



FY2027

AUSTRALIAN
INFRASTRUCTURE
ENVIRONMENTAL
SCAN



**CIVIL CONTRACTORS
FEDERATION**



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What is the FY2027 CCF Australian Infrastructure Environment Scan

The FY2027 Australian Infrastructure Environmental Scan (EScan) considers the challenges facing Australian communities and considers the inputs required to drive improvements by the end of this decade.

It calls out the need for a better understanding of what civil infrastructure truly means to Australians in everyday life. By deep-diving into the evolving civil infrastructure industry, the EScan highlights not only shortcomings through case studies and best practice examples, but also places a laser beam focus on how civil can mobilise the country's capacity to build a better, stronger future.

It provides a comprehensive scan of the Australian civil infrastructure landscape and the horizon ahead. It examines the major economic, workforce, housing, energy, productivity and policy trends shaping the sector, while highlighting the decisions that must be taken at a government, industry and national level to ensure Australia can continue to build a stronger, more productive and more resilient nation.

Because ultimately, Australia's future will not simply be determined by the scale of its ambition. It will be determined by its ability to supply the industry capable of delivering it — and by the strength of the civil foundations upon which that future is built.

EXECUTIVE SUMMARY

- THE DEMAND FOR CIVIL INFRASTRUCTURE

The demand for infrastructure and civil construction in Australia has never been greater and our nation's reliance on the water, sewerage, energy, roads, bridges, subdivisions provided by civil has come under pressure in the first six months of 2026.

Across the country, governments, industry and communities are asking more of the civil construction sector than ever before. Australia is attempting to unlock housing supply, modernise transport networks, transition to renewable energy, strengthen national productivity, improve freight efficiency and build the infrastructure that will support a growing population for decades to come.

At the centre of all of this sits civil infrastructure.

While much of the national debate focuses on demand — the demand for homes, energy, transport and economic growth — Australia's greatest challenge increasingly lies on the supply side of the equation.

How do we sustainably supply industry with the workforce, capital, materials, policy certainty, procurement frameworks and long-term support required to meet this unprecedented national demand?

That question sits at the heart of the FY2027 Australian Infrastructure Environmental Scan.

The importance of civil infrastructure has become impossible to ignore as governments seek to boost housing supply and improve affordability. Australia's housing debate has increasingly shifted toward the need to unlock supply, yet homes cannot be built until enabling infrastructure is delivered first. Roads, sewerage, drainage, water, power and subdivisions are the foundations upon which communities are created.

The relationship between housing and civil infrastructure is direct and inseparable. You cannot build homes until **Housing Enabling Civil Infrastructure** is in place.

Housing is at the heart of Australian politics which is no more evident than the significant tax policy changes for negative gearing and capital gains discounts which have required the federal government to make a 180-degree policy U-turn.

This challenge is becoming increasingly visible across Australia as population growth continues to place pressure on housing supply and community infrastructure. Governments have committed to ambitious housing targets, but achieving those targets will depend heavily on the nation's ability to accelerate the delivery of enabling civil works. The future of housing affordability will be shaped not only by planning policy and finance, but by Australia's capacity to deliver the infrastructure that unlocks land and supports new communities.

At the same time, Australia is undertaking one of the most significant transformations of its energy network in modern history through the **Energy Transition**. The transition to renewable energy is reshaping the national infrastructure pipeline, with Renewable Energy Zones, transmission corridors, wind farms, batteries, substations and grid upgrades becoming major drivers of infrastructure investment across the country.

Behind every renewable energy project sits a substantial civil construction task.

Remote access roads, earthworks, foundations, transmission infrastructure, drainage, bridges and supporting

infrastructure are all essential components of the energy transition. Australia's ability to meet its renewable energy ambitions will depend heavily on the capacity of the civil construction sector to deliver these projects efficiently, safely and at scale.

At the same time, Australia is investing in some of the largest infrastructure projects in the nation's history. Major city-shaping projects such as the Suburban Rail Loop and Sydney Metro are transforming the way Australians live, move and connect.

Australia is also preparing to construct the sporting and community infrastructure that will support the 2032 Summer Olympics. Beyond the sporting venues themselves, the Brisbane Games present an opportunity to deliver lasting transport, community and enabling infrastructure that will benefit Queensland and Australia long after the event concludes.

However, while demand for infrastructure continues to surge, significant pressures are emerging across the industry expected to deliver it.

Skills shortages remain one of the most significant challenges facing the civil construction sector. Workforce constraints are intensifying across engineering, project management, plant operations and key trades at a time when infrastructure demand is accelerating. Planning delays, procurement inefficiencies, industrial pressures, regulatory complexity and rising costs are also placing additional strain on project delivery and industry capacity.

Civil trades, such as mobile plant operators undertaking complex and technically demanding work, remain federally unfunded as apprenticeships, while other, less critical occupations receive prioritised support. This imbalance highlights a broader systemic failure to value and invest in civil infrastructure skills.

At the same time, Australia faces a broader **productivity challenge**.

The ability to deliver infrastructure efficiently, competitively and at scale will increasingly determine the nation's economic performance, housing outcomes and energy security over the coming decades.

The focus for Australia must therefore shift beyond simply announcing projects and toward ensuring the nation has the capability to deliver them.

Procurement practices have in recent years favoured large offshore contractors, concentrating market power and placing small- and medium-sized local businesses at a disadvantage. This means supporting industry with the right policy settings, investment certainty, procurement frameworks, workforce planning and regulatory reform required to meet the demands ahead. It means recognising the central role civil infrastructure plays in housing affordability, economic growth, energy reliability and national resilience. And it means ensuring governments and industry work together to strengthen the long-term capacity of the civil construction sector.

But as highlighted in the March 2026 CCF report provided by Saul Eslake and highlighted below we have the challenges of the 2026 Middle East Fuel Crisis which saw diesel prices spike to elevated levels of over \$1.50 per litre more than prior to the event.

Materials are up to 30 per cent higher and subcontractor rates have risen substantially, with prices to remain elevated.

With fixed price contracts being in place for around 85-90 per cent of all contracts there is the challenge where no rise or fall provisions exist is how can the business survive with this crisis threatening the delivery of community enabling infrastructure through to the end of the decade.

National Economic Update: The 2026 Middle East Fuel Crisis

The conflict in the Middle East initiated by the United States and Israel on 28 February 2026 has had an immediate and profound impact on the prices of crude oil, refined petroleum products, natural gas and a range of other products for which the nations on either side of the Persian Gulf are major suppliers.

As a result of Iran's ability, to close the Strait of Hormuz to almost all commercial shipping, and damage sustained by oil and gas production facilities around the Persian Gulf, there have also been significant disruptions to global supply chains. These disruptions are likely to persist well beyond the cessation of hostilities.

The effects of the conflict were rapidly transmitted to Australia. By the end of March, terminal gate prices for petrol and diesel had increased by 90.7 cents per litre (59.6 per cent) and 145.2 cents per litre (88.9 per cent) respectively since the conflict began. The Terminal Gate Price for diesel remains high as of the close of June 2026 at around 200 cents per litre which remains around 70-80 cents higher than pre-conflict.

Australia remains highly exposed to these global disruptions. In 2025, 84 per cent of Australia's refined petroleum product requirements were met through imports, including 90 per cent of diesel requirements. Most of these imports are sourced from Asian refineries that rely heavily on crude oil originating from the Middle East and transported through the Strait of Hormuz.

The Sectoral Impact of Sharply Higher Oil Prices

The impact of higher petrol prices on Australian households has been widely recognised. Australians consume approximately 16 billion litres of petrol annually, meaning a sustained increase of 75 cents per litre would have cost households around \$12 billion per year.

However, the effect of higher petroleum prices on businesses is far more uneven across industries. While public commentary largely focused on transport and agriculture, the construction sector is in fact more dependent on diesel as an energy input than either of those industries.

Within construction, heavy and civil engineering construction accounts for almost half the diesel consumption, which is more than the residential and non-residential building sectors combined.

The Australian Civil Engineering Construction Sector

Engineering construction has become an increasingly significant component of the Australian economy over the past decade. It now accounts for a larger share of total construction work and gross domestic product than at any time in the past 35 years outside the mining investment boom of the early 2010s.

Public sector investment has played a central role in this growth. Over the five years to 2024–25, more than one-third of all engineering construction work undertaken by private sector contractors was for public sector clients, compared with an average of 28 per cent over the previous three decades.

Roads, highways and subdivisions account for 27 per cent of all remaining engineering construction work, with more than two-thirds of this work being undertaken for public sector clients. Significant proportions of remaining work are also tied to electricity generation and transmission projects, railway and public transport infrastructure, and water storage and supply projects.

The Civil Engineering Construction Sector's Exposure to the Fuel Crisis

The civil construction sector has been uniquely exposed to the consequences of the Middle East fuel crisis due to its heavy reliance on diesel fuel and petroleum-linked products.

The 1,150 member firms of the Civil Contractors Federation of Australia consume approximately 88 million litres of diesel per month.

At its peak, the 145 cents per litre increase in diesel prices after 28 February cost civil construction businesses an estimated \$128 million per month.

These cost increases are particularly significant given the low operating margins across the sector. Profit margins on engineering construction projects are often between 1 and 5 per cent, depending on project size, leaving many contractors highly vulnerable to sustained cost escalation.

Beyond diesel, contractors have faced substantial increases in the cost of bitumen, asphalt, explosives, PVC and polyethylene pipes, electrical conduits and geotextiles, with anecdotal evidence suggesting price increases of between 35 and 50 per cent since the outbreak of the conflict. The challenge here is that as seen in COVID, once the price goes up it is unlikely to come back down.

These pressures are colliding with the prevalence of fixed-price contracts across the sector. The Civil Contractors Federation estimates that between 80 and 95 per cent of contracts are fixed-price arrangements.

While some contracts contain rise and fall provisions, these mechanisms are often inconsistently applied and poorly suited to rapid price escalation, particularly given the quarterly nature of relevant ABS pricing data.

The experience following the Covid-19 pandemic demonstrated the vulnerability of construction businesses to rapid cost increases under fixed-price contracts, with construction insolvencies increasing significantly between 2022 and 2023.

A further wave of insolvencies across the civil construction sector would undermine the delivery of critical national priorities, including housing, renewable energy infrastructure and major transport projects.

The next phase for Australia

Governments must recognise that the civil construction sector is as vulnerable to higher fuel and supply disruptions as the transport and agricultural sectors. Whilst increasingly unlikely, should fuel rationing or supply management become necessary, civil construction should be treated as an essential industry to ensure the continuity of nationally significant infrastructure projects and supply chains.

Federal, State and Territory Governments must permanently establish consistent and practical mechanisms to adjust contract values in response to significant input price movements, including on existing contracts, to allow for a fairer sharing of risk across the supply chain.

With many businesses considering the cost and rise and fall measures developed with State and Territory governments, the MYEFO in late 2026 will provide targeted support through existing infrastructure funding channels where abnormal input cost increases could not be absorbed within project budgets.

Targeted top-up funding such as the \$2 billion Housing Enabling Infrastructure fund for local governments delivering infrastructure projects where contracts do not adequately provide for cost escalation will assist.

Finally, governments should ensure that future civil construction contracts contain fit-for-purpose rise and fall provisions covering

fuel, bitumen and other oil-linked inputs to improve the sector's long-term resilience to global supply chain disruptions.

Australia's experience during the global financial crisis and the Covid-19 pandemic and the recent Middle East Fuel Crisis demonstrates that all governments have a critical role to play in managing economic shocks and ensuring risks are shared fairly across the economy.

Key Indicators in Civil

Engineering construction in Australia has been at record highs in recent years. In the 2025 year, the total value engineering construction work done nationwide by private and public sectors reached roughly \$153.2 billion with work done by private sector alone reached \$101.2 billion. Private sector civil engineering work for community enabling infrastructure (less mining) commenced in the past year was dominated by roads highways and subdivisions and electricity transmission and distribution.

Infrastructure Australia in its most recent annual Market Capacity Report reveals a significant turnaround in national infrastructure investment, with the five-year Major Public Infrastructure Pipeline increasing by \$29 billion to reach \$242 billion—the highest level since the agency began tracking nationwide government infrastructure investment five years ago.

The growth is largely driven by government investment in energy transmission and housing projects, as governments double down in a bid to meet their housing and net zero targets.

Infrastructure Australia tracks national demand to build across more than \$1 trillion of government and private investment against the market's capacity to deliver on that demand in terms of workers and materials.

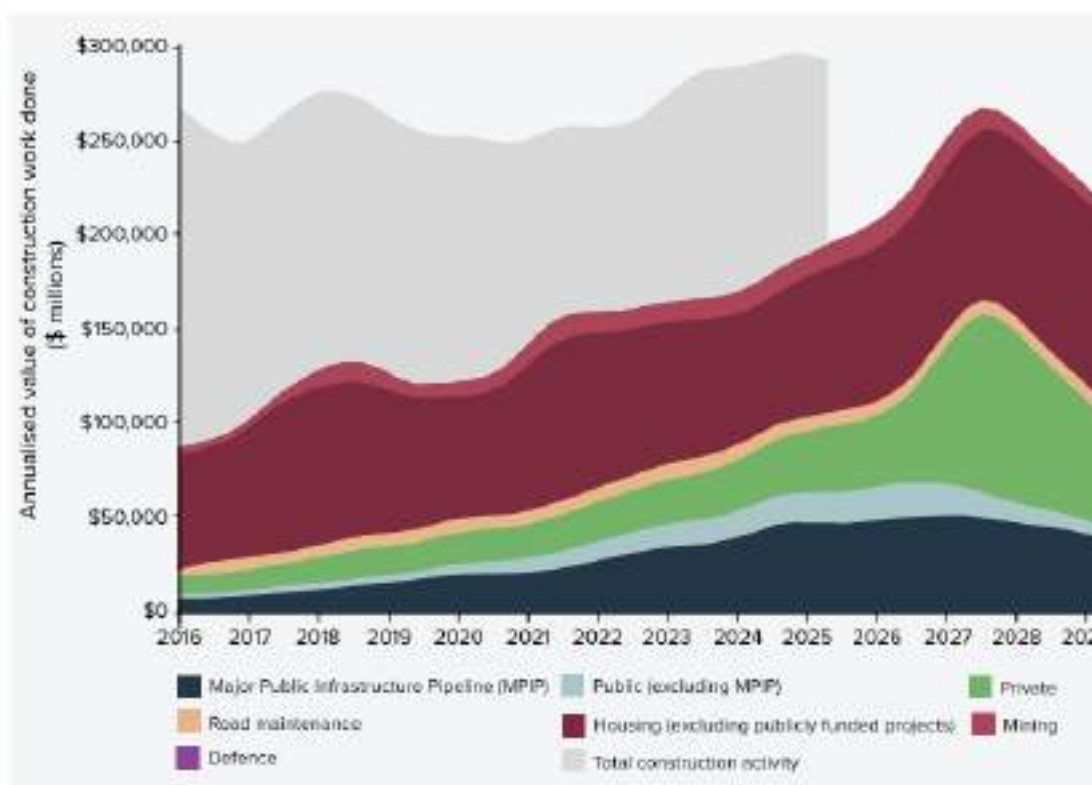
ABS Engineering Activity Dec 2025 (\$,000)			
Work commenced by the Private Sector	Total	Percent of total	Percent of total less mining
Roads, highways and subdivisions	\$26,930,634	27%	35%
Bridges	\$554,981	1%	1%
Railways	\$4,608,358	5%	6%
Harbours	\$1,333,140	1%	2%
Water Storage and Supply	\$3,804,451	4%	5%
Sewerage and Drainage	\$1,611,492	2%	2%
Electricity transmission and distribution	\$20,664,649	20%	27%
Pipelines	\$1,240,673	1%	2%
Recreation	\$5,287,827	5%	7%
Telecommunications	\$7,267,957	7%	10%
Oil, gas, coal and other minerals	\$24,977,405	25%	33%
Other heavy industry	\$1,061,740	1%	1%
Other	\$1,879,972	2%	2%
Total construction	\$101,223,278		
Total less Mining	\$76,245,873		

Utilities such as energy transmission projects are leading the pipeline's growth, with investment projected to more than double to \$36 billion over the next five years. Transport projects continue to account for more than half the total pipeline at \$129 billion.

The pipeline shows governments are doubling down on energy transmission and housing projects in a bid to meet their targets, while continuing to deliver the major transport projects we need to enable Australia's productivity and livability for decades to come.

This added demand will not come without challenges for the market—productivity growth remains sluggish, while worker shortages present a significant risk to the delivery of projects.

Figure 1: Forecast construction spend, as captured in the Infrastructure Australia database, against a backdrop of historic total construction activity (2016 to 2029)



Source: Infrastructure Australia, *2025 Infrastructure Market Capacity Report*

Infrastructure Australia's report projects the industry is currently short of 141,000 workers needed to deliver the five-year Major Public Infrastructure Pipeline.

These shortages could have acute impacts for regional areas, with ten regions across NSW, Tasmania and Queensland forecast to see public investment rise by at least 200 per cent. In some regions, investment injections are significantly higher. Meanwhile, worker shortages and stagnating productivity across the construction sector present a significant challenge to project delivery.

The report recommends investing in innovations that can boost productivity and efficiency in the long run. For instance, Governments could incentivise the market to trial productivity-enhancing innovations such as Modern Methods of Construction which can then be scaled. It also recommends the development of consistent nationwide training programs to upskill workers in these innovations.

Industry Confidence

Of those surveyed among the member base in the FY2026 CCF Civil Infrastructure Capacity Survey, a third (33%) reported that if there was an increase in the number of projects tendered in their respective state, they could take on between 10-25% extra work.

These results indicated strong productivity headroom, allowing the sector to absorb more work without major delays. The presence of capacity suggests contractors have improved efficiency and resource management despite workforce shortages.

Despite this previous position of growth, there have been some challenges emanating from the Middle East fuel crisis which has seen cashflow and slowdown of projects as rise and fall cost recovery has been a focus but this is easing with businesses adjusting.

Whilst this report considers several long-established indicators such as the ABS and the CCF Infrastructure Capacity Survey, there are many other measures considered to gauge confidence and future capacity and that includes asset acquisition and disposal.



CASE STUDY

Sales and Plant acquisition; Pickles

According to Pickles' sales results, construction specific machinery and the industrial market overall have stayed in line with the fluctuations of the previous year. While the average clearance rate is down marginally compared to 76% in 2025, an average clearance of 70% for industrial sales between January 2025 and January 2026 indicates strength in the market. There are a multitude of factors to explain this dip, one of which being more equipment available in the secondary market, due to a heightened number of vendors looking to sell equipment in order to free capital during economic pressure, particularly from small owner operators and subcontractors.

2026 has been strong already for Pickles Industrial, with the number of sales on the horizon only furthering confidence in a successful year. With \$631M in sales and over 61,000 assets sold in 2025, Pickles entered 2026 with confidence that while many aspects of the economy were out of control, consumer behavior pointed to continued strength in the marketplace.

Overall, there are buyers in the market showing intent to spend, with people still searching, inspecting, and transacting. However, there has been a noticeable change in customer behavior, where we're seeing more caution, with due diligence crucial within the tighter buyer pool. This gives a clear indication that when disposing of equipment, selling strategically matters more than ever. Presentation, maintenance history, timing, and campaign quality is crucial to maximising returns.

For the rest of the year in the secondary market, the next phase expected is more mid-life equipment entering the asset pool. Mid-life assets are those involving higher repair and maintenance costs, during a time when buyers are ultra-selective about where to deploy capital. Late-model, low-hour equipment remains scarce and sought after. In a cautious buyer market, these assets are even more desirable, particularly to businesses looking to meet short-term needs while keeping spending tight.

May 2026 was a record month at Pickles, particularly in Industrial auctions, with a large number of operators looking to offload their machinery by EOFY. This increase is common to the month each year and marks a noticeable return to sales cycles of years past. As the government and businesses begin to plan civil construction plans for the next financial year, more sales and insights will roll out across the industry.



THE NATIONAL INFRASTRUCTURE PIPELINE



New South Wales

ABS Engineering Activity NSW Value of Work Done All Sectors (\$,000)					
	2025	2024	2023	2022	2021
Roads, highways and subdivisions	\$8,835,239	\$10,045,964	\$10,520,849	\$8,236,124	\$6,725,149
Bridges, railways and harbours	\$5,940,320	\$6,326,090	\$6,462,965	\$5,328,801	\$4,353,999
Electricity generation, transmission and pipelines	\$11,684,590	\$8,668,110	\$8,244,071	\$6,129,784	\$4,283,245
Water storage and supply, sewerage and drainage	\$5,629,371	\$5,243,129	\$3,923,504	\$2,522,421	\$1,591,084
Telecommunications	\$2,607,383	\$2,608,650	\$2,565,240	\$2,270,622	\$2,356,916
Heavy industry	\$3,454,860	\$3,165,845	\$2,759,705	\$2,420,426	\$2,692,496
Recreation and other	\$3,112,164	\$3,466,470	\$3,130,301	\$2,365,241	\$2,014,129
Total	\$41,263,928	\$39,524,257	\$37,606,634	\$29,273,416	\$24,017,020

The latest NSW Budget, handed down on 23 June 2026, forecasts a \$2.3 billion deficit in 2026–27, with the Government maintaining that it will return to a \$1.1 billion surplus in 2027–28. Gross debt is projected to reach \$178.5 billion by June 2027, reflecting continued investment alongside a more disciplined fiscal strategy. The State's infrastructure program remains substantial, with \$30 billion allocated to infrastructure in 2026–27 and \$116.7 billion over the four years to 2029–30. While reaffirming its commitment to major transport, housing and social infrastructure projects, the Government has continued its focus on sequencing and prioritising projects to better align delivery with market capacity, improve value for money and reduce cost escalation.

What has changed is not the disappearance of public work; it is the sequencing of it. NSW is still carrying one of the largest civil pipelines in the country, but the rhetoric and the allocation mix have shifted away from “maximum possible spend” toward a steadier

pipeline tied to housing, water, energy, transport and advanced manufacturing. The budget overview highlights \$12.4 billion for health infrastructure, \$10.4 billion for schools, and \$1 billion to fast-track more than 5,000 homes, while the broader NSW overview says the strategy is now about coordinating housing, water, energy, transport, manufacturing and technology rather than simply adding more megaproject intensity.

Western Sydney remains the clearest concentration of public civil work. NSW's Western Sydney budget chapter points to \$10.8 billion over four years for Sydney Metro West, \$5.5 billion over four years for Western Sydney roads, and \$801.4 million over four years for the City to South West Metro. Regional NSW continues to carry significant road and recovery work as well, including \$2.8 billion over four years in road-safety funding and \$4.2 billion of combined state and federal disaster relief and recovery

funding. In practice, that means contractors are seeing a market that is still transport-heavy, but with a more visible contribution from regional roads, resilience and recovery works.

Private-side opportunity is becoming more important to the NSW outlook. Treasury's Half-Yearly Review says business investment rebounded strongly and was being supported by renewable energy projects and data centres. In the infrastructure statement, NSW highlighted the Central-West Orana REZ delivery phase, early works having started in February 2025, construction scheduled from mid-2025, 7.15 gigawatts of awarded access rights, \$115.5 million for the Newcastle Port logistics precinct, and the Transmission Acceleration Facility as a pipeline-shaping enabler. The Pre-sale

Finance Guarantee adds another private-sector catalyst by letting the State guarantee up to \$1 billion of housing projects at any one time through a revolving fund, aimed squarely at getting apartment projects into construction sooner.

For civil contractors, the NSW read-through is constructive but more selective than before. The pipeline is still deep, but the most resilient work now sits at the intersection of transport completions, Western Sydney enabling works, REZ transmission and logistics, water, disaster recovery, and apartment-enabling infrastructure. The biggest challenge is not demand collapse; it is bidding and resource allocation in a market where NSW itself is trying to avoid the delivery delays and cost escalation that came with an overheated pipeline.

Victoria

ABS Engineering Activity VIC Value of Work Done All Sectors (\$,000)

	2025	2024	2023	2022	2021
Roads, highways and subdivisions	\$9,924,367	\$8,981,800	\$8,771,109	\$7,645,000	\$5,376,891
Bridges, railways and harbours	\$4,737,583	\$5,785,667	\$6,496,507	\$5,721,121	\$4,933,409
Electricity generation, transmission and pipelines	\$5,646,399	\$5,878,801	\$4,235,360	\$2,881,396	\$3,679,765
Water storage and supply, sewerage and drainage	\$1,410,240	\$1,330,088	\$1,393,457	\$1,440,282	\$1,357,683
Telecommunications	\$1,382,713	\$1,882,232	\$1,988,612	\$1,708,107	\$1,484,119
Heavy industry	\$968,784	\$1,046,468	\$1,072,708	\$832,764	\$517,109
Recreation and other	\$1,946,131	\$2,364,700	\$2,403,420	\$1,811,184	\$1,506,987
Total	\$26,016,217	\$27,269,757	\$26,361,173	\$22,039,851	\$18,855,962

Victoria's 2026/27 Budget shows that the forecast has changed from peak public works intensity to a more managed landing. The State says it is on track for an operating surplus of over \$700 million in 2025-26, \$1 billion in 2026-27, rising to \$2 billion by 2029-30, and that net debt will begin falling as a share of GSP from 2026-27 onwards. That matters because Victoria is no longer signalling "build at maximum volume", but rather "complete the big wave and normalize".

The infrastructure pipeline is still enormous, but it is clearly tapering. \$4.4 billion of new total estimated investment has been added, government infrastructure investment is \$21.4 billion in 2025-26, then averages \$16.5 billion over the budget and forward estimates, before moderating to \$15.3 billion by 2029-30. Crucially, the Budget says that moderation is intended to free market capacity for private sector investment in sectors like housing. For contractors, that is a major change in market signal: less expectation of endless escalation in public transport megaprojects, and more room for housing, urban redevelopment and private-side work.

The public works story is increasingly one of delivery, openings and completion risk management. The budget's infrastructure page says the Metro Tunnel is open, the West Gate Tunnel is saving drivers time, 88 level crossings have been removed with 8 more due in 2026, and the State is funding \$674

million for 25 additional trains to be built in Ballarat. At the same time, the fiscal tables note that Victorian GII includes private-sector construction-related expenditure associated with the North East Link, which shows that the pipeline is still carrying major heavy civil work even as the overall spend profile moderates.

Private investment should matter more in Victoria over the next phase. The Budget explicitly links lower public GII to more capacity for housing-related private investment, while maintaining that the public program remains large by historical standards. That suggests a market where transport-linked urban development, industrial and logistics sites, utilities, and housing-enabling works become relatively more important than they were at the height of the major rail tunnel build-out.

For civil contractors, Victoria now looks less like a simple "megaproject volume" story and more like a portfolio mix story: finishing transport packages, supporting the remaining road and rail heavy-civil base, and positioning for private work that becomes possible as public demand steps down. The main challenges remain commercial discipline, workforce redeployment as big packages complete, and bidding into a market where the State is explicitly prioritizing sustainability over a renewed spend spike.



Queensland

ABS Engineering Activity QLD Value of Work Done All Sectors (\$,000)

	2025	2024	2023	2022	2021
Roads, highways and subdivisions	\$6,293,501	\$6,677,426	\$6,527,237	\$5,508,268	\$4,656,868
Bridges, railways and harbours	\$3,463,972	\$3,295,981	\$3,241,773	\$2,725,101	\$2,028,665
Electricity generation, transmission and pipelines	\$6,624,711	\$6,216,488	\$4,815,309	\$4,116,038	\$3,301,760
Water storage and supply, sewerage and drainage	\$3,204,549	\$3,454,746	\$2,722,196	\$1,898,891	\$1,875,639
Telecommunications	\$1,288,002	\$1,423,154	\$1,406,916	\$1,284,283	\$1,095,739
Heavy industry	\$8,689,772	\$7,713,713	\$7,695,369	\$5,684,361	\$6,380,134
Recreation and other	\$1,319,185	\$1,578,817	\$1,427,313	\$1,352,131	\$1,350,616
Total	\$30,883,691	\$30,360,323	\$27,836,113	\$22,569,074	\$20,689,421

Queensland continues to emerge as one of the strongest growth markets for civil construction in Australia, underpinned by a substantial transport pipeline, major energy investments and preparations for the 2032 Brisbane Olympic and Paralympic Games. Unlike some jurisdictions where major transport programs are approaching completion, Queensland maintains a broad and diversified pipeline of road, rail, water and energy infrastructure projects that are expected to sustain construction activity through the remainder of the decade.

Transport infrastructure remains the largest component of civil construction activity in the state. Major projects including Cross River Rail, Bruce Highway upgrades, Sunshine Coast rail projects and a range of regional road investments continue to support demand across both metropolitan and regional Queensland. Olympic-related infrastructure planning is also expected

to generate additional investment in transport corridors, urban development and supporting infrastructure as the state prepares for 2032.

Energy infrastructure is expected to become an increasingly significant contributor to Queensland's construction pipeline. The state's renewable energy transition is driving investment in large-scale wind farms, solar generation, transmission infrastructure and pumped hydro developments. These projects are anticipated to substantially increase the share of energy-related civil construction activity over coming years, creating new opportunities for contractors while diversifying the state's infrastructure mix beyond traditional transport projects.

Water infrastructure also continues to play an important role, particularly through dam safety upgrades, irrigation projects and investments designed to support population growth, agriculture and regional development. Key projects identified in current forward pipelines include the

Gladstone Desalination Plant, Wyaralong Water Treatment Plant, Paradise Dam Improvement Project, Burdekin Falls Dam Raising, Fitzroy to Gladstone Pipeline and Somerset Dam Upgrade.

Queensland's position is further strengthened by its share of Commonwealth infrastructure funding. The state is expected to receive the largest allocation of federal infrastructure investment, supporting both existing programs and future project development. Combined with strong population growth, significant resource sector activity and Olympic-related investment, Queensland is widely expected to remain one of Australia's fastest-growing civil construction markets through the late

2020s. By 2028, the state's civil construction profile is likely to be more diversified, with transport remaining a major component while energy and water infrastructure account for an increasingly larger share of activity.

For civil contractors, Queensland presents opportunities across major transport projects, renewable energy developments, water infrastructure and regional construction programs. The breadth of the pipeline provides a level of resilience not always present in markets reliant on a small number of megaprojects, positioning the state as a key driver of national civil construction activity over the coming years.

Western Australia

ABS Engineering Activity WA Value of Work Done All Sectors (\$,000)					
	2025	2024	2023	2022	2021
Roads, highways and subdivisions	\$3,041,928	\$3,317,592	\$3,084,889	\$2,463,407	\$1,782,538
Bridges, railways and harbours	\$2,702,530	\$3,598,750	\$3,024,713	\$1,959,669	\$1,549,533
Electricity generation, transmission and pipelines	\$4,183,238	\$4,886,503	\$3,406,515	\$2,761,901	\$1,874,990
Water storage and supply, sewerage and drainage	\$3,459,823	\$2,322,371	\$1,722,787	\$1,463,209	\$751,095
Telecommunications	\$1,085,028	\$1,064,942	\$892,161	\$731,797	\$585,956
Heavy industry	\$18,916,021	\$18,203,174	\$15,147,046	\$12,042,657	\$13,361,640
Recreation and other	\$1,579,543	\$922,472	\$719,539	\$546,291	\$416,301
Total	\$34,968,111	\$34,315,804	\$27,997,651	\$21,968,930	\$20,322,055

Western Australia's 2026-27 Budget remains the clearest example of a state where the forecast has moved toward housing-enabling infrastructure and private-capacity support, not away from work.

The WA Government says it expects an operating surplus of \$3.5 billion in 2025-26, surpluses across the forward estimates, a record \$44.3 billion infrastructure program over four years, and net debt of just 7.1 per cent of GSP in 2025-26. That is a very strong fiscal platform for civil activity.

The key shift is that WA is using that balance-sheet strength less to chase pure volume and more to unlock supply. The housing package is the centrepiece: the Budget says it is investing a record \$4.7 billion in housing, taking additional housing investment since 2021 to more than \$10.8 billion. It also points to \$1.3 billion in land development and enabling infrastructure, including \$686 million for Development WA to deliver residential lots and activate METRONET station precincts, \$522 million for power and water infrastructure in growth corridors, and a \$40 million top-up to the Infrastructure Development Fund.

That makes WA's public pipeline very relevant to civil contractors even where the work is not a classic motorway megaproject. The State is effectively creating work through land servicing, utility upgrades, precinct activation and housing-linked civil packages, while still maintaining a large transport and

social infrastructure base. The Budget also highlights \$1.5 billion in health infrastructure and the Building Hospitals Fund, showing that hospitals and enabling site works remain part of the mix as well.

Private investment should remain exceptionally important in WA because the State's economy is still being driven by business, dwelling and household investment. The Budget's economic page says state final demand has been revised up to 3.5 per cent in 2025-26, with private-side activity across business and dwelling investment doing much of the lifting. Combined with the Budget's housing finance measures (including the \$250 million Pre-sale Guarantee and \$375 million for 500 affordable homes for first-home buyers) that gives contractors a stronger private-side forward book than is visible in many eastern states.

The WA outlook is therefore one of the most positive for civil contractors, but with a different complexion than a few years ago. The opportunity set is broad: residential-enabling civils, utilities, precinct works, hospitals, and selected rail/transport projects, all on top of the State's private resources and industrial economy.

The main delivery risk is familiar: workforce and subcontractor availability in a state where both public and private workloads are still strong.



South Australia

ABS Engineering Activity SA Value of Work Done All Sectors (\$,000)					
	2025	2024	2023	2022	2021
Roads, highways and subdivisions	\$2,484,812	\$2,095,531	\$2,064,073	\$1,964,931	\$1,806,441
Bridges, railways and harbours	\$659,931	\$390,504	\$248,319	\$291,209	\$515,055
Electricity generation, transmission and pipelines	\$1,755,213	\$1,537,728	\$1,540,825	\$1,382,949	\$1,297,789
Water storage and supply, sewerage and drainage	\$1,524,594	\$937,610	\$941,266	\$775,158	\$658,777
Telecommunications	\$610,707	\$639,451	\$540,204	\$450,413	\$421,821
Heavy industry	\$2,627,243	\$2,646,263	\$2,822,530	\$2,517,405	\$2,248,825
Recreation and other	\$583,351	\$700,504	\$874,976	\$961,813	\$527,455
Total	\$10,245,850	\$8,947,590	\$9,032,193	\$8,343,879	\$7,476,164

South Australia's 2026-27 Budget has now been released, but the most accessible primary material was the treasury budget landing pages rather than the detailed agency project schedules. The official site confirms that the current budget papers are now live, and the state budget website highlights housing, economy, and infrastructure, roads and transport as core themes. That already indicates the forecast has stayed infrastructure-forward rather than pivoting away from delivery.

The market story in South Australia is still dominated by a small number of very large commitments. Recent reporting on the just-delivered budget says the pipeline remains anchored by the North-South Corridor tunnels and the new Women's and Children's Hospital, with infrastructure spend and debt both moving higher but the Government still presenting the pipeline as central to economic growth and productivity.

That said, the draft market reading is clear enough. South Australia remains a state

where one or two megaprojects dominate heavy-civil capacity, but the 2026-27 framing also suggests more emphasis on housing measures, transport, and enabling works rather than a purely transport-led story. In practical terms, civil demand is still likely to be concentrated in major metropolitan corridor work, hospital and precinct works, and selected regional and utility packages.

Private investment in South Australia should not be ignored. A housing-heavy budget narrative, including measures intended to help apartment projects move forward, implies more scope for private multi-residential and urban renewal work than in a simple "road tunnel state" reading. More broadly, South Australia's market remains exposed to defence, advanced manufacturing, energy transition and industrial investment, although those themes should be tied back to final budget-paper detail before publication. That is

an inference consistent with the budget framing, not a substitute for the agency statements.

For contractors, South Australia still offers a solid but concentrated market. The opportunity is obvious where contractors can secure a place in the large corridor, hospital,

housing-enabling or utilities packages; the risk is equally obvious where a narrow project mix leaves supply chains dependent on a few very large jobs. In final copy, this section should be tightened against the detailed 2026-27 budget papers now that they are available.

Tasmania

ABS Engineering Activity TAS Value of Work Done All Sectors (\$,000)					
	2025	2024	2023	2022	2021
Roads, highways and subdivisions	\$371,210	\$392,483	\$502,646	\$473,998	\$465,298
Bridges, railways and harbours	\$266,954	\$464,625	\$510,832	\$252,472	\$162,085
Electricity generation, transmission and pipelines	\$345,798	\$302,126	\$299,413	\$302,982	\$253,342
Water storage and supply, sewerage and drainage	\$860,802	\$745,783	\$502,023	\$543,960	\$412,557
Telecommunications	\$218,269	\$199,510	\$277,080	\$310,202	\$297,473
Heavy industry	\$221,854	\$232,931	\$210,248	\$222,463	\$215,690
Recreation and other	\$157,118	\$186,854	\$140,594	\$116,724	\$131,688
Total	\$2,442,001	\$2,524,312	\$2,442,839	\$2,222,804	\$1,938,132

Tasmania has released its 2026-27 Budget, and Treasury has also published a Fiscal Sustainability Report 2026. The budget pages confirm the new budget, while the sustainability report frames the state's finances over a longer horizon. That is an important signal for the market: Tasmania's infrastructure story now sits much more directly inside a fiscal-sustainability debate than it did when the market was simply focused on yearly capital spend.

The forecast has therefore changed toward tighter prioritization. Tasmania is still publishing a full capital and agency

budget set, but the policy setting is more openly about balancing infrastructure ambition, debt management and long-term sustainability. The 2026 fiscal sustainability publication reinforces that this is now a state where the affordability and sequencing of infrastructure matter as much as the project announcements themselves.

For the civil market, that usually means a narrower set of major works carrying more weight. Large, visible commitments — including long-discussed urban renewal and major transport-linked projects — will still drive activity, but the procurement environment is likely to be more selective and more politically exposed than in the larger mainland states.

Private investment and enabling-work opportunities still matter, particularly where they connect to housing, ports, utilities, tourism and logistics. But in Tasmania the public balance sheet remains a very strong market signal, so contractors should expect public-sector affordability and project staging to have a bigger influence on bid timing and project packaging than in WA or NSW.

The outlook is therefore mixed rather than weak. Tasmania still has real civil opportunities, but the forecast is now more about selectivity, fiscal discipline, and project sequencing than broad-based expansion. That makes the market potentially attractive for disciplined contractors, but less forgiving for businesses relying on continuous government volume.

Australian Capital Territory

ABS Engineering Activity ACT Value of Work Done All Sectors (\$,000)					
	2025	2024	2023	2022	2021
Roads, highways and subdivisions	\$197,887	\$122,291	\$170,828	\$127,200	\$107,553
Bridges, railways and harbours	\$330,683	\$52,806	\$38,206	\$3,372	\$6,459
Electricity generation, transmission and pipelines	\$519,475	\$205,040	\$232,939	\$220,731	\$97,225
Water storage and supply, sewerage and drainage	\$101,245	\$72,459	\$68,425	\$97,370	\$86,026
Telecommunications	\$149,974	\$180,383	\$201,455	\$176,677	\$180,571
Heavy industry	\$212	\$5,949	\$8,544	\$879	\$757
Recreation and other	\$237,343	\$152,772	\$185,369	\$204,270	\$224,260
Total	\$1,536,819	\$791,700	\$905,765	\$830,500	\$702,851

The ACT's latest full Budget is the 2026–27 Budget, continues to prioritise housing supply, health, local infrastructure and frontline city services, while taking a more measured approach to capital investment.

Alongside investments in housing, active transport, suburban infrastructure and the Northside Hospital, the Government has deferred and rephased around \$700 million of infrastructure projects over the forward estimates to better align delivery with fiscal capacity and project readiness. While significantly smaller than NSW or Victoria,

the ACT continues to maintain a strong civil construction pipeline relative to the size of its economy, with an increasing emphasis on sequencing projects to ensure they are deliverable.

The ACT's infrastructure program remains substantial. The Infrastructure Investment Program forecasts \$1.8 billion of expenditure by the end of FY2026 and \$8.3 billion over five years, including \$6.0 billion in the

General Government Sector and \$2.3 billion by Public Trading Enterprises. That means the forecast has not softened into a simple maintenance market; rather, it has become a more carefully staged urban-growth and city-shaping program.

Fiscal pressure is the balancing factor. In the Budget Outlook, the ACT says the Headline Net Operating Balance is forecast to be in deficit by \$424.9 million in 2025-26, improving to surplus later in the forward estimates, while net debt excluding superannuation rises materially across the period. For contractors, that means the ACT still offers a healthy pipeline, but one where affordability, packaging and staging discipline remain central.

The project mix is diversified. The Treasurer's message points to Light Rail, electric buses, safer roads, walking and cycling infrastructure, a new northside hospital, the

Canberra Aquatic Centre, and the Canberra Convention and Entertainment Centre Precinct. The Budget Outlook shows specific capital allocations for the Aquatic Centre and early planning for the Convention and Entertainment Centre Precinct, while the accounting appendix confirms Light Rail Stage 2A as a major project delivered under a long-term service concession structure.

For civil contractors, the ACT remains attractive for firms that can work across transport, public realm, utilities and civic projects rather than relying on one mega-project. The opportunity is strongest where a contractor can bridge design development, enabling works and package delivery in a smaller, procurement-disciplined market. The challenge remains obvious: the ACT pipeline is meaningful, but the Territory's fiscal position makes project prioritization unavoidable.

Northern Territory

ABS Engineering Activity NT Value of Work Done All Sectors (\$,000)					
	2025	2024	2023	2022	2021
Roads, highways and subdivisions	\$415,471	\$532,579	\$518,241	\$636,855	\$533,963
Bridges, railways and harbours	\$259,516	\$273,352	\$111,350	\$107,221	\$128,074
Electricity generation, transmission and pipelines	\$161,681	\$124,031	\$86,234	\$134,799	\$100,470
Water storage and supply, sewerage and drainage	\$130,654	\$134,988	\$113,992	\$80,012	\$139,844
Telecommunications	\$95,682	\$94,540	\$98,305	\$93,644	\$61,509
Heavy industry	\$4,671,464	\$1,344,768	\$1,282,502	\$972,694	\$517,454
Recreation and other	\$107,970	\$102,042	\$138,935	\$175,793	\$258,190
Total	\$5,842,436	\$2,606,298	\$2,349,558	\$2,201,017	\$1,739,502

The Northern Territory's 2026-27 Budget marks a real shift in the construction story. The Treasurer says the Budget is targeting operating surpluses in most years, lower fiscal deficits and reduced debt growth, while still committing major capital to law and order, flood recovery, education and economic development. That is not a low-work outlook; it is a reprioritized one.

The civil pipeline is large by Territory standards. The Infrastructure Program says the total program is \$4.25 billion, with \$2.74 billion of infrastructure payments in 2026-27. It also says transport is nearly half of the total capital works program at \$2.04 billion, housing and community amenities account for \$782.1 million, and economic development projects total \$496.3 million, largely related to the Northern Marine Complex including the Darwin ship lift project.

Outside of heavy industry, roads remain the single biggest civil opportunity set. The Budget lists \$278.4 million for Tanami Road corridor upgrades, \$239.8 million for national network highway upgrades, \$201 million for the Central Arnhem Road upgrade program, \$166 million for the Strategic Roads Package, \$133.3 million for Outback Way upgrades, and \$114 million for Buntine Highway upgrades and rest areas. That keeps the NT firmly in the market for contractors with regional-

roads, remote logistics and brownfield-upgrade capability.

The second major change is the breadth of non-road civil work. The Treasurer points to over \$130 million for flood recovery and resilience initiatives, including the \$100 million Flood Recovery Fund and a \$30.5 million Roads Repair Package, while the Infrastructure Program shows \$608.3 million for remote housing, land servicing and essential services. On top of that, the Treasurer highlights a further \$250 million for the Corrections Infrastructure Masterplan and names the Northern Marine Complex as the Territory's most significant economic project. That combination broadens the market well beyond highways.

For contractors, the NT outlook is one of genuine opportunity with equally genuine execution risk. The pipeline is strong in transport, remote housing, land servicing, corrections, flood recovery, water security and economic enabling projects, but remoteness, flood-event disruption, labour constraints and long supply chains remain fundamental delivery challenges. In other words, the Territory is one of the clearest examples of a market where demand is not the limiting factor; delivery conditions are to remain skewed toward crime, justice and recovery rather than broad-based program expansion.



Snapshots of key Projects

Australia is undertaking one of the largest infrastructure buildouts in its history. Across transport, energy, freight and city-shaping infrastructure, governments are investing hundreds of billions of dollars into projects designed to support population growth, improve productivity and modernise the national economy.

The scale of these projects is placing unprecedented demand on the civil construction industry. Collectively, they require tens of thousands of workers, enormous volumes of construction materials, significant plant and equipment capability, and long-term certainty around skills, procurement and investment settings.

Following are some of the largest infrastructure projects currently underway or planned across Australia.



A Dozen Key Infrastructure Projects in Australia

1. Suburban Rail Loop (Victoria)

Cost: Approximately \$30–34.5 billion.

Workforce: Expected to directly employ up to 8,000 construction workers (with tens of thousands more jobs supported indirectly).

Purpose: An ambitious orbital railway around Melbourne's suburbs, the SRL East section will build 26km of twin tunnels and 6 new underground stations between Cheltenham and Box Hill. This once-in-a-generation project aims to slash cross-city travel times, connect major education and health precincts, and reshape Melbourne's growth by fostering new housing and commercial hubs around the stations.

2. Australia–Asia PowerLink (SunCable) (Northern Territory)

Cost: \$30 billion+ mega-project.

Workforce: Anticipated 14,300 jobs at peak construction.

Purpose: Commonly known as SunCable, this is the world's largest proposed renewable energy infrastructure development. It involves building a 10GW solar farm and 42GWh battery in the NT outback and a 4,300km high-voltage undersea cable to export clean power to Singapore. Recently granted environmental approval, the project is touted as "generation-defining," aiming to transform the NT economy and cement Australia as a renewable energy exporter. Aside from exporting 2GW to Singapore, it will also supply up to 4GW of green electricity for domestic use in Darwin, helping cut emissions and create thousands of jobs in a region seeking new industry.

3. Sydney Metro West (New South Wales)

Cost: Revised to about \$27–29 billion as of late 2025.

Workforce: Projected to create over 10,000 direct jobs during construction (plus ~70,000 indirect jobs).

Purpose: A new 24 kilometre underground metro line from Greater Parramatta to the Sydney CBD, doubling rail capacity on this corridor. The Metro West will deliver fast, driverless trains between nine stations (e.g. Westmead, Parramatta, Sydney Olympic Park, the Bays Precinct, and the CBD) and cut the commute to around 20 minutes. By opening in the early 2030s, it will relieve overcrowding on existing lines and support Sydney's growth by improving public transport access to western Sydney's jobs and housing centers.

4. Sydney Metro City & Southwest (New South Wales)

Cost: Around \$20 billion (up from the initial \$12b estimate).

Workforce: Over 10,000 jobs created throughout construction.

Purpose: The second stage of Sydney's metro, extending the driverless rail system from Chatswood, under Sydney Harbour, through the CBD to Bankstown. It involves 15.5km of new tunnels and 7 new underground stations in central Sydney (e.g. Barangaroo, Martin Place, Pitt Street) plus the conversion of the Bankstown suburban line to metro standards. When fully operational by 2025–2026, City & Southwest will integrate with the Northwest Metro, forming a single 66km line across the city. This project dramatically boosts rail capacity, with trains every 4 minutes each way, and has been a major job creator in Sydney's construction sector. It promises to cut commute times, reduce road congestion, and spur urban renewal around new station precincts.

5. Scarborough Gas & Pluto LNG Expansion (Western Australia)

Cost: Approximately A\$16 billion (combined offshore and onshore development).

Workforce: About 3,200 construction jobs expected at peak.

Purpose: A major natural gas development led by Woodside Energy off WA's north-west coast. The project entails tapping the Scarborough offshore gas field (with a new floating production unit and 430km subsea pipeline) and expanding the onshore Pluto LNG plant (adding a second liquefaction train). Scarborough will bolster LNG export capacity and domestic gas supply, reinforcing Australia's status as a top LNG producer. It's a key part of the "Burrup Hub" vision, supporting energy security and jobs – over 3,000 construction jobs and 1,300 ongoing roles once operational – and is slated to start delivering gas by 2026.

6. North East Link (Victoria)

Cost: \$15.8 billion (Victoria's largest road project).

Workforce: Over 10,000 jobs during construction.

Purpose: A massive motorway tunneling project to complete Melbourne's orbital freeway network. North East Link will connect the M80 Ring Road to the Eastern Freeway via twin road tunnels under the city's north-east suburbs, finally closing a long-standing "missing link." This will divert heavy traffic and 15,000 trucks off local roads, slash travel times by up to 35 minutes, and improve freight efficiency. The project also includes upgrading the Eastern Freeway, a dedicated busway, new park-and-ride facilities, and walking/cycling paths – all aimed at easing congestion and supporting Melbourne's growth with faster, safer transport across the city's outer suburbs.

7. Snowy 2.0 Pumped Hydro (New South Wales)

Cost: \$12 billion+ (and rising – up from an initial \$5.9b, with a new cost review underway amid further overruns).

Workforce: About 2,000 jobs at peak construction.

Purpose: A massive expansion of the iconic Snowy Mountains Hydro Scheme to provide energy storage and generation for Australia's clean energy transition. Snowy 2.0 involves tunnelling 27km through Kosciuszko National Park to link two existing reservoirs (Talbingo and Tantangara) and build an underground power station with 2,200MW capacity. Once complete (expected around 2028), it will function as a giant battery: pumping water uphill during low demand (using surplus renewable power) and releasing it to generate electricity at peak times. Despite tunnelling challenges and delays, the project is about two-thirds complete and is critical for grid reliability, able to power the equivalent of 500,000+ homes on-demand. It has provided a vital economic boost to the Snowy region – injecting over \$4.6b into regional NSW and employing around 2,000 workers during construction.



8. Melbourne Metro Tunnel (Victoria)

Cost: \$11 billion.

Workforce: Approximately 7,000 jobs over the nine-year construction period.

Purpose: A transformative urban rail tunnel project in central Melbourne. It comprises twin 9km rail tunnels under the CBD and five new underground stations, creating a new end-to-end metro line (Sunbury to Cranbourne/Pakenham) separate from the City Loop. Due for completion in 2025, the tunnel will untangle bottlenecks in Melbourne's century-old rail network, allowing an additional half-million passengers a week during peak periods. Key stations like Parkville (serving the hospital/university precinct) and Anzac (St Kilda Road) fill major gaps in the network. By increasing capacity and cutting travel times, the Metro Tunnel enables more frequent, reliable services across Melbourne's suburbs and has already catalyzed new development above its station sites.

9. South Australia – Torrens to Darlington (North-South Corridor Final Stage)

Cost: ~\$9–10 billion.

Workforce: ~4,500 jobs during construction.

Purpose: This project will complete Adelaide's 78km North–South Motorway by building 10.5km of freeway, including about 4km of twin tunnels, to bypass 21 traffic lights between the River Torrens and Darlington. It is South Australia's biggest ever transport project, slated to finish by 2031. The tunnels and upgraded road links will cut peak travel times by up to 24 minutes, divert heavy traffic off local streets, and improve freight routes through Adelaide – all while generating thousands of jobs and contracting opportunities in the state.

10. Cross River Rail (Queensland)

Cost: \$5.4 billion.

Workforce: About 7,700 jobs supported during construction.

Purpose: A 10.2km rail link through central Brisbane, including 5.9km of twin tunnels under the Brisbane River and CBD. Cross River Rail is delivering a second river crossing and four new underground stations (at Albert Street, Boggo Road, Woolloongabba, and Roma Street) to remove a notorious bottleneck in the rail network. Once operational in 2025, it will significantly increase the capacity of Brisbane's train system, allowing more frequent services and supporting the city's growth (especially ahead of the 2032 Olympics). The project has had a city-shaping effect – spurring urban renewal around the station precincts – and is Queensland's largest current infrastructure investment, easing pressure on roads and improving public transport connectivity for the SE Queensland region.

12. Australian Capital Territory – Light Rail to Woden (Stage 2)

Cost: \$3 billion+ (for stages 2A and 2B).

Workforce: “Thousands of jobs” (the ACT's largest ever infrastructure endeavor).

Purpose: This project extends Canberra's light rail network from the city center to the southern town center of Woden. It is being delivered in two stages: an initial 1.7km leg to Commonwealth Park (stage 2A, already under construction with a new bridge over Lake Burley Griffin), followed by the main 9km route to Woden (stage 2B) once federal approvals are secured. The light rail extension will better connect Canberra's north and south with frequent electric trains, support urban redevelopment along the corridor, and reduce car dependency as the city grows. As the ACT Government notes, it's a city-shaping investment – the biggest in Canberra's history – expected to carry millions of passengers and drive employment and economic growth in the capital.

11. Tasmania – Marinus Link Interconnector

Cost: \$3.8 billion (Phase 1)

Workforce: ~2,800 jobs across TAS and VIC (direct and indirect).

Purpose: Marinus Link is a proposed 1500 MW undersea electricity cable (actually two HVDC cables in stages) connecting Tasmania to Victoria. Backed by Australia's Rewiring the Nation plan, it will triple interconnection capacity compared to the existing Basslink. The project enables Tasmania's “Battery of the Nation” hydropower and wind resources to supply the mainland, improving grid reliability and lowering power prices. Along with associated transmission upgrades in NW Tasmania, Marinus Link will unlock new renewable energy projects and jobs, delivering an estimated \$2.9 billion in economic benefits to Tasmania and Victoria. Construction of the first cable is expected to commence by 2025, with the link fully operational by 2030.





2032 Brisbane Olympics

The 2032 Olympic and Paralympic Games announced in July 2021 will unlock a pipeline of procurement opportunities, empowering Queensland businesses to grow and thrive on the world stage.

All venue projects will support the long-term needs of growing communities and be ready in time for the Games.

Brisbane's estimated cost of venues was \$7.1 billion, funded by the Australian (\$3.435 billion) and Queensland Governments \$3.5 billion under the Brisbane 2032 Olympic and Paralympic Games Intergovernmental Agreement, signed in February 2023.

The Games Independent Infrastructure and Coordination Authority (GIICA) is laying the foundations for the world's biggest event. Gica is responsible for ensuring projects and initiatives related to the 2032 Olympic and Paralympic Games, including 17 new and upgraded venues, bring long-lasting and positive impacts for Queensland.

The Brisbane 2032 Olympic and Paralympic Games (the Games) will provide extraordinary opportunities for communities across Brisbane, Queensland, Australia and Oceania.

Shift to Scale

On a national level, Tier-1 construction companies (defined as those that have delivered projects or been awarded contracts valued at over \$1 billion) are taking a greater share of public infrastructure contracts, with the top five companies taking up over 40% of the market.

The infrastructure construction market can be segmented by capacity size, as follows:

- » Tier-1 companies: have delivered or won megaprojects valued over \$1 billion
- » Tier-2 companies: have delivered on at least one project valued at over \$100 million
- » Tier-3 companies: representing rest of the market.

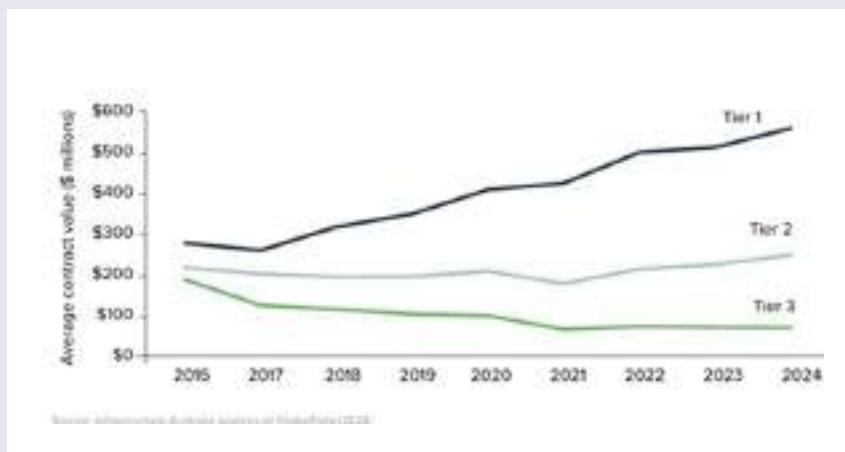
Industry continues to voice the need for a better balance of risk allocation in contracts with factors including overly complex and litigious contract models, governments' overly low risk appetite, and threat of extreme weather events on project delivery. Parties need to continue working together to find the best balance of risk to minimise unnecessary costs and deliver best value for money.

The value of the infrastructure market has increased substantially in this time and, although lower-tier companies are being awarded more contracts of smaller work, tier-1 companies are undertaking more work of highervalue projects, with increased complexity. Australia finds itself facing a situation where our largest and most important infrastructure projects are increasingly being allocated to large, offshore companies. Australia is therefore competing with other international infrastructure markets for their services.

It is clear from the Infrastructure Australia data that in recent years a greater proportion of the infrastructure pipeline has been delivered by internationally owned tier one contractors. This has happened alongside productivity improvements in the civil infrastructure sector slowing significantly.

This focus can fail to adequately reach local communities and contributes to significant multi-billion-dollar blowouts in the national infrastructure pipeline. Promoting smaller projects, particularly those under \$5-50 million, supports a “Made in Australia” agenda, fostering local employment, skills development, and project delivery in every community. Smaller projects ensure greater local content, appropriate risk allocation, workforce upskilling, and higher economic growth across Australia’s regions through Commonwealth government contracts.

When considering the increase from \$90 billion spend in 2018 to \$150 billion today (increasing by \$60 billion by 2025) in infrastructure work done and there is definitely not a correlated increase in infrastructure delivered. We will dive deeper into this ‘productivity gap’ in the productivity sections of this report.



Community Enabling Infrastructure

Infrastructure investment in roads, rail and bridges is pivotal to creating great Australian communities. Whilst last kilometre infrastructure connects homes to the grid. Major infrastructure is also critical to connecting those homes to the communities that surround them.



CASE STUDY

Molonglo River Bridge project

The ACT continues to develop as a planned city through a combination of urban renewal and greenfield expansion. With the population projected to reach around 700,000 by 2050, housing supply depends on delivering the roads, utilities and other infrastructure are underway to support new communities. This includes in the Molonglo Valley, which sits at the western edge of Canberra, with capacity for around 70,000 residents and demand for approximately 24,000 additional dwellings over coming decades.

Jointly funded by the ACT Government and Australian Government, the Molonglo River Bridge project is an example of housing enabling infrastructure, with the main driver of the project to help support land releases in the area including new suburbs of Denman Prospect, Sulman, Bandler and Whitlam, as well as the future Molonglo Town Centre.

Prior to the project, access across the Molonglo River relied on Coppins Crossing

Road, a low-level route subject to flooding and capacity constraints. The new bridge is built above a one in 100-year flood of the Molonglo River, improving network reliability and resilience in the district. The project includes a 200 metre bridge and approximately 1.7 kilometres of arterial road connections, creating a critical link between Molonglo, West Belconnen and the broader ACT transport network. The project incorporates a services corridor, including electricity, across the Molonglo River. This will allow the full development of Molonglo and Denman Prospect.

The improved connectivity reduces a key infrastructure constraint on development. It enables land to be brought to market with greater certainty, supports construction activity and ensures that new communities have access to employment, services and regional centres. The bridge also supports the development of the Molonglo Town Centre, which will serve as the district's primary commercial and service hub, planned to deliver around 7,000 homes to accommodate approximately 15,000 residents alongside retail, employment and community uses.

Roads will continue to be an important part of how people move. Population growth will increase demand on the road network across Molonglo Valley, West Belconnen and nearby areas. New construction, upgrades and duplications help keep traffic moving, improve safety and support both local travel and the movement of goods into town and group centres.

To enable alternative transport options for the region, the project includes public transport infrastructure including two queue-jump bus lanes, off-road paths to support the active travel network and includes planning for future light rail infrastructure.

The Molonglo River Bridge sits within a broader program of infrastructure delivery in the ACT, including the William Hovell Drive Duplication, currently underway. These

projects collectively improve safety, travel times and network performance, while enabling the continued development of new suburbs.

Expected to open in late 2026, the Molonglo River Bridge and the broader program reflect a coordinated approach to infrastructure sequencing, with transport and land release planned together to deliver the housing supply the ACT's growing population requires.



CASE STUDY

Torrens to Darlington

The T2D Project is the final 10.5km section of the North-South Corridor, and will complete 78km of non-stop, traffic light-free motorway between Gawler and Old Noarlunga. Drivers will be able to bypass 21 sets of traffic lights between the River Torrens and Darlington as they travel through two separate tunnels, connected by an open motorway.

The T2D Project involves constructing two separate tunnels – the Southern Tunnels and the Northern Tunnels. The tunnels will be connected by an open motorway. The motorway and the tunnels will have three lanes operating in each direction, with a combined total distance of 10.5km.

When complete, more than 50% of the T2D Project will be tunnels.

Southern Tunnels

- » Run between the open motorway at Darlington to just south of Anzac Highway in Glandore and provide key connectivity to Anzac Highway
- » Includes about 4km of twin three-lane tunnels

Open motorway linking the tunnels

- » Connecting key routes such as Richmond Road and James Congdon Drive, it will provide critical east-west connectivity and links to key destinations such as the airport
- » Just over 2.5km in length

Northern Tunnels

- » Run between James Congdon Drive and the existing open motorway south of Grange Road
- » Includes about 2.2km of twin three-lane tunnels.



BREAKDOWN OF THE INDUSTRY ACTIVITY

Transport: From Expansion to Consolidation

For more than a decade, transport infrastructure has been the cornerstone of Australia's public investment. Major projects such as motorway tunnels, metropolitan rail networks and large bridge upgrades have absorbed much of the nation's civil capacity.

That period is now stabilising. Many of the largest transport projects are approaching completion or entering maintenance phases. Investment remains significant but the pipeline is flattening as governments temper capital spending and redirect attention toward other priorities.

Contractors responding to the CCF's annual Civil Infrastructure Capacity survey reported that tender opportunities in the transport sector have moderated compared with previous years. Respondents indicated that the size and number of new projects coming to market have begun to level out. Others observed that major road and rail programs launched in the late 2010s are now transitioning from build to operate and maintain phases, requiring a different skill mix and project structure.

This evolution marks a turning point. Transport will continue to dominate overall spend for several years, but it will no longer define the growth story of civil construction. The industry's centre of gravity is shifting geographically, technically and economically toward the sectors that will underpin Australia's next stage of development.

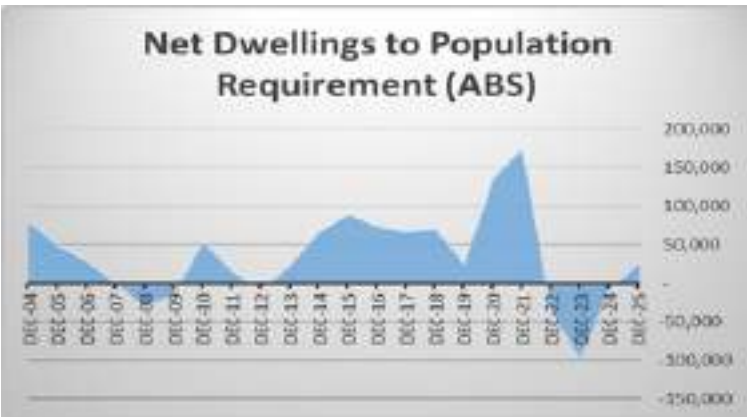
Housing Enabling Infrastructure

Australia's population growth continues to place enormous pressure on the housing market and the infrastructure networks that support communities.

According to ABS data referenced throughout this Environmental Scan, Australia's population increased over the five years to September 2025 by 2.012 million reaching 27.7 million people. At the same time, housing commencements fell sharply, creating a growing disconnect between population growth and housing delivery.



Since Covid 19 Australia has been challenged to provide enough homes for the rapidly expanding population. This demand is reshaping the national infrastructure conversation and creating political tensions. As of the Federal Budget 2026 there has been a sharp correction in the overseas migration rates to take pressure off community infrastructure such as housing.



For many years, housing policy discussions focused almost exclusively on financing, planning systems and density targets. Increasingly, governments and industry are recognising that homes cannot be delivered without first investing in the enabling infrastructure that unlocks land and supports communities.

Measure	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28
Net Overseas Migration	538,330	429,200	305,000	295,000	245,000	225,000

As of the Federal Budget 2026 there has been a sharp reduction in overseas migration rates to take pressure off community infrastructure such as housing. It will be important that migration of skilled construction workers continue to reduce the impact of worker shortages in the civil infrastructure sector.

Civil infrastructure is the starting point for housing supply.

Roads, sewerage, drainage, water, power, telecommunications and subdivisions are all prerequisites for housing delivery. As highlighted throughout this publication, “you cannot spend a dollar on housing until a dollar has been spent in civil.”

Correlation of Housing and Community to the Enabling Infrastructure

Around two thirds of all annual national infrastructure commencement(\$80b) spend goes into Housing and Community Enabling infrastructure which includes:Roads, Highways, Subdivisions; Bridges; Railways;

Water Storage and Supply; Sewerage and Drainage; Electricity Generation, Transmission and Distribution; Pipelines; and Telecommunications.

In what seems to be an obvious correlation, investment in Housing Enabling Infrastructure sees a corresponding increase in housing commencements, evidencing that a dollar can't be spent in housing until a dollar has been spent in civil.



CASE STUDY

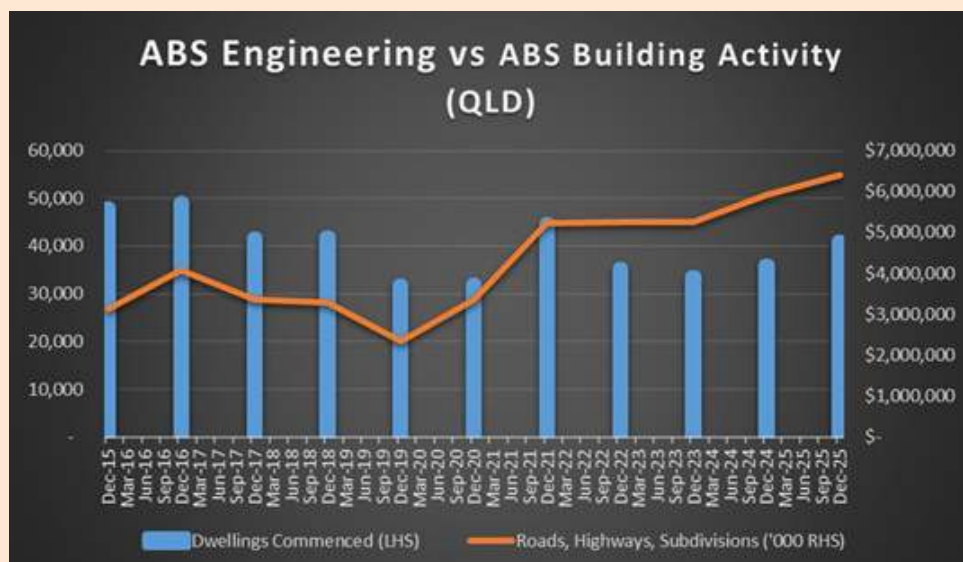
Housing Enabling Infrastructure: Queensland



» There is a close correlation between investment in civil infrastructure—particularly roads, bridges, and subdivisions—and housing delivery. Queensland, with Australia's least centralised population, offers a clearer view of this correlation as a greater proportion of infrastructure funding supports regional and peri-urban areas, rather than being concentrated in metropolitan mega-projects as seen in NSW and Victoria.

» We expect housing activity in Queensland to lift over the coming years, following a noticeable increase in civil infrastructure investment since December 2023.

In a sign of optimism for the delivery of housing, the enabling infrastructure should see annual targets for housing delivery met if last kilometre infrastructure is undertaken.



Budget 2026 – Federal Government support for Housing Enabling Infrastructure

CCF welcomed the Albanese Government's announcement of an additional \$2 billion investment in housing enabling infrastructure, describing the measure as a critical recognition that housing supply cannot be delivered without investment in civil construction.

The funding, announced in the Federal Budget will support enabling infrastructure including roads, water, sewerage and power connections required to unlock new housing developments across Australia.

The allocation of funding to local governments and regional Australia was particularly important given the growing infrastructure pressures facing councils and utilities providers.

Many regional communities have projects ready to go but simply do not have the financial capacity to deliver the enabling infrastructure needed to support growth. This funding recognises that housing affordability and infrastructure delivery go hand in hand.

Civil infrastructure is not an optional extra in the housing conversation. It is the starting point.

Energy – Driving the Transition

The Energy Transition is a Civil Construction Task

Alongside housing demand, Australia is also undertaking one of the largest energy infrastructure transitions in its history.

The shift toward renewable energy is reshaping the national infrastructure pipeline and driving enormous demand for civil construction capability. Renewable Energy Zones, batteries, substations,

transmission corridors and grid upgrades are now becoming some of the largest infrastructure investments in the country.

Infrastructure Australia forecasts a six-fold increase in renewable energy construction over the next five years and the scale of this task is difficult to overstate.

Grid-scale renewable energy projects require substantial enabling infrastructure before any electricity can be generated. Access roads capable of supporting oversized loads, bridge upgrades, site preparation works, turbine foundations, drainage systems, earthworks and transmission easements are all essential civil construction tasks underpinning the energy transition.

Turbine blades exceeding 60 to 70 metres in length are already requiring upgrades to regional roads and transport corridors simply to access project sites. Transmission corridors stretching hundreds of kilometres must also be constructed to connect Renewable Energy Zones to population centres.

At the same time, delays in enabling infrastructure are already creating pressure across the energy market.

These pressures are already becoming visible in the market.

The extension of the Eraring Power Station in New South Wales until 2029 reflects growing concerns about whether renewable generation and transmission infrastructure can be delivered quickly enough to maintain reliability and affordability across the grid. Delays in transmission delivery, grid connection approvals and major renewable projects are increasingly placing pressure on Australia's renewable energy targets and long-term energy security.

Australia's energy transition has therefore become a major civil construction task but there is a step forward and a step back.



CASE STUDY

Eraring Power Station

“Origin Energy’s Eraring coal power station gets 2-year extension”

Origin Energy will keep Australia’s largest coal-fired power station running for almost two years longer than planned as Labor’s ambitious clean energy transition stutters without adequate renewables in place.

The decision will buy NSW more time to deliver new green generation, storage and transmission infrastructure needed to maintain grid reliability and security as coal capacity exits the system.

The utility has told the Australian Energy Market Operator that all four units of the 2,880-megawatt Eraring power station will stay online until April 30, 2029, instead of closing progressively from August 2027. The plant supplies roughly a quarter of NSW’s electricity demand and plays a critical role in stabilising the state’s power. It follows repeated warnings about allowing Eraring to close before critical supporting assets are commissioned to carry the burden.

Origin chief executive Frank Calabria said:

“The extension of the fossil fuel plant in the Hunter region ensures the lights stay on.

“We’ve taken the decision to extend Eraring’s operations after assessing a range of factors, including the needs of our customers, market conditions and the important role the plant plays in the NSW energy system.

The longer lifespan would not impact Origin’s own emissions reduction targets and taxpayers will not at this stage be called upon to provide any financial support, underscoring the

profitability of the coal power station near Lake Macquarie.

The delay to Eraring’s closure reduces the immediate risk of supply shortfalls during periods of high demand or low renewable output, like heatwaves or bitterly cold weather when electricity consumption peaks and coal outages can have outsized impacts on prices and reliability.

NSW Energy Minister Penny Sharpe said the extension will help keep power bills down:

“My number one job is keeping the lights on and putting downward pressure on power prices. NSW is making real progress replacing ageing coal-fired power stations. Since the election, we have increased the amount of renewable energy capacity in operation by almost 70 per cent. That’s equivalent to Eraring’s capacity.

Grattan Institute energy expert Tony Wood said the extension was clearly an indicator that the renewable rollout was not on track.

“When Origin start to talk about closing it, that’s because they think renewables would reduce the prices which cause coal plants to run into financial difficulties. But what we are seeing here is that efforts to replace them with renewables is running into trouble.

Despite these challenges, energy infrastructure is the defining growth area for the decade ahead.

It is drawing civil capability away from metropolitan transport hubs into regional zones where renewable resources, land availability and emerging industrial hubs coincide. For many contractors, this shift means diversifying their workforces, retraining staff for new technical requirements and managing longer distance logistics.

Energy projects are also more interconnected than the transport works they are replacing. Transmission lines link states, and storage assets depend on multi-jurisdictional planning. This creates complex sequencing and coordination demands that test existing capacity in new ways.

Water and Resilience

Water security and resilience projects are re-emerging as a major component of Australia's civil investment. After several years of subdued activity, new dam, pipeline and recycling projects are entering planning and delivery stages in multiple states.

Rising climate volatility has placed renewed emphasis on water storage, flood management and urban drainage. Contractors note a growing number of tenders in these areas, particularly where regional population growth and extreme weather risk coincide. For many businesses, water infrastructure provides a steady, technically challenging workload that complements the more variable energy and housing sectors.

The skills required are familiar but specialised: earthworks, trenching and large-scale materials handling. However, regional delivery introduces logistical and workforce complexities similar to those found in the energy sector. The CCF survey found that 42 per cent of contractors engaged in water or utilities projects cited workforce mobility and housing for staff as their main operational constraint.

Investment in this area also reflects a policy rebalancing. While transport megaprojects dominated the 2010s, governments are now placing greater emphasis on the infrastructure that sustains communities such as reliable water, drainage and flood protection. These are works that often receive less public attention but are fundamental to long-term resilience and productivity.



Defence Infrastructure

As Australia undergoes its most significant strategic reorientation since World War II, the role of the domestic civil construction sector in supporting national defence cannot be underestimated.

The Australian Government is investing tens of billions of dollars into critical defence infrastructure across the country—from ports and airfields to base redevelopments and logistics hubs—as part of the Defence Strategic Review (DSR) and broader force posture changes.

Earlier this year, the South Australian and federal governments have released plans worth \$30 billion for the Osborne shipyard construction, due to be completed in 2040.

These projects are not simply capital works; they are essential enablers of sovereign capability, regional deterrence, and alliance cooperation.

CCF strongly argues that these nation-defining projects must be led by Australian civil contractors with proven local experience, domestic capital, and an active investment in Australia's training and skills system. While the presence of international firms brings valuable competition, Australia cannot afford to rely on foreign entities for the delivery of infrastructure that underpins our sovereign defence capability.

A sovereign-first approach offers multiple benefits:

- » **National security:** Reduces reliance on overseas contractors for critical infrastructure, limiting potential exposure to supply chain or geopolitical disruptions.
- » **Skills development:** Embeds defence-specific experience in the Australian workforce, building a pipeline of skilled professionals who can respond to future strategic demands.

- » **Economic resilience:** Ensures that Commonwealth investment supports local businesses and communities, particularly in northern and regional Australia.
- » **Delivery certainty:** Leverages the capacity of contractors with demonstrated track records in complex Australian environments and regulatory frameworks.

To this end it is critical:

- » Prioritise Australian-owned and operated contractors on defence-linked projects, particularly those with a demonstrated investment in skills, safety, and sovereign capability.
- » Embed workforce planning requirements in defence procurement processes to ensure continuity of local expertise.
- » Align defence infrastructure programs with broader infrastructure pipelines to avoid boom-bust cycles and workforce shortfalls.
- » Expand and enforce Australian Industry Capability (AIC) criteria to meaningfully include civil construction suppliers and subcontractors.

Australia's civil construction sector is not just a service provider—it is a strategic asset. In an increasingly uncertain global environment, building sovereign delivery capability for defence infrastructure is not optional. It is essential.





SETTINGS FOR REFORM

Industrial Relations

There are concerning drags on productivity that arise through government policies such as Best Practice Industry Conditions (BPIC) which add significant time and costs to projects where it operates. There are now trades working five days pay for less than three days work a week across Brisbane. These conditions can provide a traffic controller that has just three days training an annual income of over \$200,000.

The QLD Government on election was quick to suspend BPIC on projects to better understand the impact on projects. The Federal Government has repeatedly said it will not introduce such measures but recently passed measures that would allow discrimination against non-Union EBA bids in procurement which has potential to lead to QLD BPIC type outcomes.

Complex enterprise agreements, work stoppages, or restrictive stop work practices slow project delivery, with 27,500 working days lost over the 2004 September quarter in the building and construction industry in the Construction sector to industrial disputes.

Undue industrial influence on projects has been known for some time and recent court records and the Building Bad media investigations show that the laws that industry must meet have been sidestepped. These activities have an impact on the culture of the worksite, but significantly impact the cost and output of a worksite. With the CFMEU coming into administration, there had been an obvious and clear menace and intimidation applied to many on construction worksites with this having significant impact on dragging down site productivity and output.

National Construction Industry Forum

The Australian Government amended the Fair Work Act 2009 (Fair Work Act) to establish the National Construction Industry Forum (NCIF) as an ongoing statutory advisory body.

NCIF which CCF National is a Member has the role to provide advice to government on a broad range of issues relating to work in the building and construction industry including safety, workplace relations, skills and training, industry culture, diversity and gender equity, and productivity.

On 22 September 2025, the NCIF formally endorsed the Blueprint for the Future. The formal endorsement represents the strong commitment and engagement of NCIF members to create lasting and tangible change across the building and construction industry. It demonstrates a new way of stakeholders working together to give way to a culture of collaboration and shared interests.

Steps have been taken to create National Construction Standards. CCF fought hard against the Queensland Best Practice Industry Conditions (BPIC) framework and has consistently opposed procurement settings that create barriers to participation, increase costs or favour particular industrial arrangements. Prior to the 2025 election, the Prime Minister made clear that the Government was not seeking to introduce a federal version of BPIC, and the Minister has since confirmed that the proposed construction standards will not replicate the Queensland model.

CCF welcomes those commitments and will continue to hold the Government to them. We will be at the table throughout the development of the construction standards to ensure they support productivity, value for money and lawful workplace practices without recreating the unintended consequences experienced under BPIC.

At this stage, our focus is on ensuring the Government's commitments regarding

construction are reflected in the final policy settings and that the standards are developed in genuine consultation with industry.

Federal Funding Agreement to drive productivity

The Federal Government's 10-year, \$120 billion Infrastructure Investment Program¹ has potential to transform Australia's economy and the liveability of our communities. However, to unlock its full value, greater clarity is urgently needed around the timing and allocation of funds—particularly for delayed or deferred projects.

Rising construction costs continue to challenge project viability. Labour, concrete, steel, asphalt, fuel, and other core inputs have all increased in price, placing pressure on state budgets and the private sector alike.

The 2024-29 Federal Funding Agreement (FFA) presents a major opportunity to improve how infrastructure is planned and delivered across Australia. CCF welcomes key elements of the agreement, particularly Clause 21, which sets out shared responsibilities between the Commonwealth and the states to lift industry productivity, capability, capacity, and diversity.

Importantly, the FFA recognises the need to support contractors of all sizes, not just tier-one builders. This broader focus will help ensure that small and mid-sized civil firms, especially those in regional areas, can play a greater role in delivering the national infrastructure pipeline.

One of the most promising features of the agreement is the requirement for each state to prepare a 10-year Annual Infrastructure Plan. These plans must outline strategic priorities for transport infrastructure, including project sequencing and responses to key challenges such as rising costs, regional development needs, population growth, and the transition to net zero.

¹ <https://investment.infrastructure.gov.au/about/national-initiatives>

If developed and implemented transparently, these plans could significantly improve long-term planning, increase visibility for industry, and strengthen alignment between jurisdictions.

To strengthen this approach, the Commonwealth should consider:

- » Requiring states to publish their Infrastructure Plans, improving transparency and industry engagement
- » Encouraging smaller, shovel-ready projects under the FFA to give SMEs greater access to the pipeline
- » Prioritising regional and outer-suburban infrastructure that supports housing, freight, and resilience

Industrial Relations, and impact on Productivity

The civil construction sector is facing an increasingly complex industrial relations environment at the same time it is being asked to deliver one of the largest infrastructure pipelines in Australia's history.

While there is broad support across industry for strong workplace safety outcomes and improved workforce wellbeing, there is growing concern that some emerging industrial proposals risk reducing productivity, increasing project costs and further constraining the industry's capacity to deliver nationally significant infrastructure projects.

Australia's infrastructure sector is already operating in an environment characterised by labour shortages, escalating material costs, rising fuel prices and increasing compliance obligations. At the same time, governments at all levels continue to announce ambitious housing, transport, energy and water infrastructure commitments that rely heavily on the civil construction sector's delivery capability.

This creates an increasingly difficult balancing exercise. Contractors must

continue to improve safety, workforce participation and workplace culture while also maintaining productivity and project viability in an industry already under significant commercial pressure.

Weak productivity growth has become a major national economic concern. Both the Reserve Bank of Australia and the Federal Government have repeatedly identified productivity improvement as essential to supporting economic growth, reducing inflationary pressures and maintaining living standards:

The productivity implications of these proposals are substantial.

- » Major civil infrastructure projects already operate within increasingly constrained delivery windows. Weather events, labour shortages, supply chain disruptions, utility relocations, environmental approvals and industrial delays all contribute to reduced productive work hours across the sector.
- » Additional blanket shutdown requirements could significantly reduce available construction windows on projects already facing workforce shortages and escalating costs.
- » A reduction in available productive work hours inevitably flows through to higher project costs, longer delivery timeframes and increased pressure on already constrained labour markets.
- » Some industry groups have also raised concerns regarding the interaction between mandated shutdown provisions and existing enterprise bargaining arrangements.
- » These concerns are particularly relevant in the context of Australia's broader productivity challenges.
- » Every reduction in productive construction hours ultimately increases the cost of delivering infrastructure.

This does not mean safety outcomes should be compromised.

- » The civil construction industry continues to strongly support effective workplace safety regulation and recognises that heat management must remain an important component of modern work health and safety systems. There is broad support for practical and evidence-based heat management measures that protect workers while allowing projects to continue operating safely.
- » The challenge for policymakers is ensuring that any future reforms are proportionate, flexible and capable of reflecting the operational realities of infrastructure delivery.
- » Industry stakeholders have consistently argued that site-specific risk management approaches are more effective than blanket national shutdown rules.
- » A more collaborative and practical approach to workplace climate adaptation is likely to deliver better outcomes for both workers and project delivery.
- » This could include greater investment in workforce training, improved access to cooling and hydration infrastructure, more flexible project scheduling, enhanced weather forecasting systems and stronger guidance material around best-practice heat management.
- » Technology and innovation will also play an increasingly important role in managing these challenges.
- » The growing use of automation, remote operation technologies, digital project management systems, advanced PPE, wearable monitoring devices and improved equipment design may help reduce worker exposure to extreme environmental conditions while maintaining productivity.
- » At the same time, governments must recognise that every additional regulatory obligation imposed on the construction sector carries cost, productivity and workforce implications.
- » The cumulative impact of industrial relations reforms, procurement requirements, reporting obligations, compliance frameworks and project-specific industrial conditions is becoming increasingly significant for contractors.
- » This is particularly challenging for small and medium-sized contractors who often lack the administrative capacity of larger tier one firms but remain essential to the delivery of local infrastructure, subdivision works and regional projects. The industry's concern is not with safety itself. Rather, it is with ensuring that policy responses remain practical, proportionate and grounded in operational reality.
- » Constructive engagement between governments, unions, contractors and regulators will be critical to ensuring Australia develops workplace safety frameworks that both protect workers and support the efficient delivery of nationally significant infrastructure projects.

Solution: A Better IR Framework

Industrial disputes are bad for everyone.

A fair and balanced industrial relations framework is critical to the stability, productivity, and sustainability of Australia's civil construction sector. It underpins the ability of employers and employees to engage in constructive, lawful negotiation, resolve disputes efficiently, and maintain safe and respectful worksites.

For the civil industry—where projects are time-sensitive, capital-intensive, and interdependent—a stable IR environment enables contractors to deliver infrastructure reliably and cost-effectively. It also provides confidence to governments and private investors funding public works that projects will not be undermined by unlawful conduct or industrial disruption.

Equally, a balanced IR system ensures that workers have appropriate avenues for representation, are protected from exploitation, and can contribute to productive outcomes through clear employment terms and workplace safety provisions with supporting policy as follows:

- » **Review and amend Procurement Practices** - Government procurement practices should be investigated to ensure they do not favour some interests and create unfair barriers to entry for local industry. This will promote a safe, fair, competitive, and sustainable construction industry. Procurement practices should ensure all EAs are registered with the Fair Work Commission.
- » **Enterprise Agreements Unlawful Terms** - Amend the Fair Work Act to prevent enterprise agreements from including terms requiring subcontractors to comply with the terms and conditions of the employer's enterprise agreement. These terms remove the right to freedom of association and employee and employer rights to negotiate employment terms and conditions, and cripple small and regional businesses who can't compete.
- » **Fit and Proper Person Criteria** - Criteria should be developed outlining what standard must be met for a person to be deemed a fit and proper person to be an officer of a Registered Organisation.
- » **Eligibility Test** - Amend the Fair Work Act to include an eligibility test for union agreements, administered by the Fair Work Commission, at the time of issuing the Notice of Employee Representational Rights (NERR). If a union is going to be the employee representative, the union bargaining representatives must be the majority representatives. Similar to existing provisions for Greenfields agreements.

- » **Work within the Law** - Establish an independent construction regulator to administer a set of rules for the construction industry with a focus on ensuring all parties, including unions and/or head contractors are compliant. The regulator needs power.

As Australia grapples with record infrastructure investment, workforce shortages, and the demand to deliver nation-building projects on time and on budget, restoring civility and certainty to workplace relations is not a political choice — it is an economic necessity. A well-calibrated framework creates the conditions for collaboration, rather than conflict, and allows the civil construction industry to focus on what matters most: delivering the infrastructure communities rely on.





CASE STUDY

Risk-smart partnerships in alternative delivery models

As private investment in infrastructure and renewable energy accelerates, civil organisations require advice and support when identifying, quantifying and mitigating risk within their businesses. It is also important that contract and insurances are aligned to effectively transfer insurable risk off balance sheet.

Founded in 2007, Bellrock has built a national platform of specialist advisors who support mid-market and complex clients with 360-degree risk management.

In projects involving public-private partnerships, alliance contracting or managed service frameworks, the ability to understand insurance cover, liability transfer, escalation pathways and contract structure is critical. Bellrock works alongside civil organisations to evaluate exposures, design risk distribution strategies and provide advocacy across insurance, claims and contractual domains. Their expertise in areas such as due diligence and contingent risk means they can review project scope, joint ventures and funding models to highlight and mitigate hidden exposures early.

For civil contractors and infrastructure firms shifting from traditional government-funded delivery to models involving private capital is pivotal. By embedding risk advisory at the tender stage, organisations gain greater certainty over insurance and contractual frameworks, accelerate decision-making and reduce cost uncertainty. This allows them to focus on delivery excellence rather than being weighed down by downstream surprises.

In this environment where the pace of energy transition projects and private-

sector infrastructure is rising, partnerships with advisors like Bellrock provide a strategic advantage. They help civil industry players adopt commercial structures with confidence, mobilise alternative delivery approaches and position themselves as capable collaborators for the next generation of infrastructure investment.

Over the past 12 months Bellrock have offered complimentary and discreet risk reviews for the civil industry, delving into contracts and insurance programs. The findings of these are summarised below:

- » Contractual risk e.g. principals contracting out of proportionate liability which can then void contractors insurances (if not drafted correctly).
- » Directors and Officers at risk of being underinsured relative to the scale of their personal statutory exposures. Policies have aggregated limits which are not sufficient to the businesses exposures.
- » Contractors not being fully aware of the risks they are accepting under contract – Bellrock’s internal lawyers conduct a complimentary contract review to clearly highlight and challenge unfair contract conditions, with a simple traffic light review and commentary.
- » While insurance market conditions have been in a soft (cheap) cycle for 24 months, unfortunately those savings have not always been passed onto CCF members. By highlighting undisclosed commissions earned by brokers and benchmarking industry pricing we have identified combined savings of over \$1,000,000 across 5 contractors surveyed.
- » Exposing plant and equipment – subrogation waivers in contracts can be silent killers and prevent your insurance policy from responding where you have agreed to indemnify a principal or waive rights of subrogation. Leaving assets unknowingly exposed.
- » Many contractors have been unaware of options available to them as an alternative to providing bank guarantees (Surety bonds), which are cashflow positive and easy to administer.

Workforce Development

Prioritising the Civil Workforce

The civil industry is central to delivering and community enabling infrastructure—but there is a growing gap between rising expectations and the level of support provided. Contractors are expected to deliver more, yet the current training system is only just starting to recognise key civil apprenticeships.

The Government has begun taking some much-needed action, including a \$78 million commitment to fast-track the qualifications of 6,000 experienced workers including civil. This is a targeted and timely step toward boosting Australia's housing and infrastructure delivery capacity through the inclusion of civil occupations.

Civil qualifications at the certificate III level have been added to the Australian Apprenticeship Priority List in December 2025 but there is a disconnect with an occupational outcome that CCF will review directly.

Without targeted investment in civil skills development, Australia risks falling short of its national goals. Fixing this gap is not just necessary—it represents a generational opportunity to build a more capable, future-ready workforce that can deliver the infrastructure our growing nation needs.

Classification and Prioritisation of Infrastructure Skills

Over the past 20 years, the ANZSCO code system has failed to accurately reflect the full range of occupations within the civil construction industry. Where roles have been captured—such as bridge, road, and tunnel constructors, civil plant operators, pipe layers, and line markers—the skill

level classifications have often been set too low, leading to under-recognition of the workforce's capabilities.

However, with the rollout of the new Occupational Standards Classification Architecture (OSCA), there is optimism that civil occupations will finally be correctly recognised. This presents a long-overdue opportunity to align classification systems with the complexity and value of civil work, and to ensure the sector receives appropriate policy and funding support moving forward.

Under existing classification there are two structural issues that are ensuring civil occupations are not supported by Government.

1. Jobs in civil classified as Machinery Operators and Drivers rather than as technicians or trade workers.
2. Civil Occupations like Tunnel Constructor, Bulldozer Operators and Earthmoving Plant Operators are classified as low skilled occupations (4), rather than recognised as apprentice tier (3), such as welders, painters or bricklayers.

Why is this classification important?

This classification system is critically important because it determines how government support is allocated.

Agencies such as the Department of Home Affairs and the Department of Employment and Workplace Relations rely on these occupational codes to determine eligibility for skilled visas, apprenticeship funding, and workforce development programs. When civil occupations are misclassified or overlooked, the industry misses out on essential support—despite playing a foundational role in delivering national priorities like housing, energy, and infrastructure.

As per Appendix A and summarized below, civil occupations face long standing shortfalls across most occupations.

National civil specific shortages across all of Australia since 2021 (Jobs and Skills Australia)		
Civil Engineering Draftsperson	Civil Engineering Technician	Civil Engineer
Quantity Surveyor	Construction Estimator	Bulldozer Operator
Excavator Operator	Grader Operator	Loader Operator
Technicians and Trades Workers	Crane, Hoist or Lift Operator	Linemaker

Additional civil specific shortages in all or parts of Australia since 2021 (Jobs and Skills Australia)		
Driller	Earthmoving Plant Operator	Backhoe Operator
Road Roller Operator	Mobile Plant Operator	Construction Rigger
Crane Chaser		

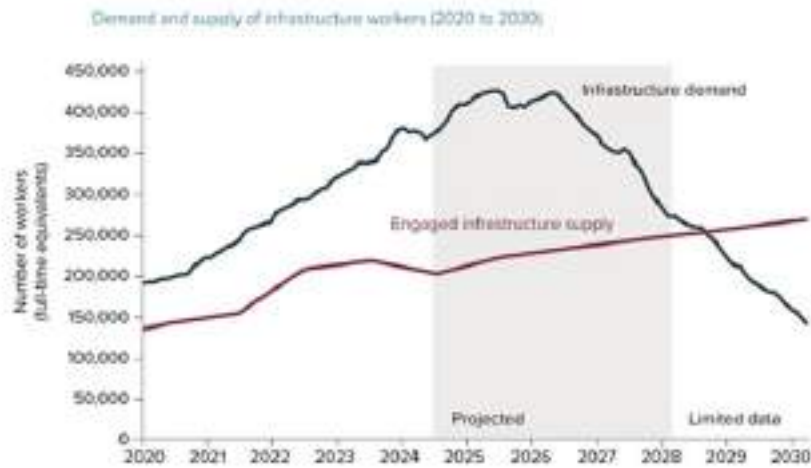
How is this impacting the sector?

Shortages persist across all major occupational groups with trades workers forecast to be in higher shortage than engineers. With 64% of new infrastructure workers expected to come from Vocational Education and Training (VET) pathways, the importance of a robust, responsive skills system is clearer than ever. Higher education and migration are expected to contribute 25% and 10% of workforce supply, respectively—but those inputs alone won’t solve the problem.

Even the most meticulously planned projects collapse if there’s no one to operate the grader, install the pipe, or stabilise the slope.

While the industry is partnering with organisations like MEGT—Australia’s largest Apprentice Connect Provider—to promote civil careers and connect apprentices with contractors, the lack of direct financial support from government is undoubtedly making it harder for contractors to take on additional apprentices, leading to significant confidence issue within the industry.

The downstream effects are enormous. Missed project deadlines mean deferred services—whether they’re delayed stormwater upgrades, postponed road access in flood-prone regions, or unconnected energy sites waiting for trenching and cabling. It’s not just contractors or governments that feel the pressure—it’s communities left waiting.



A breakthrough for Civil Skills Recognition – But more to be done

After years of lobbying, the CCF welcomed the Commonwealth's skills announcement in December 2025 for the prioritisation of civil trades and direct financial support for apprentices entering the civil infrastructure workforce.

The trade apprenticeships recognised in the Australia Apprenticeship Priority List for energy and housing are:

- » Certificate III Civil Construction
- » Certificate III Civil Construction Plant Operations
- » Certificate III Trenchless Technology

There are current challenges with the occupational outcome in some cases.

Under the Commonwealth's apprenticeship framework, financial support is targeted to priority occupations, including many trades critical to civil infrastructure delivery. Eligible apprentices can access the Australian Apprentice Training Support Payment, providing up to \$5,000 over the first two years of an apprenticeship to help cover the cost of tools, travel and day to day living expenses.

The announcement is the result of sustained advocacy by CCF over many years to ensure civil construction is recognised as a distinct workforce with unique skills needs. Civil contractors have been consistently calling for training settings that reflect the reality of our industry. This announcement shows that message is landing, and we thank the Government for listening.

There is the challenge whereby the certificate III qualifications in civil and plant operations are not aligned with the Civil Engineering Technician which is an office based outcome for the training in on site plant operations.

Supporting employers to build the workforce of the future



CASE STUDY

Key Apprentice Program

The Key Apprenticeship Program provides targeted financial support to employers hiring apprentices in occupations aligned with national priorities, particularly housing construction and clean energy roles listed on the Australian Apprenticeship Priority List.

Funding provided coming into effect from

1 January 2027 includes:

Key Apprenticeship Program payments up to \$15,000 (paid to apprentice/ employer/host)

Apprentice Training Support Payments \$2,500 (paid to apprentice)

Apprentice Trade Support Loans up to \$25,983 (paid to apprentice)

Government programs intended to incentivise the uptake of priority occupations are intended to support construction apprentices.

These payments are focused on supporting the first year of an apprenticeship, helping businesses manage upfront costs and invest in long-term workforce development.

To be eligible, employers must be able to demonstrate engagement with construction or clean energy activities and provide apprentices with meaningful, hands-on experience in these areas.

Trends for the Infrastructure Workforce

In the words of MEGT National CEO Matthew Hick:

The importance of the civil workforce is often unseen, but it is of crucial importance to the smooth functioning of our economy. Without roads, drainage systems and footpaths, housing cannot progress. Civil also provides access for major construction projects and the creation of bridges, ports and tunnels facilitate the movement of goods and people around our country. A well-trained and populated civil workforce is crucial for our economy.

MEGT signs-up around 24% of the civil apprenticeships and manages approximately 29% of the cohort. The difference in the percentages represents MEGT's above market completion rates.

The chart below shows some concerning trends. Apprenticeship commencements have declined since 2022 and have returned to the low levels of 2020. Clearly the numbers in training is declining at a time when civil project requirements and skills needs are increasing.



Contract Status	Qualification Name	FY2021	FY2022	FY2023	FY2024	FY2025
Commencements	RII20715 - Certificate II in Civil Construction	185	5	0	0	0
	RII20720 - Certificate II in Civil Construction	50	140	140	130	145
	RII30820 - Certificate III in Civil Construction Plant Operations	910	1790	1025	1135	1055
	RII30920 - Certificate III in Civil Construction	1210	2225	1160	1935	1870
	RII40820 - Certificate IV in Civil Construction	505	1430	250	440	270
	RII40820 - Certificate IV in Civil Construction Design	10	20	10	5	10
	RII50520 - Diploma of Civil Construction Design	10	25	30	20	10

CASE STUDY

Industry Best Practice: Civil Train

Civil Train is the leading provider of civil construction training across Queensland, Victoria, South Australia, Western Australia, and Northern Territory, delivering the majority of accredited and industry-recognised training in these regions. Backed by the CCF, Civil Train offers a mix of classroom, on-site, and simulated learning tailored to real-world industry conditions. In South Australia, Civil Train is preparing to commence work on a new state-of-the-art training centre that will further expand its capacity to meet growing demand for skilled civil workers.

Civil Train emphasizes safety and competency in all its training programs. By integrating practical simulations with

theoretical knowledge, students gain a comprehensive understanding of civil construction practices. The use of advanced simulation technology and real-world training environments ensures that learners are well-prepared for the demands of the industry.



South Australian Premier Peter Malinauskas has opened a live training site which is the largest in the southern hemisphere to safely train plant operators and civil workers for the critical work they undertake. A similar site is being developed in Tasmania and future options for this live site training is being considered to have site ready skills in all parts of Australia.



Training Innovation In Action: Tenstar Simulation

Tenstar Simulation continues to lead the world in civil construction simulation, offering the only platform globally that delivers advanced features such as Digital Twin Technology and specialised trench-based training. Their new digital twin capability allows companies to train operators inside a virtual replica of their own worksite, improving familiarity, safety and readiness before work begins.



Tenstar's simulators provide instant feedback, analytics and realistic machine behaviour to accelerate learning and reduce errors. Their expanded trenching suite now includes trench box installation, pipe installation, and collaborative scenarios where machine operators work alongside an avatar ground crew in VR, building communication, teamwork and safe operating practices for high-risk tasks.



These innovations reduce the need for physical machinery during training, cutting fuel use, maintenance costs and emissions while improving operator competence. Training providers continue to report major gains in efficiency and cost savings through the adoption of Tenstar technology.

Tenstar is working closely with CCF Tasmania, South Australia, Victoria and New South Wales to help their members access the highest-quality simulator-based training. Together, they are supporting civil contractors to build capability, strengthen safety outcomes and deliver Australia's essential infrastructure more productively.





CASE STUDY

Upskilling and retention for next-generation civil delivery

The shortage of skilled trades and infrastructure professionals presents a significant challenge to the civil industry. Protech provides an example of how workforce development can be embedded into business strategy, helping contractors respond to the skills gap through structured apprenticeship, trainee and mentoring programs.

Protech's model extends beyond traditional staffing. It recruits apprentices and trainees, manages their training programs and supports rotations among project sites. The organisation acts as legal employer for the trainees, overseeing wages, allowances, superannuation and benefits, while providing mentoring and administration support tailored for the infrastructure sector. Its partnership with The Industry School reflects a deliberate pathway-based approach for young people to enter civil and infrastructure careers.



This pathway is reflected in Protech's school-based model with The Industry School, formerly the Australian Industry Trade College, which has helped students gain recognised qualifications while still completing Year 12. In one cohort, Protech supported ten school-based apprentices and trainees across mechanical engineering and civil construction, with on-site exposure through Cross River Rail and continued mentoring into ongoing roles once the program ended.

For civil contractors, partnering with Protech helps build a sustainable internal talent pipeline and support retention through clearer career progression, mentorship and structured development.

In doing so, the civil sector shifts from firefighting recruitment to long-term capability building, strengthening workforce capacity and supporting project delivery across multiple lifecycles and future demand.





CASE STUDY

Looking abroad for filling skills shortage options

Australia's infrastructure pipeline continues to outpace domestic labour supply, with critical shortages across civil trades, project management and technical roles. Workforce Abundance supports the civil sector to address this challenge by connecting Australian employers with skilled professionals from around the world and managing the entire process from recruitment through to long-term settlement.

The organisation specialises in workforce planning, international recruitment, visa management and candidate integration. Its

model ensures that employers gain access to a consistent pipeline of pre-qualified, job-ready candidates while meeting all regulatory and compliance requirements. Workforce Abundance also provides relocation support, community engagement, and ongoing mentoring to help workers and their families successfully establish themselves in Australia.

For civil contractors, this approach provides more than short-term relief. It delivers a sustainable workforce solution that complements local training and apprenticeship programs. By managing both the supply and retention aspects of employment, Workforce Abundance enables infrastructure businesses to stabilise their operations, reduce turnover and build long-term capability.

In a market defined by skill scarcity, Workforce Abundance demonstrates how targeted migration and structured workforce integration can strengthen the civil industry's capacity to deliver Australia's growing infrastructure needs.





CASE STUDY

Supporting The Retirement Needs of the Industry: **Cbus**

As one of Australia's leading super funds for those that help to build, maintain and shape our country, Cbus Super are committed to investing in projects and businesses that are in members' best financial interests, are important to their members and will make a difference in the real world.

Each of their diversified investment options invests in a range of different investment types and assets. These can include shares on stock exchanges, fixed interest assets like bonds, commercial and residential property developments, neighbourhood and regional shopping centres as well as high quality infrastructure assets such as toll roads and airports through to renewable energy

investments such as wind and solar farms and even digital infrastructure such as data-centres, both in Australia and overseas.

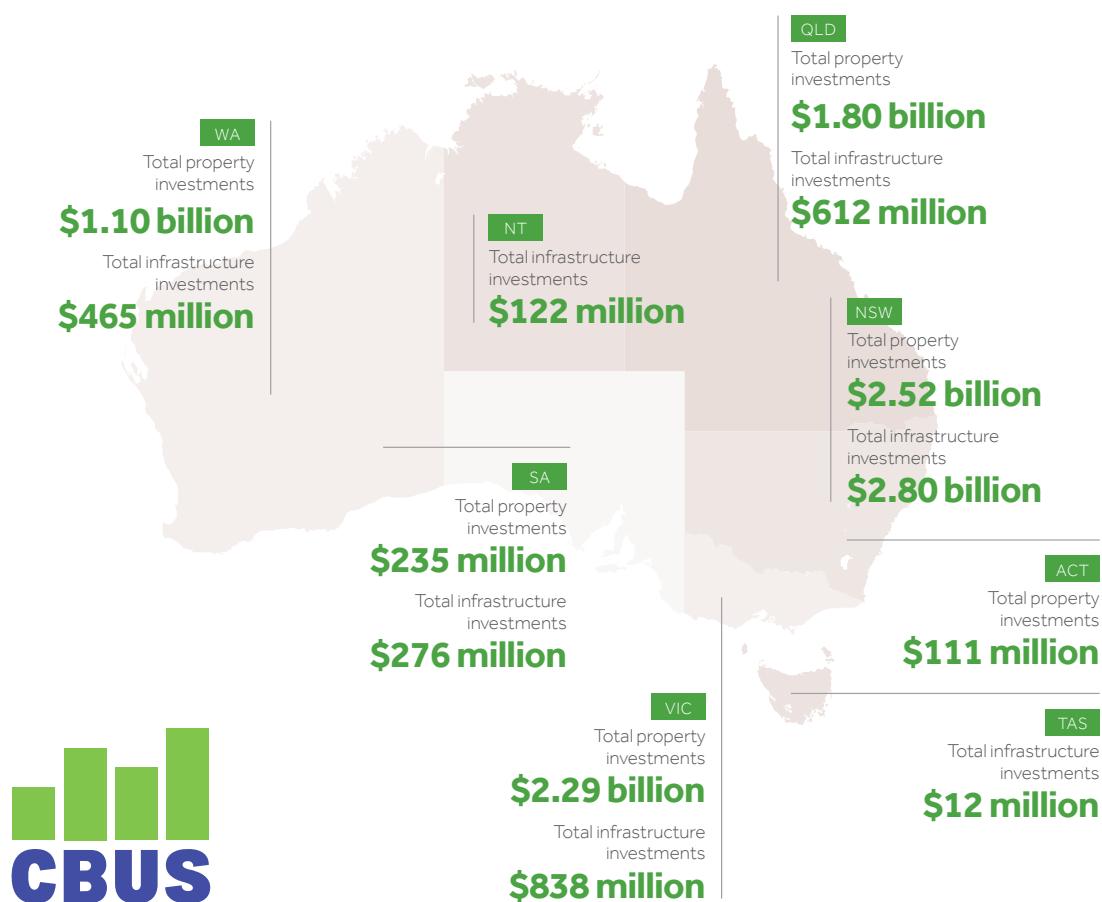
Cbus investments in both the property and infrastructure sector are also assets that are not easily bought and sold and were traditionally only accessible to large investors before the Australian superannuation scheme was established. The great news is this is no longer the case. Cbus Super members, through their super also get a real stake in many of these investments and the benefits that they deliver.

Cbus investments in property and infrastructure can be found right across Australia. And as at 30 June 2025, our investments in property and infrastructure on a state-by-state basis are as follows:

Read the relevant Product Disclosure Statement (PDS) and Target Market Determination to decide if Cbus Super is right for you. Call 1300 361 784 or visit cbussuper.com.au. Past performance is not a reliable indicator of future performance. United Super Pty Ltd ABN 46 006 261 623 AFSL 233792 as Trustee for the Construction and Building Unions Superannuation Fund ABN 75 493 363 262 (Cbus and/or Cbus Super).



Our investments in property and infrastructure
as at 30 June 2025¹.



Safeguarding the livelihoods of civil workers

Since 1994, For over 30 years, ACIRT has been the civil sector's trusted financial safety net. As the industry faces the monumental task of delivering housing infrastructure, disaster resilience, and the energy transition, workforce stability is more critical than ever and ACIRT is the industry's employees trusted redundancy fund.

To give civil contractors absolute peace of mind, ACIRT is undergoing a major modernisation. They are becoming fully ASIC-compliant by late 2026, reinforcing our status as a premier financial institution. In October 2026 ACIRT are introducing Genuine Redundancy payments ensuring construction workers get the same tax-free threshold as everyone else.

Furthermore, they are rolling out a significantly upgraded ACIRT Employer Portal powered by our global partner, MUFG. By improving system stability and eliminating manual payroll workarounds, ACIRT are directly cutting red tape for civil businesses. This evolution ensures CCF members benefit from reduced administrative stress, rock-solid governance, and a profit-to-member fund that your workforce can genuinely rely on.

In the words of Dascia Bennett, General Manager Australian Construction Redundancy Trust:

"Looking ahead, the employee entitlement fund environment will be more highly competitive and regulated (including ASIC AFS licensing). ACIRT will remain ambitious and focused on performance, transparency and modern service delivery. The future of ACIRT is clear. Transparency, trust and member security is at the heart of our focus."

Productivity and Procurement

Why productivity matters now

Productivity when defined simply is the ratio of output produced to inputs used. That is useful as a starting point, but it is not enough on its own for civil contractors or public clients who need to know why a road, bridge, pipeline, water treatment upgrade, or subdivision-enabling package cost what it did, took as long as it did, and whether those outcomes could have been improved. The practical question is how to define productivity in a way that matches how civil work is actually delivered.

Productivity in civil construction is no longer a side issue about efficiency at the margin. It is central to whether Australia can deliver the volume of enabling infrastructure now expected of the sector. The immediate context is a market where the mix of work is changing quickly rather than slowing evenly: Oxford Economics points to public civil spending reaching a peak, road and rail work easing nationally, utilities work strengthening, and market-capacity and real-cost pressures persisting.

Productivity is ultimately about how much can be delivered with scarce people, capital, materials, and time. Infrastructure Australia warns that labour remains the most critical delivery risk, with shortages projected to reach 300,000 workers by 2027 and regional shortages expected to rise particularly sharply as energy, housing, and supporting infrastructure move deeper into delivery. In other words, the industry is being asked to build more diverse and often more geographically dispersed infrastructure in an environment where workforce constraints are already binding. In that setting, better productivity is not a bonus. It is the only credible path to delivering more infrastructure without simply absorbing ever-higher costs and delay.

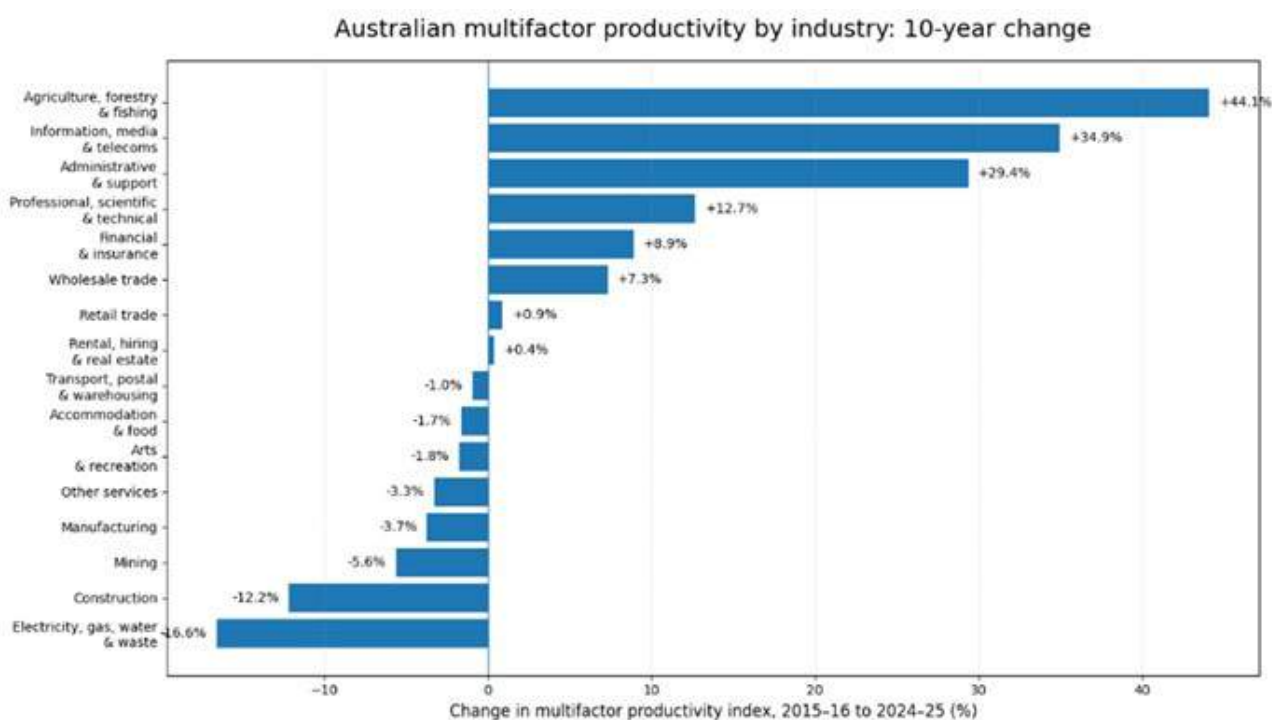
Productivity needs a civil construction definition

The biggest weakness in the current debate is that productivity is often discussed at too high a level of aggregation. Multifactor productivity, labour productivity, and gross value added per hour all have value, but they do not tell a project owner or contractor enough about what went wrong or right on a specific job. A civil construction definition of productivity needs to be built around delivery outcomes that can be observed and compared: budgeted versus actual cost, planned versus actual time, rework rates, labour intensity, subcontracting intensity, design churn, approval delays, utility relocation delays, and the extent to which the final asset delivers the benefits promised in the business case. That kind of framework is much closer to how projects succeed or fail in the real world.

Infrastructure Australia has now made this point explicitly. Its 2025 Infrastructure Market Capacity Report says there is **no consistent project-level data on subcontracting practices, self-performance,**

or the indirect costs created by layered contracting. It also notes that only 8% of firms reported measuring rework as part of their productivity metrics. In response, it argues for standardized project-level benchmarking that includes subcontractor engagement, indirect labour costs, rework rates, contract type, procurement model, use of modern methods of construction, and a core set of measures such as budgeted versus actual cost and planned versus actual time. That is a much more useful starting point for civil construction than broad claims about whether “construction” as a whole is productive or not.

There is also already an institutional base on which to build this work. Infrastructure Australia’s statutory role includes evaluating nationally significant infrastructure, and its **Stage 4 post-completion review framework is specifically designed to test whether a completed project achieved its intended objectives, delivered the benefits set out in the business case, and whether the same outcomes could have been delivered more effectively and efficiently.** That does not yet amount to a comprehensive national



Source: Australian Bureau of Statistics, Estimates of Industry Multifactor Productivity, 2024-25, Table 1, hours worked basis. Calculated from ABS index values.

productivity benchmarking system for civil construction, but it does mean the architecture now exists. The logical next step is to expand and standardize those post-completion datasets so they can support genuine cross-jurisdictional learning rather than one-off hindsight exercises.

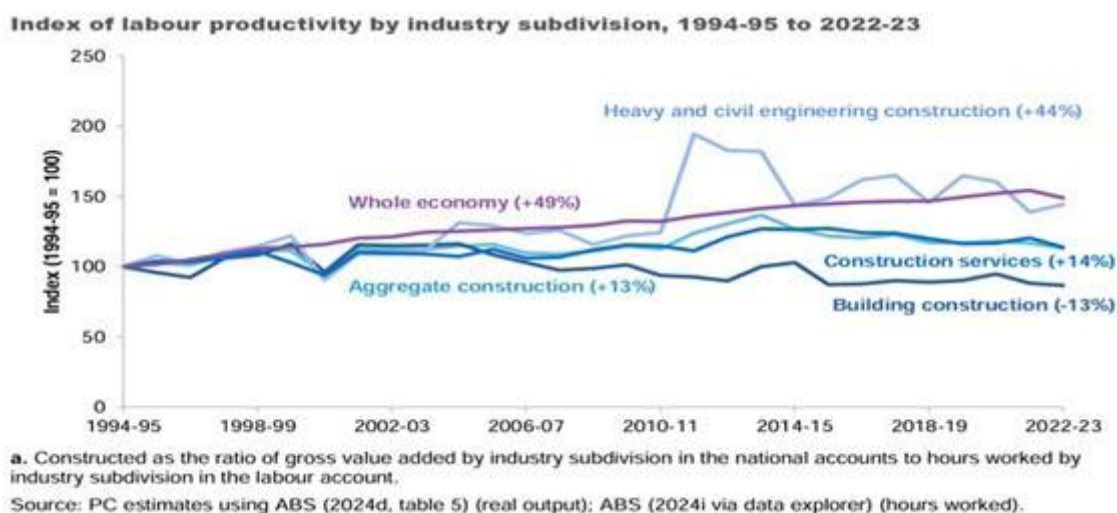
Civil construction should not be judged by the weakest parts of construction

A more disciplined measurement framework matters because the available evidence does not support a blanket story that every part of the construction sector is underperforming to the same degree. The Productivity Commission's 2025 housing construction research paper is especially useful here, not because it is about civil construction directly, but because it shows how misleading broad construction categories can be. The Commission notes that official productivity statistics are generally only available at the one-digit and two-digit ANZSIC level, which means highly different activities are often collapsed into a single "construction" story. That makes it easy to make sweeping claims and much harder to identify where the real productivity problems sit.

When the Commission disaggregated the picture, the result was striking. Between 1994–95 and 2022–23, labour productivity

in aggregate construction rose 13%, labour productivity in heavy and civil engineering construction rose 44%, and construction services rose 14%, while building construction fell 13%; over the same period, whole-economy labour productivity rose 49%. Those figures do not mean civil construction has no productivity problem. But they do mean that the common claim that "construction is unproductive" is too blunt to guide policy. A sector that includes heavy and civil engineering, residential building, non-residential building, and trade services should not be treated as though all sub-sectors are behaving the same way.

The same Productivity Commission paper also notes that infrastructure and utilities associated with development are counted in heavy and civil engineering rather than residential building. That is an important reminder that a large share of the enabling work needed to support housing, industrial land, and new communities sits firmly inside the civil sector, even when public debate frames the problem as "housing construction." In other words, civil contractors are often being drawn into bottlenecks that originate well before a shovel hits the ground: land assembly, approvals, servicing, code interaction, and utility interfaces. The Commission's housing findings therefore reinforce a broader point for civil construction: policy needs to become much more precise about where delay and inefficiency actually sit.



At the same time, there is no basis for complacency. Infrastructure Australia's 2025 report shows that construction industry multifactor productivity rose by 2% in 2023–24 after falling the year before, but the long-term trend remains essentially flat and below mid-1990s levels. So the right conclusion is not that civil construction is “fine.” It is that the industry should be assessed on its own terms, with a sharper distinction between the performance of heavy and civil work and the broader structural weaknesses visible elsewhere in construction.

Procurement choices are productivity choices

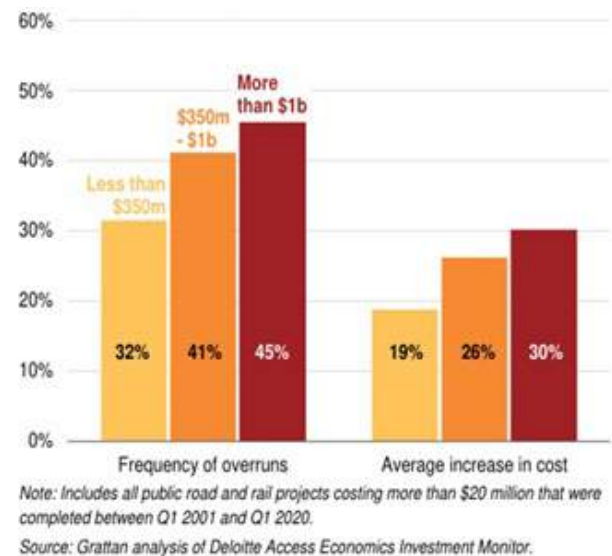
If measurement is the first problem, procurement is the second. The evidence from Infrastructure Australia suggests that the biggest productivity losses are not simply generated on site; they are often locked in much earlier through project selection, packaging, scope definition, contract model adopted, and risk allocation and project team selection. Therefore, the greatest opportunity to improve productivity in Australia, and set infrastructure projects up for success, lies with clients adopting optimally sized projects with well-defined contract scopes delivered by a suitably experienced contractors through a contract model most appropriate for project complexity that includes a transparent and fair risk allocation. It is important that risk is not transferred but remains with the entity most able to control the risk.

Infrastructure Australia's 2026 Annual Performance Statement shows that megaprojects now account for a disproportionately large share of the federally funded nationally significant pipeline: 32 megaprojects were in scope, nine of them had total costs above \$5 billion, and those nine alone represented 64% of the pipeline by value. The same statement notes that as project size and complexity increase, delivery becomes more complicated and the cost impact of realized risks and schedule delay rises as well. Infrastructure Australia also warns that small shifts in megaproject

timing can materially affect market capacity and construction inflation across the wider program.

Figure 1: Bigger projects overrun more often and by more.

Frequency of overruns and average increase in cost as a percentage of initial project costs by level of initial cost.



The subcontracting model adds another layer. Infrastructure Australia estimates that 41% of infrastructure construction is now delivered by subcontractors, meaning that more than \$100 billion of the five-year public pipeline will be delivered by firms beyond the principal contractor. Industry respondents told Infrastructure Australia that subcontracting provides access to workers and specialist expertise, but they also reported cost overruns, quality inconsistencies, coordination difficulties, and project delays as common challenges. The report warns that excessive subcontracting can erode Tier 1 self-performance, dilute training, create additional supervision layers, and increase interface risk, especially when risk is pushed aggressively down the chain.

That is why procurement has to be understood as a productivity setting, not simply a probity exercise. Infrastructure Australia states plainly that prevailing procurement models focused on lowest-cost, project-by-project tendering discourage the adoption of scalable innovation, including digital engineering, offsite methods, and lower-emissions materials. It also argues that

better results depend on moving beyond transactional contracting toward models that support collaboration, transparency, and shared accountability. The implication for civil construction is clear: procurement reform should not just be about faster tenders. It should also be about more realistic risk allocation, earlier contractor input, greater use of repeatable scopes, and, where appropriate, breaking very large packages into more manageable and more contestable components. That last point is an inference from the available evidence, but it follows directly from the combination of megaproject risk, interface complexity, and thin market capacity.

The Strategic Review of the Infrastructure Investment Program reinforces that direction. As summarized by Infrastructure Australia, that review found the project pipeline had become unsustainable, with significant cost pressures, inconsistent governance, and too many projects lacking a clear national rationale or credible planning and costings. Its recommendations — earlier gateway assurance, stronger cost-estimation methods, more disciplined funding arrangements, and rolling programs aligned to nationally significant outcomes — are not just fiscal reforms. They are productivity reforms, because better project selection and sharper front-end discipline reduce the odds that projects arrive in the market as under-scoped, over-optimistic, and procurement-ready in name only.

Technology and pilots can turn rhetoric into results

Technology matters in civil construction, because technology can reduce rework, improve sequencing, create more reliable progress data, standardize repetitive tasks, and allow better integration across design, delivery, operations, and maintenance. Infrastructure Australia's 2025 report says 64% of building and construction firms invested in digitalization over the previous year, with activity spread across BIM, AI,

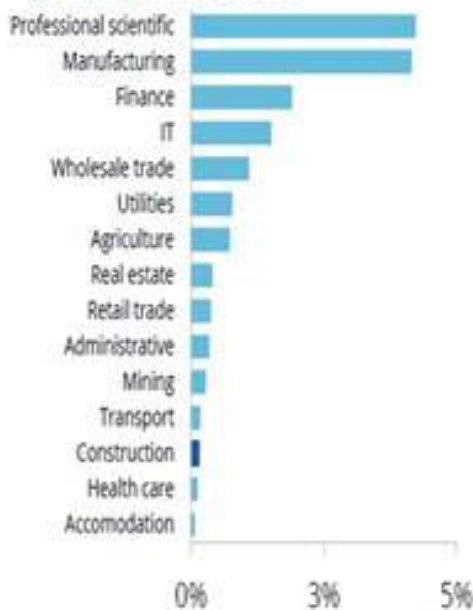
robotics, and automation, but it also found that 26% of firms made no digital investment at all, with smaller businesses lagging on both adoption and awareness. This suggests the problem is not a lack of promising tools. It is that adoption is still uneven and too often trapped in pilots that never affect the mainstream market.

Infrastructure Australia also makes an important distinction between innovation that is technically proven and innovation that is commercially scaled. It argues that governments should use large infrastructure programs to trial and embed productivity-enhancing innovations, and it points to overseas examples where public clients deliberately did this. On London's Crossrail project, isolated innovation efforts were turned into a coordinated program with challenge-based priorities, contractual incentives, matched project funding, and tracking of how ideas were converted into implementation. In the first year, more than 400 ideas were submitted, 180 were developed into solutions, and over 100 innovations were later carried into future projects. The point is not that Australia should copy Crossrail wholesale. It is that productivity gains came from organized client-side sponsorship of innovation rather than hoping the supply chain would somehow do it alone.

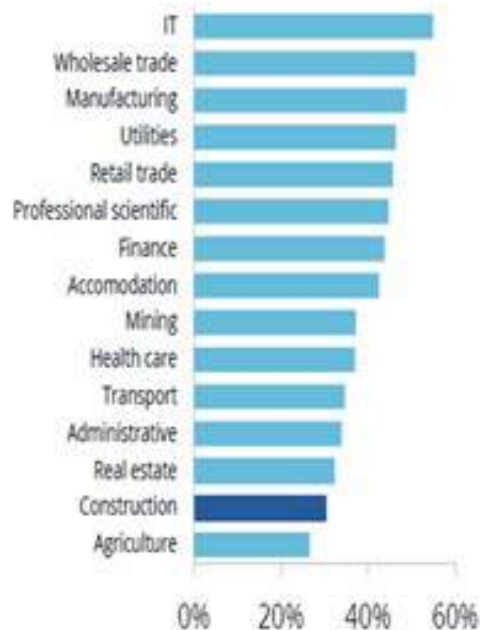
The same lesson appears in Singapore and the United States. Infrastructure Australia highlights Singapore's Productivity Innovation Project Incentive Scheme, which provided government funding for site process re-engineering, digital systems, robotics, and modern methods of construction, with grants covering up to 70% of project costs for proposals that could deliver major site productivity improvements. It also points to the US Federal Highway Administration's programs to accelerate deployment of proven innovations, including prefabricated bridge components and alternative contracting approaches. One Massachusetts bridge program cut construction time from 48 months to 9 months using accelerated construction techniques and prefabricated sections, while

Why? Innovation is low

Business R&D expenditure, per dollar of gross value added, 2021-22



Proportion of firms innovating, 2022-23



Notes: R&D expenditure per dollar of GVA excludes R&D wholly carried out by a third party. Non-employing firms excluded from proportion of firms innovating measure. Several industries have been excluded from measures. See source for methodology. Source: Productivity Commission 2025, *Housing Construction Productivity: Can we fix it?*

also achieving a small cost saving. These are not abstract lessons. They show that public clients can materially change delivery outcomes when they de-risk adoption and create a pathway from demonstration to routine use.

Australia should take the same approach in civil construction. A practical next step would be a civil productivity pilot built around one repeatable program — for example bridges, water network upgrades, regional roads, or housing-enabling subdivision works — where the client, contractor, designer, relevant utilities, and approvals agencies agree to a simplified assurance pathway, common data capture, clear risk ownership, and an independent post-completion review. The purpose would not be to waive safety, environmental, or quality obligations. It would be to test how much delay, cost, and rework comes from duplication, uncertainty, fragmented approvals, and poorly aligned procurement settings, then publish the results in a form that can be replicated. That would turn “innovation” from a bidding slogan into measurable reform.

What Governments should do next

The first priority therefore is to measure what matters. Governments should agree on a national set of civil construction productivity indicators that are simple enough to use routinely and strong enough to support comparison across agencies and jurisdictions. At a minimum, those measures should include budgeted versus actual cost, planned versus actual time, rework, indirect labour costs, subcontracting intensity, self-performance, and a record of the procurement model used. Standardized benchmarking of the established post-completion review framework for projects delivered efficiently should be used. The task now is to turn those concepts into a national data standard and require their use on major public projects.

The second priority is to stop pretending that the cheapest tender is always the most

productive outcome. Productivity is lifted when projects are packaged intelligently, when risk is allocated to the party best able to manage it, when the contractor is given enough design certainty to invest, and when innovation that carries an upfront cost can still compete because whole-of-life value is taken seriously. Lowest-cost, project-by-project procurement discourages scalable innovation, while better integration across the contracting chain can reduce rework, improve safety, and strengthen delivery resilience. Oxford Economics argue that innovation and productivity-enhancing solutions should sit high on successful bidding criteria.

The third priority is to audit the friction points outside the site fence. The Productivity Commission's housing work shows how approvals, infrastructure connections, layered regulation, and licensing settings can create long delays and "cascading failures," with major development timelines stretching to ten years or more while only a fraction of that time is spent physically building. Civil construction sits at many of those interfaces. It is therefore entirely reasonable to ask a wider infrastructure question: how much productivity is being lost in environmental approvals, utility relocations, land access, inconsistent licensing, fragmented code application, or duplicated assurance demands between funding agencies and asset owners? If governments want faster and cheaper delivery, they have to measure and reform those interfaces, not just ask contractors to work harder inside the existing system.

The central conclusion is straightforward. Civil construction productivity will not be lifted by multifactor productivity alone, nor by treating every cost increase as proof of industry failure. It will improve when governments choose better projects, stage them more intelligently, adopt procurement models that support collaboration and repeatability, risks are priced and allocated more sensibly, and project performance data is captured in a way that allows genuine

benchmarking. The evidence now available from the Productivity Commission and Infrastructure Australia is already enough to support that agenda. What is missing is not another abstract diagnosis. It is the willingness to measure performance honestly, trial new delivery models, and scale the practices that demonstrably improve time, cost, and delivery certain.

Recommendations

The civil construction industry supports a practical productivity agenda focused on better measurement, smarter procurement, technology adoption and regulatory reform. To improve infrastructure delivery outcomes, governments should consider the following actions.

1. Establish a National Infrastructure Productivity Measurement Framework

Develop a nationally consistent framework to measure infrastructure delivery performance across jurisdictions. Metrics should include project cost, delivery timeframes, procurement model, contractor participation, rework rates, utility relocation delays and project outcomes. Consistent measurement would allow governments to identify high-performing agencies, delivery models and project types, while providing greater transparency around the factors contributing to project success or cost escalation.

2. Expand Productivity Commission and Infrastructure Australia's Productivity Function

Provide the Productivity Commission and Infrastructure Australia with additional resources and mandate to collect, analyse and publish infrastructure productivity data. As the nation's independent infrastructure adviser, Infrastructure Australia is well placed to benchmark project performance across jurisdictions, identify emerging trends and evaluate the effectiveness of policy and procurement reforms. Improved transparency would assist governments to make more informed infrastructure investment decisions and provide a stronger evidence base for future reform.

3. Trial Debundled Procurement Models

Governments should identify a number of suitable infrastructure projects and trial alternative packaging approaches, including smaller and more contestable work packages. While large bundled contracts can offer advantages in some circumstances, they can also limit competition, reduce opportunities for mid-tier contractors and concentrate project risk among a small number of participants.

The objective should be to test whether alternative packaging approaches improve project outcomes. Trials should assess impacts on competition, contractor participation, innovation, local industry involvement, project cost and delivery timeframes. By collecting and comparing performance data, governments can better understand which procurement models are most effective for different project types and market conditions.

4. Establish Civil Construction Productivity Demonstration Projects

Create a program of pilot projects where governments, contractors, designers, utilities and regulators work together to trial new delivery approaches. These projects should be designed to test opportunities to improve productivity through simplified approval pathways, streamlined reporting obligations, improved coordination and greater use of digital delivery tools.

Importantly, the objective should not be to reduce safety, environmental or quality standards. Rather, the purpose is to identify where duplication, uncertainty and administrative complexity are creating unnecessary delays and costs. Lessons learned should be independently evaluated and made available across the broader industry.

5. Conduct a National Review of Infrastructure Red Tape

Undertake a comprehensive review of the regulatory and administrative requirements that affect infrastructure delivery. This should include planning approvals, environmental assessments, utility coordination, reporting

requirements, procurement obligations and overlapping compliance frameworks.

The review should focus on identifying duplication, inconsistent requirements between jurisdictions and opportunities to simplify approval processes without compromising community expectations. Governments should also consider establishing measurable targets for reducing approval timeframes and administrative burdens on infrastructure projects.

6. Explore a Civil Construction Technology Adoption Program

The Commonwealth has increasingly recognised the role technology plays in improving productivity across key sectors of the economy. In agriculture, governments have supported the adoption of precision farming, automation, digital monitoring systems and AgTech solutions through a range of grants, pilot programs and co-investment initiatives designed to accelerate innovation and improve productivity outcomes.

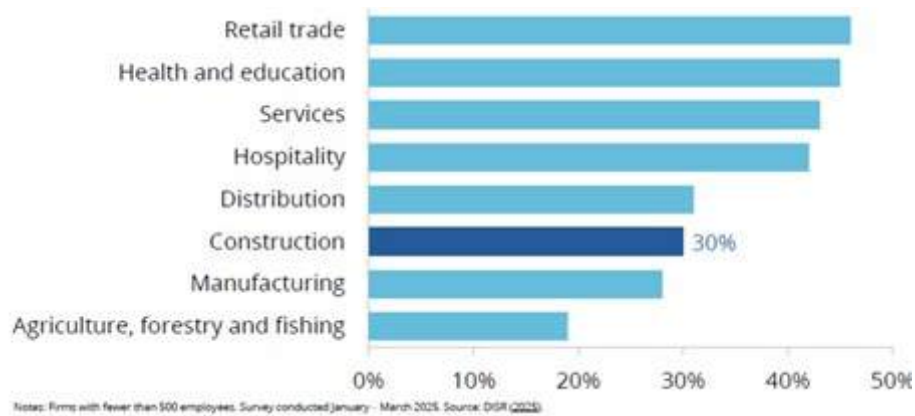
A similar conversation should now occur in civil construction.

The civil construction industry is responsible for delivering the enabling infrastructure that supports housing, freight, energy, water security and economic development. Yet despite the critical role the sector plays in achieving national policy objectives, there has been comparatively little focus on supporting the adoption of productivity-enhancing technologies across the industry.

Many of the technologies capable of improving productivity already exist. Machine control systems, drone surveying, reality capture, digital engineering, artificial intelligence, digital twins, asset monitoring platforms and automated project management systems are increasingly being deployed across parts of the industry. These technologies have demonstrated the potential to reduce rework, improve project planning, enhance safety, increase equipment utilisation and provide better visibility of project performance.

Construction businesses are behind others on AI adoption

Share of small- and medium-sized Australian businesses adopting AI in 2025



The Commonwealth should explore a Civil Construction Technology Adoption Program modelled on the principles that have successfully supported technology uptake in agriculture. Rather than funding speculative research, the program should focus on accelerating the deployment of proven technologies that have demonstrated the ability to improve productivity, reduce project risk and enhance delivery outcomes. Supporting technology adoption in civil construction represents an investment

not only in industry capability, but in the efficiency and effectiveness of Australia's future infrastructure pipeline.

Multifactor Innovation, Smart Tech and AI

Some areas of innovation in sustainable, environmentally efficient infrastructure delivery are highlighted in the following pages.



CASE STUDY

Komatsu

Central to Komatsu's approach is its "Smart Construction" initiative, which integrates cutting-edge technologies such as Intelligent Machine Control (iMC) 2.0, 3D Machine Guidance, and drone-enabled surveying. These tools empower contractors to enhance productivity, safety, and precision across project lifecycles.

The Komatsu Innovation Hub in Wacol, Queensland, serves as a testament to the company's dedication to technological advancement, offering interactive exhibits that showcase the latest in mining automation, digital services, and sustainable solutions.

Komatsu's commitment to environmental responsibility is further demonstrated by its development of new technology engines that deliver fuel savings of 5% to 15% while complying with Tier 4 Final emissions standards.

These engines significantly reduce particulate matter and nitrogen oxide levels, contributing to a more sustainable future for the industry.

Construction Technology in Australia's Publicly Funded Civil Infrastructure

SITECH Solutions is an Australian construction technology provider supporting civil contractors through Trimble machine control, site positioning, surveying, connected-site and project-management technologies. As an authorised Trimble dealer, it helps contractors apply digital tools that lift productivity, quality and safety.

Technologies such as Trimble Earthworks, Siteworks, WorksManager and WorksOS already enjoy strong and growing adoption across the Australian civil construction sector. Trimble's published Earthworks figures show

around 30% faster grading, roughly 30% savings in excavation and compaction, and up to 55% less survey effort - gains that work back to fuel, since fewer passes, less rework and shorter hauls mean fewer machine hours, less diesel and lower emissions. With about a quarter of earthwork typically done twice industry-wide, the rework prevented by grade control accurate to 10 - 20 mm is significant; Trimble notes that greater precision burns less fuel, while fewer errors and less rework cut carbon emissions and material waste. WorksManager keeps crews on the latest 3D design, while Trimble's Connected Site unifies design, field and reporting data through open, LandXML-based exchange.



Figure 2: Trimble-published efficiency gains across the earthworks cycle, underpinned by GNSS satellite positioning (source: Trimble Earthworks Solutions).

The Western Sydney Airport bulk-earthworks project shows this at mega project scale. The project moved some 24 million m³ to tight specifications across 270+ machines, with up to ten design updates daily and every layer confirmed first time. Getting it right first time is where fuel savings compound: intelligent-compaction trials reported a 38% fuel saving against forecast, and movements reconciled to roughly 97% of load-sheet and survey records - evidence that accuracy and less rework convert directly into lower fuel use, cost and emissions.

SITECH has found that digital construction delivers most when digital capability is valued within the procurement phase of projects and when technology adoption is integrated into construction workflows and becomes an operational necessity to meet construction quality and productivity objectives.

Trimble technology solutions delivered with the required training and technology support through SITECH are now delivering stronger infrastructure value, lower-emission delivery and a more resilient sovereign construction capability.



CASE STUDY

Building Confidence Through Data-Driven Assurance: Coffey Testing

Modern civil infrastructure projects demand proof of quality, not just promises of delivery. Coffey Testing provides the test results and geotechnical data that allows contractors, clients and investors to ensure projects are built to last.

Through its national network of laboratories and on-site facilities, Coffey Testing delivers geotechnical and construction materials testing that supports the full lifecycle of civil assets—from design and construction through to maintenance and renewal. The

company's focus on precision, consistency and digital reporting allows contractors to integrate verified testing results directly into quality, performance and sustainability frameworks. Providing value add to projects and geotechnical solutions.

This approach changes how success is measured. Real-time test data helps identify performance trends, manage risk and document long-term material behaviour. Contractors can use these insights to demonstrate asset integrity, reduce future maintenance exposure and validate the quality standards expected by civil contractors.

In effect, Coffey Testing transforms quality assurance into peace of mind. By embedding robust testing and traceable data within project delivery, civil organisations are able to substantiate the value of their work beyond completion. Success is no longer defined solely by deadlines or cost outcomes but by proven durability, reduced risk and confidence that infrastructure will perform as designed for decades to come.

BYDA Digital Utility Portal: preventing the next strike before it happens

Australia's underground utility network suffers more than 15,000 reported excavation strikes every year, predominantly from civil construction activities.

Research by Before You Dig Australia (BYDA) reveals the true cost exceeds \$4.6 billion annually, with indirect and social costs 32.4 times higher than direct repair bills. Telecommunications, gas, water and electricity assets are at risk every day.

Yet the system meant to prevent these strikes has drifted from risk control to liability control. It is a 40-year-old, pdf-based referral process in a high-risk digital age. Fragmented state legislation, inconsistent data quality and asset owners reluctant to share GIS information have left frontline workers making safety decisions based on plans that are often inaccurate, overwhelming or both.

BYDA is leading a push for national systemic reform, including mandatory 'before you dig' consultation before any excavation, increased data standards and universal cooperation from asset owners, utilities and regulators.

To operationalise this, BYDA developed the Digital Utility Portal (BDUP): a secure, GIS-enabled platform that replaces fragmented

PDFs with a single, interactive, standards-compliant view of utility assets.

Proof of concept testing of the Portal achieved compelling results: an average of 9.6 hours saved per BYDA planning request, equal to \$600 engineering hours. Nationally, that translates to 5.2 million hours annually and \$330 million in productivity gains.

BYDA's modelling further projects that implementing the full reform agenda, including national legislation, digital data standards, and uplifted workforce capability, can reduce utility strikes

by 30 per cent, saving \$1.38 billion each year; a valuable outcome for civil contractors better empowered to safely deliver Australia's enabling infrastructure with reduced risk.



Digital Systems Enhancing Machine Connectivity, Health Monitoring and Remote Capability:

Kobelco Construction Machinery is aligning its product development with the civil sector's move from standalone technology solutions to fully integrated digital ecosystems. Key to this strategy are the GEOSCAN telematics platform, the K-Assist remote-support system, and the emerging K-Dive remote-operation concept. Together, these technologies enable contractors to optimise machine utilisation, minimise downtime and apply data-driven decision-making across multiple sites.

GEOSCAN is Kobelco's telematics system that delivers real-time operational data from excavator fleets. It captures metrics such as operating hours, fuel consumption, location tracking, idle time, work-mode data, alerts and maintenance status. By enabling contractors and dealers to visualise performance remotely through smartphones or web-based dashboards, GEOSCAN supports more effective utilisation planning, maintenance scheduling and security oversight, particularly valuable for fleets working in regional and remote environments.

K-Assist builds on that connectivity by focusing on machine health and diagnostics. This dealer support system provides remote diagnostic capability through independent, automatic and on-demand self-diagnostic programs onboard the excavator, allowing dealer technicians to continuously monitor key operational parameters and remotely diagnose issues as they arise. Early alerts and guided troubleshooting reduce downtime and improve reliability, creating measurable gains in productivity and reduced total cost of ownership for civil contractors.

K-Dive represents the next frontier in Kobelco's digital integration program. Currently in advanced development, the technology allows remote operation of excavators through immersive interfaces that mirror the operator's cab environment. This capability has potential to support hazardous-environment work, enhance safety, and expand training access across dispersed job sites – key priorities for Australia's evolving civil construction market.

By combining advanced telematics, proactive support and remote-operation research, Kobelco is helping build a more connected and resilient civil industry – one where technology directly supports the people who deliver Australia's infrastructure.

A Digital Foundation for Australia's Civil Construction Industry: Procore

Civil construction is the backbone of Australia's community-enabling infrastructure, and expectations for project delivery have never been higher. Contractors are increasingly expected to deliver safer, higher-quality outcomes while managing tighter margins, growing compliance requirements and more complex stakeholder expectations. To deliver with confidence, the industry needs a digital foundation that protects project integrity from the earliest planning phases through to final completion.

Procore is a construction management platform purpose-built for the industry, serving as a project's system of record and single source of truth. By centralising communication and documentation, Procore connects field and office teams and ensures everyone is working from the same up-to-date information, rather than chasing the latest drawing or relying on incomplete or disconnected site records after the fact.

Through integrated workflows for project delivery, quality, resource management and financial control, teams can identify productivity, quality and delivery risks before they affect field operations. RFIs, drawings, site diaries, inspections and project correspondence are managed within a single platform, ensuring teams are working from current information while maintaining a complete and traceable project record.

Real-time visibility into labour, equipment and project performance enables issues to be addressed before they become margin-eroding delays. Quality, compliance and non-conformance processes are captured as work is completed rather than documented retrospectively, helping support progress payments, protect cashflow and reduce rework. Building on this foundation, Procore's analytics and AI-powered

construction intelligence help teams identify emerging risk, productivity trends and cost exposure earlier, enabling more informed decisions throughout delivery.

The result is a more connected and accountable delivery environment that improves both project outcomes and business performance. Since adopting Procore, Australian contractor Haslin Constructions has reported a 25% increase in overall productivity, 40% improvement in reporting efficiency and a 50% reduction in project closeout times - demonstrating how connected delivery improves visibility, control and accountability across complex civil and infrastructure projects.

Quality Assurance

Construction-industry insolvencies continue to be elevated, but remain below the pre COVID-19 average. The construction industry tops the market in terms of absolute number of insolvencies this year, accounting for 27% of all insolvencies in 2023-24. Businesses with less than 5 employees represent over two-thirds of insolvencies during 2022-23. Small businesses with less than 19 employees make up 82% of total construction insolvencies.

Recent analysis of over \$15 billion in subcontractor spend, 34% was identified as a significant risk where suppliers have either failed or required a review. This data alone reflects the real, material risks facing the industry. New technology allows companies to more confidently assess supplier capacity over the course of a project, aligning with responsible contracting practices and helping project teams avoid these project disruptions. With key trades tightly sequenced along critical paths, a single subcontractor's failure to deliver can trigger, cascading delays and cost overruns usually costing 1.5 to 3 times the subcontract value.



CASE STUDY

From Admin Burden to ROI – CONQA

For many civil contractors, the market is tough right now. A shrinking pipeline of quality projects drives a race to the bottom on price. Finding and keeping skilled workers is a constant headache, and compliance requirements are adding more red tape to every job.

Compliance requirements too often add to these burdens. Instead of being a valuable tool, Inspection and Test Plans are completed retrospectively, weeks after the work is done, solely for the sake of documentation, not for genuine quality.

Quality Assurance (QA) shouldn't be this way, and for many industries, it isn't.

A World Health Organisation study revealed that when surgeons used simple 'Safe Surgery Checklists' during surgery – to verify critical steps like "have we removed

the instruments before we sew the patient back up" – death rates fell by an astonishing 47%. However, if this were construction, checklists if completed after the patient was discharged, or in some cases, deceased is too late and there is a more effective way to quality assure.

While construction isn't a medical procedure, errors have costly consequences. Studies show that rework eats up 21% of construction value through lost time, wasted materials, damaged reputations, and projects dragging past their deadlines.

It doesn't have to be this way. The key is making QA simple and easy to complete during physical inspections, as work happens.

Companies like Downer, Fulton Hogan, and Doval are leveraging the simplicity of CONQA's platform to transform QA into a collaborative, easy process. Supervisors and engineers can now share the load, capture real-time data from their mobile devices, and significantly reduce administrative overhead.

By implementing CONQA, hundreds of contractors have seen less rework, enriched site records, faster project close-outs, and teams who spend more time on high-value tasks - not retrospective admin.



Multifactor productivity transformed by emerging technology

Productivity gains in the civil construction industry are coming set to change the way construction is delivered indefinitely.

Industry partners such as Timescapes, Propeller and Docketbook are providing new technology and AI to support the sizeable projects to be designed and constructed on time and under budget.

The Civil Contractors Federation is actively working to connect proven technologies and industry leaders with contractors to support practical improvements in productivity. By facilitating engagement through national events, technical briefings, and targeted roundtables, the organisation provides a platform for knowledge transfer and the adoption of tested digital solutions. This work is complemented by ongoing advocacy for procurement reform, aimed at enabling more flexible and innovation-friendly project delivery frameworks. Through these efforts, the Federation is helping to remove key barriers to adoption and promote scalable, industry-wide productivity gains.

These efficiencies being developed, adopted and continually improved are creating multi factor productivity outcomes that industry is championing.



CASE STUDY

Tech and AI Capacity Building Transparency: How Reality Capture Accelerates Civil Infrastructure Delivery: **Timescapes**

Australia is facing significant pressure to meet housing and infrastructure demands due to rapid population growth and urbanisation.

The federal government has responded by setting an ambitious target of building 1.2 million new homes by 2029 under the National Housing Accord. It has also committed \$120 billion over the next decade for supporting infrastructure—schools, hospitals, transportation networks, and upgraded utilities—to serve these expanding communities effectively.

To manage this unprecedented growth, transparency among government stakeholders, contractors, and communities is critical. Clear, accessible information helps build trust, improves collaboration, and ensures accountability at every project stage. Transparency removes organisational silos, streamlines bureaucratic processes, and establishes a central, visual source of truth.

New technologies are helping to deliver this level of transparency. Reality capture solutions like Timescapes allow government stakeholders and civil contractors to visually track, validate, and communicate construction progress easily. Project stakeholders gain immediate insight into key activities

without needing frequent site visits, while communities remain fully informed via publicly accessible project timelines and timelapse footage.

Ultimately, adopting Timescapes allows civil infrastructure projects to progress more efficiently and deliver essential services quickly—ensuring the best returns on public investment and improved outcomes for Australia's rapidly expanding communities.



Productivity Improvement: Propeller

Civil contractors are at the frontline—and they need better tools to deliver faster, leaner, and with greater certainty. Propeller provides exactly that. With accurate, real-time 3D site data from drones and GPS, teams can make faster decisions, spot risks early, and avoid costly delays and rework.

This is about more than efficiency. It's about ensuring public dollars go further. Propeller reduces disputes, miscommunication, and waste by giving all stakeholders—from field crews to departmental leaders—clear, shared visibility into progress and performance.

In a climate of constrained budgets and rising urgency, Propeller enables civil contractors to move quickly, stay accountable, and build the infrastructure that communities so desperately need. The alternative—falling further behind—is not an option.

Menai Civil cites cloud-based processing as their biggest win which can be reviewed in their Menai case study . Using Propeller's PPK workflow, the team now surveys big earthworks projects once a week to keep them on track. Sending their data processing

to Trimble Stratus frees up Brendan and his team to survey more sites, more often, getting teams the data they need to make better decisions.

"The old way, we were lucky to get the data back in a few days. Now, I sometimes fly five sites in one day and all the data is back the next day. It frees up the rest of your week because you're only spending one day out in the field. The rest of the week, you're not stuck processing and getting data out."

For government and departmental leaders, Propeller offers confidence that every investment in infrastructure is driving faster, smarter, more transparent results when they matter most.





CASE STUDY

Circular construction to manage material costs

Material cost escalation and supply pressures have driven civil contractors to explore circular solutions that reduce reliance on virgin materials. ECORR, an Australian leader in engineered resource recovery, is helping the civil industry turn construction and demolition waste into high-performance materials suitable for roads, subdivisions, and infrastructure works.

By recycling spoil and surplus materials into certified aggregates, roadbase, and engineered fill, ECORR enables projects to reduce costs, secure supply, and improve sustainability outcomes. Its advisory model supports early design and tender stages, helping contractors identify recycled options that meet technical specifications while lowering embodied carbon and disposal costs.

On-site mobile processing solutions provide additional benefits by reducing haulage, fuel use, and emissions, while minimising downtime and risk on constrained or remote projects. ECORR's Western Sydney facility demonstrates the scalability of this model, achieving recycling rates above 98 per cent and near-zero landfill outflows.

For civil contractors, adopting circular practices through partnerships with providers like ECORR delivers both economic and environmental advantages. It helps stabilise costs, strengthens supply chains, and positions the sector to meet growing government and client expectations for low-carbon, resource-efficient delivery. As green steel and other sustainable materials emerge, this approach will underpin a more resilient and competitive civil industry.



CASE STUDY

Integrated Supply And Low-Carbon Materials For Civil Infrastructure: Heidelberg Materials

Driven by excellence and high performance, Heidelberg Materials Australia maintains a strong national presence in the civil infrastructure sector through an extensive and integrated supply chain of concrete, aggregates, sand and recycled construction materials. With more than 300 sites and 3,600 employees across the country, Heidelberg Materials provides the civil sector with dependable access to consistent and quality materials at scale.

As material costs continue to rise and supply chains face increasing pressure, civil contractors are prioritising suppliers who can reliably deliver both technical performance and strong sustainability credentials. Heidelberg Materials offers standard, high-performance and decorative concrete solutions, alongside low-carbon and recycled material options. With quarries and plants located close to key growth regions, contractors benefit from reduced exposure to supply risk through geographic and product diversification.

For civil projects, this translates into improved confidence in delivery schedules, reduced dependence on distant supply sources or constrained imports, and stronger sustainability outcomes. The availability of low-carbon concrete and recycled aggregates enables contractors to meet evolving environmental targets, strengthen tender positions and address regulatory requirements. Beyond materials, Heidelberg Materials also supports project teams

with digital tools, technical expertise and responsive service to optimise material selection, specifications and logistics throughout all projects.

By forming strategic partnerships with suppliers such as Heidelberg Materials, the civil construction sector can strengthen resilience around critical material inputs, integrate low-carbon and recycled options earlier in design, and reduce long-term schedule and cost risks. These strategies not only improve project certainty but also position organisations competitively as sustainability expectations continue to increase across government, industry and community stakeholders.

Through this approach, Heidelberg Materials continues to support civil contractors in delivering the infrastructure that underpins Australia's growth, helping build stronger communities, shape a more resilient and sustainable construction materials industry, and create a legacy for generations to come.





CASE STUDY

Administrative Capacity: Docketbook

Construction payment delays continue to challenge our industry's sustainability, with initiatives like the Payment Times Reporting Scheme highlighting this problem. Yet, it's not solely a financial issue; it's a systemic one. Head contractors sit at the centre of a complex flow of dockets, invoices and approvals, and when that flow breaks down, payment times stretch and suppliers carry the burden.

Docketbook addresses this by digitising the capture and validation of dockets at the source and sharing seamlessly across company boundaries. Instead of chasing paper or reconciling PDFs weeks later, head contractors receive real-time, structured data that aligns directly to contract quantities, rates and suppliers. This removes one of the biggest causes of delay, disputed or missing information.

With cleaner upstream data and, fully reconciled to orders and claims, head contractors can assess and approve claims faster, reducing bottlenecks in the payment cycle. More importantly, it creates a transparent audit trail across the entire process, from order through to invoice, giving all parties confidence in what is being claimed.

For suppliers, this same structure strengthens their position under state-based Security of Payments Acts. When payment claims are backed by verified, audit-logged docket data, they are clearer, more defensible, and easier to substantiate in the event of a dispute or adjudication.

The result is a shift from reactive administration to proactive cashflow management. Head contractors benefit from improved compliance and supplier relationships, while subcontractors and suppliers gain the confidence and evidence needed to enforce their rights.

Better data doesn't just speed up payments, it rebalances the system.





CASE STUDY

Pipeline systems to strengthen delivery resilience

In an environment of rising material costs and heightened competition for key construction inputs, the civil industry increasingly relies on trusted partners that can provide both supply certainty and technical excellence. Iplex Australia supports this need through its comprehensive range of pipeline systems, engineering support, and local manufacturing capacity.

Serving major civil, water, and infrastructure projects, Iplex produces systems for water distribution, sewerage, stormwater, and gas conveyance. Its strong local footprint and established distribution network provide

a safeguard against international supply disruptions and specification variability. The company's emphasis on design capability, quality assurance, and technical support ensures contractors receive consistent, fit-for-purpose solutions.

Iplex's innovation in large-diameter polyethylene, glass-reinforced plastic, and dual-wall polypropylene products enables faster installation, reduced maintenance, and improved life-cycle performance. By integrating recycled materials and sustainable manufacturing practices, Iplex also contributes to lower embodied carbon outcomes across civil infrastructure delivery.

For contractors, early engagement with suppliers such as Iplex helps mitigate project risk, stabilise pricing, and optimise design efficiency. These partnerships underpin more reliable and sustainable delivery outcomes across both regional and urban projects. By combining engineering expertise with a national supply presence, Iplex demonstrates how the civil industry can build long-term resilience through innovation, local capability, and strategic collaboration.

AI-Powered Construction Management Software: Improving Efficiency and Certainty for Civil Contractors

Civil contractors continue to operate in one of Australia's most complex delivery environments. Labour shortages remain a persistent constraint, compliance obligations are expanding, and competitive tendering is placing sustained pressure on already-tight margins. At the same time, major infrastructure pipelines across transport, energy transition, water and housing demand more predictable delivery, stronger reporting, and tighter commercial discipline.

This combination of pressure and opportunity has made AI-powered construction ERP platforms a critical enabler of industry resilience. Contractors increasingly need real-time cost clarity, automated risk detection, and seamless alignment between field operations and financial controls. Traditional systems - fragmented spreadsheets, disconnected software, or partially manual workflows - simply cannot keep pace with modern project complexity.

AI-enabled construction management systems address these challenges by unifying financials, project control, forecasting, workforce management, plant and equipment, quality and compliance into

a single digital ecosystem. Machine-learning models strengthen tender accuracy, flag anomalies before they escalate, and provide automated insights into productivity, cost drift, project risks and subcontractor performance. For contractors facing margin pressure, these capabilities are no longer a competitive edge - they are essential for viability.

Solutions from Access Construction support this industry shift by embedding AI-driven forecasting, real-time cost capture, digital site workflows, and comprehensive compliance oversight. This technology

helps civil contractors operate with greater efficiency and discipline - reducing rework, improving governance, lifting productivity and maintaining financial control even in resource-constrained environments - ensuring stronger returns on government infrastructure investment.

As the industry moves toward sustained, more disciplined growth, AI-powered construction management systems will be central to helping civil contractors build the resilient, productive and community-enabling infrastructure Australia depends on.



CASE STUDY

Scaling Up and Down, Asset acquisition and disposal: **Slattery Grays**

CCF's 1,150 Contractor Members are based in every town, city, region and community of Australia and as such flexible procurement and disposal of assets is critical to delivery of infrastructure. As such contractors and associates collaborate with organisations such as Slattery Grays which is the largest industrial, auto and commercial eCommerce business in Australasia, offering a huge range of industrial, auto, consumer and commercial goods, direct from manufacturers and distributors. As such this allows improved capacity from the smallest to the Tier One contractors, the value and convenience to unlock value from their assets and scale up with short notice which can be critical in all

manner of circumstances particularly natural disaster resilience and recovery where our contractors are always early responders.

It is challenging to efficiently deliver infrastructure across every part of Australia particularly for Government and Private clients, so it is the flexibility that is offered in procurement and disposal by a partner such as Slattery Grays which has national coverage across Australia with global reach with city and regional offices, covering approximately 50,000 sqm of warehouse space, 160,000 sqm of yard space and other additional smaller sites and regional. Naming just some of their CCF contractors and associates such as Diona, Coates, Kennards, Road and rail Excavations, Haslin Constructions, Abergeldie have improved their capacity by way of harness a mix of online platforms to procure or offload motor vehicles, manufacturing, construction and transport that rely on the flexible procurement and disposal options offered by this type of partner. Scaling up and being nimble requires contractors to work within agile environments and this leads to time, cost and productivity efficiencies.



CASE STUDY

Scaling Up and Down, Asset acquisition and disposal: **Pickles**

Pickles is the marketplace people trust to find their used equipment and with regular sales events for civil contractors, Pickles' auctions are a streamlined, transparent way to buy and sell industrial equipment. With a wide selection of quality machinery including excavators, graders, crushers, loaders, and more, Pickles ensures businesses can access the tools they need, when they need them. These events give contractors the chance to upgrade fleets, purchase assets at competitive prices, and avoid lengthy procurement processes and large transportation fees.

During Q1 to Q4 2025, Pickles recorded strong results:

- » 618 excavators sold | \$30M gross sales
- » 101 graders sold | \$12M gross sales
- » 66 crushing & screening assets sold | \$11M gross sales
- » 75 Bulldozers sold | 11M gross sales

As Australia's leading used asset marketplace and auction group, Pickles partners with CCF at key industry events to show support and uplift the industry overall. Using data and technology, they create thriving marketplaces that allow contractors to connect and transact with ease.



CASE STUDY

Equipment Hire and Specialist Solutions to move projects forward

Renowned as a premium supplier of quality equipment and expert advice, Kennards Hire is proud to be at the forefront of industry safety, innovation and customer experience. As the largest family-owned equipment hire business in Australia and New Zealand, Kennards Hire operates more than 200 branches and sites and employs over 1,900 team members, supported by an extensive fleet of quality equipment.

Across infrastructure, utilities and facilities projects, hiring provides the civil sector with access to compliant equipment, expert support and end-to-end solutions that help keep projects moving.

From compact 1-tonne machines through to 35-tonne excavators, Kennards Hire's continuously expanding range of heavy-duty earthmoving and compaction equipment can help contractors to prepare project sites irrespective of the challenges. Traffic management equipment also helps optimise site safety with lighting, safety gear, signage, barriers and traffic flow solutions to support projects.

Kennards Hire's Specialist Solutions capability combines equipment and expertise across Water Management, Temporary Fencing, Site Services and Power & Renewable Energy Solutions, helping contractors manage project complexity, maintain compliance and keep projects moving from early planning through to delivery.



CASE STUDY

Efficient power solutions

In the quest for a sustainable future, reducing reliance on fossil fuels and minimising carbon emissions has become a key priority for many infrastructure, construction and industrial projects. This has spurred the development of innovative technologies such as hydrogen generators, hybrid power systems and battery energy storage systems.

Hydrogen generators offer a clean energy alternative to diesel generators by using hydrogen to produce electricity, emitting only water as a by-product and eliminating CO2 emissions.

Battery Energy Storage Systems (BESS) enhance these setups by storing excess renewable energy for use during peak demand, reducing the need for diesel generators to run continuously. Hybrid power systems (HPS) integrate renewable energy sources such as solar or wind with traditional generators, optimising the use of renewables and decreasing overall fuel consumption and emissions. These technologies help reduce project emissions while maintaining reliable power on site.

Kennards Hire delivers end-to-end power solutions to support emergency, temporary and permanent power requirements across construction, infrastructure, mining and industrial environments. Based on a site-specific assessment, we design and deliver a fully integrated, turnkey power solution - from planning and equipment specification through to mobilisation, installation, monitoring and demobilisation. Their renewable and hybrid capability includes

Battery Energy Storage Systems (BESS), Hybrid Power Systems (HPS) and advanced energy storage solutions that reduce or eliminate reliance on diesel generation.

Paul Nicholson, Operations Product Specialist – Power and Renewable Energies explains

“Our goal is to adopt and customise an expanding range of new, more sustainable technology solutions for our customers, enabling you to reduce your carbon footprint on major projects while still enjoying the energy efficiency and performance levels you expect on-site.”



CASE STUDY

Supporting civil purchasing: **Bunnings Trade**

Bunnings has recently formed partnership with CCF nationally to support the civil workforce across the country. With 330 Bunnings outlets and a growing number of TKD stores reaching most communities, we are expanding our products and support services to civil contractors across town, city and community.

With most of the 200,000 workers in civil working in tier 2 and 3 smaller businesses, we see it as critical that Bunnings are there to support civil business capacity to deliver roads, water, sewerage, subdivision, housing and community enabling infrastructure. These are the trades that keep our communities moving, keep them housed and serviced with the infrastructure that is required in everyday life and in times of crisis.

Through our partnership, CCF Members gain access to Industry leading exclusive segment specific pricing and the supporting

PowerPass administration, enabling regional and smaller contractors to compete more effectively in infrastructure delivery and maintenance. This ensures that local, state, and federal government funding goes further—allowing for the construction of additional roads to unlock new subdivisions, increasing capacity for water and sewerage systems to replace aging infrastructure, or upgrading highways to make daily commutes safer and more efficient.

Our partnership is about unlocking the full potential of Australia's civil construction industry. Together, we are investing in the industry, growing local capacity, and enabling the rollout of the infrastructure Australians are calling for. By lifting the capability of civil businesses across the country, this partnership is driving the delivery of the roads, water storage, energy and essential services that underpin vibrant, growing Australian communities—now and into the future.





CONCLUSION

This period ahead and the communities that we build will be defined by the infrastructure that enabled it.

It cannot be assumed that the affordable housing, educational, health and other infrastructure will just be there. The energy transition to renewables is within our grasp in the next ten years, but it requires the civil infrastructure to be there first.

Having civil infrastructure as the first principle will open up last kilometre infrastructure for housing or a wind farm, but civil skills need to be fully prioritized to fill the large gaps that Jobs and Skills Australia report each year.

Measuring productivity and producing baseline measures of output allow comparisons between governments and from project to project.

Ultimately the period over the next five years will see further AI and tech efficiencies land on civil infrastructure worksite making the projects faster, quicker, leaner, cheaper. Whilst there will be upward pressures on costs and blowouts, there will be a greater forensic understanding of how to get better.

With civil infrastructure now front and centre there will be opportunities to further define its role in other emerging priority areas such as defence.

It is for certain that civil infrastructure will continue to be the focus of CCF at the State, Territory and National level to drive the social, economic and environmental goals of the country.

It is in every town, city, region and community of Australia that the 193,000 working in civil infrastructure will continue to build our country and further leadership from the Federal Government will be key in these areas.

About the Civil Contractors Federation

The Civil Contractors Federation is the nationally recognised peak body representing the industry nationally for civil construction which refers to the design, construction, and maintenance of the physical and naturally built environment, including public works such as roads, bridges, dams, airports, ports, drainage, energy, water, sewerage systems, pipelines, and railways which is truly National Community Enabling Infrastructure that builds Australia.

The CCF has branches in all states and territories and has around 1,800 Contractor and Associate members nationally.

Members also play a vital role in the residential and commercial construction industry by providing earthmoving and land development services including the provision of power, water, communications and gas. Our Contractor Members are in fact the enablers and builders all sorts of vital infrastructure and we provide the infrastructure for housing, energy transition and community enabling infrastructure across every town and city in the country.

CCF at the national level has two entities. These include CCF Australia and CCF National Registered Organisation.

- » CCF Australia LTD was established for the charitable purposes of promoting, protecting and advancing the civil construction industry in Australia for the public benefit including by being the peak body representing the civil construction industry in Australia. Each State and Territory has branches that operate as incorporated entities with each jurisdiction electing a representative to the CCFA LTD Board. To achieve these objects CCFA LTD may, without limitation:
 - » undertake facilitation and coordination functions in relation to the civil construction industry in Australia;

- » provide education and training;
- » lead discussion and implement policy for best practice and safety in the construction industry;
- » harness the resources of the community in support of the objects.

Our Civil Contractors Federation National Registered Organisation is a separate entity registered under the Fair Work (Registered Organisations) Act 2009.

- » CCF National Registered Organisation (ABN 41 639 349 350) is registered with the Fair Work Commission as the nationally Registered Organisation for Civil Construction under the provisions of the Fair Work Act 2009 with roughly 1200 registered contractor Members ranging from smaller businesses to tier 1 builders with over 1,000 employees each and 600 Associate Partners. It is governed by a National Board comprised of member-elected representatives from each state and territory. Each branch has an elected board made up of Contractor Members who provide governance and strategic direction, supported by a Chief Executive Officer and team delivering the operations and service delivery of the Registered Organisation.

The role of Civil Contractors Federation National (Registered Organisation) is to:

1. Be the representative body under the Fair Work (RO) Act of employers engaged in the Civil Construction Industry; and
2. Promote, protect, and advance the interests of Members engaged in the Civil Construction Industry.

Appendix A

Core Skills List Time Series 2021 -2025											
Core Skills Occupations List Occupation			No Shortage			Shortage			Regional Shortage		
Occupation	Civil Apprenticeship (Y/N)	National Shortage Rating	NSW Shortage Rating	VC Shortage Rating	QLD Shortage Rating	SA Shortage Rating	WA Shortage Rating	TAS Shortage Rating	NT Shortage Rating	ACT Shortage Rating	Civil Apprenticeship
Civil Engineer		Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	2025
Civil Engineer		Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	2024
Civil Engineer		Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	2023
Civil Engineer		Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	2022
Civil Engineer		Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	2021
Geotechnical Engineer		Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	2025
Geotechnical Engineer		Shortage	Shortage	Shortage	Shortage	No Shortage	No Shortage	No Shortage	Shortage	No Shortage	2024
Geotechnical Engineer		Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	2023
Geotechnical Engineer		Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	2022
Geotechnical Engineer		Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	2021
Quantity Surveyor		Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	2025
Quantity Surveyor		Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	2024
Quantity Surveyor		Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	2023
Quantity Surveyor		Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	2022
Quantity Surveyor		Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	2021
Structural Engineer		Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	2025
Structural Engineer		Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	2024
Structural Engineer		Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	2023
Structural Engineer		Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	2022
Structural Engineer		Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	2021
Transport Engineer		Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	No Shortage	No Shortage	2025
Transport Engineer		Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	No Shortage	No Shortage	2024
Transport Engineer		Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	2023
Transport Engineer		Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	2022
Transport Engineer		Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	2021
Production or Plant Engineer		No Shortage	No Shortage	No Shortage	No Shortage	No Shortage	No Shortage	No Shortage	No Shortage	No Shortage	2025
Production or Plant Engineer		Shortage	Regional Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	No Shortage	No Shortage	2024
Production or Plant Engineer		Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	2023
Production or Plant Engineer		Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	Shortage	2022
Production or Plant Engineer		No Shortage	No Shortage	No Shortage	No Shortage	No Shortage	No Shortage	No Shortage	No Shortage	No Shortage	2021



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