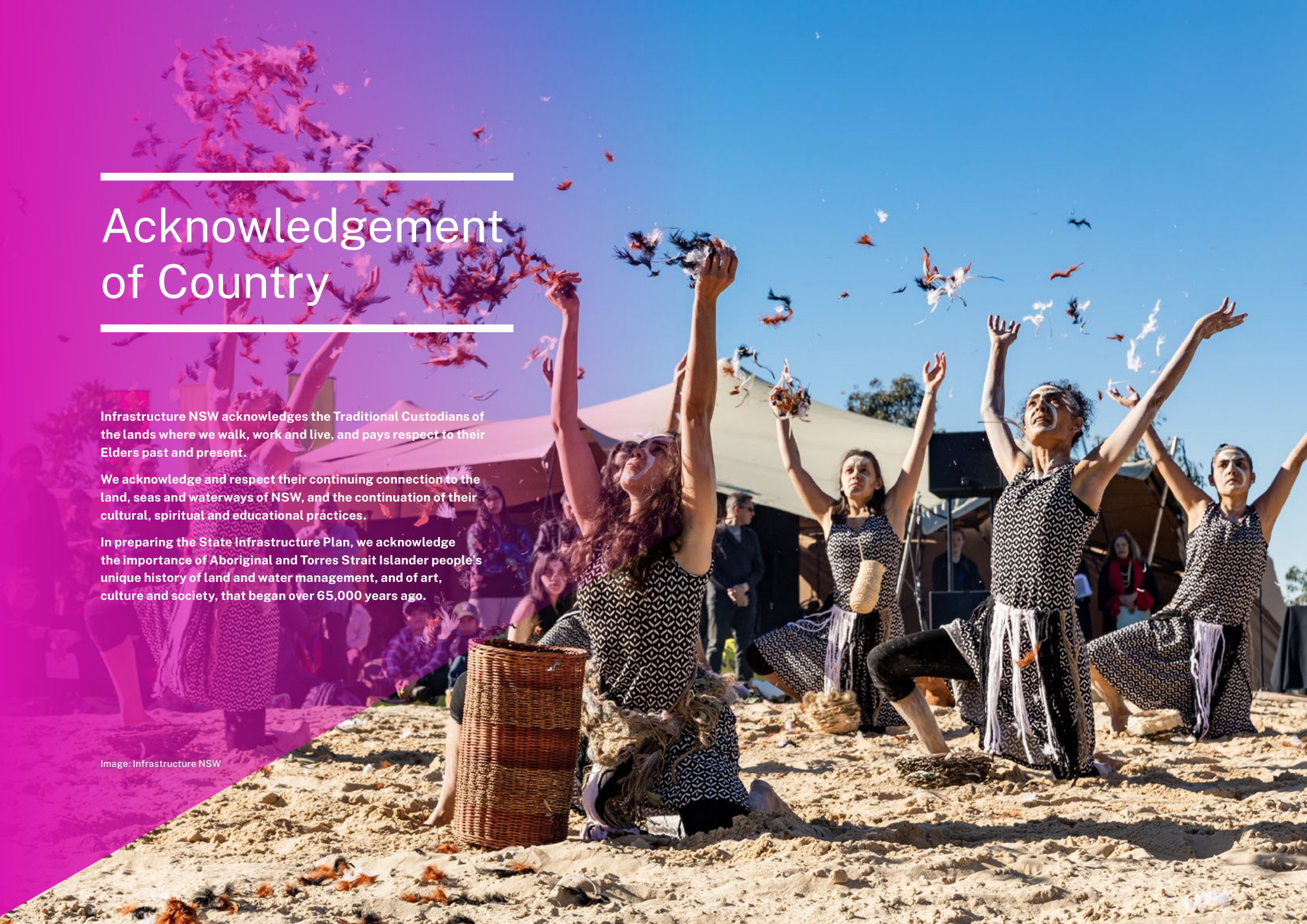
Acknowledgement of Country

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

High infrastructure investment continues with new priorities

The 2023–24 Budget includes \$116.5 billion in infrastructure investment over the next 4-years. The average estimated infrastructure investment of \$29.1 billion per annum is a new record and approximately 4% of Gross State Product.¹

The increase in total investment is due to new and additional funding for health and education. Investment in transport infrastructure remains strong supporting housing growth, improving productivity, and connecting communities to jobs and each other.

The NSW Government is committed to accelerating housing supply and is investing \$3.6 billion in clean energy infrastructure.

More efficient delivery of the pipeline will be required

As outlined in the NSW Treasury Budget papers, careful investment decisions have been made in a tight fiscal environment.² The infrastructure program is shifting away from complex and large megaprojects, towards the delivery of infrastructure to support essential services such as schools, hospitals, and roads.

A number of mega projects are currently in delivery, including major Sydney Metro projects. These mega projects are placing strain on the capacity of the NSW construction industry to deliver.

Ongoing skills shortages compounded by interstate and international competition for the same resources continue to be a challenge. To effectively mitigate against delivery risk, it will be key to improve the efficiency of infrastructure delivery and the productivity of the construction industry. Recent increases in immigration have helped but a focus on training and attraction of workers to the sector will also contribute to addressing skills shortages.

The pipeline provides greater visibility of NSW Government’s investment outlook for the construction industry. This in turn allows industry to better plan its resources in order to meet the State’s future infrastructure needs.

The State Infrastructure Plan

Infrastructure NSW provides regular advice to the NSW Government on the prioritisation of the forward pipeline to ensure existing commitments are delivered efficiently and future population and industry demands are met. The *2023–24 State Infrastructure Plan* (the Plan) outlines what the NSW Government has chosen to prioritise and invest in for the next five years, in the context of Infrastructure NSW’s advice.

Infrastructure NSW’s advice considers current NSW Government priorities and the strategic directions highlighted in the *Staying Ahead: State Infrastructure Strategy 2022–2042* (the Strategy). The Plan responds to the requirement of the Infrastructure NSW Act 2011 to produce an annual infrastructure plan for NSW.

NSW Government investment in the 2023–24 infrastructure pipeline is consistent with several recommendations and objectives in the Strategy. This Plan sets out further detail on the NSW Government’s priorities on housing, renewable energy and the importance of infrastructure resilience and asset management.

Appendix A provides project-level information for the NSW Major Infrastructure Pipeline (projects with a minimum capital value of \$50 million), including estimated cost and delivery timeframes.

Box 1

Alignment to Staying Ahead: State Infrastructure Strategy 2022–2042

The Strategy outlines Infrastructure NSW’s independent advice on the State’s needs and strategic priorities for infrastructure over the long-term.³ The Strategy made 57 recommendations (102 including sub-recommendations) across 9 long-term objectives aimed at improving outcomes and living standards for the people of NSW.

The Strategy’s objectives are aligned to NSW Government priorities and the 9 long-term objectives remain critical focus areas of NSW. Since the Strategy’s release, the fiscal and market position have changed. Housing supply and affordability have also emerged as critical issues to address immediately.

The Plan provides an overview of short-term policy and investment priorities necessary to work towards the 9 long-term objectives highlighted in the Strategy. The Plan recommends a further objective (Box 2) to unlock housing support through the timely provision of infrastructure.

The 9 long-term objectives of the Strategy

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.

2 Key priorities: refocusing infrastructure capital spend

The Strategy recommended the need to support flourishing communities by addressing housing supply and affordability issues, and essential services. The Strategy also highlighted the importance of an orderly and efficient transition to net zero.

The 2023–24 NSW Government Budget refocuses infrastructure investment on delivering outcomes across key priorities aligned with the Strategy’s objectives. The Budget also seeks to move to a more sustainable level of infrastructure investment, including prioritising asset management and maintenance.

Increasing housing supply and affordability

Australia is experiencing a severe housing crisis. Quality well-located infrastructure is essential in addressing NSW’s need for additional dwellings.

Nation-wide 1.5 million households are considered ‘at risk of mortgage stress’.⁴ It is estimated that 45.5% of the median income is required to service mortgage costs.⁵ Rents are continuing to increase strongly as vacancy rates remain at historic lows.

Chapter 4—*serving growing communities*—and chapter 10—*integrate infrastructure, land use and service planning*—of the Strategy outlined infrastructure as a key enabler of increased housing supply. Increased housing supply must be accompanied with the necessary supporting and enabling infrastructure, such as hospital, schools, road upgrades, and public spaces. This includes better access to essential services for vulnerable and disadvantaged communities, and delivering secure, affordable, and diverse housing across NSW.⁶

Since the release of the Strategy, housing affordability and accessibility have worsened. Reflecting the housing crisis, the National Housing Accord is targeting to build 1.2 million homes over the 5-years from July 2024. NSW’s share of this target is around 75,000 new homes per year over the 5-year period.

The 2023–24 Plan builds on the Strategy and identifies additional recommendations to unlock housing supply in NSW (Box 2). Infrastructure NSW will monitor progress against this objective and the other 9 objectives set out in the Strategy.

Box 2

Enabling housing supply is a critical short and long-term objective of the future infrastructure direction

Objective

Unlock housing supply through timely provision of infrastructure.

Strategic directions

- ▶ Leverage well-serviced locations and support greater density.
- ▶ Clarify priority precincts and housing areas to provide strategic alignment for NSW Government agencies and certainty for industry.
- ▶ Increase diverse and affordable housing options to meet different needs.

- ▶ Drive a consistent and timely approach to infrastructure investment to support housing.

Recommendations

1. Identify a limited number of priority precincts and growth areas that will deliver maximum dwelling uplift for the least infrastructure expenditure.
2. Commit to a whole-of-government program-level approach to land use planning and infrastructure investment to meet housing supply targets.
3. Adopt a simplified, earlier, and transparent process for funding and delivering routine housing-related enabling infrastructure.

Leverage well-serviced locations and support greater density

Recommendation 44 of the Strategy called to “deliver more housing, jobs, amenities and services in locations where there is spare capacity in existing and planned infrastructure.”⁷

Leveraging existing infrastructure capacity is important to maximising the benefits of growing NSW. Infill development and increasing density is a more cost-effective use of land, relative to greenfield development.⁸

The NSW Government is rebalancing growth around Sydney’s key transport hubs. Prioritising ‘doing density well’ around locations well served by existing infrastructure will deliver more benefits, and lower the costs of growing Sydney.⁹

Planning for additional homes in accessible and desirable locations will help attract and retain a skilled workforce and encourage private investment in housing.¹⁰

Clarify priority precincts and housing areas to provide strategic alignment for NSW Government agencies and certainty for industry

It is challenging to progress all identified precincts and growth areas simultaneously across NSW, especially with current fiscal and market constraints. The NSW Government should define and focus on a limited number of priority precincts and growth areas in Greater Sydney for coordinated planning and investment.¹¹

Strategic alignment between NSW Government agencies on delivery priorities will increase confidence for industry to focus housing investment in those areas.

Prioritisation of precincts and growth areas should consider:

- ▶ areas with existing infrastructure capacity
- ▶ leveraging previous investments in mass transport
- ▶ the inclusion of social and affordable housing
- ▶ staging and sequencing in line with market capacity
- ▶ options to create density and retaining NSW’s natural endowments.

The establishment of stable governance for selected precincts and growth locations is required to coordinate different tiers of government, industry, and community stakeholders.¹²

Increase diverse and affordable housing options to meet different needs

Access to housing supports participation in work, education and the community and is essential to wellbeing and prosperity. A mix of housing types, lots sizes and density are needed to support vibrant communities.

The NSW Government has a role in facilitating general housing market supply to enable households to have choice in purchasing or renting housing. This includes facilitating a supply of affordable housing for essential service workers. An increased focus on the supply of social and affordable housing is also needed.¹³

Recommendation 12 of the Strategy identified the need to “establish a financially sustainable social housing and related infrastructure program”. In particular, sub-recommendation 12 (d) called to “ensure strategic land use plans consider social and affordable housing developments in locations well connected to key infrastructure, services and amenities, and promote mixed tenure and diverse community outcomes.”¹⁴

Drive a consistent and timely approach to infrastructure investment to support housing

Infrastructure planning and coordination is critical for investment decision making. These investments create a pipeline of development ready land and is the principal way the government supports the delivery of new housing.¹⁵

Since the release of the Strategy, the NSW Government has introduced the Housing and Productivity Contribution (HAP) to replace the previous Special Infrastructure Contribution. The HAP aims to create a consistent fund that can contribute to the delivery of essential state infrastructure in Sydney, Illawarra-Shoalhaven, the Lower Hunter, and the Central Coast.

The NSW Government has also expanded the place-based Urban Development Programs (UDP), which will develop infrastructure opportunity lists. The delivery of infrastructure on the lists is subject to government budget and prioritisation processes.

The potential infrastructure investment needed to support growth is significant. Earlier understanding of the infrastructure costs and decision making is needed. This will avoid unnecessary expense on business cases and public sector resources on projects that are delayed or will not proceed. In addition, it will provide the community with clear expectations.

To achieve this, better and earlier information about the level of service demand, proactive asset management and the type of infrastructure investment is needed. There is also an opportunity to simplify program-level routine investment aimed at unlocking housing.

Prioritising reliability, affordability, and the transition to renewable energy

Chapter 6 of the Strategy—*achieve an orderly and efficient transition to net zero*—highlighted the importance of NSW ensuring an orderly and cost-effective net zero transition. The energy transition will play an important role in NSW’s success in achieving net zero.¹⁶

The NSW Government is focused on stimulating private investment in the renewable energy transition. This is to preserve a market-based approach to the energy transition and minimise the need for government subsidies. A rapid transition will require investment in technology and skills and create high-quality job opportunities across NSW.¹⁷

The NSW Government is focused on delivering the *Electricity Infrastructure Roadmap*, which will guide the NSW transition. Renewable Energy Zones (REZs) are being established to secure a supply of clean, affordable, and reliable electricity. The REZs will also be key to driving employment and economic wellbeing across regional NSW.

REZs locate infrastructure in large but defined areas to take advantage of economies of scale and cost-efficiency.¹⁸ Through an abundance of high-quality renewable energy resources, regional NSW is in a strong position to secure a supply of clean, affordable, and reliable electricity.

Improving asset resilience in an evolving climate environment

Due to the increasing risks of natural and human-induced shocks, the NSW Government is embedding resilience considerations into decision making across the infrastructure lifecycle. The Strategy outlines necessary policy changes to reduce the risk and impact of shocks on NSW communities and the economy.

New infrastructure assets are being designed to increase community resilience to severe weather events, changing climate conditions, public health crises, and cyber security threats. It is also crucial to identify and mitigate any potential risks to the existing asset base.¹⁹

The NSW Government is improving asset management and planning capacity and capability, particularly following natural hazard events (Box 3). It is also essential to better understand the infrastructure portfolio's vulnerability to shocks for increased asset resilience. The NSW Government is improving its understanding of risks to infrastructure and communities through the forthcoming *State Disaster Mitigation Plan*.

Greater visibility of asset management

The NSW Government infrastructure asset base has increased significantly over the last 10-years to \$493 billion and will only increase in the future.²⁰ Infrastructure investment should be focused on maximising the value of existing assets across the lifecycle by ensuring they are properly maintained, renewed, and replaced.²¹

Asset management is the cornerstone of infrastructure investment. It enables reliability, resilience, and longevity of the infrastructure that is essential to the people of NSW. It also ensures that the most cost-effective proposals that align with NSW Government priorities are selected.²²

The NSW Government is seeking to optimise agencies' existing portfolios by ensuring they are properly maintained, renewed, and replaced. Capital projects to deliver new assets should only be considered where these options have been explored and they do not deliver the required service need. This increases NSW Government's ability to enhance capabilities through cost-effective and low-risk interventions.²³

Asset management supports existing priorities, including housing. For example, a greater focus on asset management for NSW's social housing assets will also have benefits for tenants and the wider community. Designing and maintaining assets to modern standards, and improved maintenance and upgrades will ensure that tenants are safe and protected from natural hazard events and other shocks.²⁴

Box 3

Improving approaches to asset resilience

Infrastructure NSW is working in partnership with infrastructure delivery agencies and the NSW Reconstruction Authority (NSWRA) to improve approaches to infrastructure resilience.

In the aftermath of recent natural disasters, Infrastructure NSW is preparing a procedure guide to streamline processes around the collection of **data to support disaster response and recovery** for infrastructure impacted by natural disasters. This is to facilitate the coordination of emergency responses and reconstruction planning.

Building upon recent response and recovery experiences, Infrastructure NSW and the NSWRA are collaborating on a **Reconstruction Readiness Review** of agency practices and procedures following a disaster event. This Review will identify gaps and opportunities for improvements to asset management practices. Infrastructure NSW is supporting the NSWRA to embed resilience into decision making through the first **State Disaster Mitigation Plan**.

Infrastructure NSW is also working with NSW Treasury to improve guidance on resilience considerations in the NSW Business Case Guidelines, including risk assessments and resilience enhancing activities.

3 Market capacity and delivery challenges

NSW Government priorities require almost doubling housing construction and accelerating energy transition, while continuing with significant transport projects. It will challenge market capacity to deliver these projects simultaneously. Market capacity will be further complicated by global competition for skills, especially in clean energy. The scale of investment in the US, supported by the Inflation Reduction Act will attract in demand energy skills that are needed for projects in NSW.

Across Australia, the infrastructure sector continues to face challenges, such as skills and material shortages and cost escalation. A constrained national construction market and poor productivity is also placing pressure on contractors, suppliers, and investment in the sector.²⁵

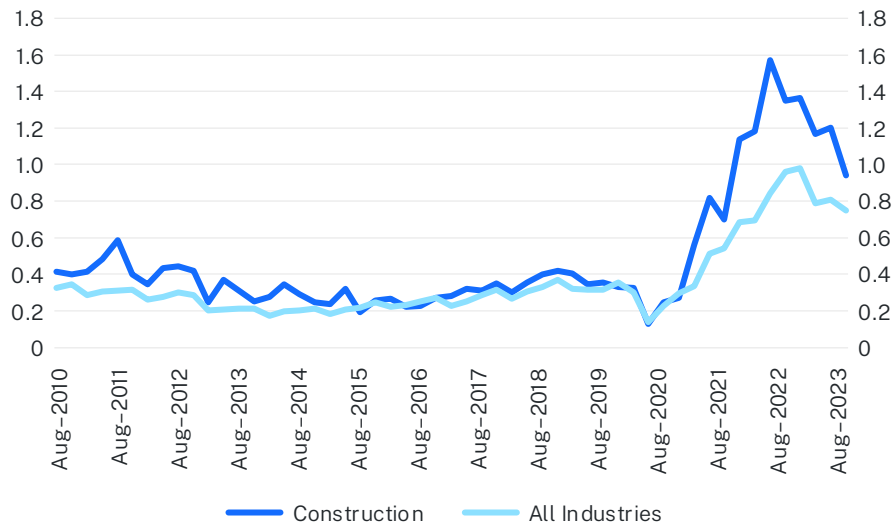
The challenging conditions over the last two years has contributed to a spike in NSW construction firm insolvencies over the past 12-months.²⁶ Nationally, the construction sector has accounted for around 30% of insolvencies.²⁷

Skills shortages and competition for workers for housing and energy projects will challenge delivery

Skills shortages are a significant challenge for the infrastructure sector and the NSW economy. Skilled immigration, training, and attraction of workers to the sector will play a role to address this challenge in the coming years, but there is not a quick fix.

There is strong demand for construction leading to rapid wage growth²⁸ and high vacancy-to-unemployment (Figure 1).²⁹ Skills shortages for key trades such as carpenters, plumbers, and electricians are particularly prevalent.

Figure 1: Vacancy-to-unemployment ratios



Source: Australian Bureau of Statistics, catalogue 6354.0, Job Vacancies, Australia, Australian Government; Australian Bureau of Statistics, catalogue 6291.0.55.001 Labour Force, Australia, Detailed, Australian Government.

Competing priorities between the States and Territories across housing and energy transition will increase pressure on the skilled labour supply over the coming years. Cross jurisdictional collaboration, frequent industry engagement, project sequencing and transparency on NSW Government priorities will help reduce pressure on infrastructure delivery in NSW.

The energy transition will make a profound structural adjustment to the Australian workforce over the next decade. The energy sector is skills intensive, requiring higher rates of tertiary education relative to other sectors of the economy.³⁰ Skilled migration can help meet

some short-term skills shortages and knowledge transfers but global competition for skilled labour in energy is increasing rapidly.³¹ Global labour shortages across energy supply chains are already impacting projects and investment decisions.³²

The development of major energy projects will increase skilled labour demand across regional NSW. The NSW Government and industry will need to collaborate to ensure regional areas are attractive to skilled labour. An expansion of services and the development of other employment options will increase incentives to relocate and remain in regional NSW.³³

It is also crucial to accelerate domestic rates of training and apprenticeships to generate a strong supply of skilled labour ensuring NSW remains competitive.

Box 4

Capability uplift in construction

The NSW Government Women in Construction Program aims to improve gender diversity and can support the current skilled labour shortage. Infrastructure NSW is leading this program, which has a specific goal to increase the number of women in trade and nontraditional roles across the construction industry, alongside the Department of Education and industry partners.³⁴

The NSW Office of the Building Commissioner has partnered with TAFE NSW to develop the Construct NSW Digital Learning Platform. The platform creates and sponsors training courses to address skills and learning gaps in the construction sector.³⁵

Material cost escalation is easing but prices remain high

Supply chain constraints and domestic material shortages have eased over the past 12-months; however, prices remain high.

Cost escalation has been a significant challenge for the NSW's Government's fiscal planning and the commercial viability of projects. Price growth peaked in late 2022 with increases slowing in 2023 but remains high (Figure 2).³⁶

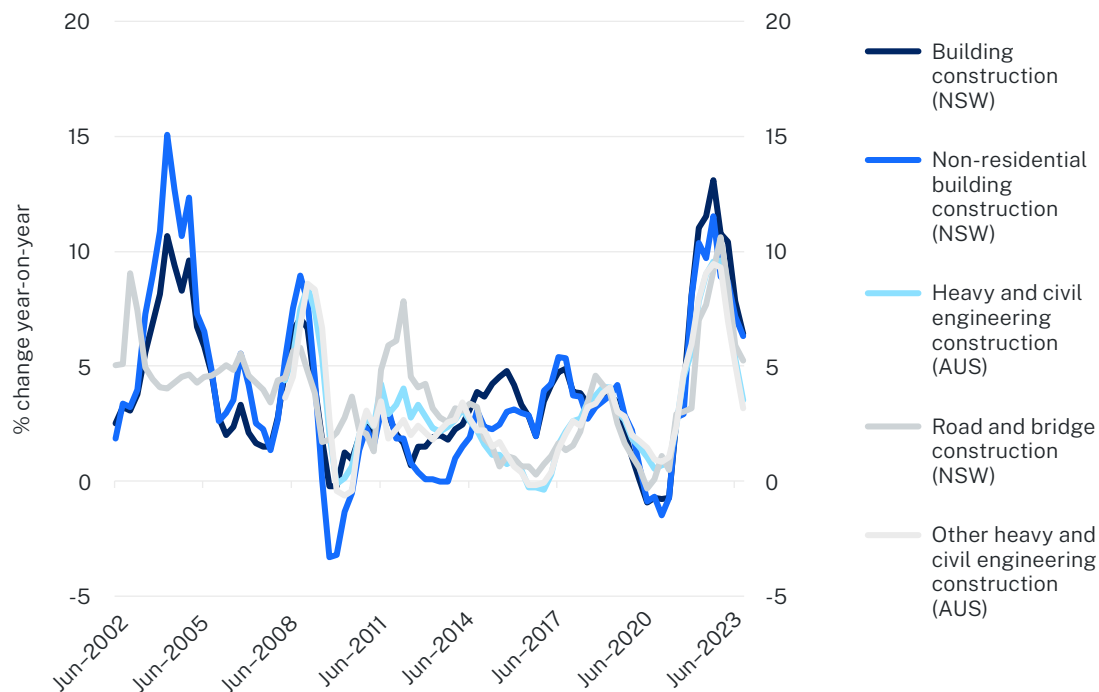
Cost escalation continues to be driven by key inputs—such as steel, timber, and cement. High freight and energy costs have also flowed into prices for inputs across the sector.

Box 5

Increasing sustainability in construction

Recommendation 27 of the Strategy called for the development of a roadmap for NSW public infrastructure to achieve Net Zero.³⁷ Infrastructure NSW is leading work to develop a *Decarbonising Infrastructure Delivery* policy to ensure that sustainability and carbon management is embedded into the infrastructure decision making process and across all stages of the project lifecycle.³⁸ The policy will require the consideration of non-build options, reusing existing assets, increasing the use of sustainable materials and tent measurement and reporting of upfront carbon across NSW infrastructure projects.

Figure 2: Construction Cost Inflation—annual percentage change in Producer Price Indexes



Source: Australian Bureau of Statistics, 6427.0 Producer Price Indexes, Australia, Australian Government.

The need and ambition to accelerate housing supply is great

The NSW annual share of the National Housing Accord target is significantly higher than average completions over the last 10-years.³⁹ Due to recent market challenges the lag between approvals and completions is increasing.⁴⁰ At current rates of dwelling approvals, NSW will be challenged to reach its share of the national housing target.

Elevated input costs, labour shortages, wage inflation and interest rates remain key challenges to housing construction. Industry-wide challenges are having negative consequences for the pipeline of new residential construction. NSW dwelling approvals have declined year-on-year.⁴¹

There are opportunities that can be harnessed to meet these challenges. Particularly in innovation and modernising construction methods, such as prefabrication and modular products. Investment from both NSW Government and industry is needed to focus resources to ensure that these markets are operating at scale in the coming years.

There is also a need for capability uplift across the sector to address gaps in the market. For example, there is a need to increase the number of firms certified for the construction of Class 2 buildings (i.e., apartments). This will require specific training and capability uplift across the sector.

Box 6

Increasing productivity in construction

Slowing construction sector productivity is an issue in Australia and internationally. Australia's construction productivity growth has been slow over the past 30-years and is lagging other sectors of the economy.⁴² Lifting productivity in the construction sector is particularly important in the current environment, given the NSW Government's ambitious infrastructure investment agenda and significant capacity constraints currently faced by the sector.

The Strategy highlighted the importance of **digital technology**, and that the application of digital practices combined with workforce capability uplift could drive productivity across the infrastructure sector. In particular, Recommendation 38 called for widespread adoption and use of digital technology in infrastructure planning, delivery, and operation.⁴³

Increasing digital capabilities in the construction sector will increase productivity, improve service delivery, drive cost efficiencies, and help lower emissions. Infrastructure NSW is currently finalising a whole-of-government Implementation Program to implement the *NSW Roadmap for digitalising planning, design, construction, and operation of infrastructure* released in November 2022.⁴⁴ Enhanced data and information management on construction projects and throughout the infrastructure lifecycle presents significant opportunities to improve productivity for the sector. Digitalisation and productivity uplift is also likely to result in the sector becoming more environmentally sustainable overtime, for example, through increased supply-chain efficiency and reduced materials wastage.

Infrastructure NSW is producing an overarching **Construction Industry Playbook** (the Playbook) to improve consistency across NSW Government delivery agencies and increase transparency for industry on current NSW Government policy positions and priorities. The Playbook will draw together infrastructure related policies and guidance into a single document. It will highlight government priorities for construction procurement policy including guidance to implement productivity improvements and sustainability goals.

4 Strategic investment direction and implementation

The NSW Government faces significant fiscal and market capacity challenges in delivering its infrastructure program. Irrespective of the current challenges, the 2023–24 Pipeline is focused on setting a new course for the people of NSW.

Careful consideration of the Pipeline

The NSW Government has conducted a series of rapid reviews to inform decisions on the infrastructure pipeline. These reviews, including the Strategic Infrastructure Review and the Sydney Metro Review, have examined the forward capital pipeline to consider value for money and balance the needs of the people of NSW with fiscal and market pressures.

The Strategic Infrastructure Review has informed the infrastructure pipeline for the 2023–24 Budget. The review also recommended stronger central oversight, coordinated decision making for future investments and alignment between infrastructure planning and housing supply.

Refocusing on new priorities to unlock growth

The NSW Government is delivering on the commitments that have been made to the people of NSW, with several megaprojects already in delivery (e.g., Sydney Metro West, Sydney Metro City and Southwest, and Sydney Gateway). These large and complex projects are expected to have a transformational impact on how NSW will grow and develop over the coming decades.

The 2023–24 NSW Government infrastructure program is targeted towards essential services. The NSW Treasury Budget papers announced a \$13.8 billion investment in health facilities and \$9.8 billion for new and upgraded schools. New public transport infrastructure is being directed to support new housing that is well connected to services and jobs.⁴⁵

The Budget papers show an increase in health, education, and public transport infrastructure investment compared to the previous year. Moreover, budget allocations have been made toward other policy priorities (i.e., increasing housing supply and the energy transition), consistent with objectives of the Strategy.⁴⁶

Designing the investment program to endure

The asset management capability of NSW Government agencies is improving. However, continued pressure on the asset base including from shocks and stresses requires a continued focus.⁴⁷

Infrastructure NSW is working with NSW Treasury, on the implementation of the NSW Asset Management Policy⁴⁸ so that the NSW Government can make value-driven decisions in an increasingly complex environment. Strategic Asset Management Plans (SAMPs) and Asset Management Plans (AMPs) will become key inputs to budget prioritisation.

Infrastructure NSW's 2022–23 *State of Infrastructure Report* recommends an approach to portfolio decision making and investment that:⁴⁹

- ▶ **Enables** agencies to realise the potential of assets through decisions that restore, replace, and preserve the asset base.
- ▶ **Unlocks** latent capacity to accommodate demand, share capability between agencies and adapting to change.
- ▶ **Creates** new capability by augmenting and upgrading existing assets and boosting resilience through transformation and building back better.

Infrastructure NSW is also developing a standardised methodology for agencies to report their maintenance and renewals liability.

For the first time, the NSW Major Infrastructure Project Pipeline includes major asset maintenance, upgrade, and renewal opportunities (Box 7).

Box 7

Asset maintenance, upgrade, and renewal pipeline

Infrastructure NSW has updated the NSW Major Infrastructure Project Pipeline to include upcoming major asset maintenance, upgrade, and renewal projects.

The purpose of including these projects is to elevate and promote the importance of asset maintenance across the NSW Government and to provide greater forward-looking transparency for private sector involvement.

The asset maintenance, upgrade, and renewal pipeline includes NSW Government procurement opportunities of asset maintenance, upgrade, and renewal opportunities where the opportunity:

- ▶ Has an estimated value of \$50 million or above.
- ▶ Will go to market within the next 7 years.
- ▶ Has been publicly announced.

It should be noted that this list only includes the major asset maintenance and management projects (i.e., those with a contract value over \$50 million) for uniformity with the Major Projects Pipeline and Planning lists. The bulk of asset maintenance and management work is conducted via smaller value contract packages.

Moving forward, consideration will be given to lowering the threshold of the Asset Maintenance pipeline list to capture the pipeline of available work more comprehensively in this space.

The asset maintenance, upgrade and renewal pipeline is included in Appendix A.

Box 8

Refocused Budget investment areas for 2023–24 NSW Infrastructure Pipeline

Housing and Communities

- ▶ \$2.2 billion Housing and Infrastructure Plan
- ▶ \$224 million Essential Housing Package
- ▶ \$39 million for Faster Planning Program
- ▶ 1,500 new permanent social housing dwellings
- ▶ Landcom to deliver an additional 1,409 affordable homes and 3,288 market homes to 2039–40
- ▶ Accelerating the delivery of social, affordable housing in regional NSW

Energy transition

- ▶ \$3.6 billion for energy infrastructure
- ▶ Supporting the accelerated delivery of Central West Orana REZ and Hunter Transmission Project
- ▶ The establishment of the Energy Security Corporation and the Transmission Acceleration Facility

Health

- ▶ \$13.8 billion for health infrastructure
- ▶ \$700 million for the new Rouse Hill Hospital
- ▶ \$550 million for the Fairfield Hospital redevelopment
- ▶ \$538 million for the Albury Wodonga Regional Hospital redevelopment
- ▶ \$350 million for the Canterbury Hospital redevelopment
- ▶ \$263.8 million for the Grafton Base Hospital Redevelopment

Education

- ▶ \$9.8 billion for schools and skills infrastructure
- ▶ 100 new and upgraded preschools
- ▶ 34 new and upgraded schools
- ▶ Replacement of demountables and additional classrooms
- ▶ \$1.4 billion for a pipeline of new and upgraded schools in regional NSW

5 The 2023–24 infrastructure pipeline

This section provides a breakdown of the NSW Major Infrastructure Pipeline (e.g., sector, value and project phase etc.) announced in the 2023–24 NSW State Budget.

The NSW Major Infrastructure Pipeline provides a forward view of the NSW Government infrastructure projects expected to come to market valued over \$50 million. It consists of three lists:

- ▶ Capital projects funded for delivery.
- ▶ Capital projects with funds committed for planning.
- ▶ Asset management projects funded for delivery.

The purpose of the NSW Major Infrastructure Project 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.

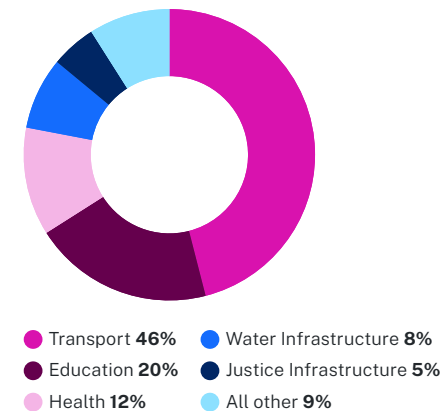
The 2023–24 Pipeline consists of 173 infrastructure projects, of which 33% have received a funding commitment for delivery while 64% are in-planning. The transport sector accounts for the majority of the Pipeline (46% of projects). This is followed by the education (20%) and health (12%) sectors (Figure 3).

The size of the transport pipeline reflects the sector’s importance in boosting NSW’s productivity and servicing its growing communities.

See Appendix A for the complete NSW Major Infrastructure Project Pipeline as of October 2023. The Pipeline is hosted on the Infrastructure NSW Pipeline portal website and updated periodically throughout the year as major contracts are awarded.

Note that at the time of publication some projects listed are subject to the ongoing Federal Government Infrastructure Review and ongoing Sydney Metro Review.

Figure 3: Share of NSW Government major infrastructure projects in pipeline, planning and asset maintenance, by sector, 2023–24 to 2027–28



Source: Infrastructure NSW

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

Appendix A: NSW Major Projects Pipeline

NSW Major Projects Pipeline

The NSW Infrastructure Pipeline provides a forward view of infrastructure under development by the NSW Government. It includes infrastructure projects with a minimum capital value of \$50 million.

Sector	Project name	Estimated Value	Procurement Strategy	Current Phase	Procurement		Construction	
					Start Date (est.)	End Date (est.)	Start Date (est.)	End Date (est.)
Arts & Culture	Powerhouse Ultimo Renewal	\$\$\$	TBA	Design	Q3 2023	Q4 2023	Q1 2024	Q4 2026
Arts & Culture	Barangaroo Cutaway fitout works	\$\$	D&C	Construction Procurement	Q1 2023	Q3 2023	Q4 2023	TBA
Arts & Culture	Barangaroo Harbour Park	\$	TBA	Design	TBA	TBA	TBA	TBA
Commercial	Bradfield City Centre Stage 1 Enabling Works	\$\$\$\$	CO, D&C	Rolling Program	Ongoing	Ongoing	Ongoing	Q4 2028
Commercial	Advanced Manufacturing Research Facility in Bradfield City Centre	\$\$	ECl, D&C	Design	Q3 2024	Q3 2025	Q3 2025	Q4 2026

Key

Definition of Procurement Strategies

ECI—Early Contractor Involvement
 VECl—Very Early Contractor Involvement
 CO—Construct only
 CD&C—Collaborative Design and Construct
 D&C—Design and Construct
 DF&C—Design, Finalisation and Construct
 DP—Delivery Partner
 MC—Managing Contractor
 ITC—Incentivised Target Cost
 A—Alliance
 PPP—Public Private Partnership
 Various

Definition of Current Phase

Strategic Planning—Preparation to approval of strategic business case.
 Final Business Case—Preparation to approval of final business case.
 Construction Procurement—Preparation, approval, and release of procurement documents.
 Rolling Program—Rolling program with on-going procurement and delivery.

Definition of Estimated Project Values

\$ = \$50M to \$100M
 \$\$ = \$100M to \$250M
 \$\$\$ = \$250M to \$500M
 \$\$\$\$ = \$500M to \$1BN
 \$\$\$\$\$ = Over \$1BN

Definition of Dates

Procurement Start Date—Estimated commencement date for construction procurement of main works and may include enabling works.

Construction Start Date—Estimated commencement date for construction of main works and may include enabling works.

Main Works Start Date—Estimated commencement date for construction of main works and may include enabling works (For asset management projects).

Dates may be subject to change.

Sector	Project name	Estimated Value	Procurement Strategy	Current Phase	Procurement		Construction	
					Start Date (est.)	End Date (est.)	Start Date (est.)	End Date (est.)
Commercial	Moree Special Activation Precinct	\$\$	ECI	Design	Q1 2024	Q4 2024	Q1 2025	Q4 2026
Commercial	Snowy Mountains Special Activation Precinct	\$\$	Various	Design	Q4 2023	Q1 2027	Q4 2024	Q1 2030
Commercial	Wagga Wagga Special Activation Precinct	\$\$	Various	Design	Q2 2022	Q1 2024	Q3 2022	Q4 2025
Education	Midtown Macquarie Park (new primary school)	\$	DF&C	Tender	Q2 2023	Q4 2024	Q3 2024	TBA
Education	New Primary School in Tallawong	\$	VECI	Design	Q4 2020	Q4 2023	Q1 2024	TBA
Health	Albury Wodonga Regional Hospital	\$\$\$\$	TBA	Strategic Planning	H2 2023	H2 2024	H1 2025	TBA
Health	NSW Ambulance Infrastructure Program	\$\$\$\$	Various	Rolling Program	Ongoing	Ongoing	Ongoing	TBA
Health	Rouse Hill Hospital	\$\$\$\$	DF&C	Strategic Planning	H2 2024	H2 2024	H2 2024	TBA

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Sector	Project name	Estimated Value	Procurement Strategy	Current Phase	Procurement		Construction	
					Start Date (est.)	End Date (est.)	Start Date (est.)	End Date (est.)
Health	Statewide Mental Health Infrastructure Program	\$\$\$\$	Various	Rolling Program	Ongoing	Ongoing	Ongoing	TBA
Health	Integrated Mental Health Complex at Westmead	\$\$\$	DF&C	Strategic Planning	Q1 2024	Q2 2024	Q3 2024	TBA
Health	New Shellharbour Hospital and Integrated Services	\$\$\$	DF&C	Construction Procurement	Q4 2023	Q1 2024	Q1 2024	TBA
Health	Ryde Hospital Redevelopment	\$\$\$	DF&C	Strategic Planning	Q2 2023	Q4 2023	Q1 2024	TBA
Health	Bathurst Hospital Redevelopment	\$\$	TBA	Strategic Planning	Q3 2024	Q4 2024	Q1 2025	TBA
Health	End of Life Care Program	\$	Various	Rolling Program	Ongoing	Ongoing	Ongoing	TBA
Health	Glen Innes Hospital Redevelopment	\$	DF&C	Strategic Planning	Q1 2024	Q2 2024	Q3 2024	TBA
Health	Manning Base Hospital Stage 2	\$	DF&C	Strategic Planning	Q2 2024	Q3 2024	Q3 2024	TBA

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					Start Date (est.)	End Date (est.)	Start Date (est.)	End Date (est.)
Health	Temora Hospital Redevelopment	\$	TBA	Strategic Planning	Q3 2024	Q4 2024	Q1 2025	TBA
Justice Infrastructure	Protect Highly Sensitive Data (Phase 2)	\$\$	Various	Rolling Program	Ongoing	Ongoing	Ongoing	Ongoing
Justice Infrastructure	Sustaining Critical Infrastructure Program (Phase 1 and 2)	\$\$	Various	Rolling Program	Ongoing	Ongoing	Ongoing	Ongoing
Telco	Mission Critical Messaging Program	\$\$	D&C	Procurement	Q1 2023	Q1 2024	Q2 2024	Q4 2027
Transport	Sydney Metro West—Line Wide Systems*	\$\$\$\$\$	TBA	Construction Procurement	TBA	TBA	TBA	TBA
Transport	Sydney Metro West—Trains, Signalling*	\$\$\$\$\$	TBA	Construction Procurement	TBA	TBA	TBA	TBA
Transport	Sydney Metro West—Maintenance and Operations*	\$\$\$\$\$	TBA	Construction Procurement	TBA	TBA	TBA	TBA
Transport	Digital Systems Tranche 2	\$\$\$\$	Various	Construction Procurement	Q4 2022	Q1 2024	Q2 2024	Q2 2027

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					Start Date (est.)	End Date (est.)	Start Date (est.)	End Date (est.)
Transport	Mulgoa Road Upgrade Stages 2, 5A and 5B*	\$\$\$\$	Alliance	Design	Q1 2024	Q2 2024	Q3 2024	Q4 2029
Transport	Parramatta Light Rail Stage 2 Enabling Works (Wentworth Point Bridge)	\$\$\$\$	CD&C	Construction Procurement	Q2 2023	Q3 2024	Q4 2024	Q1 2030
Transport	Sydney Metro West—Hunter Street Station and Precinct, Precinct Development Partner*	\$\$\$\$	D&C	Construction Procurement	TBA	TBA	TBA	TBA
Transport	Sydney Metro West—Parramatta Integrated Station*	\$\$\$\$	D&C	Construction Procurement	TBA	TBA	TBA	TBA
Transport	Sydney Metro West—Pyrmont Integrated Station*	\$\$\$\$	D&C	Construction Procurement	TBA	TBA	TBA	TBA
Transport	Sydney Metro West—Stations Package West (Westmead, North Strathfield, Burwood North, Five Dock, The Bays)*	\$\$\$\$	D&C	Construction Procurement	TBA	TBA	TBA	TBA
Transport	Sydney Metro West—Sydney Olympic Park Integrated Station*	\$\$\$\$	D&C	Construction Procurement	TBA	TBA	TBA	TBA

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					Start Date (est.)	End Date (est.)	Start Date (est.)	End Date (est.)
Transport	Mona Vale Road West upgrade, McCarrs Creek Road to Powder Works Road	\$\$\$	CO	Design	Q4 2025	Q1 2026	Q2 2026	Q2 2029
Transport	New England Highway, Muswellbrook Bypass*	\$\$\$	CD&C	Construction Procurement	Q4 2022	Q3 2024	Q2 2025	Q2 2028
Transport	New Richmond Bridge and traffic improvements—Stage 2*	\$\$\$	TBA	Final Business Case	Q4 2024	Q3 2025	Q2 2026	Q4 2028
Transport	Newell Highway, North Moree Heavy Duty Pavement*	\$\$\$	CO	Design	Q3 2023	Q4 2023	Q1 2024	Q2 2027
Transport	Pacific Highway, Wyong Town Centre*	\$\$\$	TBA	Design	Q4 2024	Q2 2026	Q4 2026	Q4 2030
Transport	SouthWest Metro Conversion and Station Works (SWM3)	\$\$\$	ITC	Construction Procurement	Q3 2023	Q1 2024	Q3 2024	Q2 2026
Transport	Sydney Metro West—Brownfield Package*	\$\$\$	D&C	Construction Procurement	TBA	TBA	TBA	TBA
Transport	Zero Emission Buses Stage 1—New Macquarie Park bus depot	\$\$\$	TBA	Design	Q3 2023	Q3 2024	Q4 2024	Q1 2027

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					Start Date (est.)	End Date (est.)	Start Date (est.)	End Date (est.)
Transport	Epping Bridge Project	\$\$	D&C	Design	Q2 2024	Q2 2025	Q1 2026	TBA
Transport	Hill Road Widening	\$\$	CO	Design	Q4 2023	Q2 2024	Q3 2024	Q1 2026
Transport	SouthWest Metro Rail Corridor Works (SWM2)	\$\$	ITC	Construction Procurement	Q3 2023	Q4 2023	Q1 2024	Q2 2024
Transport	The Horsley Drive, M7 Motorway to Cowpasture Road*	\$\$	CO	Design	Q1 2025	Q4 2025	Q1 2026	Q2 2028
Transport	Appin Road Safety Improvements*	\$	CO	Design	Q4 2023	Q2 2024	Q3 2024	Q2 2026
Transport	Central Coast Highway, Tumby Road intersection upgrade*	\$	CO	Design	Q1 2024	Q3 2024	Q4 2024	Q4 2027
Transport	Macquarie Park Precinct and Bus Interchange*	\$	CO	Design	Q3 2023	Q1 2024	Q2 2024	Q1 2026
Transport	New Richmond Bridge and traffic improvements—Stage 1	\$	CO	Design	Q1 2024	Q2 2024	Q3 2024	Q2 2026
Transport	Pitt Town Bypass	\$	CO	Construction Procurement	Q4 2023	Q4 2024	Q1 2025	Q4 2026

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					Start Date (est.)	End Date (est.)	Start Date (est.)	End Date (est.)
Transport	SouthWest Metro Rail Corridor Works (SWM1)	\$	ITC	Construction Procurement	Ongoing	Q3 2023	Q3 2023	Q4 2023
Transport	SouthWest Metro Corridor and Bridge Protection Works (SWM4)	\$	D&C	Construction Procurement	Ongoing	Q4 2023	Q2 2024	Q2 2025
Water Infrastructure	Nyngan to Cobar—Stage 1—Pump Station Upgrade	\$	CO	Construction Procurement	Q4 2023	TBA	TBA	TBA
Water Infrastructure	SDLAM Acceleration—Yanco Creek Modernisation	\$	CO	Construction Procurement	Q4 2023	Q4 2023	Q1 2024	Q4 2024

* Note: At the time of publication this project is listed as subject to the on-going Federal Government Infrastructure Review or the on-going Sydney Metro Review.

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NSW Major Projects Planning Pipeline

The NSW Infrastructure Planning Pipeline provides a forward view of projects under investigation by the NSW Government. It includes infrastructure projects likely to have a minimum capital value of \$50 million that the NSW Government has committed to investigating.

Sector	Project name	Estimated Value
Education	New schools for Westmead	TBA
Education	Upgrades for schools in Murwillumbah	TBA
Education	100 Government Preschools	\$\$\$\$
Education	Macquarie Park Education Campus	\$\$\$
Education	Rydalmere Education Campus	\$\$\$
Education	TAFE NSW Liverpool Campus Relocation	\$\$\$
Education	TAFE NSW SATC (Bradfield City Campus)	\$\$\$
Education	Edmondson Park (new high school)	\$\$
Education	Jordan Springs (new high school)	\$\$
Education	Liverpool Boys and Girls High School Upgrade	\$\$
Education	Schofields/Tallawong (new high school)	\$\$
Education	TAFE NSW Gosford Campus relocation	\$\$

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Sector	Project name	Estimated Value
Education	Concord High School Upgrade	\$
Education	Condell Park High School Upgrade	\$
Education	Gables (new primary school)	\$
Education	Gillieston Public School (redevelopment)	\$
Education	Girraween Public School Upgrade	\$
Education	Gledswood Hills/Gregory Hills (new high school)	\$
Education	Googong (new high school)	\$
Education	Leppington Public School Upgrade	\$
Education	Leppington/Denham Court (new high school)	\$
Education	Medowie (new high school)	\$
Education	Melrose Park (new high school)	\$
Education	Melrose Park Public School (redevelopment)	\$
Education	Nirimba Fields (new primary school)	\$
Education	Nowra (new primary school)	\$
Education	Parramatta East Public-School Upgrade	\$

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Education	Rhodes East (new primary school)	\$
Education	Sir Joseph Banks High School Upgrade	\$
Education	Sydney Olympic Park (Carter St Precinct) (new primary school)	\$
Education	Telopea Public School Upgrade	\$
Education	Ulladulla High School Upgrade	\$
Education	Wilton Junction (new primary school)	\$
Health	Bankstown Hospital (New)	\$\$\$\$\$
Health	Fairfield Hospital	\$\$\$\$
Health	Canterbury Hospital	\$\$\$
Health	Grafton Hospital Redevelopment	\$\$\$
Health	Blacktown Mount Druitt Hospital	\$\$
Health	Cessnock Hospital Redevelopment	\$\$
Health	Sydney Biomedical Accelerator as part of Tech Precinct	\$\$
Health	Ballina District Hospital	\$
Justice Infrastructure	Parramatta Justice Precinct Redevelopment	\$\$\$\$\$

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Justice Infrastructure	Greater Sydney Metropolitan Corrections Strategy	\$\$\$\$
Justice Infrastructure	Intensive OOHC	\$\$\$\$
Justice Infrastructure	Sydney CBD Courts Redevelopment	\$\$\$\$
Justice Infrastructure	Central Coast—New Courthouse	\$\$\$
Justice Infrastructure	South West Sydney (Campbelltown) Courts Network	\$\$\$
Social Infrastructure	Core & Cluster	\$\$\$
Social Infrastructure	Riverwood Estate Redevelopment	\$\$\$
Social Infrastructure	Explorer Street, South Eveleigh	\$\$
Social Infrastructure	Aboriginal Child & Family Centres	\$
Transport	Bruxner Highway, Wollongbar to Goonellabah*	TBA
Transport	Fifteenth Avenue Transit Corridor	TBA
Transport	Garfield Road Central	TBA
Transport	Hawkesbury-Nepean Valley Road Resilience Program	TBA
Transport	Heathcote Road, The Avenue to Princes Highway	TBA
Transport	Mamre Road Upgrade—Stage 2	TBA

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Sector	Project name	Estimated Value
Transport	Mandalong Road upgrade, Morisset*	TBA
Transport	Murray River, Swan Hill bridge replacement*	TBA
Transport	Nelson Bay Road Improvements	TBA
Transport	Parramatta to Sydney Foreshore Link	TBA
Transport	Picton Road Upgrade Program—Almond Street to M1 Princes Motorway*	TBA
Transport	Picton Road Upgrade Program—Nepean River to Almond Street*	TBA
Transport	Redfern North Eveleigh—Clothing Store Sub Precinct	TBA
Transport	Redfern North Eveleigh—Eastern Suburbs Rail Site	TBA
Transport	Redfern North Eveleigh—Paint Shop Sub Precinct	TBA
Transport	Richmond Road Corridor Upgrade	TBA
Transport	Spring Farm Parkway Stage 2	TBA
Transport	Transport Access Program 4	TBA
Transport	Werrington Arterial Stage 2*	TBA
Transport	Bandon Road Upgrade	\$\$\$\$\$
Transport	Castlereagh Connection	\$\$\$\$\$

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Sector	Project name	Estimated Value
Transport	Central Precinct Renewal Program— Main Works	\$\$\$\$\$
Transport	Circular Quay Renewal (including wharf upgrade)	\$\$\$\$\$
Transport	Parramatta Light Rail Stage 2 Main Works	\$\$\$\$\$
Transport	Western Sydney Rapid Bus Project	\$\$\$\$\$
Transport	Elizabeth Drive upgrade, M7 to Badgerys Creek	\$\$\$\$
Transport	Princes Highway Upgrade— Milton/Ulladulla Bypass*	\$\$\$\$
Transport	Southern Link Road, Horsley Park	\$\$\$\$
Transport	Burdekin Road and Townson Road Upgrade	\$\$\$
Transport	Central Coast Highway, Wamberal to Bateau Bay	\$\$\$
Transport	Elizabeth Drive upgrade, The Northern Road to Badgerys Creek	\$\$\$
Transport	Garfield Road Upgrade East	\$\$\$
Transport	Garfield Road Upgrade West	\$\$\$
Transport	John Renshaw Drive upgrade, Black Hill*	\$\$\$
Transport	M5 Weave Westbound Solution, Moorebank	\$\$\$
Transport	Princes Highway Upgrade— Jervis Bay Road to Sussex Inlet Stage 1*	\$\$\$

Key

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ECl— Early Contractor Involvement
 VECl— Very Early Contractor Involvement
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Sector	Project name	Estimated Value
Transport	Richmond Road, M7 to Townson Road	\$\$\$
Transport	Avoca Drive Upgrade Kincumber	\$\$
Transport	Homebush Bay Drive and Australia Avenue intersection upgrade*	\$\$
Transport	Intersection Upgrade at Norwest Boulevard and Lexington Drive	\$\$
Transport	Newell Highway, improve flood mitigation between West Wyalong and Forbes	\$\$
Transport	Richmond Road, Elara Boulevard to Heritage Road*	\$\$
Transport	Barton Highway Upgrade—Stage 2*	\$
Transport	Bells Line of Road Safety Improvements	\$
Transport	Manns Road Upgrade, Stockyard Place to Narara Creek Road Priority Intersection Upgrades	\$
Transport	Oxford Street East Cycleway	\$
Transport	Pacific Highway, Harrington Road / Cooperook Road interchange*	\$
Transport	Wakehurst Parkway Improvements—Frenchs Forest to Narrabeen	\$
Water Infrastructure	Reconnecting River Country Program	\$\$\$\$
Water Infrastructure	Lostock Dam to Glennies Creek Dam Pipeline	\$\$\$
Water Infrastructure	Tamworth Interconnection Pipeline Project	\$\$\$

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Sector	Project name	Estimated Value
Water Infrastructure	Belubula Water Security Project	\$\$
Water Infrastructure	Macquarie Wambuul Water Security Project	\$\$
Water Infrastructure	Nyngan to Cobar—Stage 2—Pipeline Replacement	\$\$
Water Infrastructure	Reconnecting the Northern Basin Project (Fish Passage)	\$
Water Infrastructure	SDLAM Acceleration—Koondrook—Perricoota Flow Enabling Works	\$
Water Infrastructure	SDLAM Acceleration—Mid-Murray Anabranches Demonstration Reach	\$
Water Infrastructure	SDLAM Acceleration—Murray and Murrumbidgee National Parks (Yanga & Millewa)	\$
Water Infrastructure	Tamworth Advanced Water Treatment Plant	\$
Water Infrastructure	Wilcannia Weir Replacement Project	\$

* Note: At the time of publication this project is listed as subject to the on-going Federal Government Infrastructure Review or the on-going Sydney Metro Review.

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Asset maintenance, upgrade, and renewal

The NSW Infrastructure Pipeline provides a forward view of asset maintenance, upgrade, and renewal projects under development by the NSW Government. It includes infrastructure projects with a minimum capital value of \$50 million.

It should be noted that this list only includes the major Asset Maintenance projects (i.e., those with a contract value over \$50 million) for uniformity with the Major Projects Pipeline and Planning lists. The bulk of Asset Maintenance work is conducted via smaller value contract packages. Moving forward, consideration will be given to lowering the threshold of the Asset Maintenance pipeline list to provide visibility of more opportunities.

Sector	Project name	Estimated Value	Procurement Strategy	Current Phase	Procurement		Construction	
					Start Date (est.)	End Date (est.)	Start Date (est.)	End Date (est.)
Transport	Opal Next Generation	\$\$\$\$	Asset Management	Procurement	Q1 2023	Q1 2024	Q1 2024	Q4 2026
Transport	Sydney Trains Electrical Isolation Improvement Program—Remote Switching System for the 1500VDC network	\$\$\$	Other—Asset Management/Maintenance	Strategic Planning	Ongoing	Ongoing	Ongoing	Ongoing
Sports Infrastructure	Penrith Stadium Refurbishment	\$\$\$	Other—Asset Management/Maintenance	Design	Q1 2024	Q2 2024	Q3 2024	TBA

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Sector	Project name	Estimated Value	Procurement Strategy	Current Phase	Procurement		Construction	
					Start Date (est.)	End Date (est.)	Start Date (est.)	End Date (est.)
Arts & Culture	Royal Botanic Gardens and Domain Trust—Strategic Asset Management Plan	\$\$	Other—Asset Management/Maintenance	Rolling Program	Ongoing	Ongoing	Q1 2025	Q4 2034
Arts & Culture	Placemaking NSW—Pyrmont Bridge Restoration	\$	Other—Asset Management/Maintenance	Rolling Program	Ongoing	Ongoing	Ongoing	2030

* Note: At the time of publication this project is listed as subject to the on-going Federal Government Infrastructure Review or the on-going Sydney Metro Review.

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