

# Queensland Infrastructure Performance Report 2025



# Acknowledgment

IAQ recognises and respects both Aboriginal peoples and Torres Strait Islander peoples, as the First Nations people in Queensland.

We recognise First Australians' unbroken connection to land and water, which has continued for millennia. Their strength through culture and kinship will help guide our journey towards reconciliation.

We pay our respects to the Traditional Owners on whose lands we live, connect, work and learn, along with their Elders past and present, and thank them for continuing to share their knowledge, ways of learning, and culture with us.

Partnering with First Nations peoples will enable us to deliver infrastructure that recognises, embraces, and celebrates the traditions, practices, cultures, and stories that enrich Queensland and its people.

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# Presenting 2025 Industry Insights

Welcome to the Queensland Infrastructure Performance (QIP) Report 2025.

We are thrilled to release this report in its second year, a “pulse check” from across the state where industry investment confidence is growing and we have an opportunity to firm up continuity and stability for industry to deliver, now and into the future.

*Are we ready?*

*We asked and you certainly answered!*

This year’s QIP Report comes at a time when the Brisbane 2032 Olympic and Paralympic Games is fast-approaching and a significant amount of infrastructure is needed to not only deliver the Games, but to provide a lasting legacy across urban and regional areas. We also have business-as-usual commitments to all communities now and after the Games. But can we deliver the Games and other commitments at a business-as-usual-rate?

Focusing on priority sectors including transport, energy, water, housing, health, and Brisbane 2032 infrastructure, we have brought together survey responses, deep-dive interviews and comparative research to bring you the current industry sentiment. Thank you to survey respondents, interviewees, our QIP Expert Advisory Group and industry partners to make this year’s report possible.

The QIP Report presents an annual check-in for industry and government for ongoing collaboration on the opportunities and solutions we can work on together to ensure Queensland’s infrastructure delivers not just for the next project, or the next budget cycle, but for the next generation.



**Jon Frew**, Board Chair

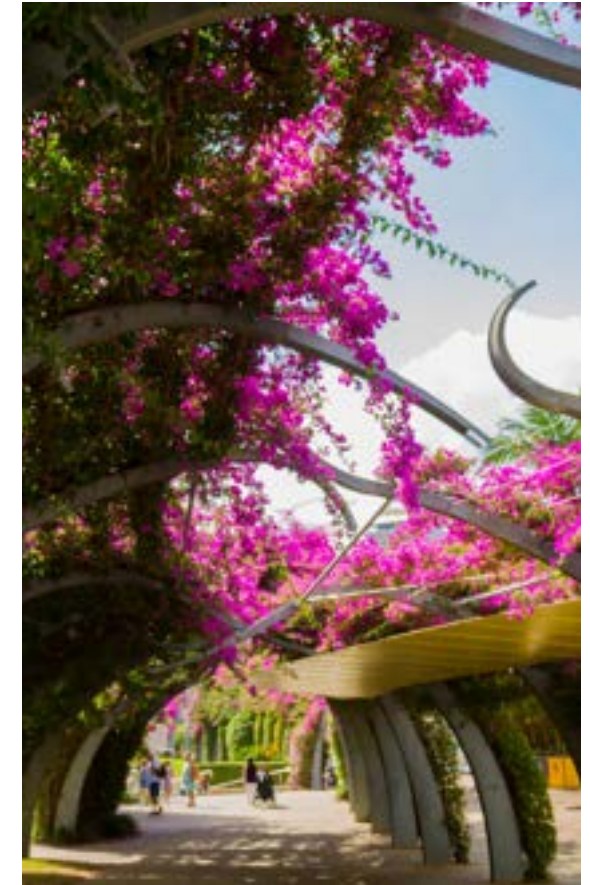
**Tracy Mackey**, CEO

# Purpose and Approach

The Queensland Infrastructure Performance (QIP) Report, developed by IAQ in partnership with Jacobs, provides a clear and evidence-based view of infrastructure performance, priorities, and sentiment across Queensland (Qld). It supports IAQ, government and industry in identifying areas for improvement, guiding investment, and shaping future policy.

Building on the 2024 pilot, the 2025 report adopts a strengthened methodology to broaden insights and deepen sector engagement. The approach includes:

<b>Queensland Infrastructure Performance Survey</b> 01	<b>Sector and Regional Analysis</b> 02	<b>Longitudinal Insights</b> 03	<b>Key Industry Interviews</b> 04	<b>Research and Case Studies</b> 05	<b>Expert Advisory Group (EAG)</b> 06
Conducted statewide over four weeks in July 2025, the anonymous online survey captured responses from 690 infrastructure professionals across public and private sectors. It included structured questions and optional commentary, enabling analysis of sentiment, emerging themes, and sector concerns. The survey achieved a 95% confidence level and 4% margin of error, with strong engagement reflected in a halved abandonment rate from 2024 and 779 qualitative comments.	Responses were segmented by sector and geography, ensuring the report reflects both metropolitan and regional perspectives and captures the diversity of infrastructure priorities across the state.	Comparison with 2024 data highlights shifts in sentiment, emerging trends, and evolving challenges, supporting a more dynamic understanding of sector performance.	Targeted one-on-one interviews, held during the survey period, with nine key leaders from government, construction, supply, regional Queensland, and early-career professionals provided deeper insights into strategic priorities, delivery capacity, innovation, and regional disparities.	The report integrates analysis of state and federal budgets, industry publications, and case studies from comparable jurisdictions to contextualise findings and highlight best practices.	IAQ convened an EAG with representatives from member organisations, government, and academia to guide development, validate findings, and sharpen focus areas.



Together, these inputs form a robust foundation for the report's insights and opportunities, reflecting the real experiences and priorities of Queensland's infrastructure sector.



# Chapter 1: Qld's Investment Environment & Industry Capacity

## Question 4:

How would you describe Qld's investment environment?

## Question 5:

Do you agree the industry has the capacity to deliver the current pipeline of infrastructure projects?

## Question 6:

Where should government and industry focus to improve industry capacity and drive productivity?



## Question 4:

How would you describe Qld's investment environment?

**51% say Qld's investment environment is improving, a strong increase of 21% on 2024**

Qld's infrastructure investment environment has seen a marked uplift in sentiment in 2025, with 51% of respondents indicating improvement – increased from 30% in 2024.

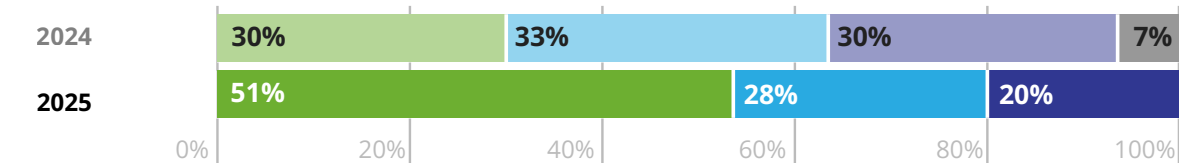
Government respondents were the most optimistic, with 60% reporting an improving environment, followed by consultants at 49%. The construction sector was least positive at 43%. Regional sentiment has doubled, rising from 23% to 46%, signalling growing confidence in infrastructure investment outside South-East Queensland (SEQ)—though still trailing the metropolitan outlook.

These results highlight broadening confidence across sectors and regions.

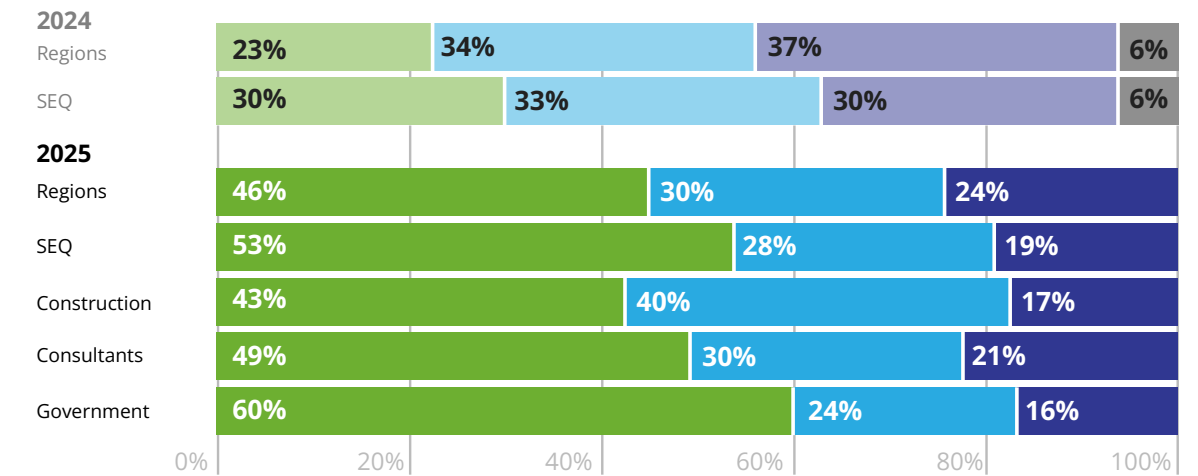
## Regional positivity **doubled** to 46%

2025	2024	Government	Regions
<b>51%</b> Improving	<b>30%</b> Improving	<b>60%</b> Improving	<b>46%</b> Improving
<b>20%</b> Deteriorating	<b>30%</b> Deteriorating	<b>16%</b> Deteriorating	<b>24%</b> Deteriorating

### Qld Investment Environment - All



### Qld Investment Environment - by Region and Sector



#### Legend



## Question 4:

How would you describe Qld's investment environment?



### Infrastructure investment pipeline has been turbulent

Respondent quote

Beyond the 51% indicating Qld's investment environment is improving, 115 respondents provided further commentary.

Comments highlighted a complex and evolving investment environment in Qld, marked by both optimism and concern. While the upcoming Brisbane 2032 (B2032) Games are seen as a catalyst for infrastructure momentum, many comments pointed to fragmented governance, slow project delivery, and inconsistent planning across sectors. Key opportunities were identified in renewable energy, housing, and regional development, yet these are tempered by uncertainty in policy direction, escalating costs, and workforce shortages.

Respondents also noted a growing appetite for investment, particularly in SEQ, but stressed the need for strategic coordination, improved public transport, and equitable regional support to fully realise Qld's potential.

**Table 1:** Respondent comments relating to Qld's investment environment

Theme & Number of comments	Description	Comment
<b>Government and Planning Challenges</b> 	Concerns about fragmented governance, lack of strategic coordination, delays in approvals, and reactive planning.	<ul style="list-style-type: none"> <li>'Infrastructure investment pipeline has been turbulent'</li> <li>'There have been considerable delays and cancellation of projects that were well progressed in planning and approvals...'</li> <li>'...investment appetite is clearly increasing, but the delivery system remains fragmented, reactive, and politically driven...'</li> </ul>
<b>Olympics and Brisbane 2032</b> 	The influence of the 2032 Olympics on infrastructure planning and investment appetite.	<ul style="list-style-type: none"> <li>'Sustaining but shifting from Transport to energy and water sectors, however it must increase to cope with Brisbane 2032 demands'</li> <li>'The 2032 Games are accelerating the appetite to deliver tangible outcomes'</li> </ul>
<b>Transport and Public Infrastructure</b> 	Addresses the adequacy and accessibility of transport infrastructure, especially in the context of population growth and Olympic demands.	<ul style="list-style-type: none"> <li>'Compared to Sydney and Melbourne, considering the Olympic Games 2032, we are vastly behind in public transport infrastructure'</li> <li>'Public transport is suffering significantly'</li> </ul>
<b>Energy and Renewable Investment</b> 	Uncertainty and inconsistency in government support for renewable energy projects.	<ul style="list-style-type: none"> <li>'Seeing lots of renewable energy development pulling out due to uncertainty around opportunity and planning'</li> <li>'Decreased green energy investment'</li> </ul>
<b>Workforce and Skills</b> 	The need for a skilled workforce to match infrastructure ambitions.	<ul style="list-style-type: none"> <li>'...we need the workforce to reflect these investments - recommend skilled migration and occupational licensing across states'</li> <li>'Costs have increased too much and it is now prohibitive. Unavailability of suitably qualified staff'</li> </ul>
<b>Housing and Land Development</b> 	Opportunities and needs in land use and housing development, especially in response to population growth.	<ul style="list-style-type: none"> <li>'Numerous Federal and State agencies are sourcing available land for development'</li> <li>'Consider zoning for housing and the changing demands of future use, for example, increasing multi level residential in and around Brisbane City...'</li> </ul>
<b>Water and Utilities Infrastructure</b> 	Points to aging and inadequate water and utility systems, with concerns about their ability to support future growth and development.	<ul style="list-style-type: none"> <li>'Failure to upgrade the water networks, sewer and stormwater systems, built in 1920-1940, they are inadequate and Utilities fail to support the huge rates income they take'</li> </ul>
<b>Regional Inequity</b> 	SEQ favoured over regional areas; significant projects removed without replacement.	<ul style="list-style-type: none"> <li>'It's never been better in SEQ, but it's different in the regions'</li> <li>'The cost of doing business in Isaac Region is often too expensive. Cost of construction is likely a significant factor impacting appetite for investment relative to population growth'</li> </ul>

## Regional investment strained by SEQ growth

Sharing their views on Qld's investment environment, industry leaders highlighted in their summarised comments, the unprecedented scale of infrastructure investment in SEQ, underpinned by major initiatives such as B2032 and significant transport upgrades. While recognised as a key economic driver, concerns were raised regarding emerging regional disparities, particularly the diversion of resources and underinvestment in enabling infrastructure outside SEQ.

Several leaders expressed some frustration over the imbalance in funding allocation (between SEQ and regional Qld) and emphasised the need for enhanced strategic coordination to effectively manage the scale and complexity of the investment pipeline. Following recent government changes, an openness to wider investment was also observed.

### These insights point to several key focus areas for improvement:

- Strengthen regional investment and infrastructure
- Improve industry engagement in regional projects
- Maintain balanced focus between SEQ and Regions
- Enhance strategic coordination across sectors.

### 1. Unprecedented Infrastructure Investment in SEQ

- *'Spend in SEQ over the next seven years will reach unprecedented levels due to the Olympics, major transport upgrades, hospitals, and housing initiatives'*
- *'SEQ is as strong as we have ever seen it'*
- *'Huge pipeline of work... Olympics in 2032, the QTRIP programme \$42 billion / 4 years'*

### 2. Regional Disparities and Resource Drain

- *'SEQ is leading.... but remote areas are progressing due to energy projects and transport links driven by private sector involvement'*
- *'Investment SEQ has sucked a lot of resources and talent ....regions are finding it harder to cope'*
- *'We get low or no response from industry for large packages of work in regions'*
- *'Invest in supply chains, transport routes, resilience—the catalytic infrastructure that SEQ is able to build off that we don't have in the regions'*

### 3. Regional Investment Potential and Frustration

- *'I'm frustrated with \$7.5 billion on Cross River Rail.... we have road infrastructure falling down'*
- *'SEQ dominates investment; regions lack enabling infrastructure'*
- *'Do more on the regions, keep doing just as much in SEQ'*

### 4. Strategic Coordination and Delivery Challenges

- *'It's a perfect storm of activity... bringing challenges in terms of the capacity to deliver'*
- *'Qld's never had such an investment pipeline... requiring strategic coordination across sectors'*

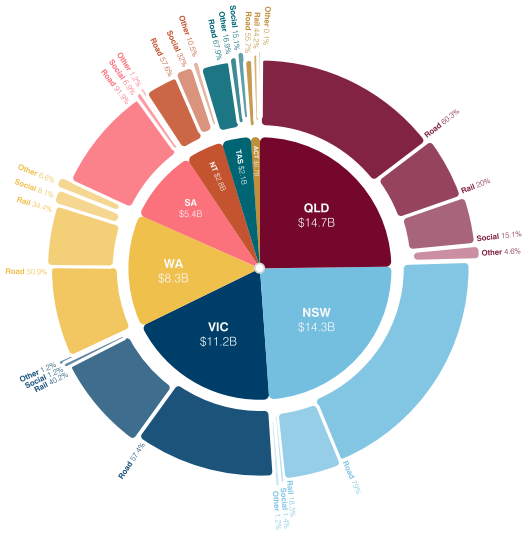
### 5. Improving Investment Outlook Post-Government Change

- *'Investment outlook is improving post-government change... there is certainly an openness to wider investment'*

# Investment Environment – Research

Research into the investment and business landscape across Qld and other states highlights a notable increase in infrastructure spending in Qld. However, it also underscores the challenges posed by the state's complex planning system; findings that align closely with industry sentiment and survey data.

**Figure 1:** Federal budget infrastructure allocations by jurisdiction and asset class



**Source:** (Infrastructure Partnerships Australia, 2024)

**Table 2:** State government infrastructure spending % of budget: 24/25

State	Share	Total	Change
VIC	18.7%	\$77.4B	-\$1.1B
NSW	16%	\$86.4B	+\$872M
SA	15.6%	\$20.8B	+\$3.1B
QLD	14.6%	\$55.6B	+\$10.3B
WA	8.8%	\$15.5B	-\$40M

**Share** of budget expenditure on infrastructure funding  
**Total** of infrastructure funding (over forward estimates)  
**Change** to infrastructure funding program

**Source:** (Infrastructure Partnerships Australia, 2024)

**Table 3:** How regulation affects infrastructure across states

State	Business Environment	Key Impact on Infrastructure
VIC	Poor tax/licensing environment, improving planning	High land/stamp duties, but zoning reforms underway could support housing rollout
NSW	Mid-ranked, high stamp duty, tight retail trading regulations	Longest approval times, low planning consistency and certainty – risks delays
SA	Best overall: Low payroll tax, streamlined licensing	Shorter approvals, consistent and certain planning – ideal for project delivery
QLD	Moderate cost rank, weakest consistency in planning	Regional tax incentives, fragmented planning system limits large-scale coordination
WA	Mid-range performance, strong on building approval speed	Active planning reforms support energy and housing delivery

**Source:** (Business Council of Australia, 2024)

## Insights from Infrastructure Market Capacity 2024 Report

- \$213B infrastructure pipeline over FY2023–28, with a shift in investment towards Qld & NT (+\$16B), while NSW & VIC decline (-\$39B)
- Persistent labour shortages, especially in trades and regional areas, despite overall reduction in workforce gap by 32,000 FTEs
- Emphasis on managing demand, improving productivity, and boosting materials supply (especially steel, concrete) through national reforms and planning tools

**Source:** (Infrastructure Australia, 2024)

## Insights Public Sentiment

- 57% of Australians want the government to cut spending, showing public fatigue with budget deficits and inflation
- With 45% of Australians believing the government is too large and overly involved through regulation, taxation, and public spending; infrastructure delivery must clearly demonstrate value and efficiency to retain public support

**Source:** (Creighton, 2025)

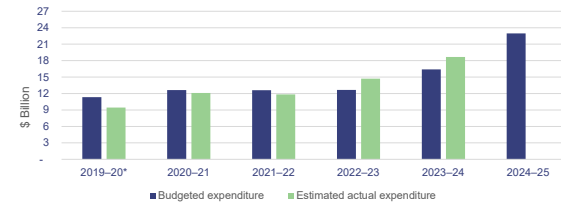
## Infrastructure investment trends in Queensland

Analysis of Qld’s capital expenditure, as reported by the Queensland Audit Office (2025), reveals a period of relatively stable budget allocations up to 2022–23, followed by a marked increase commencing in 2023–24 and accelerating further in 2024–25. The most significant budgetary uplifts are observed in the transport and energy sectors, reflecting strategic priorities in connectivity and sustainability.

Brisbane and Redlands received the highest total investment value. However, when assessed on a per capita basis, the greatest expenditure occurred in Outback Qld, Central Qld, and Wide Bay—indicating targeted investment in regional equity and service delivery.

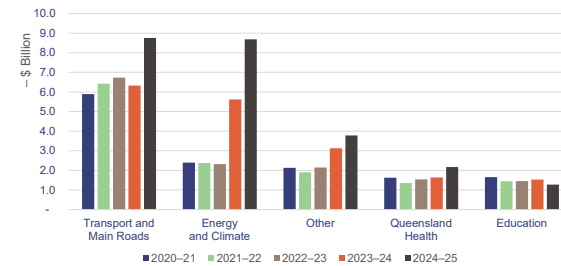
Looking ahead, the Queensland Budget 2025–26 signals continued momentum, with record funding committed to health, infrastructure, housing, and education.

## Queensland Major projects 2024 (Report 9: 2024–25)



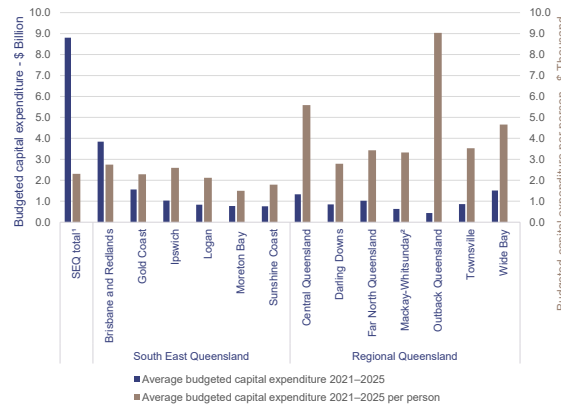
**Figure 2:** Budgeted and estimated actual capital expenditure across all state government entities – financial years from 2019–20 to 2024–25

**Source:**  
(Queensland Audit Office, 2025 pg. 4)



**Figure 3:** Budgeted capital expenditure for each portfolio – financial years from 2020–21 to 2024–25

**Source:**  
(Queensland Audit Office, 2025 pg. 5)



**Figure 4:** Average budgeted capital expenditure – financial years from 2020–21 to 2024–25

**Source:**  
(Queensland Audit Office, 2025 pg. 6)

## Queensland Budget 2025-26

# This Budget is Delivering for Queensland.

The Foundation for a Fresh Start.

The Crisafulli Government’s 2025–26 Budget focuses on making our community safer, delivering a place to call home for more Queenslanders, driving down cost of living pressures for families, delivering more free healthcare than ever before and building generational infrastructure.

### BUDGET SNAPSHOT

\$5.2B	<b>MAKING OUR COMMUNITY SAFER PLAN</b> with stronger laws, more police, better resourced courts, effective youth early intervention and rehabilitation, and better support for prevention of domestic and family violence.
\$18.5B	<b>HOSPITAL RESCUE PLAN</b> more than 2,600 extra hospital beds including 3 new hospitals, 10 hospital expansions and more regional health services.
\$4.7B	<b>GAMES DELIVERY PLAN</b> to get on with implementing the 2032 Delivery Plan with venues and villages.
\$33.1B	<b>RECORD HEALTH BUDGET</b> for health services when you need them including more ambulances, more health workers and more free healthcare than ever before
\$116.8B	<b>RECORD INFRASTRUCTURE BUDGET</b> for generational infrastructure for our future to get our busy roads flowing again and deliver a safer Bruce Highway.
\$8.1B	<b>RECORD HOUSING BUDGET</b> with a place to call home for more Queenslanders through a new Boost to Buy nation-leading home ownership scheme to reduce the deposit gap, boosted home owner grants and new social and community housing.
\$21.9B	<b>RECORD EDUCATION BUDGET</b> to help kids catch up, keep up and stay in school, with more teachers, safer classrooms, new primary schools and special schools.

**Source:** (Queensland Government, 2025)

## Question 5:

Do you agree the industry has the capacity to deliver the current pipeline of infrastructure projects?

### 53% say Qld does not have capacity to deliver the pipeline

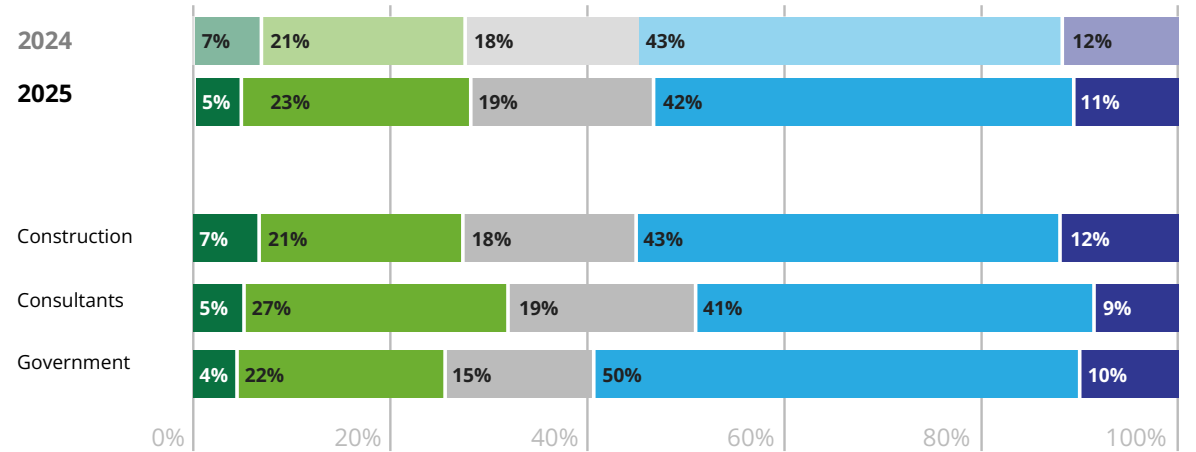
In 2025, concerns about Qld's capacity to deliver its infrastructure pipeline remain high, with 53% of respondents disagreeing that the industry has the capacity to deliver. This represents only a modest 2% improvement from 2024. Views were consistent across the state, with 53% of regional respondents and 54% in SEQ expressing concern.

Government respondents were the most pessimistic, with 60% identifying insufficient capacity, 10% higher than consultants, who were the most positive. These results reinforce a persistent industry-wide concern about delivery capability, despite slight year-on-year improvement.

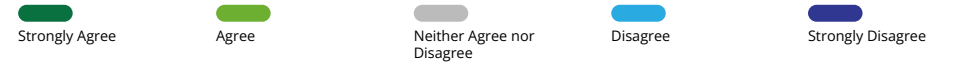
### Government was the most sceptical, at 10% more than Consultants

2025	2024	Government	Consultants
<b>28%</b> Agree	<b>28%</b> Agree	<b>26%</b> Agree	<b>32%</b> Agree
<b>53%</b> Disagree	<b>55%</b> Disagree	<b>60%</b> Disagree	<b>50%</b> Disagree

### Does the industry have capacity to deliver the current pipeline?



#### Legend



**Question 6:**

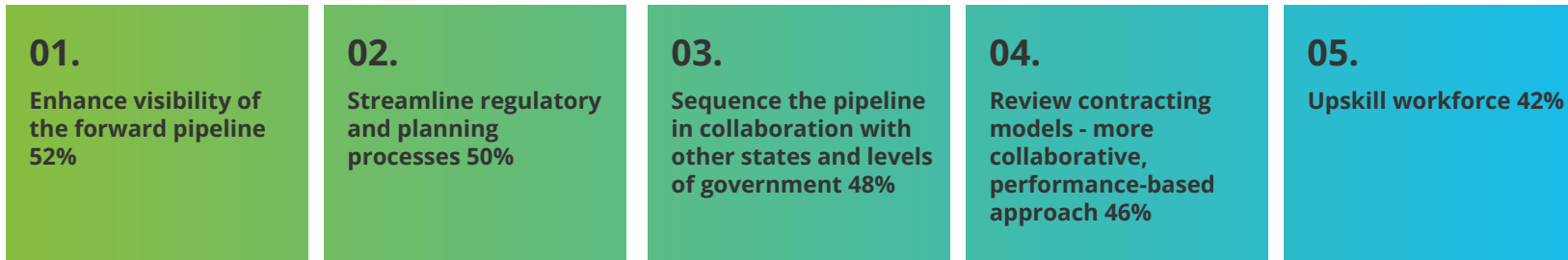
Where should government and industry focus to improve industry capacity and drive productivity? (Select up to 5)

**Enhancing visibility of the forward pipeline the #1 priority to improve industry capacity and drive productivity**

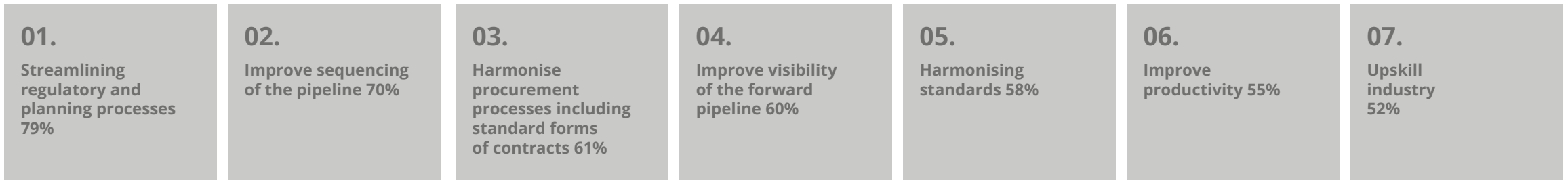
Survey respondents in 2025 identified priorities for improving industry capacity and productivity, with enhancing visibility of the forward pipeline rising to the top at 52%. This marks a significant shift from 2024, when it ranked fourth—highlighting a growing recognition that clearer, earlier insight into upcoming projects is critical to industry readiness. Other leading responses included streamline regulatory and planning processes (50%), sequence the pipeline in collaboration with other states and levels of government (48%), review contracting models to enable more collaborative, performance-based approaches (46%), and upskill the workforce (42%).

The consistency of the top four priorities year-on-year underscores a stable and focused view on where government and industry must act to strengthen delivery capability.

**2025**



**2024:** Focus improvements to drive productivity and improve capacity (assessed over two questions)

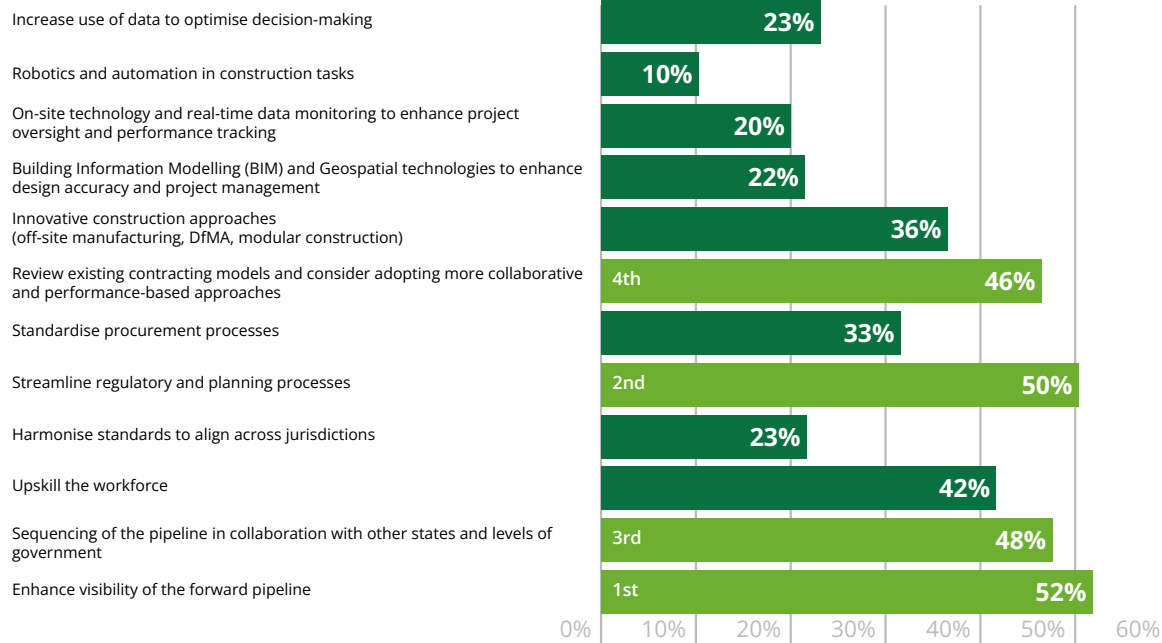


## Question 6:

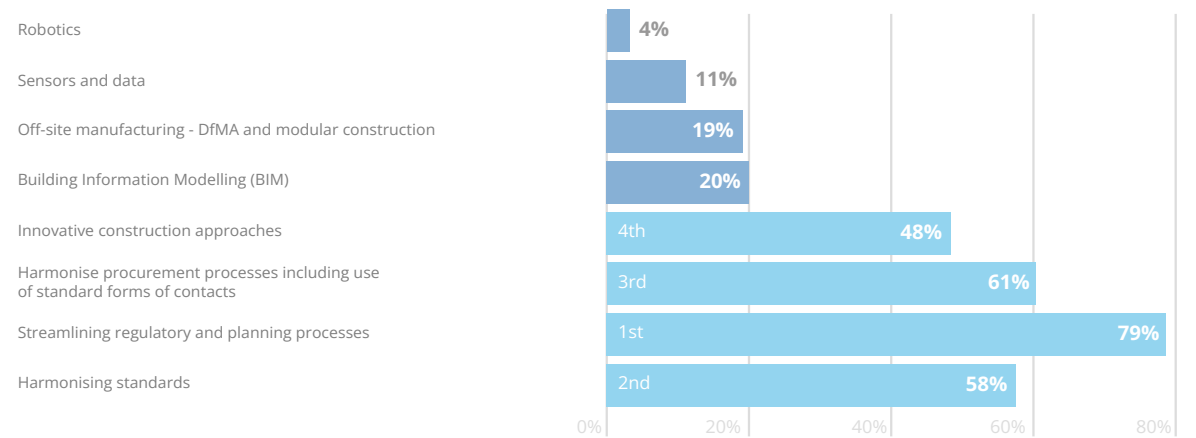
Where should government and industry focus to improve industry capacity and drive productivity? (Select up to 5)

Technology-based solutions remain the lowest-ranked focus areas for improving industry capacity in 2025, continuing a trend observed in the previous year. Building Information Modelling (BIM), offsite manufacturing (DfMA and modular construction), sensors and data, and robotics were again rated lowest by respondents. This consistent pattern suggests that the industry views the key barriers to improvement as structural and process-related, rather than technological, reinforcing the need for foundational reforms over innovation-led approaches.

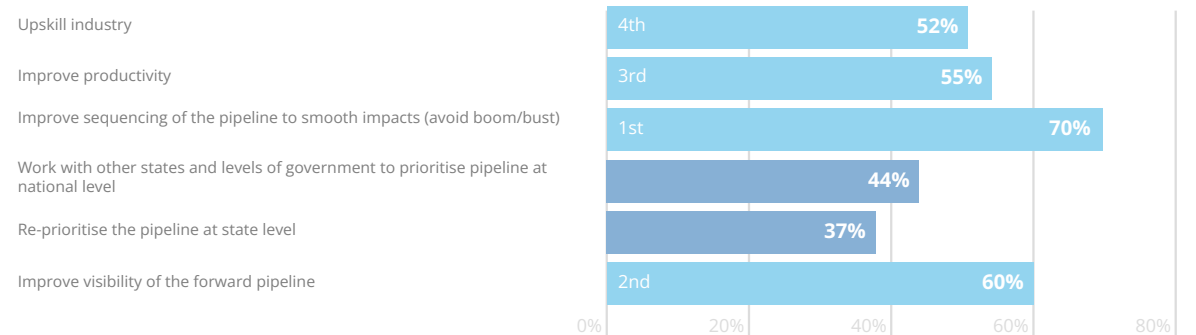
### 2025 - Where should government and industry focus to improve industry capacity and drive productivity?



### 2024 – Focus improvement to drive productivity



### 2024 - Focus to improve capacity



# Industry Capacity

## - Industry Leader Perspectives

Building on the priorities identified through the 2025 survey, industry leaders have outlined targeted recommendations to strengthen capacity and drive productivity across Qld's infrastructure sector. These suggestions reflect practical, experience-based insights and are grouped into five strategic themes that align closely with the top-ranked focus areas from survey respondents. Together, they offer a considered perspective on where future efforts could be most effectively directed.

### Workforce Attraction and Development

- Introduce skilled and semi-skilled migration programs
- Align licencing across states (e.g., RPEQ)
- Support international students and graduates transition to workforce
- Promote construction careers in schools
- Attract more females into construction
- Attract workers from other states (including FIFO)
- Implement apprenticeship and training targets (e.g. through national skills initiatives)

### Sequence the Pipeline

- Stage and sequence projects to avoid market overload
- Defer or reschedule projects that crowd the market
- Shift focus from growth to prioritisation in investment strategy
- Adopt a programmatic approach to infrastructure delivery
- Smarter sequencing and tech to reduce pressure

### Regulatory and Planning Reform

- Align state and local planning frameworks to avoid project delays
- Remove restrictive local government regulations on production volumes and operating hours
- Streamline professional licensing processes to accelerate skilled migration
- Reduce reliance on lengthy business case processes and excessive consultancy

### Procurement and Delivery Innovation

- Make procurement more collaborative and less time-consuming
- Adopt innovative construction methods and technologies to improve productivity
- Standardise delivery processes to increase efficiency

### Visibility and Stability of the Pipeline

- Ensure consistent project flow to prevent business closures and workforce loss
- Provide early visibility of upcoming work to retain skilled labour

Research into the capacity and productivity of the infrastructure and construction industry highlights the current state of productivity and skilled migration, the demand for materials and workforce, and notable recommendations made by in recent reports from Department of Employment and Workplace Relations, and the Queensland Productivity Commission.

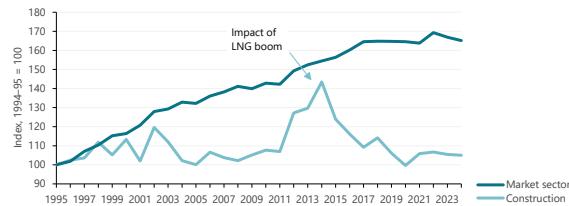
## Current State

### Construction Industry Productivity

(Queensland Productivity Commission, 2025)

- Labour productivity in construction has barely improved (only 5% since 1994–95), while the broader market economy grew by 65%.
- Since 2018, construction productivity has declined by ~9%.
- Businesses see upskilling as the most impactful way to improve productivity; digital innovation is seen as less effective.

**Figure 5:** Productivity growth in the construction industry has been well below the Labour productivity indices, Queensland



**Source:** (Queensland Productivity Commission, 2025, pg. 70)

### Skilled Migration in Queensland

(Queensland Productivity Commission, 2025)

- Construction has low migrant representation compared to other industries.
- Qld's skilled migration intake is disproportionately low (1,200 out of 26,260 nationally).
- Fewer than 100 construction trades workers migrate permanently to Qld annually.
- Barriers include misaligned skills assessments and licensing.
- Recommendations include streamlining migration pathways and aligning assessments.

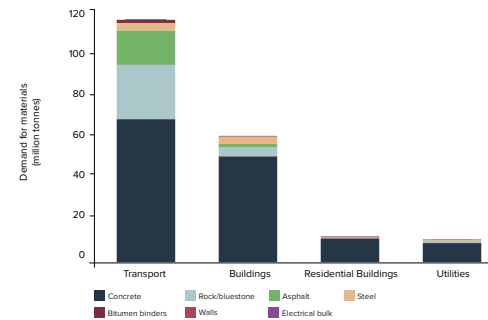
## Demand

### Material Demand & Industry Capacity

(Infrastructure Australia, 2025)

- Top materials needed: concrete, rock/bluestone, asphalt, steel.
- Industry capacity is stagnant or worsening; demand is driven by Qld.
- 53% of businesses feel confident scaling up by 25%.

**Figure 6:** Demands for materials from the Major Public Infrastructure Pipeline by sector (2023-24 to 2027-28)



**Source:** (Infrastructure Australia, 2025, pg. 30)

### Workforce Development & Skills Initiatives

(Infrastructure Australia, 2025)

- National Skills Agreement & Universities Accord (2024):
  - 20,000 fee-free TAFE places in construction.
  - Streamlining 1,900 migrant skills assessments.
- Workforce Shortages:
  - National shortage of 197,000 infrastructure workers in 2025.
  - 267,914 projected worker shortfall by 2032.
- Regional areas (Qld, NT, TAS) face rising demand due to renewable energy projects.

## Recommendations

### Occupational Licensing & Automatic Mutual Recognition (AMR)

(Queensland Productivity Commission, 2025)

- Qld's entry requirements for trades are stricter than the OECD average and it remains the only state not participating in (AMR), unlike NSW which accepts a wide range of interstate licences.
- Industry groups support adopting AMR to improve mobility and productivity, but stress need for competency checks to maintain safety and quality.

### Migration & Workforce Mobility

(Queensland Productivity Commission, 2025)

- Streamline skilled migration pathways for construction trades, including aligning skills assessments for migration and licensing.
- Adjust Qld's migrant intake to better reflect infrastructure demand.
- Implement a nationally coordinated skills accreditation system to improve mobility across jurisdictions.

### Training & Career Pathways

(Infrastructure Australia, 2025)

- Enhance apprenticeship programs.
- Expand access to training with 20,000 fee-free TAFE places, and improve delivery of training resources / workplace safety education.

### Workplace Culture & Inclusion

(Infrastructure Australia, 2025)

- Address inequality: introduce a national Culture Standard, and access to safe amenities, PPE, mentoring, and flexible work arrangements.
- Improve workforce diversity:
  - Jobs and Skills Councils to review qualifications and training gaps.
  - Targeted support for underrepresented groups (First Nations, women, people with disabilities, older workers).

### Material Supply & Infrastructure Coordination

(Employment and Workplace Relations, 2025)

- Monitor and coordinate material supply:
  - Track local production capacity and collaborate nationally on demands.
- Support industry scaling up through better forecasting and resource planning.

# Chapter 2: Industry Growth & Priority Sectors for Improvement

## Question 7:

To what extent is Queensland's infrastructure projects and the planned infrastructure investment helping to grow a more sustainable construction industry?

## Question 8:

Which infrastructure sectors are driving industry growth?

## Question 9:

Which infrastructure sectors do you think should be a priority for improvement, upgrade or development?



## Question 7:

To what extent do you think Queensland’s infrastructure projects and the planned infrastructure investment are helping to grow a more sustainable construction industry?

### 70% say infrastructure projects are growing a more sustainable industry – down 10% from 2024

In 2025, 70% of respondents see infrastructure projects as contributing to a more sustainable construction industry. While this is a strong result, it marks a 10% drop from 80% in 2024. Sentiment varies across the state, with SEQ showing greater confidence (72%) compared to regional Qld (57%). Notably, 43% of regional respondents say infrastructure is having little to no impact, highlighting a growing divide in perceptions and the need for more inclusive, sustainable industry outcomes.

### Regional Qld 15% more sceptical than SEQ

2025

**70%**

Moderate or better

2024

**80%**

Moderate or better

SEQ

**72%**

Moderate or better

Regions

**57%**

Moderate or better

**30%**

Small-Not at all

**20%**

Small-Not at all

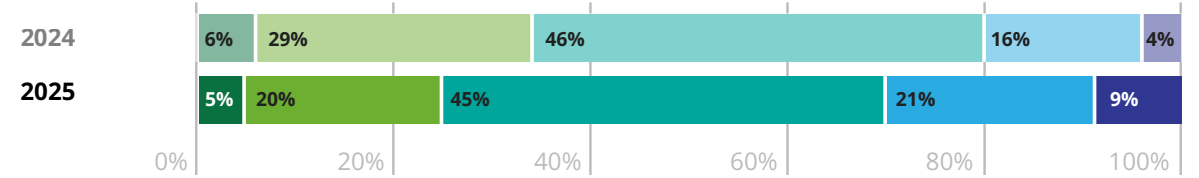
**28%**

Small-Not at all

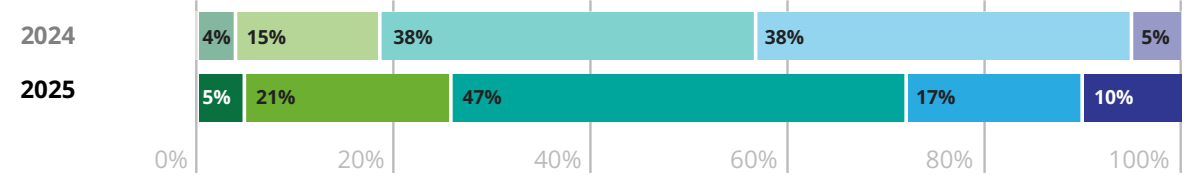
**43%**

Small-Not at all

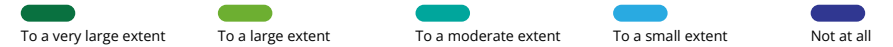
### Are infrastructure projects growing a more sustainable construction industry?



### Regions and SEQ



### Legend



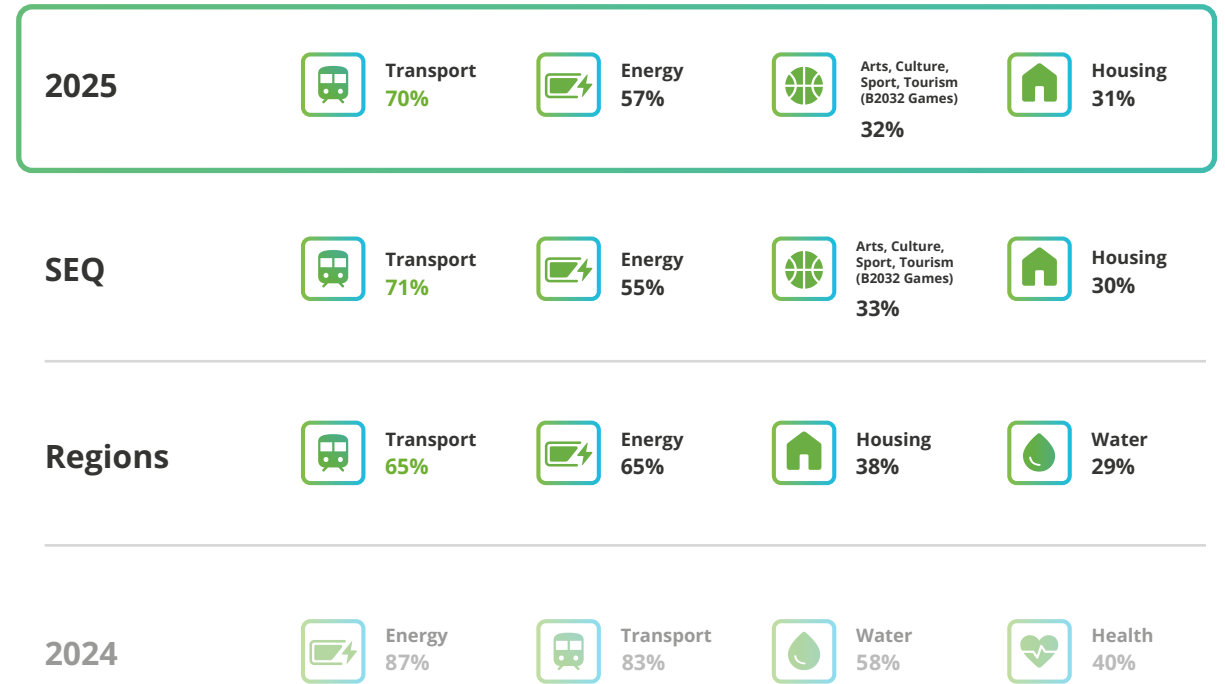
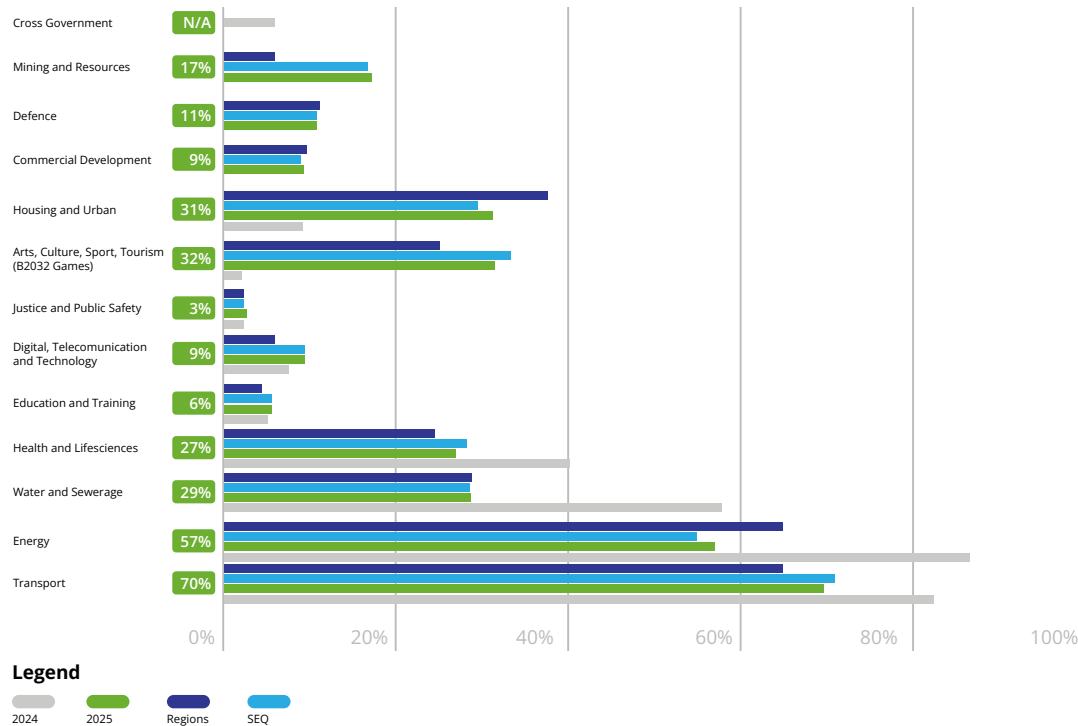
## Question 8:

Which infrastructure sectors are driving industry growth?

### Transport overtakes Energy to become the leading growth driver

The sectors driving industry growth in 2025 show both consistency and change. Transport has overtaken Energy to become the leading growth driver, selected by 70% of respondents, with Energy following at 57%. These two sectors continue to lead across both SEQ and regional Qld. The B2032 sector—covering arts, culture, sport, and tourism—made a notable leap to third overall, reflecting growing confidence in its capacity to stimulate industry activity. However, it did not rank in the top four for regional Qld, where Housing and Water are more prominent growth drivers. These shifts point to differing priorities between metropolitan and regional Qld, reinforcing the need for investment strategies that reflect local contexts.

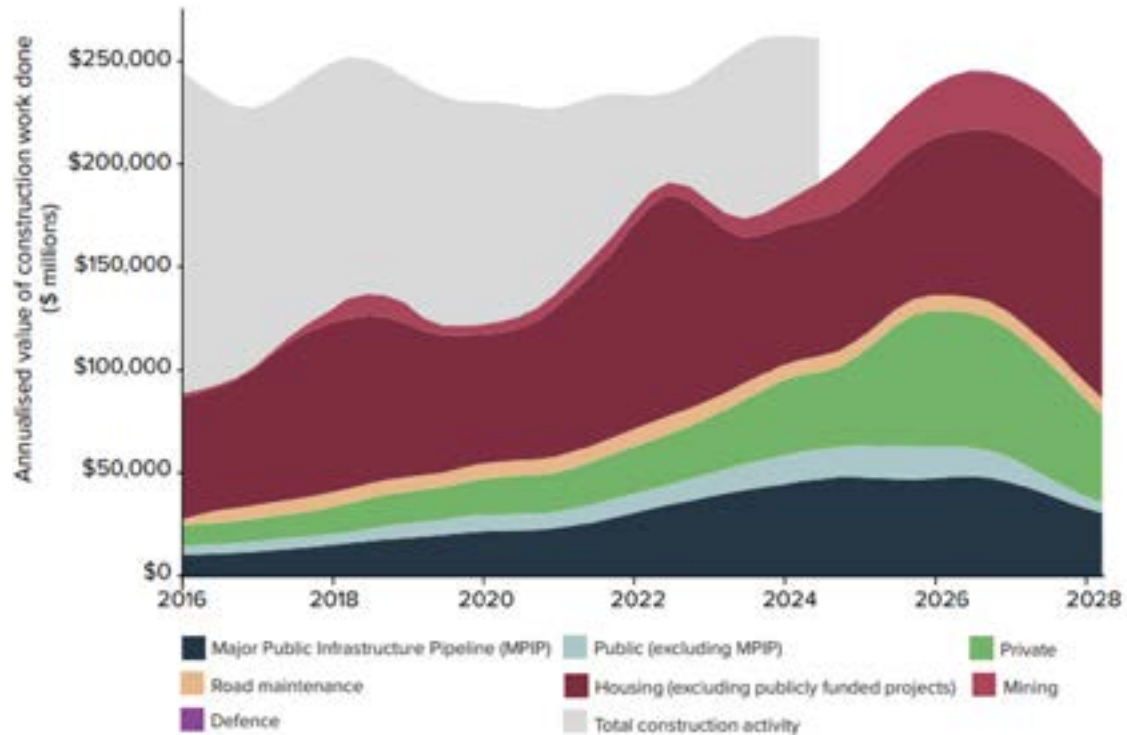
#### Infrastructure sectors driving industry growth



# Industry Growth – Research

Research into what’s driving industry growth shows Qld road infrastructure is receiving major Federal funding in the 2025–26 Budget. Infrastructure Australia forecasts a peak in private sector construction and housing investment by 2026–27, in addition to the Major Public Infrastructure Pipeline—expected to drive significant economic growth in Qld.

**Figure 7:** Forecast construction spend, as captured in the Infrastructure Australia database, in the context of historic total construction activity (2016 to 2028)



Source:  
(Infrastructure Australia, 2024)

**Figure 8:** Investing in infrastructure Federal 2025-26 budget



Source:  
(Australian Government, 2025)

# Industry Growth – Research

Research into the 2025-26 State Government budgets show strong momentum behind industry growth. Qld's \$116.8 billion infrastructure budget includes major investments in transport, health, energy, housing, and Brisbane 2032 infrastructure which are driving activity across the state, as shown in the heat map in **Table 4**.

**Table 4:** 2025-26 State Budget Highlights

~\$1B-\$4B

\$5B-\$9B

\$10B+

IAQ 2025 focus sectors

State 2025-26 Budget	QLD \$116.8 Billion Infrastructure Budget	NSW \$118.3 Billion Essential Infrastructure	WA \$38 Billion /4yrs	SA \$27.3 Billion/4yrs Public Infrastructure	NT	VIC \$71.6 Billion/4yrs Infrastructure budget
Housing	<b>\$165M</b> Boost to Buy <b>\$5.6B/5y</b> new community social housing <b>\$2B</b> Residential Activation Fund	<b>\$1.0B</b> Pre-Sale Finance Guarantee - fast-tracking more than 5,000 homes and creating 1,500 jobs	<b>\$963M</b> cost-of-living relief <b>\$1.4B</b> housing supply and affordability	<b>\$552.4M</b> housing package <b>\$118.3M</b> cost of living relief	<b>\$833.2M</b> remote and urban housing, land release, community amenity	<b>\$249M</b> for enabling infrastructure
Energy	<b>\$6.7B</b> affordable, reliable, and sustainable energy	<b>\$27.3M</b> Future Jobs Investment Authority in coal-producing regions				
Water	Included in <b>\$2B</b> Residential Activation Fund – Infrastructure	<b>\$319.1M</b> Sustainable Diversion Limit Adjustment Mechanism + other water		<b>\$14M</b> Adelaide Beaches Replenishment		
Health	<b>\$1.8B</b> Surgery Waitlist <b>\$1.7B</b> Ambulance ramping Hospital Rescue Plan <b>\$18.5B/5y</b>	<b>\$12.4B</b> health infrastructure over 4 years	<b>\$1.4B</b> to expand health and mental health services	<b>\$1.9B</b> (2024-25 - 2028-29) investment in Health system	<b>\$160.1M</b> health infrastructure investment	<b>\$9.3B</b> hospital care, <b>\$497M</b> mental health infra <b>\$437M</b> virtual EDs <b>\$230M</b> emergency, ambulance
Workforce	<b>\$20M</b> Returning to Work package	<b>\$2.8B</b> TAFE to grow skilled workforce	<b>\$2.7B</b> future growth and create WA jobs			
Transport	<b>\$5.5B</b> The Wave <b>\$5.75B</b> Faster Rail to Gold Coast <b>\$9B</b> Bruce Highway upgrades <b>\$41.7B</b> roads, bridges, transport	<b>\$14.36B</b> transport capital in 2025–26	<b>\$152M</b> new suburban flat fare Transperth and Transregional public transport	<b>\$110.6M</b> road safety package - totalling \$456.7M since 2023-24	<b>\$2B</b> roads, aerodromes and jetty	<b>\$4.1B</b> Sunshine Station <b>\$976M</b> Better Road Blitz <b>\$727M</b> activate Metro Tunnel <b>\$270M</b> regional rail reliability <b>\$162M</b> bus network upgrades
Education	<b>\$100</b> Back to School Boost 15 new schools – <b>\$1.9B</b>	<b>\$10.4B</b> schools /10 years	<b>\$1.8B</b> for education and training	<b>\$1.25B</b> commitment to children's education	<b>\$32.2M</b> to upgrade schools <b>\$4.1M</b> in capital grants	<b>\$1.5B</b> new schools, upgrades, and maintenance
Brisbane 2032 (Arts, Culture Sport, and Tourism)	<b>\$4.7B</b> for Games V&V / 4yrs <b>\$7.1B</b> Venues Program - 2032	<b>\$12.5M</b> NSW Take-Off Fund - boost tourism and exports				
Source	(Queensland Government, 2025)	(NSW Government, 2025)	(Government of Western Australia, 2025)	(Government of South Australia, 2025)	(Northern Territory Government, 2025)	(Victorian Government, 2025)

## Question 9:

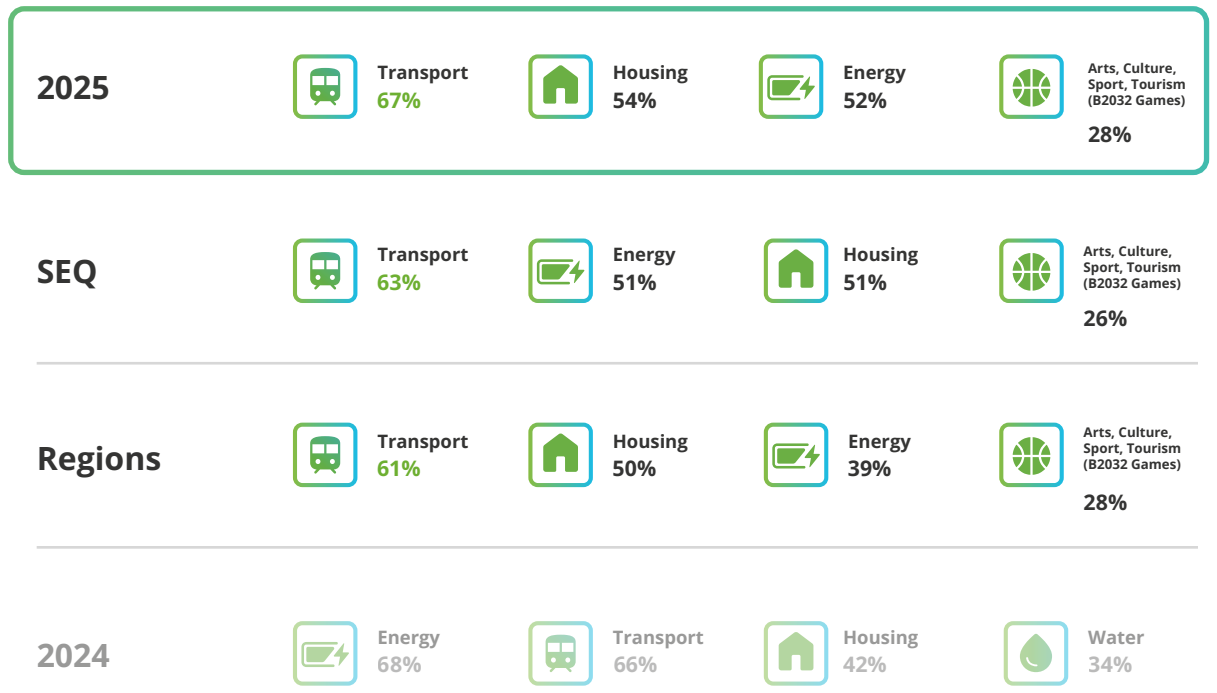
Which infrastructure sectors do you think should be a priority for improvement, upgrade or development? (Select your top 3)

Transport #1 priority, while Housing and B2032 gain ground

Sector priorities for improvement in 2025 reflect a stable, but reshuffled, top three. Compared to 2024 results, Transport rose to first place, while Energy slipped to third. Housing and B2032 both lifted in priority, with B2032 jumping from ninth place to fourth, reflecting its growing strategic and time sensitive importance. SEQ respondents placed greater emphasis on Energy, ranking it 12% higher than regional counterparts.

These results suggest stronger housing investment statewide and increased focus on B2032 infrastructure would better align improvement priorities with growth drivers.

### Sector priorities for improvement, upgrade or development



## Addressing housing requires coordinated investment in essential trunk infrastructure

Sharing their views on Queensland's infrastructure priorities, four key themes emerged. Housing was consistently identified as a central concern, described as a crisis requiring urgent attention. Leaders emphasised that addressing housing challenges requires coordinated investment in essential trunk infrastructure, including transport, water, sewage, and energy.

Transport was highlighted as a critical enabler—not only for unlocking housing supply across the state, but also for driving regional economic growth and easing urban congestion. Commercial development was seen as a strategic opportunity to stimulate economic activity and streamline regulatory processes, paving the way for broader housing initiatives.

## Commercial development ... paving the way for housing

### Housing as a Central Issue

01

*'Obviously we're in a housing dilemma at the moment, then all that essential trunk infrastructure water and sewage, energy, transport'*

*'...housing as a starting point, then you need to service them through transport, water and sewage and energy'*

*'It's certainly housing'*

*'...addressing some of the housing shortages'*

*'Housing is a crisis'*

### Transport is Key

02

*'Prioritising urban active transport is really important'*

*'Transport for the regions is vitally important... Roads are the only viable transport mode'*

*'[Regions] don't have rail option... everything to a port or railhead requires road access'*

*'Transport priorities: public transport, accessibility upgrades, level crossing removals'*

*'Transport is a massive enabler of housing...'*

### Essential Infrastructure - Enabling Housing

03

*'...water and sewage, energy, transport... needed to support sustainable, liveable community'*

*'[housing requires] ...transport and water and sewage and energy... they go hand-in-hand together'*

*'Transport, water and sewerage, housing, health, energy'*

*'Housing...then all that essential trunk infrastructure water and sewage, energy, transport'*

### Commercial Development

04

*'Commercial development because of it's economic stimulus ability'*

*'Use commercial developers to help clear red and green tape, get developments off the ground...then housing developers and smaller fry can reap the benefits...'*

# Priority Sectors – Research

Research into factors influencing infrastructure priorities, projects and investments highlight national infrastructure investment priorities proposed by Infrastructure Australia, and global political factors impacting Australia's infrastructure.

**Figure 9:** Infrastructure Australia's 2025 proposed national infrastructure investment priorities



**Source:**  
(Infrastructure Australia, 2025 pg. 7)

## Global political factors impacting Australia's infrastructure

### US Tariffs

- 125% tariffs on Chinese imports are increasing global costs for construction materials.
- Australian firms importing US-made products face higher prices due to embedded international components.
- Procurement strategies are being reassessed to manage volatility and inflation (McDonald, 2025)

### China Trade Relations

- China's export restrictions on rare earths (e.g., samarium, terbium, dysprosium) are disrupting supply chains.
- Australia's reliance on China for processing limits its ability to respond quickly.
- Economic slowdown in China is reducing demand for Australian exports, affecting infrastructure funding (Zadeh, 2025; Kobayashi, 2025)

### Ukraine and Middle East Conflicts

- Energy market volatility is driving up fuel and material costs (e.g., concrete, bricks).
- Australia's GDP could decline by 0.15–0.20% due to oil price shocks.
- Investor confidence and project viability are under pressure (ID Times, 2025; Lansing Institute, 2025)

### Global Trade Tensions and Protectionism

- Broader trade tensions are causing supply chain disruptions and currency volatility.
- The Australian dollar hit a five-year low, increasing costs for imported inputs (Rodrik, 2025; Economist Intelligence Unit, 2025)

### Labour Shortages and Migration Policy

- Global competition for skilled workers is intensifying local labour shortages.
- Australia is expanding visa programs to attract tradespeople and infrastructure talent (Economist Intelligence Unit, 2025)

### Insolvency and Financial Strain

- In the 12 months to March 2025 [in Australia], 2,636 construction companies became insolvent, a further 23 percent year-on-year increase. (Forward Path Advisory, 2025)
- Rising interest rates and inflation linked to global instability are straining financial resilience. (Economist Intelligence Unit, 2025)

### Anti-Dumping Regulations

- Australia has tightened anti-dumping rules in response to low-cost imports, especially from China.
- This adds complexity and cost to material procurement for infrastructure projects (McDonald, 2025)

### BRICS Expansion and Strategic Realignment

- The growing influence of BRICS is reshaping global trade alliances.
- Australia may face strategic pressure to diversify beyond traditional Western partnerships (Rodrik, 2025)

### Global Energy Transition and Competition

- Rising demand for copper and other critical minerals is driving up prices.
- Infrastructure investment is needed to support Australia's role in supplying these materials (Zadeh, 2025)

# Chapter 3: Infrastructure Performance

## Question 10:

**Place-based Approaches** - To what extent is government and industry applying place-based approaches that better connect infrastructure, land use, and economic and social development, delivering precincts that provide long-term value to communities?

## Question 11:

**Sustainability** - To what extent is government and industry working together to enhance the sustainability of infrastructure, including reduction of carbon footprint and environmental impacts of infrastructure through planning, delivery, operation and renewal?

## Question 12:

**Resilience** - To what extent is government and industry planning and delivering enhanced infrastructure resilience to address climate change, natural disasters, weather patterns and other events (cyber)?

## Question 13:

**Smarter Approaches** - To what extent is government and industry working together to embrace better practices and adopt smarter, more innovative approaches to improve infrastructure?



# Infrastructure Performance - Snapshot

To evaluate the performance of Queensland's infrastructure, the QIP survey asks how effectively government and industry are applying place-based approaches, enhancing sustainability and resilience, and adopting smarter, more innovative practices. These indicators collectively reflect how well infrastructure investments are delivering on Queensland's economic, environmental, and social objectives.

This chapter presents detailed results and trends for each performance indicator, with **Figure 10** offering a snapshot of overall performance. In 2025, three of the four indicators show a majority positive result, though two only marginally. Place-based approaches lead with 60% positive responses, followed by resilience (53%) and sustainability (52%). However, the indicator for smarter, more innovative practices is trending negatively, with 52% of respondents indicating limited or no adoption.

All indicators have declined compared to 2024, with drops ranging from 3% to 15%. This downward trend signals a need for targeted action to reverse performance slippage and ensure Queensland's infrastructure continues to meet the evolving needs of its communities and economy.

**Figure 10:** Infrastructure Performance snapshot

	Place-based Approaches	Sustainability	Resilience	Smarter Approaches
2025 Results	<p><b>60%</b> Moderate or better</p> <p><b>40%</b> Small-Not at all</p>	<p><b>52%</b> Moderate or better</p> <p><b>48%</b> Small-Not at all</p>	<p><b>53%</b> Moderate or better</p> <p><b>47%</b> Small-Not at all</p>	<p><b>48%</b> Moderate or better</p> <p><b>52%</b> Small-Not at all</p>
2024-25 Trend	<p><b>-6%</b> Down</p>	<p><b>-15%</b> Down</p>	<p><b>-7%</b> Down</p>	<p><b>-3%</b> Down</p>



# Place-based Approaches - Survey Results

## Question 10:

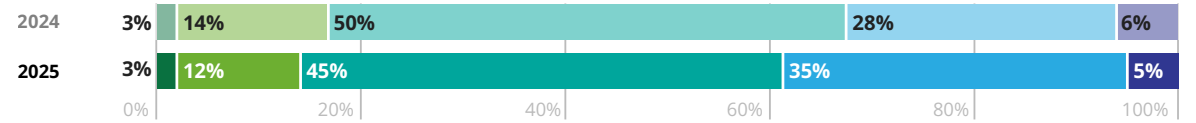
To what extent is government and industry applying place-based approaches that better connect infrastructure, land use and economic and social development, delivering precincts that provide long-term value for communities?

### Regional Qld sceptical - 49% report positive uptake of place-based planning, 14% lower than SEQ

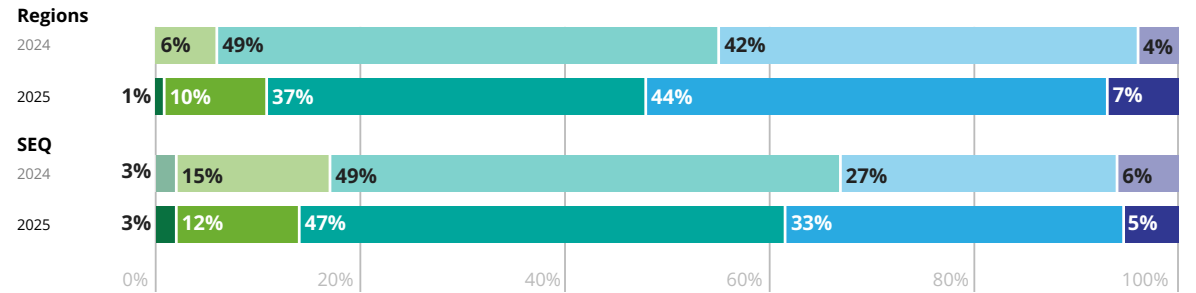
Overall, 60% of survey respondents across the state reported positive application of place-based approaches in infrastructure planning and delivery. A place based approach is one that is considered to connect infrastructure, land use and economic and social development, delivering precincts that provide long-term value for communities This is down 6% from 2024, indicating limited progress in uptake. Regional Qld are the most sceptical, with 51% reporting application of place-based approaches is limited, while SEQ leads as the most positive at 63%.

2025	2024	SEQ	Regions
<b>60%</b> Moderate or better	<b>66%</b> Moderate or better	<b>63%</b> Moderate or better	<b>49%</b> Moderate or better
<b>40%</b> Small-Not at all	<b>34%</b> Small-Not at all	<b>37%</b> Small-Not at all	<b>51%</b> Small-Not at all

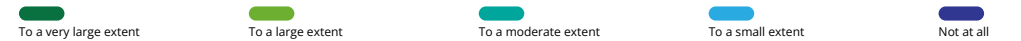
### Applying place-based approaches that better connect infrastructure



### Regions and SEQ



#### Legend



## Place-based Approaches – Optional Comments

### Question 10:

To what extent is government and industry applying place-based approaches that better connect infrastructure, land use, and economic and social development, delivering precincts that provide long-term value to communities?

Beyond indicating how well government and industry are applying place-based approaches, 81 respondents provided further commentary.

Participants broadly highlighted the need for coordinated, long-term planning, and noted that implementation is inconsistent despite support. Stronger progress is noted in SEQ compared to regional and remote areas that lack attention and investment. It's considered that community infrastructure and transport are not keeping pace with population growth, planning remains politically driven, and stronger state leadership is needed to enable coordinated, place-based outcomes.

**Table 5:** Respondent comments relating to Qld's place-based approaches

Theme and number of comments	Description	Comment
<b>Lack of Coordination and Vision</b> 	Fragmented planning, siloed delivery, and absence of strategic, long-term direction across government levels.	<ul style="list-style-type: none"> <li>'...lack of strategic and coordinated approaches... too many silos, not enough real collaboration, no vision, leadership, or long-term commitment...'</li> <li>'Infrastructure planning and works are too fragmented and politicised'</li> <li>'...little coordination across entities'</li> </ul>
<b>Under-utilisation of Place-Based Potential</b> 	Limited and inconsistent implementation of place-based approaches despite broad conceptual support.	<ul style="list-style-type: none"> <li>'Could be doing a lot more in this space. There's some talk, but VERY minimal funding to deliver these outcomes'</li> <li>'Attempts being made, but is not being realised'</li> </ul>
<b>Uneven Application Across the State</b> 	Indicates stronger progress in SEQ, with regional and remote areas receiving minimal attention and investment.	<ul style="list-style-type: none"> <li>'Regions away from Brisbane, Gold Coast &amp; Sunshine Coast are largely ignored'</li> <li>'It's not evenly distributed across the state'</li> <li>'Very little evidence in Cape York'</li> </ul>
<b>Housing, Transport, and Infrastructure Lag</b> 	Concerns that infrastructure and transport failing to keep pace with rapid housing development and population growth.	<ul style="list-style-type: none"> <li>'Housing developments are progressing without enough community and transport amenities'</li> <li>'Transport infrastructure connections are still lagging...'</li> <li>'Queensland population is growing rapidly, and infrastructure is falling behind'</li> </ul>
<b>Political Drivers Over Community or Place Outcomes</b> 	Concerns planning is driven by electoral cycles rather than long-term, community-focused, place-based vision.	<ul style="list-style-type: none"> <li>'Place-based planning is inconsistent across Queensland and... mired in politics that can drive sub optimal outcomes...'</li> <li>'Precincts are still planned around political cycles, not lifecycle value'</li> </ul>
<b>Need for Stronger State Leadership</b> 	Need for clearer state direction to enable integrated, coordinated place-based delivery.	<ul style="list-style-type: none"> <li>'Government needs to lead and champion'</li> <li>'Vital state government leadership needed in Central Queensland'</li> </ul>
<b>Systemic Barriers – Red Tape, Funding, Skills</b> 	Bureaucracy, lack of capacity, and absence of aligned procurement slowing progress.	<ul style="list-style-type: none"> <li>'Too much red tape and inflexibility in approval processes'</li> <li>'Great ideas usually – who pays for delivery is a key question'</li> </ul>

# Place-based Approaches

## - Industry Leader Perspectives

### Strengthen regional relevance and scale what works

Industry leaders shared mixed views on place-based approaches. Some noted they 'don't see a lot' while others felt place-based approaches are performing well, citing active frontages on buildings, densification around transport nodes, and mechanisms like city deals and regional plans as supporting the application. A strong theme emerged around SEQ-centric decision-making, noting that 'the SEQ lens doesn't always meet a regional requirement', leading to gaps in infrastructure connectivity and diminished local relevance.

#### These insights point to key opportunities including:

- Strengthening regional relevance in decision-making
- Expanding and scaling place-based approaches that are working well.

#### Improving

01

*'...the place-based approaches concept has been performing quite well on the back of some of the city deals and regional plans'*

*'...we are doing well ... more active frontages on buildings and more densification around key transport nodes'*

*'Place-based planning is progressing'*

#### SEQ vs Regional disconnect

02

*'...there's a gap...because a lot of the decisions are made in Brisbane...SEQ lens doesn't always meet a regional requirement'*

*'...bureaucracy takes away place-based approaches so they just don't bother'*

#### Limited

03

*'I don't see a lot of place-based approaches coming though... its not apparent...I used to hear about it a lot more'*

*'[Place-based approaches applied] to a small extent'*



# Place-based Approaches - Research

Research into place-based approaches to infrastructure planning and delivery nationally and internationally shows they are gaining traction across jurisdictions to better align investment with local needs and conditions. In Qld, these principles are embedded through strategic planning and reform initiatives. Other Australian states, including New South Wales and Victoria, are trialling models that integrate infrastructure delivery with community priorities. Internationally, place-based infrastructure is increasingly recognised as a key component of sustainable urban development, with documented case studies demonstrating its practical benefits. Relevant national and international case studies are highlighted below.

## Queensland

### PlaceConnect – Qld Government

*(Queensland Government, 2025)*

The Queensland Government's Strategy for Social Infrastructure (SSI) uses a place-based approach to guide the planning and delivery of buildings like hospitals, schools, and community hubs. It emphasises:

- Local context: Infrastructure tailored to community needs.
- Collaborative models: Co-location and shared-use facilities.
- Long-term value: Infrastructure that delivers compounding social and economic benefits.

### Regional Infrastructure Plans

*(Queensland Government, 2025)*

The regional infrastructure plans embed place-based thinking into the State Infrastructure Strategy, ensuring that building projects (e.g., civic centres, health facilities) are aligned with regional priorities and community aspirations.

## Australia-Wide

### Infrastructure Australia – Planning Liveable Cities

*(Infrastructure Australia, 2018)*

Reviews infrastructure sequencing in Australia's five largest cities and recommends:

- Aligning housing and building infrastructure delivery.
- Reforming governance and funding to support place-based planning.
- Using local data to guide infrastructure investment.

### NSW – Place-based Infrastructure Compact (PIC)

*(NSW Department of Planning, 2023)*

The Greater Sydney Commission piloted the PIC model in Greater Parramatta and Olympic Peninsula (GPOP):

- Aligns infrastructure delivery (e.g., schools, hospitals, transport) with urban growth.
- Uses scenario planning to guide building investments.
- Promotes coordinated infrastructure that supports liveable, productive precincts.

## International Case Studies

### Asian Development Bank – Principles of Infrastructure

*(Nakamura & Nagasawa et al., 2019)*

Outlines best practices from Japan and other countries, emphasising:

- Integrated planning: Infrastructure projects designed with local economic and social goals.
- Quality infrastructure: Long-term, resilient buildings that support community development.

### Global Infrastructure Hub

*(Global Infrastructure Hub, 2025)*

Examples include:

- Thames Tideway Tunnel (UK): Infrastructure aligned with environmental and urban renewal goals.
- Hornsdale Power Reserve (Australia): A building-based energy solution with regional impact.
- Paseo del Bajo (Argentina): A road corridor project improving urban connectivity and precinct development.

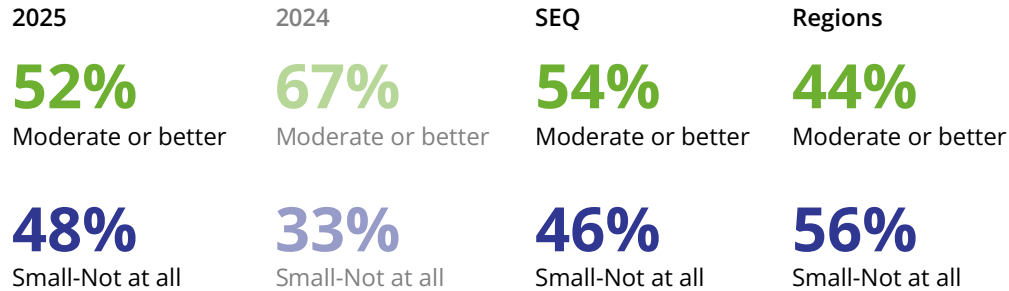
Question 11:

To what extent is government and industry working together to enhance the sustainability of infrastructure, including reduction of carbon footprint and environmental impacts of infrastructure through planning, delivery, operation and renewal?

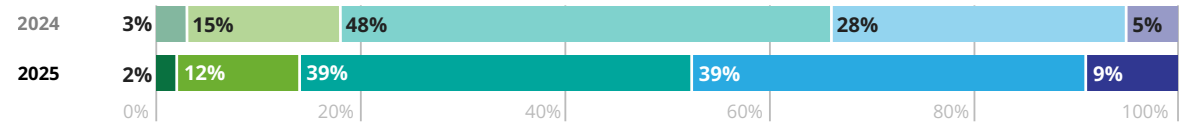
Working together to enhance sustainability of infrastructure drops significantly - down 15%

In 2025, 52% of survey respondents reported a moderate or better perception of application of enhanced sustainability in infrastructure planning and delivery. This marks a significant 15% drop from the previous year, indicating sustainable approaches are declining. SEQ is the most positive region with 54% reporting moderate or better while regional respondents were notably more sceptical, with only 44% indicating government and industry are working together to enhance the sustainability of infrastructure.

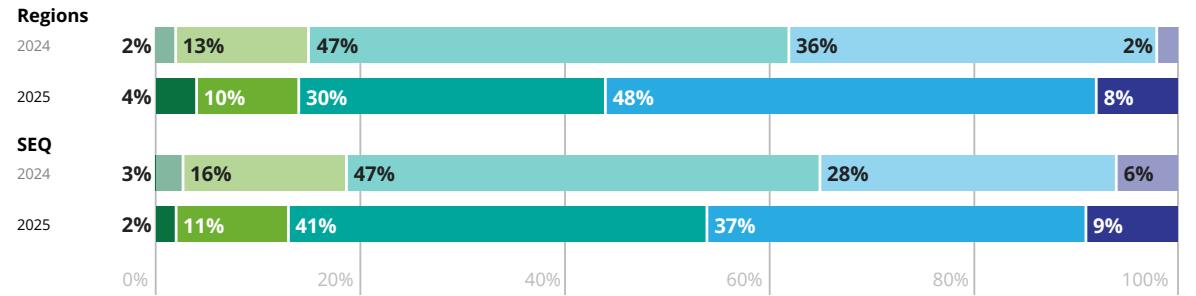
Regional Qld even more sceptical with 56% saying small or not at all



Enhancing Sustainability of Infrastructure



Regions and SEQ



Legend



### Question 11:

To what extent is government and industry working together to enhance the sustainability of infrastructure, including reduction of carbon footprint and environmental impacts of infrastructure through planning, delivery, operation and renewal?



*Sustainable outcomes can be done as profitable outcomes if we stick in the centre, reduce energy demand, reduce supply chain road blocks, reduce government red tape and agree on a sensible middle road to drive change*

*Respondent quote*

With results in Question 11 demonstrating a drop in how Qld is enhancing the sustainability of infrastructure, 82 respondents provided further commentary.

Several strong themes have emerged highlighting concerns of unclear policies and lack of targets, a need to focus more on outcomes, constrained budgets reducing sustainable initiatives, and frustration with slow and fragmented progress. Additionally, shifting renewable energy policies and the need for stronger collaboration between government and industry were also raised.

**Table 6:** Respondent comments relating to smarter approaches

Theme and number of comments	Description	Comment
<b>Policy Gaps, Lack of Strategy &amp; Targets</b> 	Absent or unclear sustainability policies, lack of targets, or poor enforcement.	<ul style="list-style-type: none"> <li>• <i>'No clear guidance in frameworks regarding sustainability targets or considerations'</i></li> <li>• <i>'Lack of specific targets and initiatives in the sustainability space is leading to wasted effort and confusion...'</i></li> <li>• <i>'Planning is not synchronised with federal and regional government and no concrete long-term goals'</i></li> </ul>
<b>Tick-Box Mentality</b> 	Criticism of a box-ticking approach rather than outcomes-focused delivery.	<ul style="list-style-type: none"> <li>• <i>'Mostly tick-box requirements rather than actual outcomes'</i></li> <li>• <i>'Focus on ratings schemes that are being gamed to deliver results for consultants rather than materiality changes'</i></li> </ul>
<b>Sustainability Undermined by Budget &amp; Procurement Decision</b> 	Sustainability dropped when budgets are constrained, or lowest-cost bids win.	<ul style="list-style-type: none"> <li>• <i>'Sustainability is sacrificed when CAPEX budgets need to be reduced'</i></li> <li>• <i>'Project budgets are reducing sustainable initiatives to minimal if able or removed completely...'</i></li> <li>• <i>'Only adopted if there is a value for money or cost saving'</i></li> </ul>
<b>Slow Progress &amp; Fragmentation</b> 	Sustainability efforts are patchy, slow, and vary greatly by region or project.	<ul style="list-style-type: none"> <li>• <i>'Government agencies and industry are implementing initiatives... but we aren't moving quickly enough...'</i></li> <li>• <i>'Seems project by project, rather than strategic and regional'</i></li> </ul>
<b>Uncertainty in Renewable Energy Investment</b> 	Uncertainty in withdrawn support for renewables, cancelled/ paused projects, and shifting policies.	<ul style="list-style-type: none"> <li>• <i>'Unstable policy / ideological backflip on renewable energy sets Qld backwards'</i></li> <li>• <i>'The current State government has cancelled Green energy projects...'</i></li> </ul>
<b>Government vs Industry - Who's Leading?</b> 	Leadership, pace and collaboration concerns.	<ul style="list-style-type: none"> <li>• <i>'See very little government &amp; industry working together'</i></li> <li>• <i>'Government needs to take a more intelligent and informed approach to being a collaborative client'</i></li> <li>• <i>'Government is too reliant on financial and procurement drivers and is not doing enough to drive industry capability'</i></li> </ul>

# Sustainability – Industry Leader Perspectives

## Smarter standard, regional empowerment, and moving beyond cost

Industry leaders highlighted several key themes and concerns impacting the sustainability of infrastructure in Queensland. These include misaligned government standards that discourage the use of low-carbon materials, and regulatory frameworks that cause delays. Market dynamics were also flagged, with sustainability often deprioritised in tenders in favour of lowest-cost options.

Additionally, regional stakeholders emphasised the need for greater autonomy and flexibility to tailor sustainable solutions locally, noting that budget constraints frequently undermine long-term sustainability initiatives.

### These insights point to key opportunities including:

- Adopting performance-based standards to enable approval and use of sustainable materials like low-carbon concrete
- Aligning environmental regulations across states and streamlining approval processes to reduce delays
- Encouraging sustainability in tenders, moving beyond cost-focused decisions to reward smarter, greener solutions
- Supporting regional autonomy in infrastructure planning to tailor sustainability efforts to local needs.

## Sustainable Materials & Standards 01

*'Government standards don't allow for low carbon concretes, and because they're more expensive, the market's not buying low carbon concrete... we need to get more performance-based standards in the system'*

*'We need to go from less prescriptive approaches to more performance-based approaches'*

## Regulatory 02

*'PFAS...as a state we have a different approach than other states in terms of what's acceptable, what's not acceptable'*

*'EPBC impacts every type of development... but they go on for months and years, it's just delaying things... as a collective, we need a more pragmatic approach....'*

## Market Incentives 03

*'We aren't being asked by clients to prioritise [sustainability] in our tenders, so we aren't'*

*'Lowest price is not always the most sustainably built thing, so we're not being pushed in that way, or we are, but we're not being rewarded for it by winning the job'*

*'...the only way we are going to be successful with innovation is if it's smarter and cheaper, not often cleaner and greener'*

## Regional 04

*'Sustainability and place-based infrastructure approaches sound great in theory, but regions need the autonomy to decide what works best locally. The real issue is cost—uncosted policies keep piling up, driving infrastructure expenses so high that projects stall. Sustainability often gets cut first when budgets tighten, even though building back with resilience offers strong returns'*

Research on national and global efforts to improve the sustainability of infrastructure reveals progress by the Australian federal and state governments, as well as recommendations from the FIDIC (International Federation of Consulting Engineers) Global Leadership Forum in 2023.

## QLD

**Transport:** Expanding public transit, walking/cycling paths, EV fleets, and biogas-fuelled buses.

**Buildings:** Constructing to Green Star standards, promoting cool/green roofs, and running energy/water efficiency education.

**Urban Greening:** Partnering with communities to grow green corridors, increase forest cover, and improve flood resilience.

*Source: (Access Environmental Planning, 2024)*

## NSW

**Renewable Energy:** 25% of electricity from renewables, expanding via large-scale solar and wind farms.

**Energy Efficiency:** Green building regulations and retrofitting programs; over 500,000 sqm of green roofs and walls installed.

**Sustainable Transport:** Expanding metro, light rail, cycling paths, and EV charging stations.

**Project:** One Central Park features vertical gardens, solar PV, recycled water, and high energy efficiency—one of Australia’s most sustainable buildings.

## VIC

**Energy:** Expanding renewables, incentivising solar PV, and improving energy efficiency across sectors.

**Transport:** Decarbonising mobility via metro tunnels, tram networks, cycling corridors, EV fleets, and biofuels.

**Water:** Using Integrated Water Management (stormwater harvesting, recycling, and efficient irrigation) to boost water security.

## Insights from Infrastructure Market Capacity 2024 Report

The Australian Government has taken significant first steps to support industry’s sustainable options, including:



Development of the National Framework for Recycled Content Traceability, which will give buyers the ability to trace the history, location or source of recycled materials



Agreement with state and territory governments, as part of the renegotiated Federation Funding Agreement Schedule on Land Transport Infrastructure Projects (2024–2029), to optimise their procurement practices to support recycled content uptake on land transport infrastructure projects



A growing commitment to sustainability and decarbonisation outcomes is expected to improve proposal development

## Annual Performance Statement 2025

Building on the Infrastructure Market Capacity 2024 Report, the Australian Government has taken significant first steps to support industry’s sustainability requirements. Federal and state governments have provided policies, advice, and leadership to strengthen infrastructure’s role in achieving net zero targets:

- Embodied Carbon Projections: Establishes a baseline for embodied carbon in infrastructure and buildings, with six recommendations to reduce emissions
- Net Zero Consultation Roadmap: Outlines strategies for transport and infrastructure sectors to reach net zero by 2050
- VIDA Decarbonisation Strategy (VIC): Targets emissions reduction in corporate operations and transport projects, supported by contracts and incentives

*Source: (Infrastructure Australia, 2025)*

## Decarbonisation of the infrastructure sector – FIDIC White Paper

The FIDIC Global Leadership Forum (GLF) 2023 White Paper identifies that infrastructure projects are a major contributor to global greenhouse gas emissions across their lifecycle—from planning and design to construction, operation, and end-of-life. FIDIC finds that while there is growing commitment to net zero targets globally, the infrastructure sector lacks consistent standards, clear metrics, and integrated carbon management practices across markets (FIDIC, 2023).

To address these challenges and accelerate sustainability, FIDIC provide the following recommendations:

### 1. Lifecycle Integration of Carbon Management

Embed carbon reduction strategies across all phases of infrastructure projects, from concept to decommissioning

### 2. Standardisation and Benchmarking

Develop and adopt international standards and create carbon intensity metrics to benchmark performance

### 3. Circular Economy and Material Optimisation

Promote reuse, recycling, and low-carbon materials to reduce embodied carbon and support circular design principles

### 4. Green Procurement and Financing

Make decarbonisation a key criterion in procurement and collaborate with financial institutions to align funding with sustainability goals

### 5. Capacity Building and Knowledge Sharing

Establish platforms like a FIDIC Academy and a Low Carbon Infrastructure Handbook to train stakeholders and disseminate best practices globally

### 6. Collaborative Action and Data Sharing

Encourage cross-sector collaboration and the sharing of carbon footprint models to enable benchmarking and continuous improvement

Source: (FIDIC, 2023)

## Scalable, innovative approaches to decarbonisation across all lifecycle phases



### Southern Program Alliance (Melbourne)

Embodied emissions reduction through design optimisation and material substitution

Source: (Scenery, n.d.)



### Toldbodvej Bridge (Denmark)

Circular economy principles applied via bridge lifting and reuse

Source: (FIDIC, 2023)



### UK's First Net Zero Carbon Station

Whole-life carbon analysis and modal shift benefits

Source: (Worldwide Universities Network, 2021)



### City Rail Link (NZ)

Targeted reductions in Scope 1, 2, and 3 emissions

Source: (City Rail Link, 2020)

**Question 12:**

To what extent is government and industry planning and delivering enhanced infrastructure resilience to address climate change, natural disasters, weather patterns and other events (cyber)?

**Delivering enhanced infrastructure resilience declined 7% from 2024**

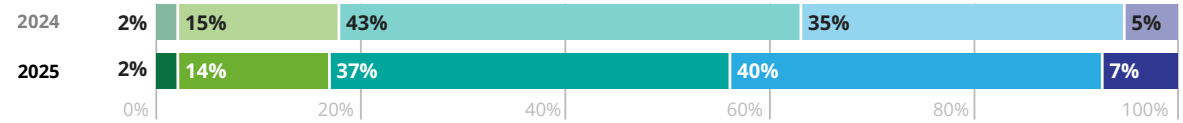
In 2025, only 53% of respondents believed resilience is being addressed to a moderate or greater extent in infrastructure planning; a 7% decline from 2024.

The drop was more pronounced in regional areas, where confidence fell from 53% to 44%, compared to a smaller decline in SEQ, from 60% to 55%. This 11% difference between SEQ and Regional Qld results highlight a growing divergence in perceptions, suggesting that efforts to integrate resilience into infrastructure planning is not only declining overall, also may be unevenly applied or experienced across the state.

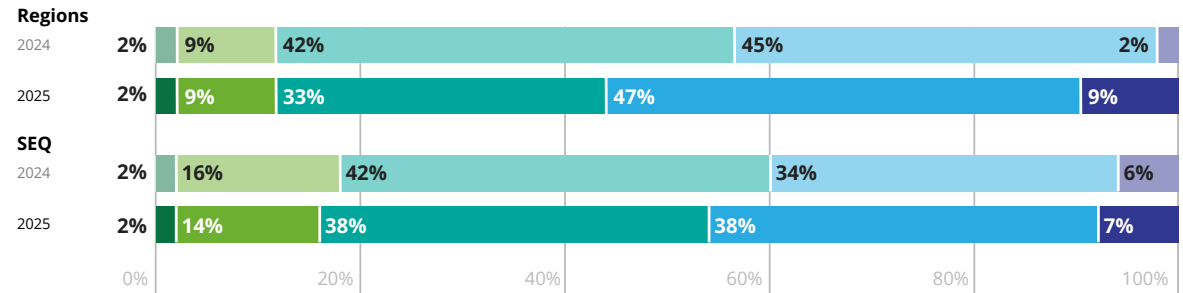
**56% in Regional Qld say enhanced infrastructure resilience delivery is limited or not at all**

2025	2024	SEQ	Regions
<b>53%</b> Moderate or better	<b>60%</b> Moderate or better	<b>55%</b> Moderate or better	<b>44%</b> Moderate or better
<b>47%</b> Small-Not at all	<b>40%</b> Small-Not at all	<b>45%</b> Small-Not at all	<b>56%</b> Small-Not at all

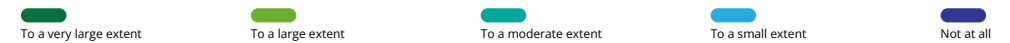
**Enhancing Infrastructure Resilience**



**Regions and SEQ**



**Legend**



### Question 12:

To what extent is government and industry planning and delivering enhanced infrastructure resilience to address climate change, natural disasters, weather patterns and other events (cyber)?



Regions highlight the connection for

*...greater engagement with First Nations communities to embed cultural knowledge into resilience strategies*

With 53% indicating a moderate or better extent to enhanced resilience, 66 respondents provided additional commentary. Feedback from industry highlights that resilience planning remains fragmented and underdeveloped across the sector. While there is growing awareness of climate-related risks, it is stated that resilience is often treated as a secondary design consideration rather than a core planning principle.

Respondents pointed to a lack of integrated systems and policy, which limits proactive risk management. Policy instability and unclear regulatory frameworks were identified as key barriers to investment, despite significant global capital interest in climate-resilient infrastructure. For Regional Qld the need for locally tailored, risk-based planning approaches, and greater engagement with communities was highlighted.

**Table 7:** Respondent comments relating to resilience

Theme and number of comments	Description	Comment
<b>Fragmentation and Lack of Strategic Planning</b> <span>25+</span>	An absence of a coordinated strategy, siloed approaches, and fragmented responsibilities between agencies.	<ul style="list-style-type: none"> <li>'Climate and disaster risk are managed in silos with minimal use of scenario modelling'</li> <li>'Resilience planning is fragmented'</li> <li>'Planning should be risk-based... not just in response to damage following a disaster...'</li> </ul>
<b>Inconsistent Government Leadership &amp; Policy Instability</b> <span>20+</span>	Frustration with government policy change, cancelled projects, and lack of long-term direction.	<ul style="list-style-type: none"> <li>'Lack of policy clarity is causing lack of investment... hundreds of billions of \$ in international investment waiting...'</li> <li>'The new State Government has reversed useful and effective initiatives from the previous Government'</li> </ul>
<b>Resilience as Afterthought</b> <span>15+</span>	Climate resilience retrofitted, not embedded into project planning or design.	<ul style="list-style-type: none"> <li>'Still treated as a design layer, not a system principle'</li> <li>'This [resilience] is still an after thought for most'</li> <li>'Work is coming to market too defined without adequate early-stage climate consideration'</li> </ul>
<b>Climate Action Undermined by Cost &amp; Red Tape</b> <span>15+</span>	Cost as a barrier to resilience upgrades and sustainable choices, often deprioritised when budgets tighten.	<ul style="list-style-type: none"> <li>'The intent is there but when \$'s get tight these drop off very quickly'</li> <li>'Enhanced infrastructure can be delivered, but it comes at a cost'</li> <li>'Funding to achieve resilience is limited'</li> </ul>
<b>Flooding, Bushfires, and Infrastructure Risk</b> <span>10+</span>	Examples of climate-related risks not being adequately managed in infrastructure.	<ul style="list-style-type: none"> <li>'Cyclone Alfred showed lack of design for resilience'</li> <li>'Bushfire is total mess... QFD have had 6 years to develop models, and they are not done...'</li> <li>'Allowing flood-prone development stifles the industry and transfers risk'</li> </ul>

## Whole-of-life cost of infrastructure urged - investing early avoids the disruption

Industry interviews highlighted key factors in infrastructure resilience, particularly in regional Queensland. A key concern was the vulnerability of supply chains, illustrated by the extended road closures from floods disrupting access for over 170,000 residents. Leaders emphasised the importance of considering whole-of-life costs in infrastructure planning, noting that early investment can mitigate disruption and productivity loss.

While some acknowledged improvements in resilience planning, others pointed to ongoing trade-offs between cost, sustainability, and long-term resilience—especially in constrained environments.

### These insights point to opportunities including:

- Investing more in regional Qld to avoid extended disruptions
- Adopting whole-of-life cost analysis in planning and decision-making.

## Questioning Regional Resilience

*'...a major supply disruption due to road closure between Cairns and Mareeba...for three weeks 170,000 people were cut off and we had to fly food in'*

*'[Regional communities] are we resilient or apathetic?'*

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## Cost

*'We need to consider the whole-of-life cost of infrastructure. Investing early avoids the disruption and productivity loss caused by asset unavailability'*

*'...sustainability and resilience face trade-offs in a cost-constrained environment'*

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## Improving

*'...we're doing better on the infrastructure resilience side'*



Research highlights Qld’s risk to climate extremes and investments in improving resilience across Qld, NSW, Victoria and South Australia.

**Figure 11:** Climate Risk Mapping



Source: (Parliament of Australia, 2024)

## QLD 25/26

(Queensland Government, 2025)

- Boosting the safety and flood resilience of regional unsealed roads across regional Qld with a \$100 million investment in the Country Roads Connect program
- Supporting Queenslanders experiencing financial challenges with the Qld financial Resilience Program, providing \$2.2 million in 2025–26
- Boosting drought resilience for agriculture through \$51.9 million over 4 years

## NSW 25/26

(NSW Government, 2025)

- \$23.1 million over three years for Building on Aboriginal Communities Resilience to expand community-led suicide prevention and wellbeing support programs
- \$5.5 million to deliver eight Class 1 vehicles to enhance Fire and Rescue NSW operational flexibility, support regional response capacity, strengthen community resilience and meet increased demand for emergency services
- In the six years since the unprecedented 2019-20 bushfires, the NSW and Australian Governments have spent \$9.5 billion providing disaster relief and recovery

## VIC 25/26

(Victorian Government, 2025)

- \$53.1 million in 2025-26 investment over four years to further support Victorian emergency services and volunteers
- \$10 million in 2025-26 to maintain critical assets essential for emergency response
- \$36.2 million in 2025-26 over two years to address recovery needs from the Western Victoria Bushfires
- \$2.5 million in 2025-26 over four years for more Country Fire Authority (CFA) stations

## SA 25/26

(Government of South Australia, 2025)

- \$17.3 million for future drought preparedness and resilience programs
- \$656.3 million for Stage 1 of the High Productivity Vehicle Network to upgrade routes between Swanport Bridge and Truro, improving freight efficiency and route resilience by bypassing metropolitan Adelaide

Question 13:

To what extent is government and industry working together to embrace better practices and adopt smarter, more innovative approaches to improve infrastructure?

Majority (52%) rates smarter, more innovative approaches to improve infrastructure as small to not at all

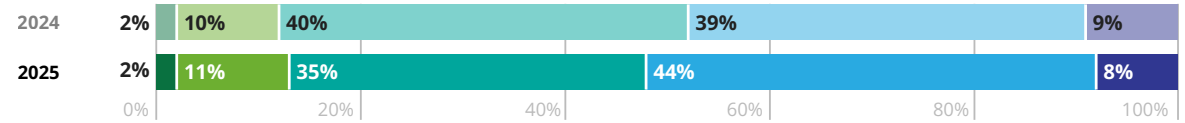
Survey responses indicate that collaboration between government and industry to adopt smarter, more innovative infrastructure practices remains limited. In 2025, 52% of respondents rated this collaboration as small to none, a 3% decline from 2024. SEQ reported an even split in 2025, with 50% of respondents seeing moderate or better collaboration and 50% indicating limited progress. Regional areas reflected the overall trend negative trend, showing a stronger decline from 2024 down 7%.

Results suggest that focused attention is needed to improve how to embrace better practices and adopt smarter, more innovative approaches to improve infrastructure.

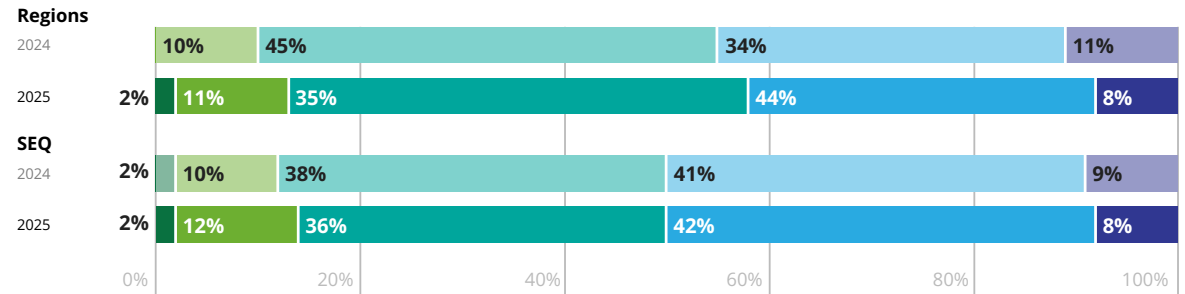
Regions are more sceptical than SEQ with a negative trend for perceptions of smarter infrastructure practices – down 7% from 2024

2025	2024	SEQ	Regions
<b>48%</b> Moderate or better	<b>51%</b> Moderate or better	<b>49%</b> Moderate or better	<b>48%</b> Moderate or better
<b>52%</b> Small-Not at all	<b>48%</b> Small-Not at all	<b>51%</b> Small-Not at all	<b>52%</b> Small-Not at all

Embracing better practices and adopting smarter, more innovative approaches



Regions and SEQ



## Question 13:

To what extent is government and industry working together to embrace better practices and adopt smarter, more innovative approaches to improve infrastructure?

With the majority rating smarter, more innovative approaches to improve infrastructure as limited to none, 61 respondents provided additional commentary. Feedback indicated that current procurement models, including fixed-price contracts and conventional risk sharing approaches, are perceived as limiting the adoption of innovative practices. While innovation is frequently referenced in policy and strategy, its implementation remains limited, with minimal observable impact.

Respondents identified a lack of clarity and alignment between government and industry roles, which affects collaboration and confidence. There were references to emerging technologies such as BIM, digital twins, and AI, though integration is inconsistent and often under-resourced. Innovation activity appears to be concentrated in metropolitan areas, with regional stakeholders reporting limited engagement and sectoral disparities in uptake.

**Table 8:** Respondent comments relating to smarter approaches

Theme and number of comments	Description	Comment
<b>Innovation Blocked by Legacy Systems and Procurement</b> 	Traditional procurement models, fixed-price contracts, and risk-averse departments hinder innovation.	<ul style="list-style-type: none"> <li>'Government dictates the specifications which prevents the industry to offer anything else'</li> <li>'Innovation in infrastructure remains a buzzword... Government and industry continue to default to legacy design-bid-build models...'</li> <li>'Procurement / control models continue to stifle innovation with an appetite for fixed pricing and conventional risk sharing approaches'</li> </ul>
<b>Talk vs Action Gap</b> 	Innovation is talked about, but rarely implemented or visible on the ground.	<ul style="list-style-type: none"> <li>'There is talk of smarter ways but no translation to outcomes'</li> <li>'Innovation is a word thrown around quite a lot, until it reaches governmental departments where it is pushed back on'</li> <li>'Smarter approaches are trumpeted but not making impact'</li> </ul>
<b>Disconnected Government – Industry Relationships</b> 	The need for stronger partnerships and clearer roles between the public and private sectors.	<ul style="list-style-type: none"> <li>'Industry wants to help but has no confidence in government agencies'</li> <li>'The relationship between government and industry... willingness to embrace change... is non-existent'</li> <li>'Policies sometimes conflict with other frameworks, like QIPP'</li> </ul>
<b>Procurement &amp; Budget Constraints</b> 	Innovation requested, but constrained by budgets and procurement.	<ul style="list-style-type: none"> <li>'Government tender docs seek innovation, but budgets don't stretch'</li> <li>'If the procurement is not streamlined then any gains in manufacturing are only lost in the bureaucracy...'</li> <li>'Budget constraints and conventional risk sharing approaches stifle innovation'</li> </ul>
<b>Slow Uptake of Digital Tools</b> 	Calls for greater use of BIM, digital twins, 4D engineering, and data-led decision-making.	<ul style="list-style-type: none"> <li>'Minimal BIM integration due to lack of resourcing.'</li> <li>'Some improvements have been made in BIM and 4D Digital Engineering, but this could be more useful'</li> <li>'AI could make BIM less labour intensive'</li> </ul>
<b>Missed Regional and Sectoral Opportunities</b> 	Innovation appears to be concentrated in urban centres, with regions and some sectors underrepresented.	<ul style="list-style-type: none"> <li>'Maybe in the big cities, but nothing near us [in the regions]'</li> <li>'I cannot see any evidence of this up in this region?'</li> <li>'Depends on the sector. Too much union interference in some projects'</li> </ul>

## Smarter Approaches – Industry Leader Perspectives

### Innovation potential in Qld's infrastructure sector

Industry leaders expressed concern about the slow pace of technological adoption and innovation within Qld's infrastructure sector, noting that construction practices remain outdated, with limited uptake of modern tools and techniques. It was observed that innovation is often only pursued when it delivers cost or time savings, rather than broader sustainability improvements. Regional voices highlighted a risk-averse culture underpinned by limited budgets, which hinders experimentation and the adoption of smarter approaches.

#### These insights point to opportunities including:

- Adopting modern technology across the construction industry
- Standardising processes to improve efficiency
- Overcoming risk aversion in local government to enable experimentation.

### Not enough, more needed

*'...want to see greater adoption of technology and innovation across the board now. The construction industry has been a technology laggard for years and we need to improve that'*

*'We're still building like it's 50 years ago'*

*'We need to embrace technology and standardisation to build horizontal infrastructure more efficiently. Lessons from other industries can guide us'*

*'[to win work] innovation only works if it makes us faster and cheaper — not just cleaner or greener'*

### Regional risk

*'...local government have become risk adverse...to trying new things because we don't have the budget if something goes wrong'*

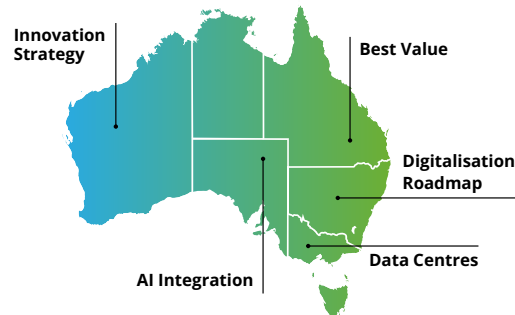


Research show that government is actively embedding smarter, more collaborative approaches into infrastructure delivery, leveraging digital technologies, innovative procurement models and strategic partnerships to align with evolving priorities.

**Figure 12:** Qld smarter approaches - future investments



Source: (Queensland Government, 2025)



## Budget Investments

### QLD

(Queensland Government 2025, 2024)

- Whole-of-government BIM and SEQ Digital Twin enhance planning and asset management
- Global insights shape digital delivery models
- Focus shifts to best value with performance-based KPIs
- PPPs, alliances, and ECI frameworks foster innovation and manage risk
- Models support climate resilience, flexible supply chains, and shared accountability

### NSW

(Infrastructure NSW, 2024)

- Infrastructure NSW leads strategic planning and delivery of major projects, with a strong focus on collaboration through its Principles for Partnership framework
- Projects like the Aerotropolis Sector Plan and Infrastructure Digitalisation Roadmap aim to align industry capabilities with government priorities
- The Infrastructure Digitalisation Program is transforming how capital projects are procured and delivered by embedding digital technologies across the lifecycle. This includes better data sharing, standardised designs, and modern construction methods

### VIC

(Business Victoria, 2023; Department of Treasury and Finance, 2024)

- The Industry R&D Infrastructure Fund provides matched grants (up to \$2 million) to businesses investing in advanced infrastructure for sectors like health tech, defence, and clean energy
- Projects for digital infrastructure and data centres collaboration between government, tech industry, and academia
- Victoria's Modernised Infrastructure Procurement Framework introduces flexible models like Whole of Life, Cost Reimbursable, and Lump Sum contracts

### SA 25/26

(Public Sector Network, 2025)

- SA's Innovate 2025 initiative focuses on workforce capability, AI integration, and cross-sector collaboration
- Defence and space sectors benefit from partnerships between universities, SMEs, and government through programs like the Defence Innovation Partnership

### WA 25/26

(Government of Western Australia, 2024; 2025)

- WA's Innovation Strategy outlines a 10-year plan to become a global innovation hub, with goals like tech transfer, inclusive innovation, and global scaling
- Priority actions include building talent, enabling precincts, simplifying procurement, and promoting WA's capabilities internationally

# Policy Settings

## – Industry Leader Perspectives

In addition to industry leaders providing their perspectives on infrastructure performance, industry leaders also provided insight into specific policy settings that can hinder progress, and warrant attention to improve planning and delivery of infrastructure projects.

### Focus areas include:

- Updating technical and government standards to enable use of sustainable materials like low-carbon concrete
- Aligning planning systems between state and local government
- Increasing flexibility in regulation and development conditions such as operating hours and production limits on material producers
- Streamlining procurement processes to reduce delays and encourage collaboration
- Adapting business case frameworks to support wider benefits for regional project viability.

### Standards and Technical Specifications

01

*'Technical Specs from clients are so prescribed they don't allow for green concrete'*

*'Government standards don't allow for low carbon concrete'*

*'MRTS standards limit scope for innovation or smarter ways of doing things'*

### Planning Process & Regulation

02

*'The planning processes are not good... there is a disconnect between state planning policy and local government planning policy... We need more quarries. We need planning reforms'*

*'We are hemmed in by virtue of how much we [material producers] can produce'*

*'Our planning scheme is horrifically bad. 77 local governments with 77 different ways of approving land and housing developments'*

*'Prioritising the planning of those things with potential, but we're still getting stuck in the shift from planning to delivery'*

*'We need more latitude and flexibility to respond to market signals — like expanding operating hours or increasing annual production limits'*

*'PFAS [regulation] - as a state Qld has a different approach than other States'*

### Procurement Processes

03

*'Approach to procurement is very challenging. We need to be far more collaborative'*

*'up to 14 months from start of tender to award of tender... its a really long time and really hard to plan your business around... trying to hold a team'*

*'Smarter more streamlined procurement processes, and partnering [required]'*

### Business Cases

04

*'Business cases fail regions—don't capture indirect or long-term benefits'*

*'The business case process is robust, but often undermined by predetermined solutions, limiting the ability to deliver the best outcomes for communities'*

*'Even capital cities struggle to justify infrastructure through business cases — often needing to bundle projects or bypass internal policies, highlighting the greater difficulty for regional areas'*

### Energy Policy

05

*'[there is a] mixed mash of policies approaches with energy'*

# Policy Settings - Research

Research on policy and regulation indicates it is considered to hinder construction productivity (Queensland Productivity Commission, 2025), while recent policy and regulatory change has been noted across four states.

**Figure 13:** Key regulations affecting construction in Queensland

Land use, planning and environment		Building regulation	Labour / licencing regulations	Safety and industrial relations
Planning Act 2016		Queensland Building and Construction Act 1991		Workplace Health and Safety Act 2011
Building Act 1975		Electrical Safety Act 2022		
Plumbing and Drainage Act 2018		Labour Hire Licencing Act 2017		Industrial Relations Act 2016
National Construction Code (2022)		Further Education and training Act 2014		
Queensland Development Code		Professional Engineers Act 2002		
Local Government Act 2009	City of Brisbane Act 2010	Australian and International Standards		Valuers Registration Act 1992
Regional Planning Interests Act 2014		BUIlding Industry Fairness Act 2017		Surveyors Act 2003
Economic Development Act 2012		Architects Act 2002		
Mixed Use Development Act 1993	Vegetation Management Act 1999			
Planning and Environment Court Act 2016	Environment Protection Act 1994			
Queensland Heritage Act 1992	Nature Covrsation Act 1992			
Waste Reduction and Recycling Act 2011	Land Act 1994			

**Source:** (Queensland Productivity Commission, 2025 pg.80)

**Regulatory Complexity & Fragmentation:** Productivity in construction is hindered by restrictive land use rules, increasingly complex building regulations, and inconsistent policies across states that encourage industry fragmentation and limit scale.

State	Policy Change
<b>VIC</b>	<ul style="list-style-type: none"> <li>Fast-track housing approvals under Housing Statement; cuts timelines for eligible projects (Department of Transport and Planning, 2025)</li> <li>Cut the red tape: Environmental Effects Statement process capped at ~18 months to speed up major project approvals (Victorian Government, 2024)</li> </ul>
<b>NSW</b>	<ul style="list-style-type: none"> <li>Housing &amp; Productivity Contribution introduced for growth areas to fund transport, schools, open space (Victorian Government, 2025)</li> </ul>
<b>SA</b>	<ul style="list-style-type: none"> <li>Housing Roadmap pairs fast-tracked land release with \$1.5B water/sewer upgrades (Department for Housing and Urban Development, 2024)</li> <li>Removal of some growth boundaries to unlock greenfield land (Department for Housing and Urban Development, 2024)</li> </ul>
<b>QLD</b>	<ul style="list-style-type: none"> <li>Infill Development Fund offsets infrastructure charges/fees to speed housing supply (Queensland Government, 2025)</li> <li>Planning (Social Impact and Community Benefit) and Other Legislation Amendment Bill 2025 - includes a community benefit system to build social licence, amended the Economic Development Act 2012 and Brisbane Olympic and Paralympic Games Arrangements Act 2021 to streamline governance and delivery of Games-related infrastructure (Queensland Government, 2024)</li> </ul>

# Chapter 4: Sector Priorities and Opportunities

## Transport

### Questions 14 & 15:

Transport opportunities and how to improve planning and delivery

## Energy

### Questions 16 & 17:

Renewable energy targets and opportunities to deliver outcomes

## Brisbane 2032 Games

### Questions 18 & 19:

Brisbane 2032 Games opportunities and optional open commentary

## Water

### Questions 20 & 21:

The achievement of water infrastructure goals and identifying water infrastructure opportunities

## Housing

### Questions 22 & 23:

Performance in addressing the demand for housing, and opportunities to deliver outcomes

## Health

### Questions 24 & 25:

Health infrastructure pipeline performance, and opportunities to deliver a high-quality health system



# Infrastructure Sectors – Snapshot

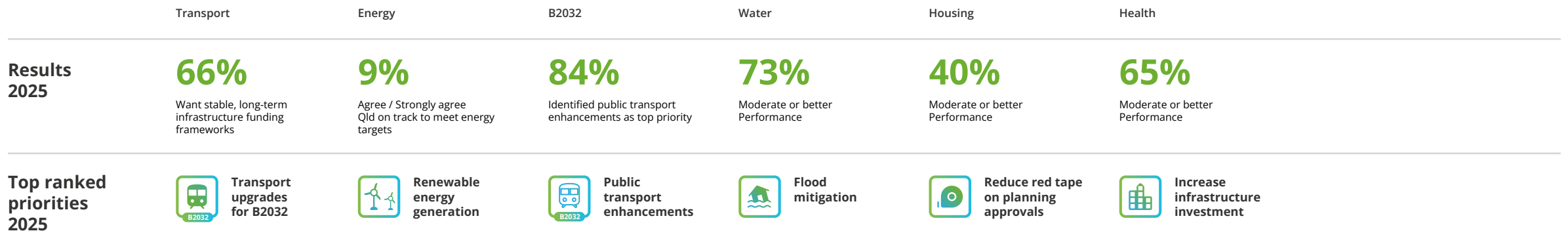
The 2025 QIP survey reveals a dynamic and evolving infrastructure landscape across Queensland, with clear sectoral priorities and emerging challenges

Building on the 2024 QIP analysis of the Transport and Energy sectors, an additional four key sectors were included to broaden the understanding of individual sector performance and opportunities. In Transport there were unanimous calls for stable funding, better coordination, and faster approvals. In Energy, confidence in meeting 2030 renewable targets declined, with focus shifting to immediate delivery — particularly in generation and storage. Brisbane 2032 Games is seen as a major opportunity, with public transport upgrades identified as the most impactful legacy investment.

Water infrastructure received generally positive ratings, though construction respondents were more critical. Flood mitigation and water security led priorities in both SEQ and regional areas. Housing reflects overall concern, with 60% of respondents indicating limited impact from current efforts and regional voices calling for reduced red tape on planning approvals. Health infrastructure sentiment was positive overall, but regional respondents indicated a lack of confidence in the system. Foundational improvements such as investment, workforce, and service access were consistently prioritised over technology-led solutions.

This chapter presents detailed results and trends for each sector, with **Figure 14** offering a snapshot of overall performance.

**Figure 14:** Infrastructure Sectors snapshot



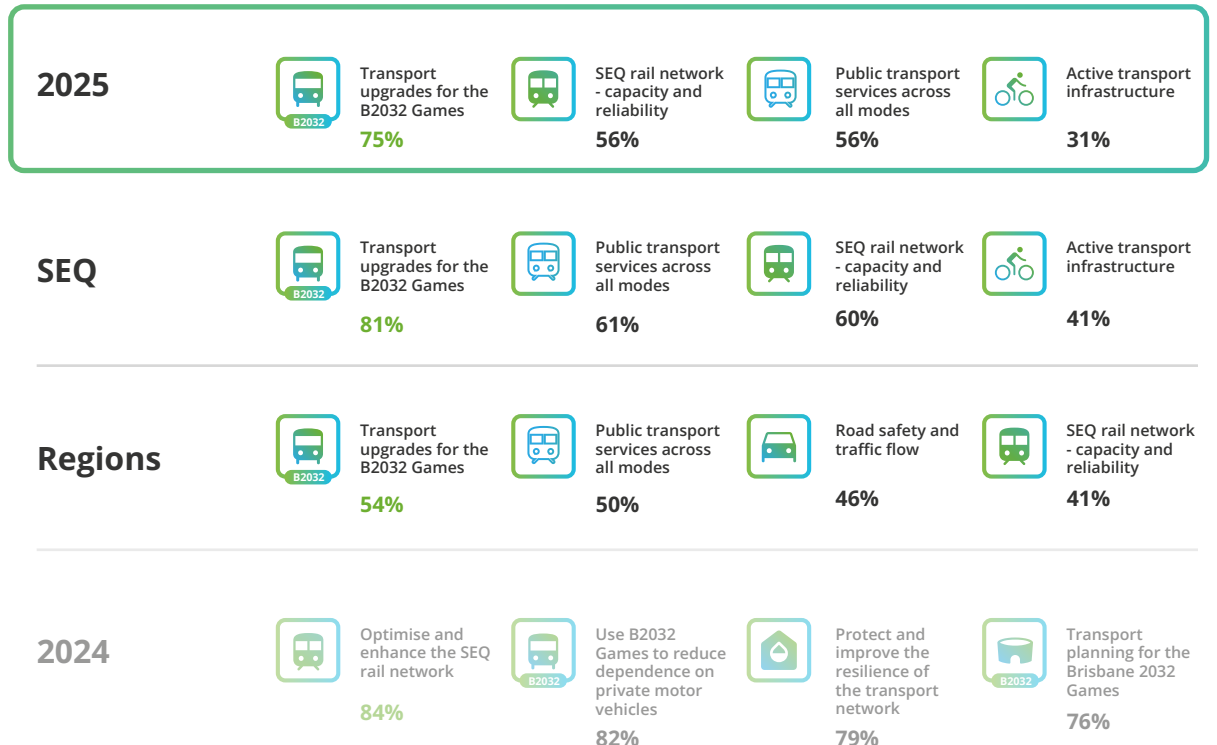
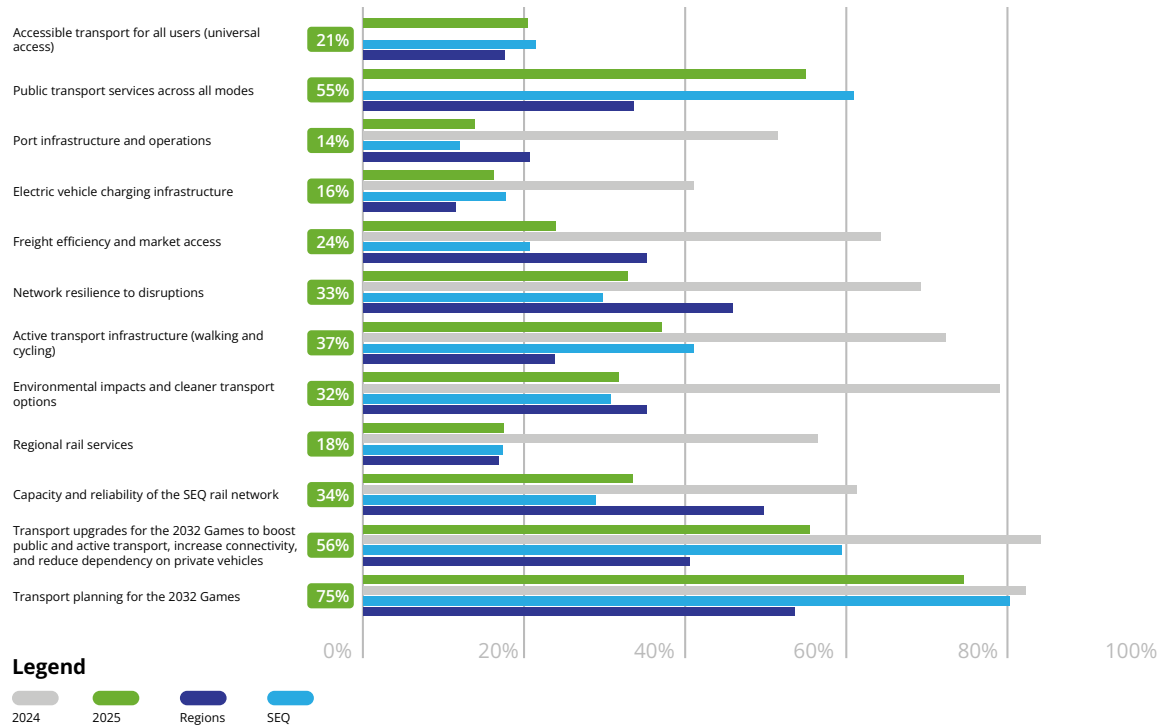
## Question 14:

Which transport opportunities should be prioritised in terms of their importance and ability to deliver outcomes? (Select up to 5)

There must be a focus on B2032 for Transport (75%)

Survey respondents were clear that the leading opportunity for Transport is upgrades for the B2032 Games to boost public and active transport, increase connectivity, and reduce dependency on private vehicles (75%). Two significant drops of approximately 20% were identified in the top four, with capacity and reliability of the SEQ rail network (56%), and public transport services across all modes (56%) ranked second and third, followed by active transport infrastructure (37%). This pattern shows a decisive preference towards a concentrated focus on major network upgrades and event-driven delivery, reflecting industry expectations for the critical role of the B2032 Games as a catalyst for transport transformation.

### Transport Infrastructure Opportunities



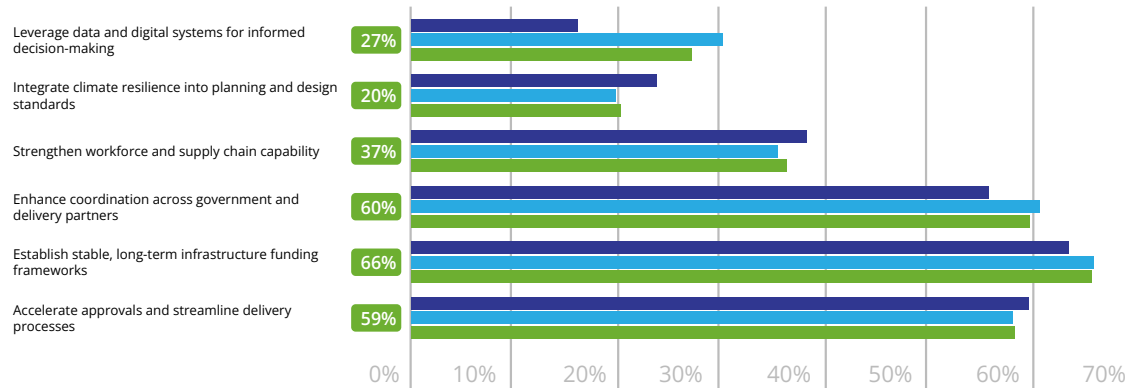
Question 15:

What should be done to improve planning and delivery of transport? (Select up to 3)

SEQ and Regional voices unanimous on top three priority transport enablers

Survey responses demonstrate a strong consensus on priority actions for improving transport planning and delivery, with three measures emerging as distinctly more critical than others. Establishing stable, long-term infrastructure funding frameworks (66%), enhancing coordination across government and delivery partners (60%), and accelerating approvals and streamlining delivery processes (59%) were identified as the most significant actions, with a differential of more than 20% separating these priorities from the next-ranked response, and a wider gap to the remaining measures.

What should be done to improve planning and delivery of transport?



Legend



66%

1. Establish stable, long-term infrastructure funding frameworks 66%

“

Large-scale funding like the \$7.5 billion Cross River Rail is often justified as economic growth, but it primarily serves commuter areas with political influence while essential road infrastructure remains underfunded and neglected

60%

2. Enhance coordination across government and delivery partners 60%

“

Transport is hindered by overly tight technical specifications. We need to shift towards more performance-based standards

Industry leader perspectives

59%

3. Accelerate approvals and streamline delivery processes 59%

## Question 15:

What should be done to improve planning and delivery of transport?



*Qld's transport system suffers more from process drag than funding gaps...*

Respondent quote

50 respondents provided optional commentary highlighting a range of recurring themes to improve planning and delivery of transport. Key concerns included slow and fragmented approval processes and funding framework stability and prioritisation - particularly for regional areas.

**Table 9:** Respondent comments relating to transport opportunities

Theme and number of comments	Description	Comment
<b>Approvals</b> 	Slow, fragmented approval processes are seen as a major barrier, with calls for streamlined governance and faster decision-making.	<ul style="list-style-type: none"> <li>• 'Qld's transport system suffers more from process drag than funding gaps. Without digital platforms to track approvals, decision-making remains reactive and fragmented'</li> <li>• 'Shorten the time it takes for road projects to get through business case and approvals'</li> <li>• 'Accelerate approvals but don't bypass planning agreements'</li> </ul>
<b>Funding</b> 	Consistent funding pipelines and more efficient procurement are needed to avoid inefficiencies and delivery delays.	<ul style="list-style-type: none"> <li>• 'Establish stable, long-term infrastructure funding frameworks'</li> <li>• 'More funding for transport. More funding priority for regional areas'</li> </ul>
<b>Accessibility</b> 	Stakeholders want improved public transport accessibility, connectivity, and expansion into under-served and growing areas.	<ul style="list-style-type: none"> <li>• 'Accessible transport as policy - evidently 40% of train stations in SEQ are only accessible by stairs'</li> <li>• 'Improve inter-connections and accessibility of the public transport system beyond city centres'</li> </ul>
<b>Roads</b> 	Urgent safety upgrades are needed for roads, particularly regional routes.	<ul style="list-style-type: none"> <li>• 'Again - let's forget about climate change - let's move to get the Pacific Hwy from Rockhampton to Townsville safe'</li> <li>• 'Local Govts need to have better long-term funding to activate the infrastructure projects needed to support the State strategy. Road networks in regional Qld need better funding frameworks'</li> </ul>
<b>Workforce</b> 	Shortages in skilled labour are driving calls for more local training, apprenticeships, and targeted skilled migration.	<ul style="list-style-type: none"> <li>• '...more effort into training more high-quality local engineers, apprentices and construction workers'</li> <li>• 'Not sufficient skilled workers or funding... need to access skilled migrants and focus on quick education...'</li> </ul>
<b>Planning</b> 	Greater emphasis on long-term transport and corridor planning to future proof infrastructure needs.	<ul style="list-style-type: none"> <li>• 'Longer term (100-200 year) corridor planning and acquisition'</li> <li>• 'We have been planned to death and the report sits on the shelf - delivery is the important aspect'</li> </ul>
<b>Optimisation</b> 	Improving and maintaining current infrastructure is viewed as a higher priority than starting new major projects.	<ul style="list-style-type: none"> <li>• 'A focus on optimising the performance of existing assets and capacity is needed'</li> </ul>
<b>Sustainability</b> 	There's demand for more resilient, climate-conscious, and active transport infrastructure planning.	<ul style="list-style-type: none"> <li>• 'Integrate climate resilience into planning and design standards'</li> <li>• 'Improving climate change ie. tree shelter and safe connections for active transport is important...'</li> </ul>

Research into transport projects across Australia confirms a sustained funding commitment, maintaining transport as the leading category of Commonwealth public infrastructure investment. However, elements of the project landscape remain fluid, shaped by shifts in government and community consultation feedback.

## National Insights – Federal Budget 25/26



The \$17.1 billion transport infrastructure investment announced in the 2025–26 Federal Budget is seen as vital for driving economic growth and supporting living standards across Australia (Infrastructure Australia, 2025)



Transport infrastructure remains the largest public infrastructure expenditure category, accounting for 59% of the MPIP (\$126 billion) over the five-year outlook (2023–24 to 2027–28). However, transport investment has reduced by 20% on the previous year's projections, driven by completions of mega-projects in 2023–24, fewer new projects commencing and cost changes for some mega projects in the outlook period (Infrastructure Australia, 2025)



4.6% of Australia's GDP was accounted for by Australia's transport, postal and warehousing industry in 2023–24 (Australian Government, 2025)

Transport projects across Australia		
State	Project	Reason
<b>Cancelled - sample transport projects</b>		
VIC	Geelong Fast Rail — cancelled (Nov 2023) (Victorian Government, n.d.)	The Commonwealth's Infrastructure Investment Review found the undeliverable and misaligned with current priorities and has withdrawn funding for the project
NSW	Beaches Link road tunnel — cancelled (8 Sep 2023) (Transport for NSW, n.d.)	NSW Government withdrew the project's SSI application; won't proceed. Combination of financial, environmental, and strategic concerns
QLD	Gold Coast Light Rail Stage 4 (Queensland Government, 2025)	Qld Government cancelled the project citing issues with community consultation and capacity of the pipeline
<b>Under review - sample transport projects</b>		
QLD	Regions: Bruce Hwy Western Alternative - Stage 4 ('Moreton Bay Motorway') (Department of Transport and Main Roads, n.d.)	New route in consultation phase due to strong community opposition and concerns over property, environment, and heritage impacts
<b>Progressing - sample transport projects</b>		
VIC	<ul style="list-style-type: none"> <li>Melbourne Metro Tunnel: Over 90% complete; early testing of systems began in 2024, opening planned for 2025—a full year ahead of original estimates (Victoria's Big Build, 2024)</li> <li>Level Crossing Removal Program: Over 110 crossings removed, improving safety and reducing congestion—program remains on budget and on time. (Victoria's Big Build, 2024)</li> </ul>	
NSW	<ul style="list-style-type: none"> <li>Sydney Metro West &amp; Western Sydney Airport Metro: Tunnelling and station builds on schedule; airport line set to open with the new airport in 2026 (Sydney Metro, n.d.)</li> </ul>	
SA	<ul style="list-style-type: none"> <li>North-South Corridor (T2D Tunnels): Fully funded at \$15.4 billion, major works to begin 2025—largest transport build in SA history (Infrastructure Magazine, 2025)</li> </ul>	
QLD	<ul style="list-style-type: none"> <li>SEQ: New bikeways and busway extensions in Brisbane Metro program on track for staged opening from late 2025</li> <li>Regions: Bruce Highway Upgrades: Multiple stages north of Brisbane to Cairns are funded and progressing, with some works completed ahead of schedule (Brisbane City Council, n.d.)</li> </ul>	

Question 16:

Is Queensland energy infrastructure on track to meet 50% renewable energy by 2030 while maintaining an affordable, reliable and secure electricity supply?

Consistent 2024 and 2025 trend towards overall negative sentiment

Confidence in Qld’s progress toward the 2030 renewable energy target has weakened slightly over the past year. The proportion of respondents who Agree or Strongly Agree that the state is on track fell by 8% from 2024 to 2025, while those who Disagree or Strongly Disagree remain the majority at 56%, largely unchanged from last year (57%). This downward shift in positive sentiment suggests growing uncertainty related to the direction of the industry with Government plans to release an updated energy roadmap later in 2025.

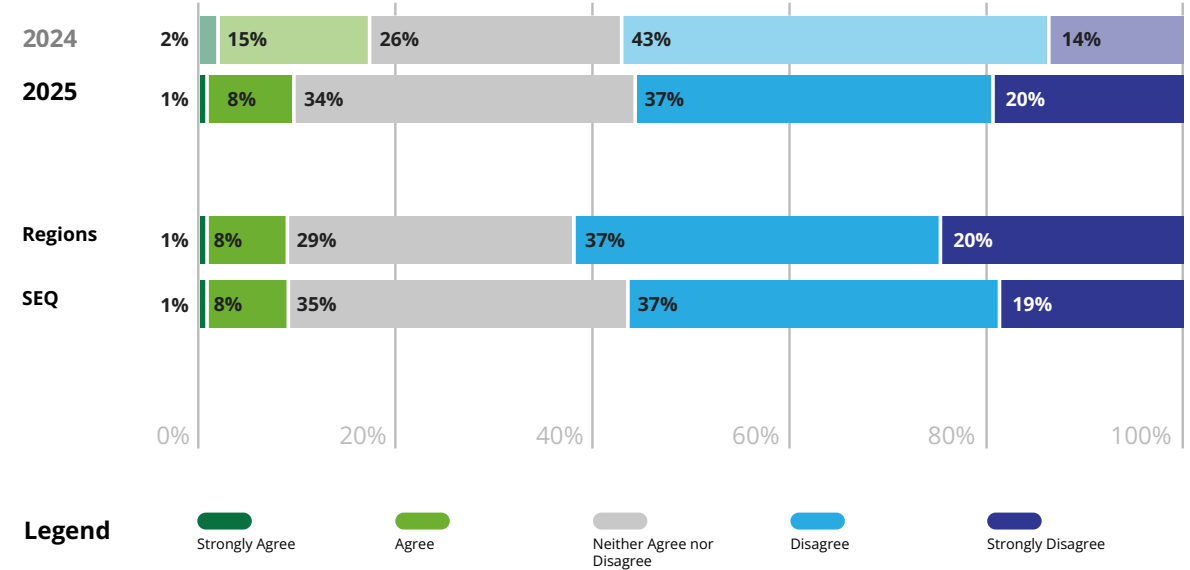
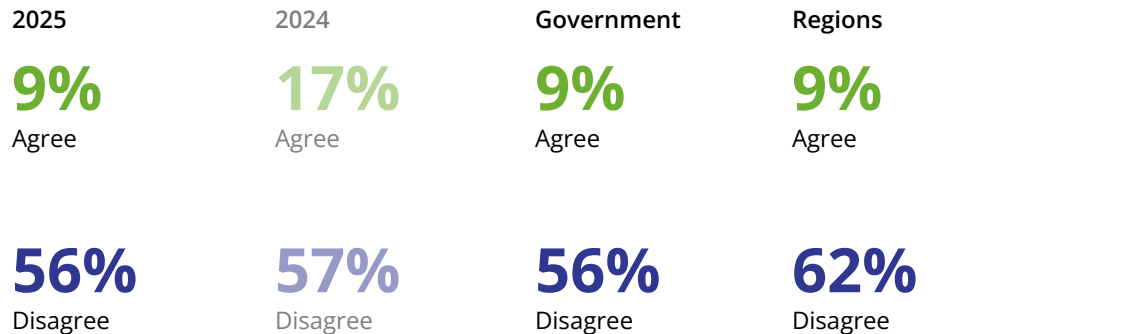


*We have mixed policy approaches with regards to energy*

Industry leader perspectives



*Misinformation and ageing assets hinder renewable transitions*



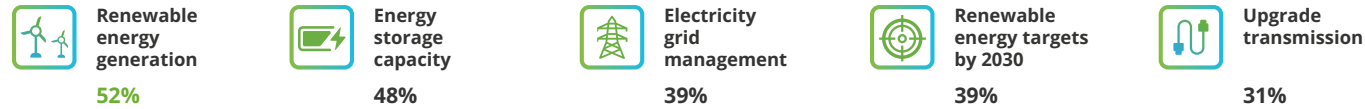
Question 17:

Which energy opportunities should be prioritised in terms of importance and ability to deliver outcomes? (Select up to 5)

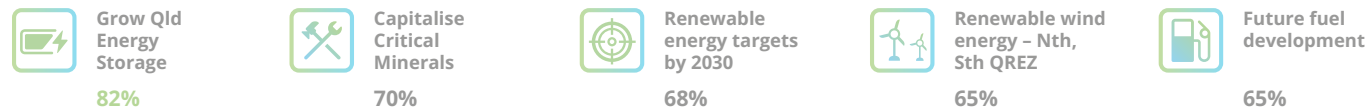
The 2025 results show a pivot from last year's emphasis on enabling resources to near-term system delivery

Renewable energy generation (52%) is now perceived as the leading opportunity for the State, followed closely by energy storage capacity (48%). This contrasts with potential opportunities identified in 2024, to grow Qld's energy storage (82%) and capitalise on the State's critical mineral resources (70%). The priority to achieve 2030 renewable energy targets declined markedly from 68% in 2024 to 39% in 2025. This shift appears to reflect a reduction in confidence that targets can be met (Question 16), and the government's review of current objectives and plans to release an updated energy roadmap later in 2025. The opportunity to capitalise critical resources also dropped sharply in favour from second highest priority in 2024 (70%), to lowest priority in 2025 (12%).

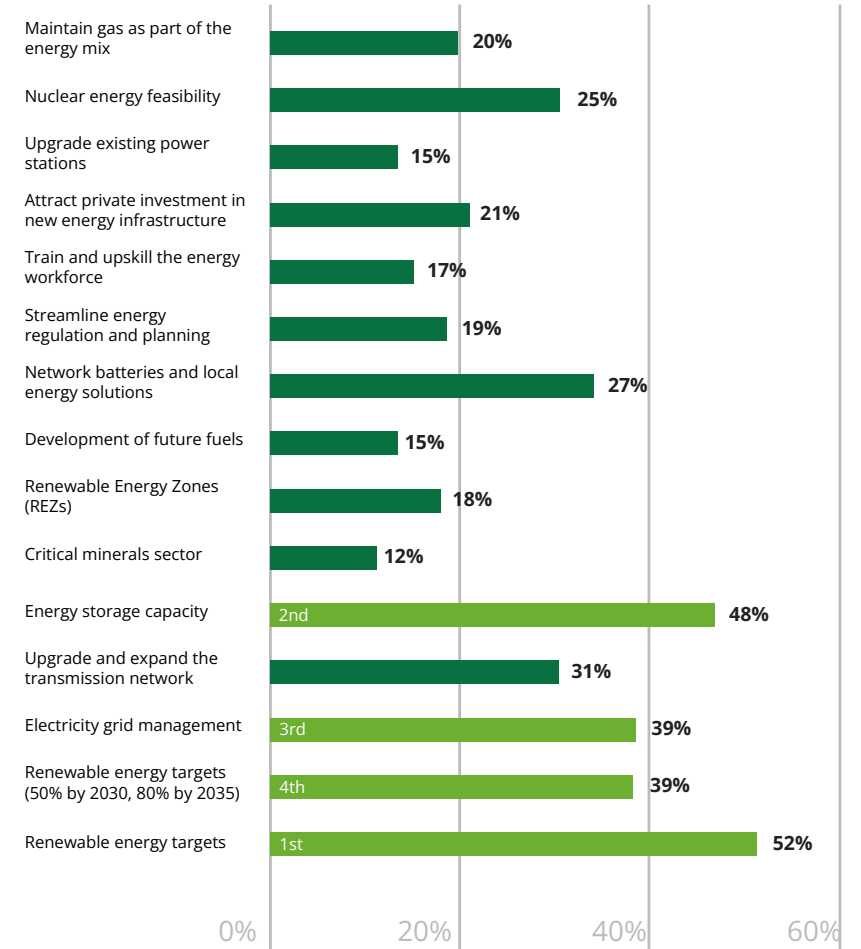
2025



2024

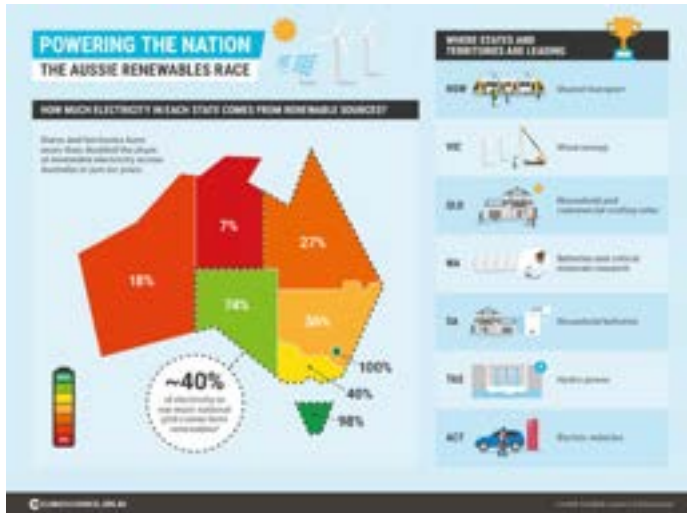


Energy Infrastructure Opportunities



# Energy – Research

Research focussed on renewable energy generation, identified as Qld’s number one opportunity for ability to deliver outcomes. Industry confidence in Qld appears to be softened amid a review of current targets by the State Government, signalling a need for greater clarity and commitment to long-term energy transition goals.



Source: (Climate Council, 2024)

## National Insights – Federal Budget 25/26



While Victoria and NSW continue to streamline approvals and expand Renewable Energy Zones (REZs), Qld’s new rules introduce more complexity and uncertainty, potentially slowing its transition to net zero (Vorrath, 2025)



Recent regulatory changes have made Qld less attractive for new renewable projects, potentially delaying approvals by 12–24 months or more (Austrin, 2025)

Energy Projects across Australia		
State	Project	Reason
<b>Cancelled - sample transport projects</b>		
National	<ul style="list-style-type: none"> <li>A wave of hydrogen developments—including projects in Port Pirie, Whyalla, Gladstone, and others—have been either cancelled or shelved</li> </ul>	<ul style="list-style-type: none"> <li>Noted high costs, market uncertainty, and strategic shifts away from hydrogen amid low demand and feasibility concerns (Barnad, 2025)</li> </ul>
QLD	<ul style="list-style-type: none"> <li>Fortescue’s PEM-50 Green Hydrogen Facility (Gladstone)</li> <li>A\$1 billion Moonlight Ridge wind farm</li> <li>Pioneer-Burdekin pumped hydro project</li> </ul>	<ul style="list-style-type: none"> <li>Noted shifting company strategy and unfavourable international policy, particularly from the US government (Hydrogen Newsletter, 2025)</li> <li>Noted poor community consultation and support. (Loesche, 2025)</li> </ul>
<b>Recently completed and progressing - sample energy projects</b>		
National	<ul style="list-style-type: none"> <li>The government announced it would open another 16,000 square kilometres of the state for gas exploration. The government is also planning to open new gas peaking plants and keep its coal plants open longer. (Department of Climate Change, Energy, the Environment and Water, 2025;2024)</li> <li>CIS Tender 1 marks a major step toward 82% renewables by 2030, with 19 projects delivering 6.4GW of generation and 5.1GWh of storage—NSW leads, followed by VIC, SA, and Qld</li> </ul>	
NSW	<ul style="list-style-type: none"> <li>Legislation now enables fast-tracking of green energy infrastructure, with a new Renewable Energy Planning Framework (NSW Department of Planning, 2024)</li> </ul>	
SA	<ul style="list-style-type: none"> <li>Goyder South Wind Farm (Neoen): Stage 1 began delivering power in April 2024; full operations expected by 2025. It has a capacity of ~412 MW and is supported by the Blyth grid battery (238.5 MW / 477 MWh), which became operational in 2025. Stage 2 has received development approval for wind, solar and battery storage (Goyder South Wind Farm, 2024)</li> </ul>	
QLD	<ul style="list-style-type: none"> <li>Western Downs Green Power Hub (Neoen): Australia’s largest solar and battery project: a 400 MW solar farm paired with a 540 MW / 1,080 MWh battery – 2024 (Western Downs Green Power Hub, n.d.)</li> <li>The Queensland Government announced in June 2025 that it will invest \$2.4 billion in the State Budget for CopperString, North Queensland’s biggest ever energy project (Queensland Government, 2025)</li> </ul>	



[Energy Minister] Mr Janetzki is working on a five-year energy road map to chart the state’s path to net zero, which is due for release by the end of the year

(Stewart, 2025)

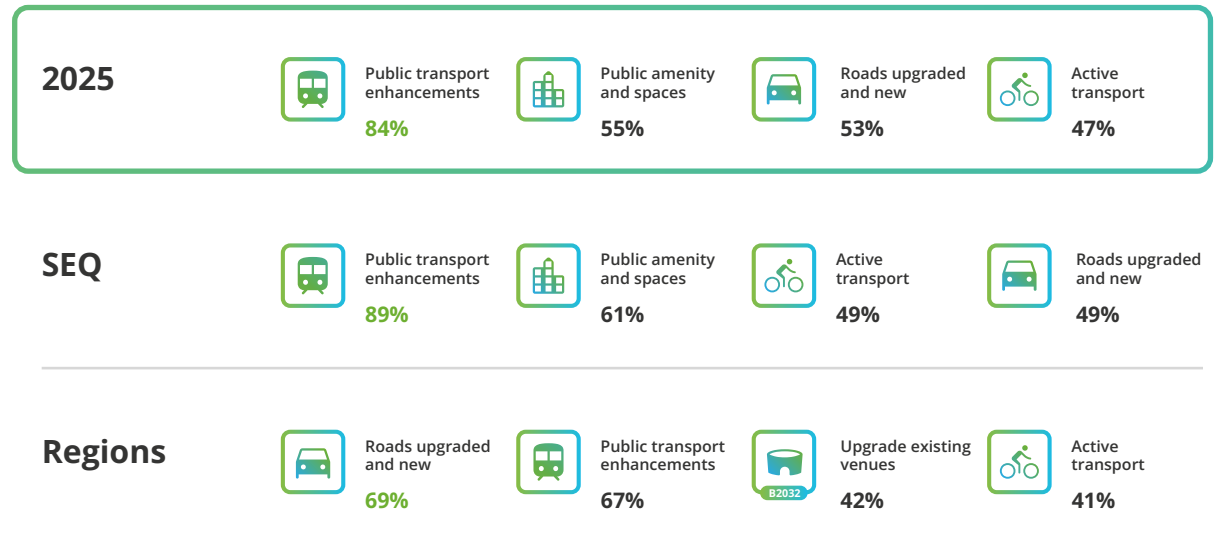
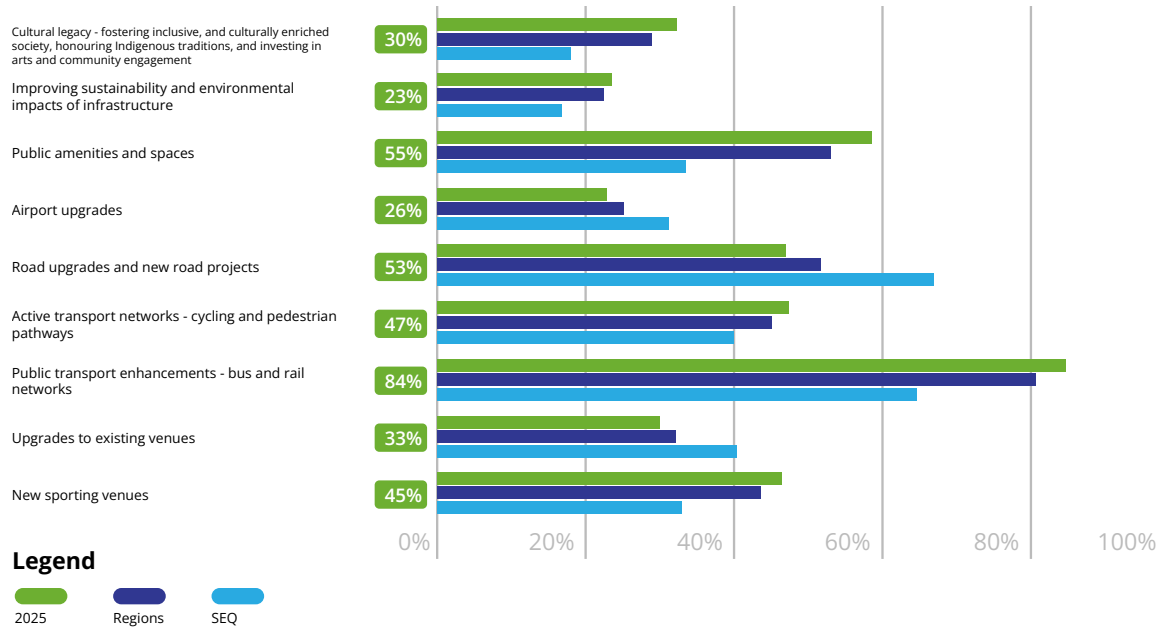
## Question 18:

Which of the following Brisbane 2032 Games opportunities will have the most significant impact and long-term legacy for Queensland communities? (Select up to 5)

## Public transport enhancements (84%)

Public transport enhancements (84%) were overwhelmingly identified as the most impactful opportunity associated with Brisbane 2032, in terms of delivering a lasting legacy for Qld communities. Among the top four priorities, public amenities and spaces (55%) stood out as the only non transport-related initiative, underscoring the sector's broader interest in improving liveability alongside mobility. These results reinforce a clear industry focus on transport infrastructure and public realm investment as central to achieving enduring community benefits from the Games.

### Brisbane 2032 Games Opportunities



## The Brisbane 2032 Games are seen as a springboard for long-term positive changes for Qld’s communities

Industry leaders see the B2032 Games as a pivotal opportunity to shape Queensland’s long-term future—not just through sport, but through transformative infrastructure and community outcomes. Leaders envision B2032 positioning Brisbane as a national hub for sport and entertainment, while also catalysing broader cultural investment.

Transport infrastructure emerged as a dominant theme, with calls to prioritise active and public transport improvements to reduce car dependency and improve traffic flow as a critical legacy goal.

There is also a clear desire to ensure B2032 delivers enduring benefits beyond SEQ, with legacy infrastructure that serves communities for generations — supporting accessibility, sustainability, and public spaces that enhance liveability.

### 01 Sporting and Entertainment Legacy

*‘...hopefully we become a Mecca for sporting and entertainment in Australia, and take Victoria’s mantle’*

### 02 Cultural and Artistic Investment

*‘Things that appeal to both visitors and locals. One of the other things I’d like to see as a legacy is more funding into the art sector overall’*

### 03 Enhancing Liveability

*‘Games should drive liveability, not just short-term spectacle. Enhance outdoor amenity’*

### 04 Transport Network as a Priority

*‘The transport network, not venues or Olympic infrastructure. We can use it to prioritise moving people around more easily and with less congestion’*

*‘We’ve got to figure out how to get people out of vehicles, to unplug our streets and give the streets back to people’*

*‘The opportunity for a transformative transport legacy was missed. If action had been taken in 2021, we could have had fast connections to Toowoomba, northern NSW, and possibly Hervey Bay. Instead, we’re seeing only minor improvements, not the significant change that was possible. That would have been real, lasting, legacy’*

### 05 Regional View

*‘It’s tough for the regions—Expo 88 and the Commonwealth Games in ’82 helped SEQ bring forward vital infrastructure without business cases. That kind of transformational change defined Brisbane and SEQ during a time of growth, and we’re missing that opportunity now’*

**Question 19 (optional):**

What should be done to maximise opportunities that are inherent with hosting the Brisbane 2032 Games?



*Ensure investment is considered so that it creates a legacy for generations to come*

Respondent quote

Feedback from 237 industry professionals on Brisbane 2032 reveals both optimism and caution. While many view the Games as a catalyst for current infrastructure investment, concerns were raised about slow progress and an overemphasis on Olympics-specific projects at the expense of broader community needs. The dominant theme was clear: B2032 must deliver lasting, community-focused infrastructure beyond sporting venues, with 68 respondents explicitly calling for legacy assets that serve future generations.

Public transport emerged as a key priority, particularly for disadvantaged and regional communities, with 72 respondents advocating for improved access.

**Table 10:** Respondent comments relating to B2032 Games opportunities

Theme and number of comments	Description	Comment
<b>Infrastructure Legacy</b> 65+	Ensuring long-term infrastructure benefits beyond B2032 as a significant driver. Comments stress the importance of maintaining and adapting infrastructure.	<ul style="list-style-type: none"> <li>• 'Make Brisbane an appealing place to live to drive growth pre and post Olympics'</li> <li>• 'Ensuring appropriate legacy infrastructure is maintained post 2032'</li> <li>• 'Leave a lasting legacy for active transport networks. I don't want to have to drive my car everywhere for the next 20 years. Look what London did'</li> <li>• 'Reuse existing infrastructure with upgrades if required'</li> </ul>
<b>Transport Opportunities</b> 35+	Focus on how B2032 can catalyse a more accessible and sustainable transport network across Qld, benefiting both locals and visitors.	<ul style="list-style-type: none"> <li>• 'Full upgrade of SEQ transport network, look ahead for next 50 years'</li> <li>• 'Build networks that are usable for now and in the future...'</li> <li>• 'Fast rail upgrades to all SEQ...'</li> </ul>
<b>Accessibility</b> 35+	Enhancing public transport, especially in regional areas, is a recurring topic. Many comments support initiatives that improve connectivity and make transport more accessible to all community members.	<ul style="list-style-type: none"> <li>• 'Accessible transport for all, including disabilities into discussion / plansings'</li> <li>• 'All Games venues to be Universally Designed and accessible... Needs to be in the tender docs as mandatory'</li> </ul>
<b>Collaboration</b> 25+	Advocates a coordinated approach involving government, industry, and communities to enhance project execution.	<ul style="list-style-type: none"> <li>• 'Establish a far more effective model for collaboration across government, agency, and private sector'</li> <li>• 'Government and contractor collaborative models so time (and money) isn't wasted on tendering'</li> <li>• 'Bring the contractors into the conversation with consultants... conversation is occurring in silos'</li> </ul>
<b>Sustainability &amp; Environment</b> 15+	Focus on infrastructure that supports clean cities and long-term ecological health.	<ul style="list-style-type: none"> <li>• 'Embed environmental outcomes as a priority'</li> <li>• 'Government should implement more sustainable infrastructure'</li> <li>• 'Promote the accessible, environmentally sustainable games and the positive legacy the games leaves for the community'</li> </ul>
<b>Accelerating Progress</b> 15+	Highlights the need to speed up planning, delivery, and decision-making to meet B2032's goals.	<ul style="list-style-type: none"> <li>• 'Start work soon, as running out of time'</li> <li>• 'Enough time has been wasted, get building Games infrastructure and supporting transport upgrades now'</li> <li>• 'We are at risk of losing any legacy benefit of hosting the Games due to the political delays in delivering any works'</li> </ul>
<b>Regional Inclusion</b> 10+	Comments impart the need to ensure regional communities benefit from B2032 through fair investment and planning.	<ul style="list-style-type: none"> <li>• 'Ensure regional areas benefit as well'</li> <li>• 'Ensure design and construction works are shared... in North and Regional Queensland not just in SEQ'</li> <li>• 'Bring more events to regional areas like Toowoomba'</li> </ul>

Continuation of the table on the next page



**Question 19 (optional):**

What should be done to maximise opportunities that are inherent with hosting the Brisbane 2032 Games?

Broader aspirations included regional development, workforce growth, and inclusive planning—especially involving First Nations and regional stakeholders. While opposition to the Games was minimal, concerns around transparency and delivery underscore the importance of trust and long-term value. Overall, the commentary reflects a strong industry ambition to ensure B2032 leaves a meaningful and inclusive legacy for Qld.



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Theme and number of comments	Description	Comment
<b>Tourism</b> <span style="background-color: #28a745; color: white; border-radius: 50%; padding: 2px 5px;">10+</span>	Suggestions to enhance global tourism and promote Queensland using the global platform of the Games.	<ul style="list-style-type: none"> <li>• <i>'Focus on tourism / destination, and hospitality innovations that will make Brisbane an attractive, exciting place to visit'</i></li> <li>• <i>'Create immersive tourism experiences: Eco-tourism, cultural attractions...'</i></li> <li>• <i>'Should have a significant international campaign to promote and visit Queensland...'</i></li> </ul>
<b>Cost Management Strategies</b> <span style="background-color: #28a745; color: white; border-radius: 50%; padding: 2px 5px;">10+</span>	Concerns about cost overruns. Emphasis on strategies to avoid wasteful spending and ensure financial accountability.	<ul style="list-style-type: none"> <li>• <i>'Ensure investment is considered so that it creates a legacy for generations to come'</i></li> <li>• <i>'Better management of cost overruns'</i></li> <li>• <i>'Transparent, not rushed, and robust cost planning...'</i></li> </ul>
<b>Resistance</b> <span style="background-color: #28a745; color: white; border-radius: 50%; padding: 2px 5px;">5+</span>	Concerns or opposition to B2032, often linked to cost, prioritisation, or legacy.	<ul style="list-style-type: none"> <li>• <i>'Cancel it and put the funding into more areas that provide services for the wider Qld population'</i></li> <li>• <i>'Not hosting the games and spend the money on infrastructure...'</i></li> </ul>
<b>Workforce</b> <span style="background-color: #28a745; color: white; border-radius: 50%; padding: 2px 5px;">&lt;5</span>	Addresses capacity and capability of the workforce, with strategies to manage shortages and strengthen skills.	<ul style="list-style-type: none"> <li>• <i>'We need more skilled labour to be able to sustainably and efficiently deliver this program of work'</i></li> <li>• <i>'No good providing jobs and not upskilling at the same time'</i></li> <li>• <i>'Increase the construction workforce. The games should not hinder the construction of housing and infrastructure'</i></li> </ul>
<b>First Nations</b> <span style="background-color: #28a745; color: white; border-radius: 50%; padding: 2px 5px;">&lt;5</span>	Recognising, respecting, and including Aboriginal and Torres Strait Islander peoples in every part of B2032.	<ul style="list-style-type: none"> <li>• <i>'Embed First Nations engagement in planning now'</i></li> <li>• <i>'Inclusion of Indigenous communities and opportunities for participation'</i></li> <li>• <i>'There needs to be consultation for co-design with First Nations people and Traditional Owners...'</i></li> </ul>

A broad international review of Olympic legacy outcomes highlights both risks and opportunities—ranging from underutilised venues and long-term fiscal burdens to transformative successes such as East London’s urban regeneration and the revitalisation of the Seine River in Paris. In Queensland, the *2032 Delivery Plan* and *Elevate 2042 Legacy Strategy* serve as the State Government’s guiding frameworks to ensure Brisbane 2032 delivers enduring, community-focused benefits beyond the Games.



**Table 11:** Olympic Legacy: Risks and Opportunities

City	Year	Positive Legacy	Negative Legacy
<b>Summer Olympics</b>			
Paris	2024	Reopened Seine River; inclusive community engagement; sustainable design	Still unfolding; concerns about cost and long-term venue use
Tokyo	2020	Sustainable architecture; technological innovation	No spectators due to COVID-19; limited economic benefit; underused venues
Rio de Janeiro	2016	Some infrastructure improvements; new museum and cultural spaces	Many venues abandoned; economic and political instability worsened
London	2012	Regeneration of East London; creation of Olympic Park; cultural programs, Improved transport & behavioural shift.	Gentrification and displacement; mixed success in venue reuse
Beijing	2008	Major urban development; improved air quality temporarily; iconic venues	Displacement of residents; long-term use of venues questioned
Athens	2004	Revived national pride; improved transport infrastructure	Many venues abandoned; financial strain contributed to Greece’s debt crisis
Sydney	2000	Improved sports infrastructure; successful reuse of venues; boosted tourism	High costs; some venues underutilized post-Games
<b>Winter Olympics</b>			
Beijing	2022	First city to host both Summer and Winter Games; reuse of 2008 venues	Environmental concerns; limited winter sports culture
PyeongChang	2018	Promoted winter sports; regional development	Some venues underused; high maintenance costs
Sochi	2014	Infrastructure development in remote region	Massive overspending; limited post-Games use; political controversies
Vancouver	2010	Strong legacy planning; venues well-integrated into community use	High costs; housing affordability issues
Turin	2006	Boosted tourism; reuse of some venues	Some facilities underused post-Games

**Source:** (Beanland, 2024; International Olympic Committee, n.d.; International Olympic Committee, n.d.)

**Source:** (Beanland, 2024; International Olympic Committee, n.d.)

### 2032 Games Delivery Plan

- 1. Venue Development:** New venues like Brisbane Arena and upgrades to the Gabba will support the Games and long-term community use
- 2. Transport Upgrades:** Major investments in rail, metro, and roads will improve regional connectivity and support Games logistics
- 3. Athletes Village & Precincts:** Brisbane’s Athletes Village and Victoria Park will serve the Games and later be repurposed for housing and public use
- 4. Tourism & Trade Boost:** A 20-year strategy aims to grow Qld’s global profile, with a projected \$4.6 billion uplift
- 5. Local Sports Investment:** Over 130 community sports facilities will be upgraded under the “Games On!” program



**Table 12:** B2032 Major Regional Projects

Regional Project	Region	Type of Project
Barlow Park Major Events Precinct	Cairns	Venue
Athlete Village	Rockhampton	Village
Bruce Highway Upgrade & Safety Program	Cairns, Rockhampton, Mackay, Whitsundays	Transport
Bruce Highway Tiaro Bypass	Tiario	Transport
Bruce Highway Rockhampton Ring Road	Rockhampton	Transport
Bruce Highway Goorganga Plains	Proserpine	Transport
Cairns Western Arterial Road Upgrade	Cairns	Transport
Townsville Connection Road Upgrade	Townsville	Transport
Rowing Facility Upgrade	Rockhampton	Venue

**Source:** (Queensland Government, 2023)



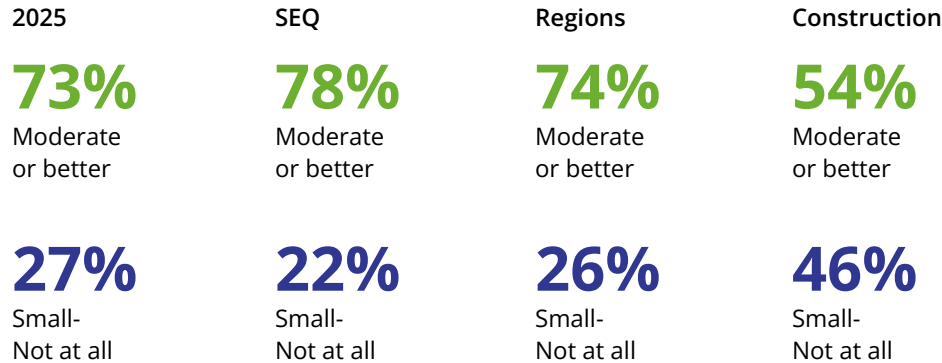
**Source:** (Queensland Government, 2023; 2023)

**Question 20:**

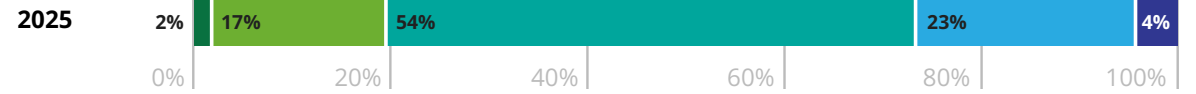
To what extent do you think Queensland’s water infrastructure projects are achieving their goals of ensuring safety, reliability and sustainability while supporting economic development and adapting to climate change?

**Strong positive sentiment from most respondents, but construction industry indicate ambivalence**

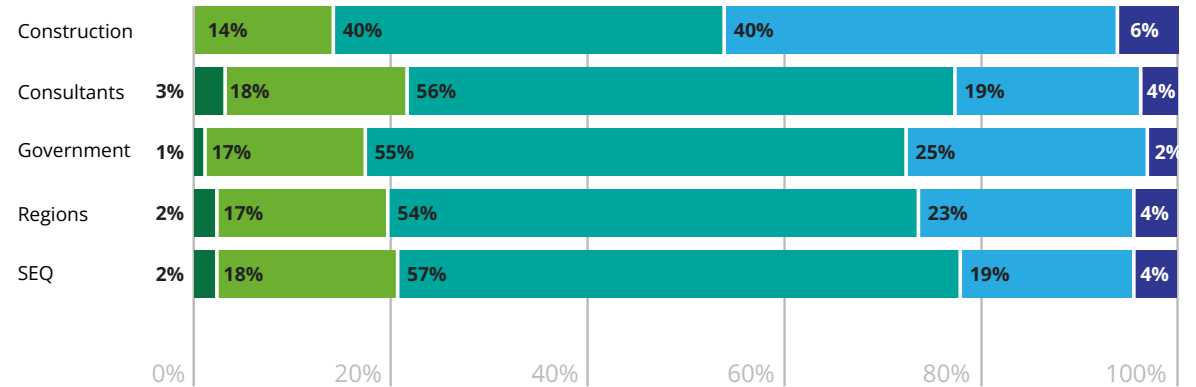
Industry sentiment toward Qld’s water infrastructure projects was cautiously optimistic this year, with 73% of respondents rating performance as moderate or better. Sector-specific responses revealed stronger confidence among consultants (78%) and government (72%). The construction sector stood out with a more critical view—only 54% rated performance positively, and 46% assessed it as having small or no impact.



**Are water infrastructure projects achieving their goals?**



**Regions and Sectors**



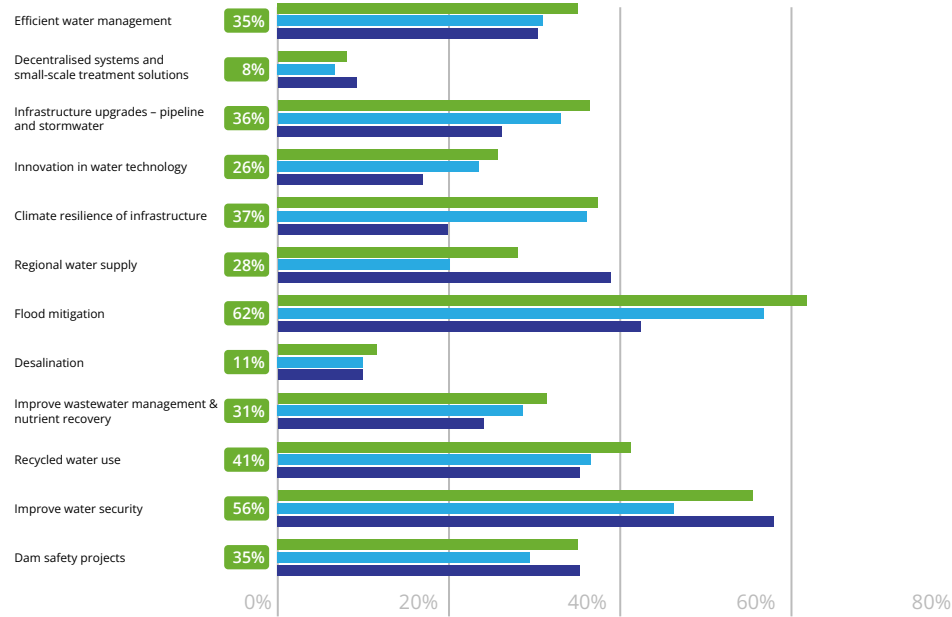
Question 21:

Which water infrastructure opportunities should be prioritised in terms of their importance and ability to deliver outcomes? (Select up to 5)

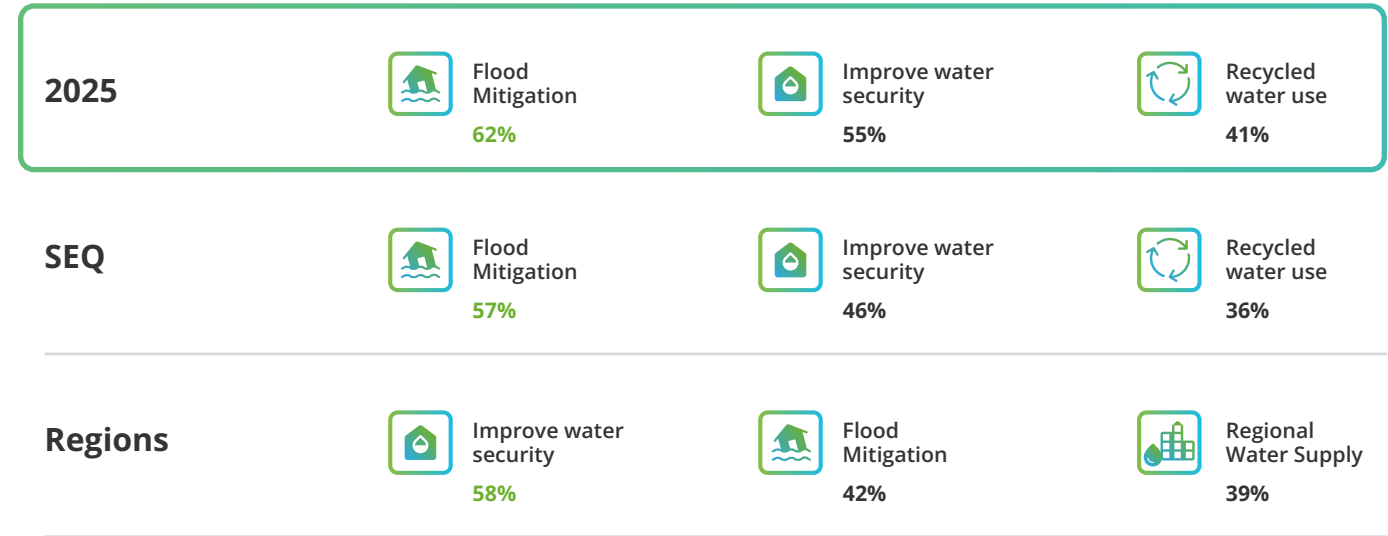
Respondents rank flood mitigation at the forefront of opportunity for Qld's water supply

Flood mitigation (62%) and improving water security (55%) emerged as the highest priorities, with a clear separation from the next most selected opportunity - recycled water use (41%). Regional respondents, while generally aligned with SEQ, placed comparatively greater importance on regional water supply and dam safety projects. Both SEQ and regional respondents were consistent in identifying the lowest priority opportunities - desalination (11%) and decentralised systems and small-scale treatment solutions (8%).

Water Infrastructure Opportunities



Legend



# Water – Research

Research indicates Qld is undergoing a significant phase of investment in water infrastructure, driven by priorities in dam safety, urban water security, and regional development. The Queensland Major Projects Pipeline Report estimates up to \$48 billion in bulk water infrastructure over the next 15 years, with over \$24 billion publicly announced.

Figure 15: Qld Delivery Focus



Source: (Queensland Government, 2023, pg. 12)

## National Insights – Federal Budget 25/26

**\$** National Water Grid Authority (NWGA) – Actively investing in over 180 planning and construction projects to enhance water infrastructure, especially in regional and remote areas (Commonwealth of Australia, 2025)

Water Projects across Australia		
State	Project	Reason
<b>Cancelled - sample transport projects</b>		
QLD	Pioneer Burdekin Pumped Hydro (Pioneer Station)	Reason: Notes a cost blowout—making it financially unviable (Worthview, 2024)
<b>Progressing - sample transport projects</b>		
NT	Transformative Marine Hub (NT) – The \$85 million Mandorah Marine Facilities, combining ferry terminal and water treatment systems, opened August 2025 ahead of schedule—modernising regional transport and water infrastructure (Chamber of Commerce Northern Territory, 2025; Northern Territory Government, 2025)	
NSW	Resilient Rivers Water Infrastructure Program (NSW) – Launched in early 2024 with \$494 million to modernize water delivery systems and recover up to 450GL annually for environmental flows in the Murray–Darling Basin (NSW Department of Planning, Infrastructure and Environment, 2024; Department of Climate Change, Energy, the Environment and Water, 2025)	
VIC	Sustainable Water-Waste Innovation (VIC) – Yarra Valley Water now operates entirely on 100% renewable electricity (from July 2025) and is developing additional waste-to-energy facilities to reduce emissions further	
QLD	<ul style="list-style-type: none"> <li>Rookwood Weir (Fitzroy River) – Completed late 2023 and operational in 2024. At 74,325 ML capacity, it's the largest Australian weir built since WWII—boosting regional water security (Sunwater, 2023)</li> <li>Paradise Dam Improvement Project – Recently fast-tracked as a Coordinated Project to restore its full storage capacity (300,000 ML), essential for agriculture and Bundaberg-area water security. (National Water Grid Authority, 2024)</li> <li>Seqwater is delivering the approximate 111 kilometre Toowoomba to Warwick Pipeline (the pipeline) on behalf of the Qld Government. It is expected to be ready in 2027 (seqwater, n.d.)</li> <li>The Fitzroy to Gladstone Pipeline is a \$983 million project to address the single source water supply risk from Awoonga Dam and enable long-term water security. Expected operation in 2026 (Gladstone Area Water Board, n.d.)</li> <li>Seqwater's 30-year Water Security Program- Major projects underway include improvements to Somerset, Wivenhoe, North Pine, and Lake Macdonald dams, alongside planning for the expansion of the Gold Coast Desalination Plant and the new Wyalong Water Treatment Plant (seqwater, 2025)</li> </ul>	

“

*They plan many water and water security projects, but ultimately, it depends on what they can afford to deliver*

Industry leader perspectives

“

*Catalytic infrastructure like water security and storage is key to growing our economy, especially in agriculture and critical minerals. But growth is limited without the right transport infrastructure to support it*

## Question 22:

To what extent is private and public sector addressing the growing demand for housing, improving affordability and ensuring that all Queenslanders have access to safe, and suitable housing?

### 60% have a critical view of the response to Qld's housing challenges

The industry indicate a predominantly critical view of how effectively the public and private sectors are responding to Qld's housing challenges. Approximately 60% of respondents rated sector performance as having an impact to a small extent or not at all, with just 8% perceiving efforts as having a large impact. Those identifying from the construction sector provided the most varied responses, with none identifying an impact to a very large extent and the highest number considering the impact as small or not at all.

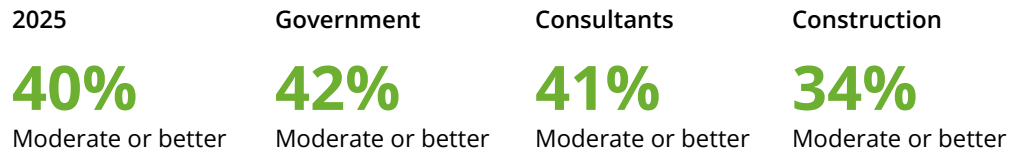


...we're in a housing dilemma...

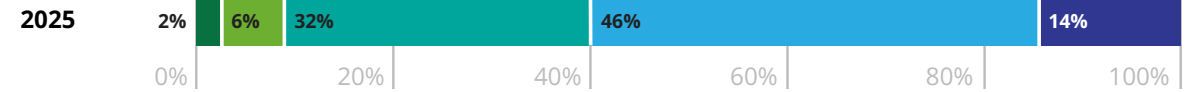
Industry leader perspectives



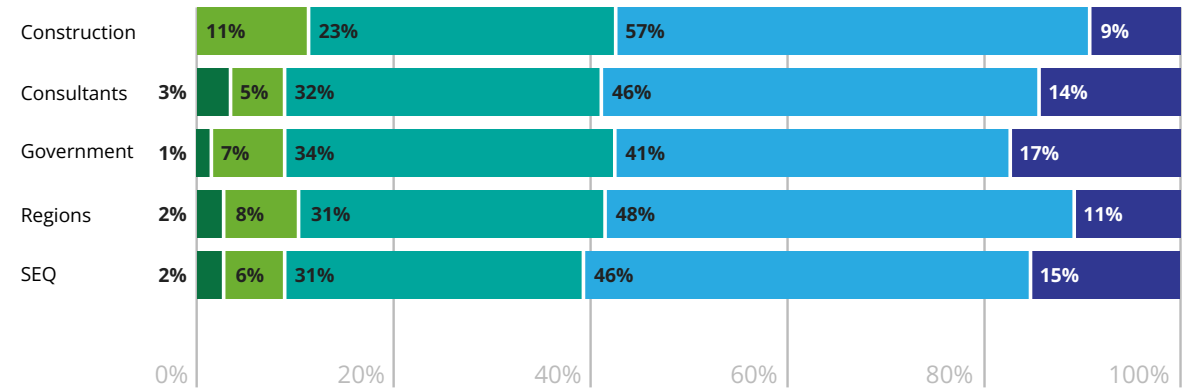
There's similar housing issues the regions... how can you accommodate the workforce?



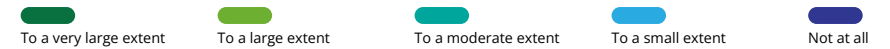
### Addressing growing demand for housing, and improving affordability and access



### Regions and Sectors



### Legend



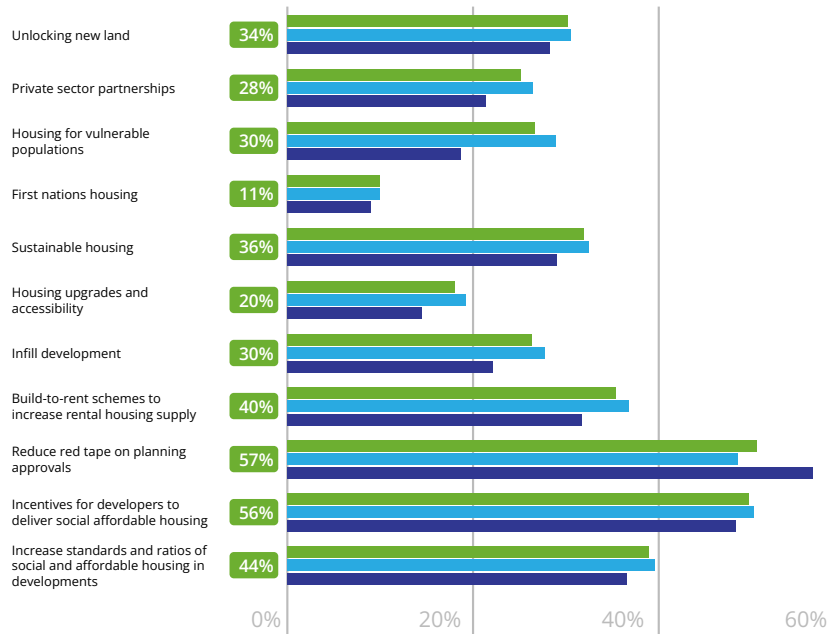
## Question 23:

Which housing infrastructure opportunities should be prioritised in terms of their importance and ability to deliver outcomes? (Select up to 5)

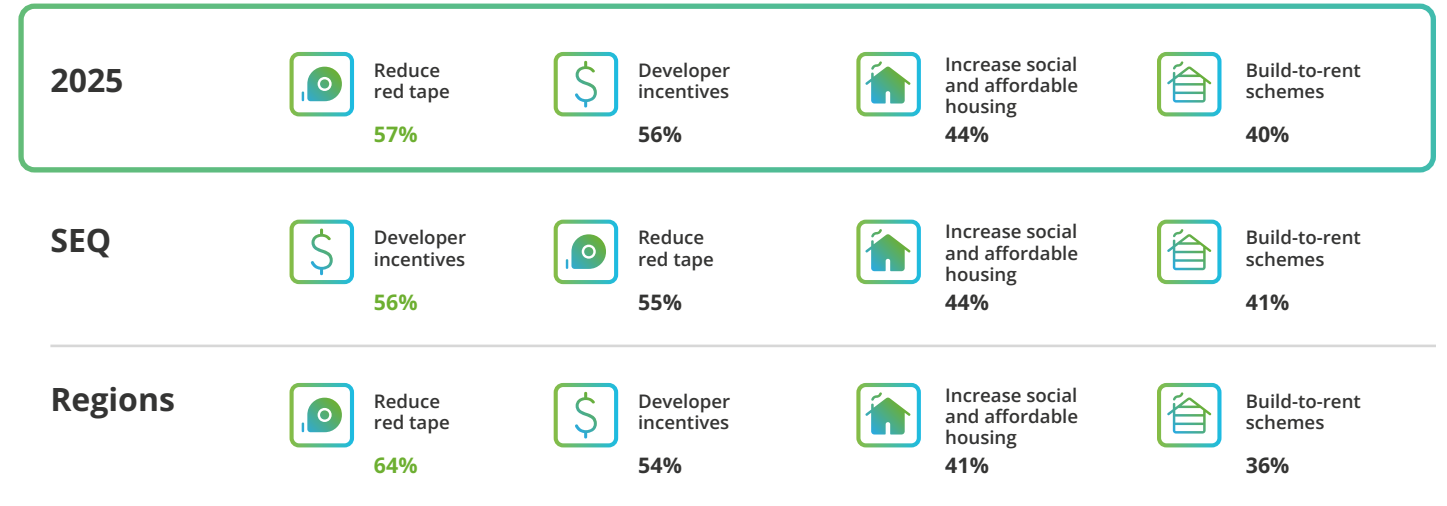
### Regional participants indicate greatest need to reduce red tape for planning approvals

Industry responses highlight top priorities as increasing the proportion of social and affordable housing in developments (54%), incentivising developers (56%), and streamlining planning approvals (57%). While SEQ and regional respondents largely agreed on these priorities, regional participants placed greater emphasis on reducing red tape for planning approvals (64%).

### Housing Infrastructure Opportunities

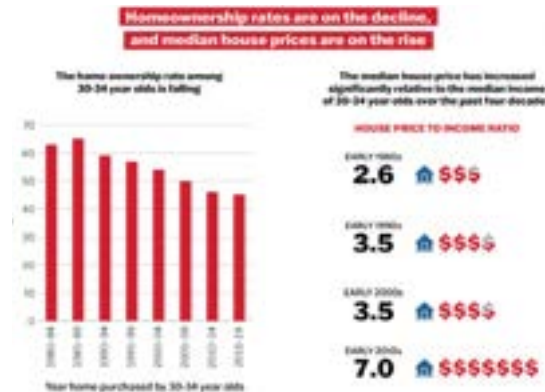


#### Legend



Research across Australia highlights a consistent effort to address the housing crisis, yet affordability continues to decline. Despite policy interventions and investment, structural challenges persist—underscoring the need for coordinated, long-term solutions to improve access to secure and affordable housing nationwide.

**Figure 16:** Homeownership rates



**Source:** (Australian Housing and Urban Research Institute, 2023)

## National Insights

- Housing Australia Future Fund (HAFF) Rollouts – July 2025: 279 projects funded, delivering 18,650 social and affordable homes across all states and territories (Australian Government, 2025; The Urban Developer, 2025)
- Government Social Housing Boost – In September 2024, the federal government green-lit over 13,700 new social and affordable homes (Australian Government, 2024; 2024, McMillian, 2024)
- The Journey to Social Inclusion (J2SI) initiative achieved a 90% success rate in enabling long-term stable housing and support for chronically homeless individuals (Sacred Heart Mission, n.d.)

State	Housing Investments in 2025/26 State Budgets
NSW	<ul style="list-style-type: none"> <li>• \$1B for a Pre-Sale Finance Guarantee to help housing developments get finance earlier, fast-tracking more than 5,000 homes and creating 1,500 jobs (NSW Government, 2024)</li> </ul>
WA	<ul style="list-style-type: none"> <li>• \$1.4B to boost housing supply and affordability (Government of Western Australia, 2025)</li> </ul>
QLD	<ul style="list-style-type: none"> <li>• \$165M Boost to Buy: Helping unlock home ownership sooner and deliver a place to call home for more Queenslanders with a new nation-leading scheme to reduce the deposit gap</li> <li>• \$5.6B new community and social housing: A place to call home for more Queenslanders with record investment for more social and community homes, delivering 53,500 new homes by 2044 (Queensland Government, 2025)</li> <li>• \$2B Residential Activation Fund: Unlocking more land for housing supply with funding to help kick-start new housing developments through essential housing infrastructure</li> <li>• 2 taxes axed to save Queenslanders: Opening the door to home ownership for more Queenslanders by abolishing stamp duty on new homes for first buyers (Queensland Government, 2025)</li> </ul>

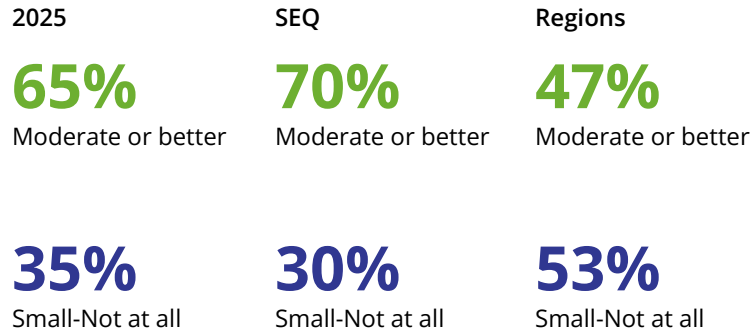
State	Successful Housing Projects
VIC	<ul style="list-style-type: none"> <li>• Victoria led the nation in new housing supply, completing 61,260 homes over the year to September 2024—outpacing NSW by 15,600 and Qld by 28,500. That equates to about 168 homes built per day (Department of Premier and Cabinet, Victoria, 2025)</li> </ul>
NSW	<ul style="list-style-type: none"> <li>• Waterloo South Renewal – One of Australia’s largest social housing renewal initiatives, marking a major step forward in affordable housing delivery (NSW Government, 2025)</li> <li>• Boronia Apartments, Sydney – Offers 74 units with rent capped at 30% of income—targeting low-income workers and those at risk of homelessness—supported by the Housing Australia Future Fund (City West Housing, 2025)</li> </ul>
SA	<ul style="list-style-type: none"> <li>• “The Coast” in Henley Beach South – Completed May 2025, this \$48 million redevelopment replaced ageing public housing with 50 mixed housing units, solar panels, EV chargers, and green communal spaces (Government of South Australia, 2025)</li> </ul>
QLD	<ul style="list-style-type: none"> <li>• “Homes for Queenslanders” Social Housing Program – Began October 2024; spans ~2.5 years, delivering hundreds of affordable homes and creating over 100 local jobs in construction and supply chains (Queensland Government, 2024)</li> <li>• Dana Springfield – Australia’s first private, master-planned city in Ipswich, expanding rapidly with a vision to reach a population of 100,000 by 2030 (Greater Springfield, n.d.)</li> </ul>

Question 24:

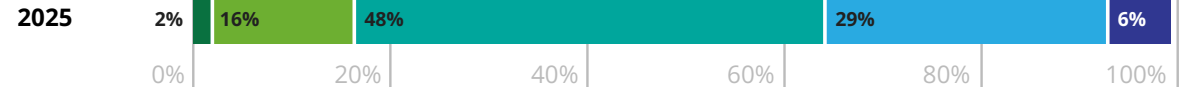
To what extent is Queensland's current health infrastructure pipeline building long-term system resilience (e.g. workforce flexibility, climate readiness, service adaptability)?

Results highlight disparity between SEQ & Regional Qld

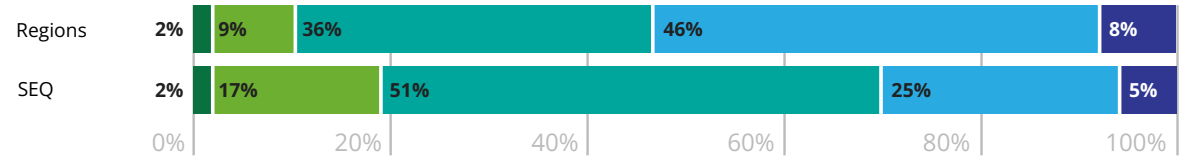
While the overall results show a positive sentiment (65%) towards Qld's health infrastructure pipeline building long-term system resilience, the breakdown reveals a clear divergence between SEQ and regional areas. SEQ respondents were notably more optimistic, with 70% selecting moderate or better and only 30% expressing lower confidence. In contrast, regional Queenslanders were more critical, with just 47% offering a positive rating.



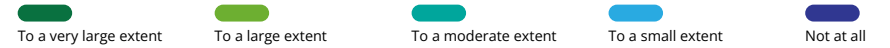
Is the health infrastructure pipeline building long-term system resilience?



Regions and SEQ



Legend



Question 25:

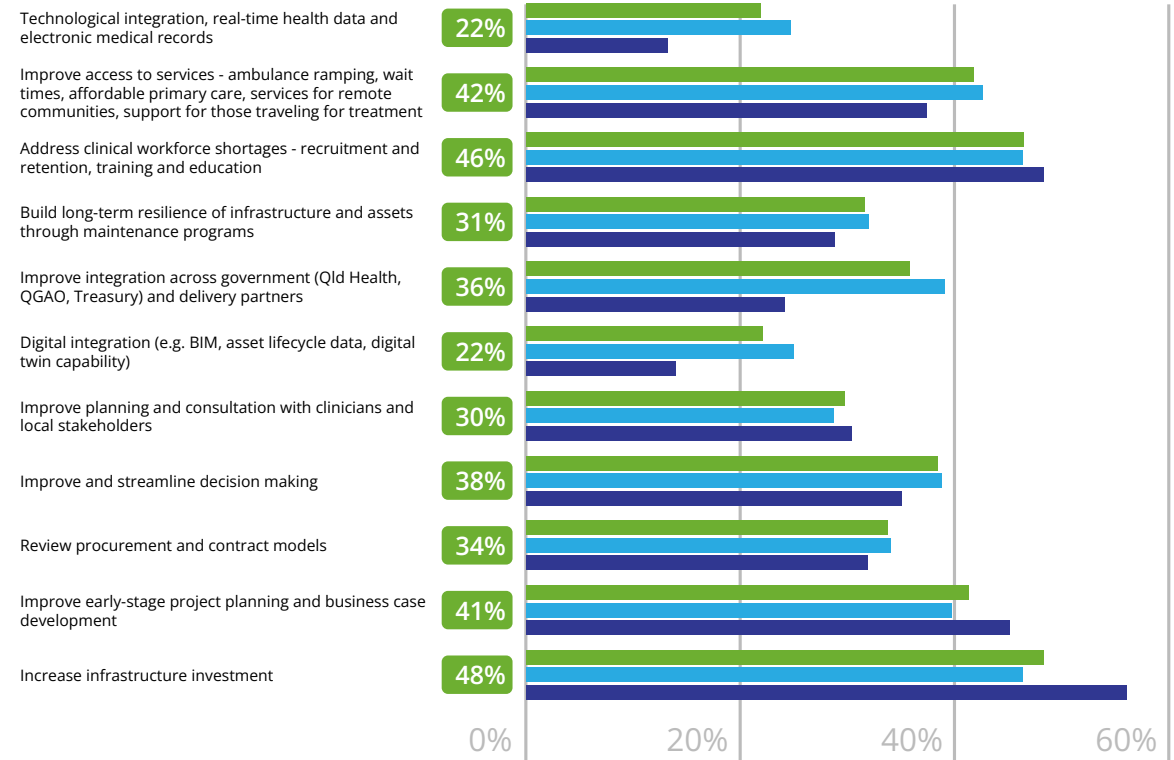
Which opportunities should be prioritised to improve health infrastructure investment outcomes and community access to a high-quality health system? (Select up to 5)

SEQ and Regional alignment on top priorities for Queensland’s health system

**Foundational system improvements are the dominant priorities for enhancing health infrastructure and access outcomes across Qld.** The most frequently selected opportunities were: increasing infrastructure investment (48%), addressing clinical workforce shortages (46%), and improving access to services by reducing ambulance ramping and wait times (42%). These priorities reflect a consistent focus on service delivery challenges rather than innovation-led solutions. Technology-based initiatives—including real-time health data, digital integration, and electronic medical records — were among the lowest-ranked options (22%).

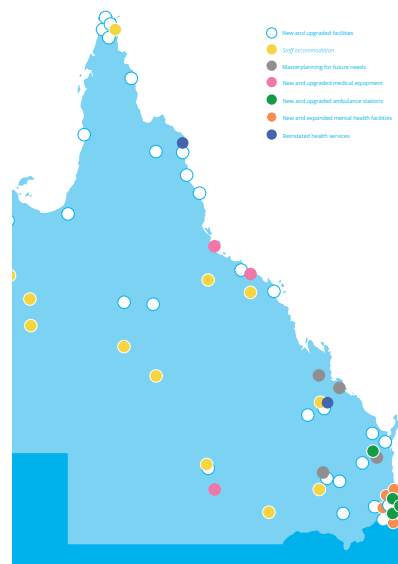
While there was broad consensus on the ranking for most opportunities, SEQ responses were more evenly distributed, with infrastructure investment (46%) and technical integration (25%) marking the highest and lowest selections respectively. In contrast, regional responses showed a wider spread, ranging from 56% to 13% for the same options.

Health Infrastructure Opportunities



Legend





Research across Australia shows a trend of an increasing health infrastructure spend in recent years, related to population growth and replacement of existing ageing assets. Over 5 years, the Qld Government has committed a record capital investment in Queensland Health infrastructure delivering more than 2,600 beds benefiting both SEQ and Regions.



*It's very public how bad the [Qld] health programme had been running for the last three years... Fragmented procurement among agencies has stalled delivery and wasted talent*

Industry leader perspectives

**Figure 17:**  
Health Projects in Queensland

Source: (Queensland Government, 2025, pg.35)

## National Insights – Federal Budget 25/26

- \$7.9 billion investment in bulk billing to strengthen Medicare and ensure free GP visits for more Australians
- Expanded access to essential services, including Urgent Care Clinics, public hospitals, and support for the health workforce
- \$792.9 million package for women's health, improving access to contraceptives, menopause support, and endometriosis treatment
- \$1.3 billion over six years to improve health outcomes for First Nations communities, including culturally safe care and infrastructure

Source: (Australian Government, 2025)

Health Investments 2025-26 State Budget Highlights				
QLD	NSW	WA	SA	VIC
<ul style="list-style-type: none"> <li>• \$1.8B Surgery waitlist</li> <li>• \$1.7B Ambulance ramping</li> <li>• Hospital Rescue Plan \$18.5B/5y</li> </ul>	<ul style="list-style-type: none"> <li>• \$12.4B to build and upgrade health infrastructure over the next four years, with \$3.3B in 2025-26</li> </ul>	<ul style="list-style-type: none"> <li>• \$1.4B to expand health and mental health services</li> </ul>	<ul style="list-style-type: none"> <li>• \$1.9B (2024-25 - 2028-29) investment in Health system</li> </ul>	<p>Total health system investment exceeds \$31 billion</p> <ul style="list-style-type: none"> <li>• \$9.3B hospital care,</li> <li>• \$497M mental health infrastructure</li> <li>• \$437M virtual EDs</li> <li>• \$230M emergency, ambulance</li> </ul>

Progressing - sample health projects	
<b>QLD</b>	<ul style="list-style-type: none"> <li>• Queensland's Hospital Rescue Plan—the biggest health infrastructure investment in state history—is backed by a record \$18.53 billion commitment and aims to deliver over 2,600 new beds across metro, regional, and rural areas (Queensland Health, 2025)</li> <li>• The 2025-26 Budget commits \$2.647 billion over five years to address underfunding in Queensland Health's maintenance program, ensuring facilities and equipment are fit for purpose (Queensland Treasury, 2025)</li> </ul>
<b>VIC</b>	<ul style="list-style-type: none"> <li>• Total health system investment exceeds \$31 billion, including an \$11.1 billion boost this year alone—\$9.3 billion for hospitals and \$634.3 million to open and operate nine new or upgraded hospitals (Victorian Department of Health, 2025)</li> <li>• New Footscray Hospital (\$1.5 billion) – Victoria's largest health infrastructure project; achieved financial close during the pandemic, now under construction (Plenary Group, 2022)</li> </ul>
<b>NSW</b>	<ul style="list-style-type: none"> <li>• Since 2011, more than 180 projects delivered, with 130+ currently underway, including &gt;90 in regional NSW (NSW Government, 2025)</li> <li>• Blacktown Mental Health Recovery Centre: Major upgrade under the \$669.8 million Statewide Mental Health Infrastructure Program, doubling capacity and shifting to a recovery-focused model (NSW Government, 2025)</li> <li>• RAIR Program – Ambulance Stations: \$232.1 million investment delivering 54 new/upgraded stations, significantly improving emergency response infrastructure across regional NSW (NSW Government, 2025)</li> <li>• Port Macquarie Hospital Helipad &amp; Car Park: \$34.0 million project enhancing critical care access with a rooftop helipad and 363 new parking spaces (NSW Government, 2025)</li> </ul>

# Chapter 5: Social Licence

## Question 26:

Which sectors are performing well in terms of how they engage communities and have developed social licence to construct and operate?

## Question 27:

Thinking about your top 3 sectors chosen in Q26, which elements of social licence are being delivered most effectively?

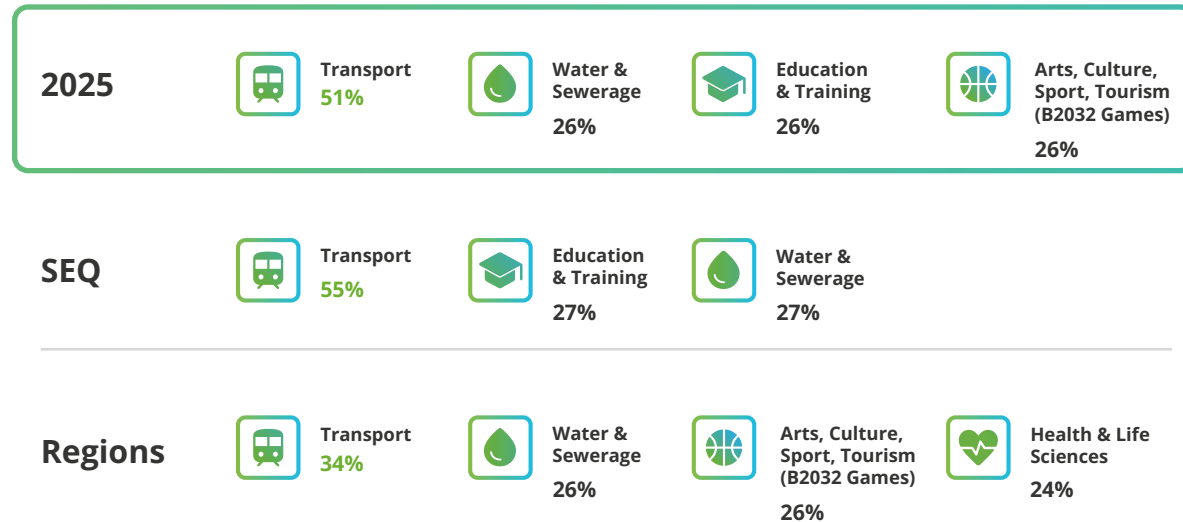


**Question 26:**

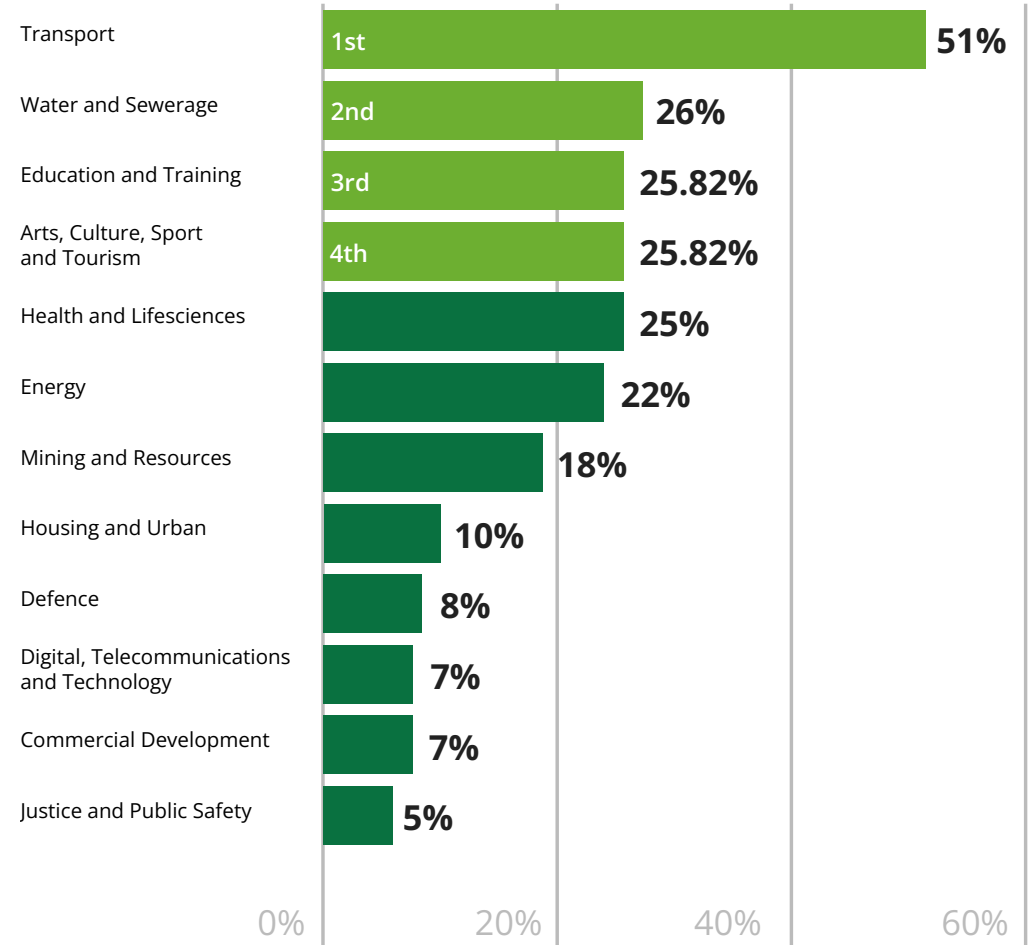
Which sectors are performing well in terms of how they engage communities and have developed social licence to construct and operate? (Select up to 3)

Results show a strong endorsement of the Transport sector, which stands out as the clear leader in community engagement and securing social licence to construct and operate, with 51% of respondents selecting it as the top performer; twice the share of the next most recognised sector. There is also notable recognition for sectors that have a direct impact on public wellbeing and everyday life, such as Water and Sewerage, Education and Training, Arts, Culture, Sport and Tourism, and Health and Lifesciences, each receiving around 25–26%. In contrast, sectors like Justice and Public Safety (5%), Commercial Development (7%), and Digital and Technology (7%) were less frequently identified, suggesting these areas may face greater challenges in building community trust and support, or may be less readily notable for the requirement for social licence.

**Transport sector is nominated the top performing sector for engaging communities, and obtaining social licence to construct and operate (SLO)**



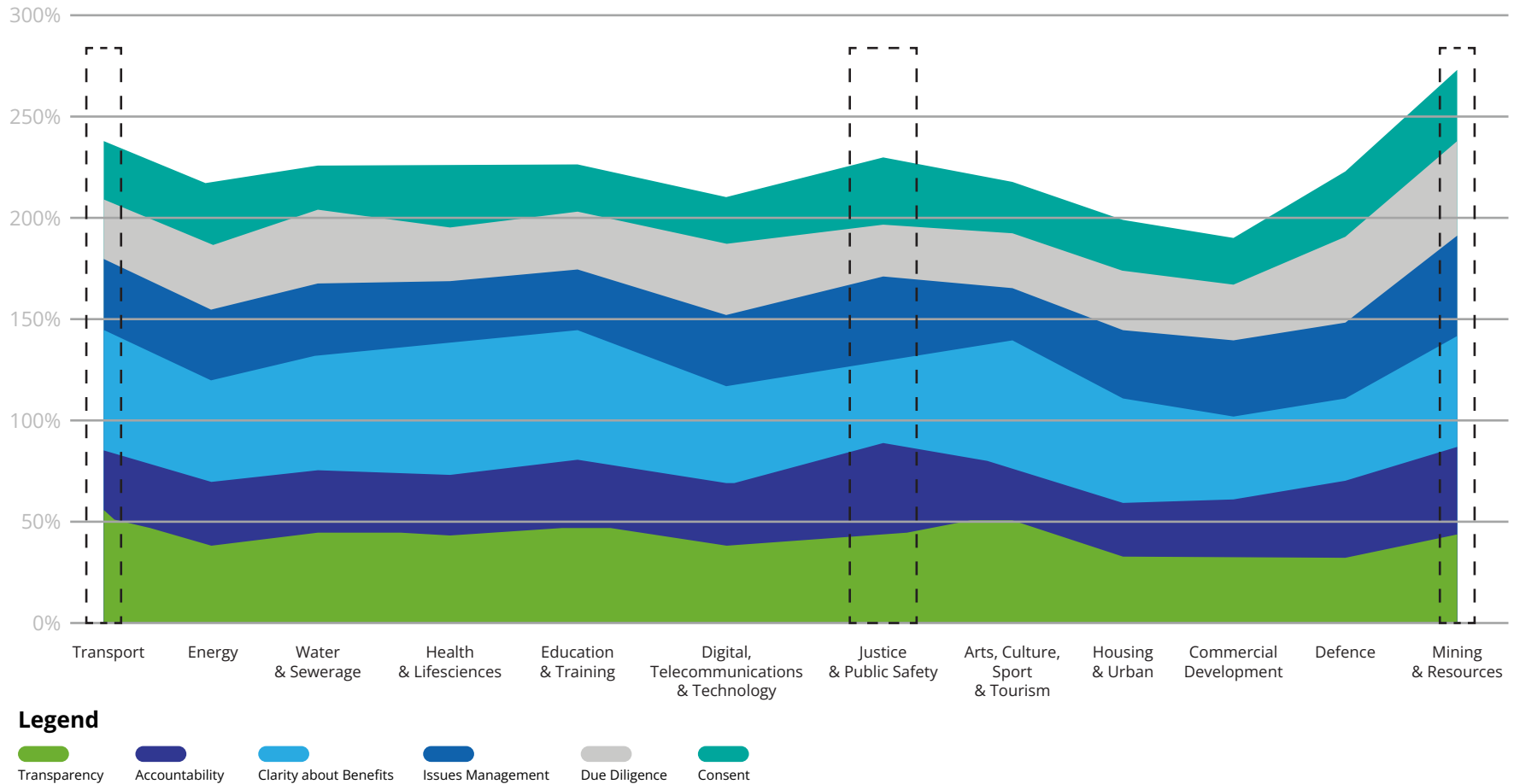
**Social Licence performance by sector 2025**



**Question 27:**

Thinking about your top 3 sectors chosen in Q26, which elements of social licence are being delivered most effectively? (Select all elements that apply)

**Which elements of social licence are being delivered most effectively?**



After overwhelmingly identifying Transport (51%) as the top performing sector for engaging communities, when respondents were asked to review social licence of sectors across a range of elements, a shift in sectors was evident. Clarity about benefits was considered to be the strongest element led by Health, Education, Arts, Culture, Tourism & Sport, then Transport. Transparency and issue management were the next highest-ranking elements. Overall, Mining, and Transport, followed by Justice performed best overall in SLO elements.

Despite Mining ranking 7th for performance by sector (Q26), respondents rated its SLO elements strongly, resulting in the Mining sector leading overall, followed by Transport, then Justice. By contrast, Justice ranked last of all options for Social Licence performance by sector.

# Social Licence – Industry Leader Perspectives

Industry leader summarised comments suggest that sectors with direct community or financial impact—such as energy, transport, health, and housing—are generally more effective in securing social licence through transparent engagement and clear communication of benefits. Initiatives like community benefit models and subsidised fare programs were cited as examples of successful public buy-in. The health sector was noted for its smaller project footprints and clearer community outcomes, contributing to stronger support.

## These insights point to several key focus areas for improvement:

- Strengthen social licence through proactive engagement, education and inclusive planning
- Tailor social licence strategies to project scale and sector, with a focus on transparency and community benefits
- Expand community benefit models and embed social licence strategies into infrastructure planning and delivery
- Leverage current assets to their full potential.

## NIMBY v IMBY 01

NIMBYs are common, but there's a growing IMBY movement; people who support projects in their backyard because they see the benefits

*'We should make better use of the assets we already have'*

*'The NIMBY-ISM is alive and well, especially in any commercial development'*

## Regional Insights 02

In the regions, communities have become apathetic. A major road hasn't functioned properly since November 2020. People should be outraged, but the issue only spikes occasionally before fading again

## Mining & Resources 03

Mining and resource companies often engage well with communities, especially since opposition usually comes from outside. Large developers could learn from this — those with the most to gain should invest in meaningful engagement, even if the project is going ahead regardless

## Health 04

Health projects often gain social licence more easily because they're on smaller sites, making them simpler to deliver

## Transport 05

*'The \$0.50 fares was actually quite a good one. I think people really bought into it'*

## Housing 06

*'I'm seeing it [social licence] working really well in housing at the moment'*

A positive example is Southport public housing project – where active community engagement has helped reduce stigma

## Reconsidered Projects

State	Project	Reason
QLD	Pioneer-Burdekin pumped hydro energy storage project 2024 (Madden, 2024)	Due to poor community consultation and support, while simultaneously expanding gas exploration and extending coal plant operations
QLD	Bruce Hwy Western Alternative – Stage 4 (“Moreton Bay Motorway”) — route change for evaluation – 2024 (Crockford, 2024)	Under review due to strong community opposition and concerns over property, environment, and heritage impacts
QLD	Moonlight Ridge wind farm 2025 (Jarret & Willcox, 2025)	Cancelled due to strong community opposition and concerns over property, environment, and heritage impacts
NSW	Yass Solar + Battery Project – 2025 (Williamson, 2025)	A major solar and battery hybrid project was withdrawn following community backlash over inadequate consultation and concerns about visual impact in the regional landscape

## Successful Projects

State	Project
VIC	<ul style="list-style-type: none"> <li>Mortlake Wind Farm: Despite general opposition to renewable developments in regional areas, Mortlake managed to navigate concerns through effective community engagement and collaboration (Department of Environment, Land, Water and Planning, 2020)</li> </ul>
NSW	<ul style="list-style-type: none"> <li>EnergyCo NSW builds long-term trust through multi-channel engagement, benefit sharing for communities and First Nations, and dedicated support systems for affected landowners (EnergyCO NSW, 2024)</li> </ul>
QLD	<ul style="list-style-type: none"> <li>Southport Public Housing Project built trust through strong community consultation, inclusive design with lived experience input, and transparent management by a housing provider and government (Queensland Government, 2025)</li> <li>Bruce Highway Advisory Council: legitimacy by re-establishing a diverse council of regional and industry representatives, ensuring infrastructure planning reflects local priorities (Department of Transport and Main Roads, 2025)</li> </ul>

## National Insights



The State of Infrastructure & Engagement Survey (ANU) shows that community engagement and social risk are now understood as critical to infrastructure delivery. Poor social licence leads to delays, cancellations, and cost overruns (Wangchuk, 2025)



Over the past decade, at least A\$30 billion in infrastructure was cancelled or delayed due in part to stakeholder pressure and lost social licence (Australian National University Institute for Infrastructure Society n.d.)



Across NSW, Qld, and VIC, energy projects continue seeing increased cancellations and opposition—many because communities feel excluded or misinformed (Bice, 2024)

## Projects and their strategies that demonstrate a positive social licence to operate.

### Southport Public Housing Project (Qld)

*(Department of Housing and Public Works; Queensland Government, 2025)*

- **Social Licence Strategy:** Strong emphasis on community consultation—public forums, drop-in sessions, media outreach, and feedback channels
- **Inclusive Design:** Developed with input from the housing sector and people with lived experience of homelessness
- **Transparency & Accountability:** Managed by a community housing provider, with clear communication with the Department of Housing & Public Works
- **Impact:** Builds trust by addressing vulnerable populations' needs and involving locals in the planning process

### Bruce Highway Advisory Council (Qld)

*(Department of Transport and Main Roads, 2025)*

- **Social Licence Strategy:** Re-established council includes regional and industry representatives (e.g., RACQ, tourism, trucking, farming)
- **Community Voice:** Expression of local priorities through diverse representation across districts
- **Impact:** Enhances legitimacy by ensuring infrastructure planning reflects community and economic needs

### QGC – Engagement with Farmers (Qld)

*(Shell Australia, 2023)*

- **Social Licence Strategy:** Detailed landholder engagement process—clear steps, negotiation rights, compensation, and legal cost coverage
- **Transparency:** Publicly available booklet outlining responsibilities and processes
- **Respect for Landowners:** Emphasis on fair treatment, legal compliance, and rehabilitation of land
- **Impact:** Builds trust with rural communities by prioritising fairness, clarity, and long-term stewardship

### Fintry Wind Farm (Scotland)

*(Carrington, 2009)*

- **Social Licence Strategy:** Innovative community co-ownership model—the locals funded and co-owned a turbine
- **Community Benefits:** Revenue reinvested into local sustainability projects (e.g., insulation, EVs, energy consultations)
- **Empowerment:** Community led planning and decision-making via Fintry Development Trust
- **Impact:** Deep social licence through shared ownership, economic participation, and environmental benefits

### EnergyCo NSW

*(EnergyCo NSW, 2024)*

- **Social Licence Strategy:** Multi-channel community engagement—info sessions, newsletters, pop-ups, and feedback loops
- **Benefit Sharing:** Community & Employment Benefit Program funds local initiatives and First Nations projects
- **Support Systems:** 24-hour support line for landowners affected by infrastructure development
- **Impact:** Builds long-term trust by embedding community prosperity into renewable energy planning

# Chapter 6: Participant Reflections on Industry & Future Opportunities

## Optional question 28:

Tell us anything else you'd like to share about Queensland's infrastructure industry and future opportunities.



# Participant Reflections on Industry and Future Opportunities








## Question 28 (Optional):

Tell us anything else you'd like to share about Queensland's infrastructure industry and future opportunities.

Feedback from 87 respondents highlighted a range of perspectives on Queensland's infrastructure challenges and opportunities, with common themes including transport accessibility, regional inclusion, labour and material shortages, and housing pressures.

- Many see transport as the most pressing issue, with 16+ people calling for more accessible and reliable public transport and raising concerns about freight inefficiencies and over-reliance on road freight.
- Respondents stressed the need for regional inclusion; 12+ people highlighted the importance of ensuring benefits extend beyond SEQ, linking this to housing and workforce pressures in regional areas.
- 20+ respondents raised challenges around labour, materials, and delivery speed, citing shortages, slow approvals, and delays as key risks to meeting Brisbane 2032 and other major project goals.
- 10 people specifically mentioned housing pressures, warning that competing priorities (housing, hospitals, Olympics) may overstretch resources and reduce delivery effectiveness.
- Calls for stronger collaboration and engagement were also common, with around 10 respondents wanting better alignment between government, industry, and communities to improve transparency.
- Priorities such as First Nations inclusion, sustainability, and strategic planning were mentioned by 5+ respondents each, highlighting the need for inclusive planning, renewable energy transition, and future-proofed investment.

**Table 13:** Respondent comments relating to the industry and future opportunities

Theme and number of comments	Description	Comment
<b>Transport</b> 	There is support for increased funding towards active and accessible public transport.	<ul style="list-style-type: none"> <li>• 'We need to prioritise regional transport projects – public transport, roads etc'</li> <li>• 'Upgrade all the roads and traffic signals around Brisbane metro... not keeping with population growth'</li> <li>• 'The cartel-like freight rail system in Qld hinders the growth of its primary production sector and related industries, increasing reliance on road freight and posing a significant and worsening sustainability issue'</li> </ul>
<b>Regional Inclusion</b> 	Comments stress the need to ensure regional communities' benefit, through fair investment and planning.	<ul style="list-style-type: none"> <li>• 'SEQ is getting too much attention for investments'</li> <li>• 'Payroll tax incentives for businesses who work in Central and North Qld'</li> <li>• 'Disparity continues to exist in the quality (safety) of regional roads vs SEQ'</li> </ul>
<b>Labour and Material</b> 	Anticipated shortages in skilled labour and materials prompt suggestions for a comprehensive and integrated action plan to address these challenges.	<ul style="list-style-type: none"> <li>• '... reduce our Qld requirements on workers - skills mitigation is the key to meet our goals'</li> <li>• 'Industry has lost a significant amount of capability and capacity... This needs to change rapidly...'</li> </ul>
<b>Accelerating Progress</b> 	Highlights the need to speed up planning, delivery, and decision-making to meet Brisbane 2032's ambitious goals.	<ul style="list-style-type: none"> <li>• 'Move faster, too much talk, not enough action'</li> <li>• 'We are too far behind – you need to speed up the delivery of new and updated infrastructures for 2032'</li> </ul>
<b>Housing</b> 	This theme explores key patterns and ideas related to housing in Queensland.	<ul style="list-style-type: none"> <li>• 'We do not qualify for an average house [homeloan] in Brisbane... Something is broken'</li> <li>• 'Let individual landholders subdivide their properties... override local government red tape.'</li> </ul>
<b>Collaboration</b> 	Strategic collaboration between various industries and government support is recommended to optimise outcomes.	<ul style="list-style-type: none"> <li>• 'The pipeline is financially, economically and socially sustainable, but greater collaboration with public and private sectors is needed to ensure that all industry participants have a sustainable 'piece of the pie'</li> <li>• 'Enhancing collaboration between government, industry, and local communities...'</li> <li>• 'By embracing innovation, collaboration, and inclusive planning...'</li> </ul>
<b>First Nations</b> 	Recognising, respecting, and including Aboriginal and Torres Strait Islander people.	<ul style="list-style-type: none"> <li>• 'Mining might be a useful reference point for the generation of social value through social licence - particularly with first nations land use agreements'</li> <li>• 'There are numerous untapped opportunities in tourism (could generate income into First Nations communities)'</li> </ul>

Continuation of the table on the next page



## Question 28 (Optional):

Tell us anything else you'd like to share about Queensland's infrastructure industry and future opportunities.

- A smaller group of people raised concerns about procurement processes and energy policy clarity, pointing to a lack of transparency and direction as barriers to private sector confidence and investment.
- Overall, feedback was largely constructive and minimally oppositional — respondents focused on risks and improvements needed, but few expressed outright resistance to Queensland's infrastructure performance.



Start of the table on the previous page

Theme and number of comments	Description	Comment
<b>Strategic Planning</b> <span>5+</span>	A sustained and strategic approach to planning, design, and delivery is emphasised as essential for ongoing and future investment, as well as for maintaining labour and skills in the industry over the long term.	<ul style="list-style-type: none"> <li>• <i>'We need our governments to do more long-term thinking, and strategy and planning...'</i></li> <li>• <i>'Get your top planners to plan long-term... not just short-term benefits...'</i></li> </ul>
<b>Sustainability</b> <span>5+</span>	Many comments advocate for projects that prioritise sustainability and environmental responsibility. There is a call for infrastructure that supports clean cities and long-term ecological health.	<ul style="list-style-type: none"> <li>• <i>'Queensland must bed down a renewable energy network (including storage and transmission) instead of continually resurrecting coal and gas'</i></li> <li>• <i>'Prioritising climate resilience and sustainability across all sectors...'</i></li> </ul>
<b>Community Engagement</b> <span>5+</span>	Effective community engagement through clear communication is advocated to prevent misinformation and ensure the public feels heard, thus increasing acceptance of project outcomes.	<ul style="list-style-type: none"> <li>• <i>'Planning, procurement, check &amp; balance, community consultation and benefits / protection of the public is always paramount in all these endeavours'</i></li> <li>• <i>'Inclusive planning... delivers lasting social, economic, and environmental benefits...'</i></li> </ul>
<b>Procurement Processes</b> <span>5+</span>	Comments suggest that current procurement processes prioritise competition over selecting the best partners, potentially leading to less effective project outcomes.	<ul style="list-style-type: none"> <li>• <i>'Many elements of procurement processes appear to be targeted at making obstacles for everyone to overcome to demonstrate that significant work has been done, rather than being targeted at understanding which organisation is best able to deliver the required outcome'</i></li> <li>• <i>'Commercial models are uninformed... procuring departments woefully under skilled...'</i></li> </ul>
<b>Energy Policy Clarity</b> <span>&lt;5</span>	There is concern over stalled investment in Queensland's energy sector due to a lack of clarity in the State Government's Energy Policy, which is seen as a barrier to growth.	<ul style="list-style-type: none"> <li>• <i>'Investment in Queensland's energy sector has stalled over the past year due to a lack of clarity in the State Government's Energy Policy'</i></li> </ul>

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## Water

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