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Infrastructure trends in Australia 2008-09 to 2017-18

Andre Kaspura





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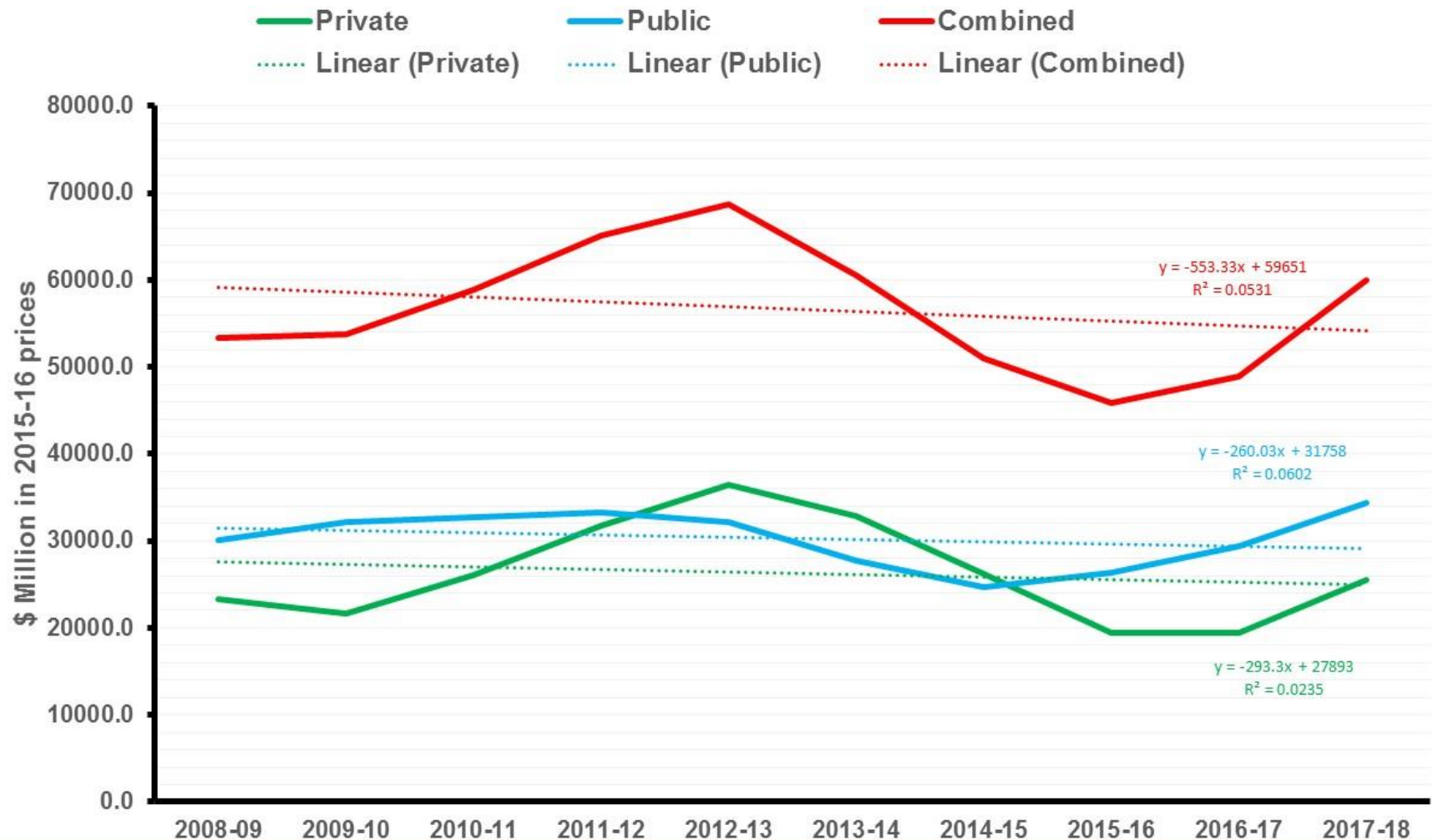
THE DATA USED

- Use abs statistics on engineering construction
- Reworked the statistics to annualize them & to deflate them. rearranged the statistics to include the components of infrastructure that accord with infrastructure Australia's definition



Public & private sector trends

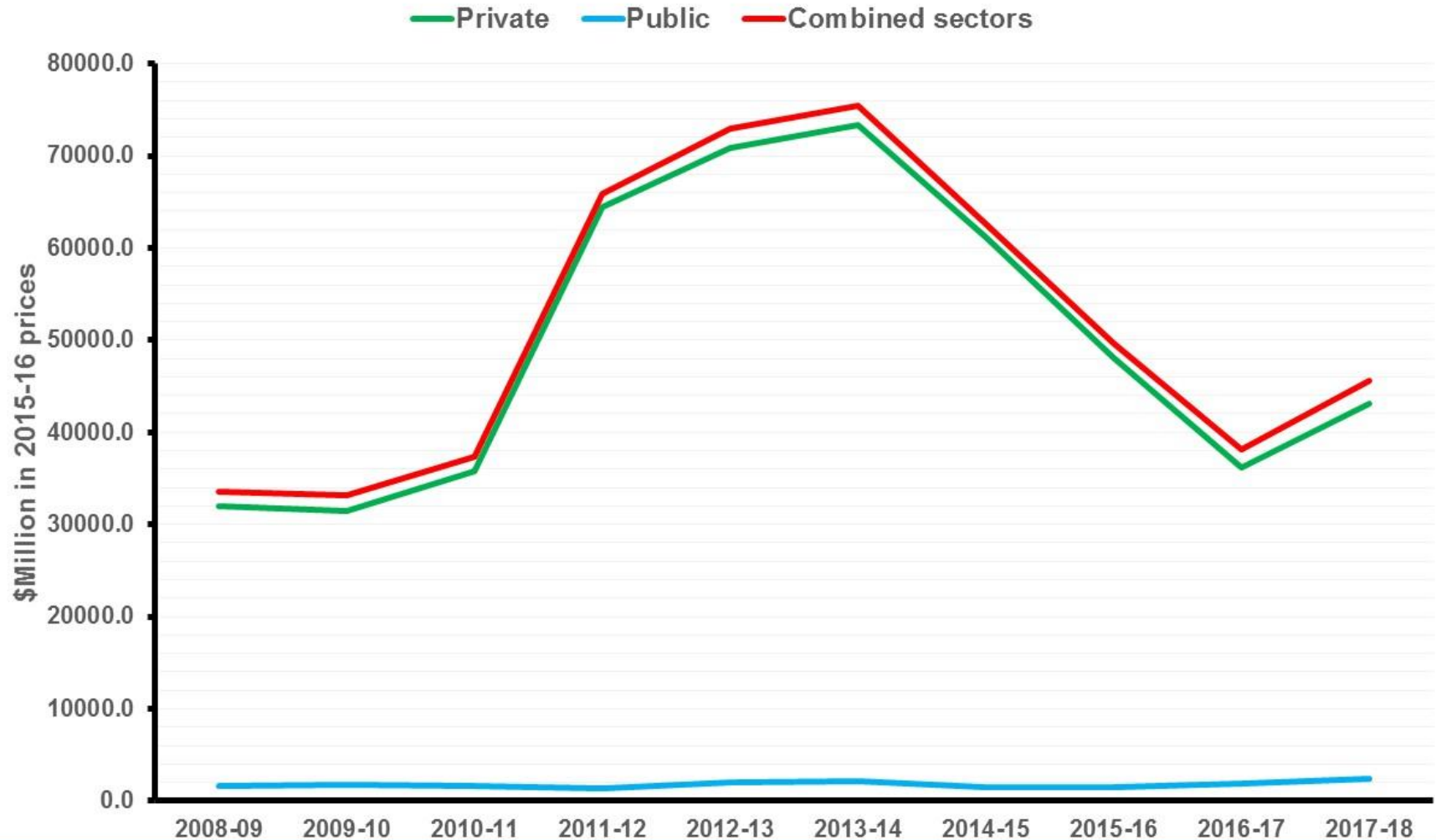
Figure 3.1: Engineering construction on infrastructure, public and private sectors, Australia last ten years





Other engineering construction

Figure 3.2: Non-infrastructure components of engineering construction, public and private sectors, Australia last ten year





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Public sector priorities

Table 4.1: Public sector infrastructure priorities over the years

Rank	2008-09		2012-13		2017-18	
	Asset class	% of construction	Asset class	% of construction	Asset class	% of construction
1	Roads	38.4	Roads	43.5	Roads	44.2
2	Electricity	23.7	Electricity	22.7	Railways	18.1
3	Water	15.1	Railways	10.7	Telecomm	13.5
4	Railways	8.3	Water	8.3	Electricity	8.0
5	Sewerage	7.2	Sewerage	7.4	Water	7.0
6	Bridges	4.4	Telecomm	3.9	Sewerage	5.2
7	Harbours	2.7	Bridges	2.4	Bridges	2.7
8	Telecomm	0.2	Harbours	0.9	Harbours	1.2
9	Pipelines	0.0	Pipelines	0.1	Pipelines	0.0



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Asset classes

- Roads and telecommunications construction have increased; accounts for on average for 47.7% of construction over the past decade.
- Bridges, railways, harbours, water, sewerage and electricity have fallen; negligible construction of pipelines; accounts for on average 52.3% of construction over the past decade.



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Average jurisdictional trends

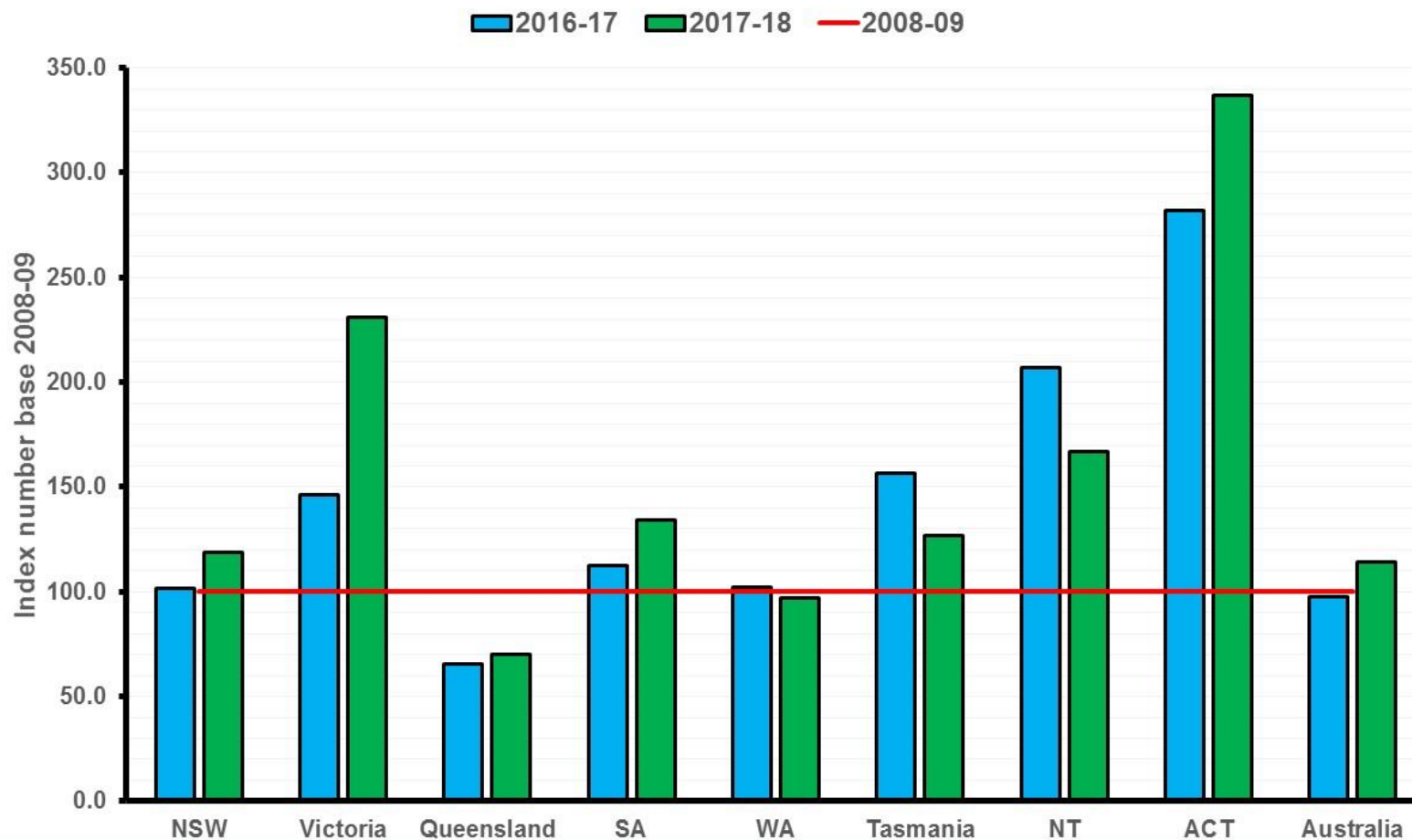
- Four jurisdictions have increasing trends; Victoria, Tasmania and the two Territories; account on average for 18.9% of national infrastructure construction over the past decade.
- Four jurisdictions have decreasing trends; NSW, Queensland, South Australia and Western Australia; account on average for 81.1% of national infrastructure over the past decade.



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Recent jurisdictional trends

Figure 6.5: Public sector infrastructure completed in jurisdictions and Australia in the last two years compared to the beginning of the decade




Population & economic growth

- Until 2012-13 public sector infrastructure grew ahead of economic growth. Since then it has lagged. The upswing since 2014-15 has helped but infrastructure still lags.
- Public sector infrastructure has also lagged population growth, particularly in Sydney and Melbourne.

Effectiveness of projects

- Positive aspects of statistical trends in engineering construction is having relatively objective information about developments on the ground.
- The down-side is we don't know anything about the effectiveness of the projects implemented.
- There has been an increasing tendency for projects to be announced during election campaigns without adequate planning and typically before business cases and benefit-cost analyses have been undertaken.



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