



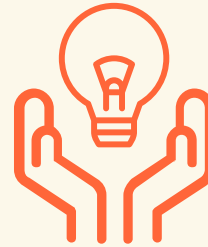
PACIFIC INFRASTRUCTURE PIPELINE UPDATE

Summary of the Regional
Infrastructure Opportunity

DRIVING DEEPER VISIBILITY OF UPCOMING INFRASTRUCTURE PROJECTS



1. What is a consolidated infrastructure pipeline and what are we trying to achieve



2. Limitations of the consolidated infrastructure pipeline



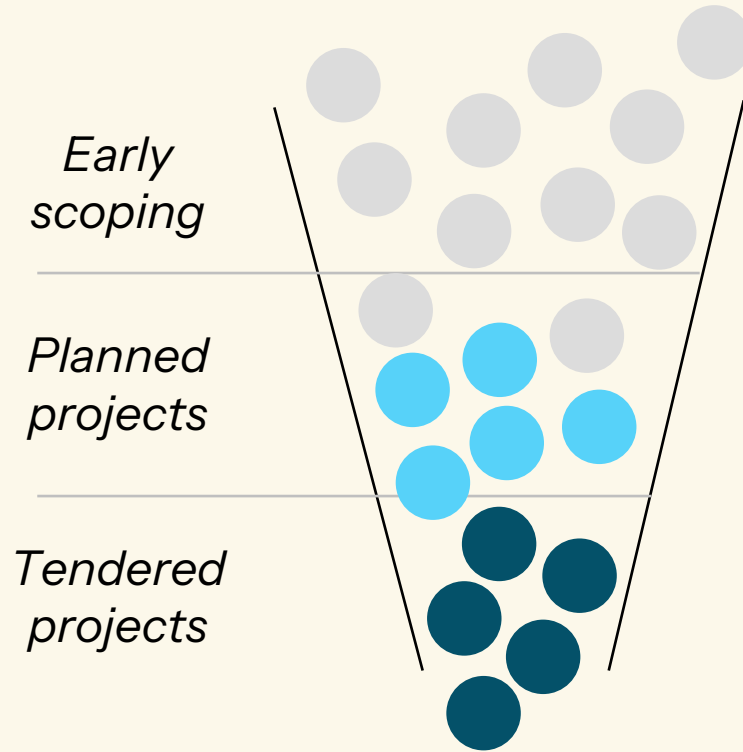
3. Summary of the consolidated infrastructure pipeline outputs

1. What is a consolidated infrastructure pipeline and what are we trying to achieve?

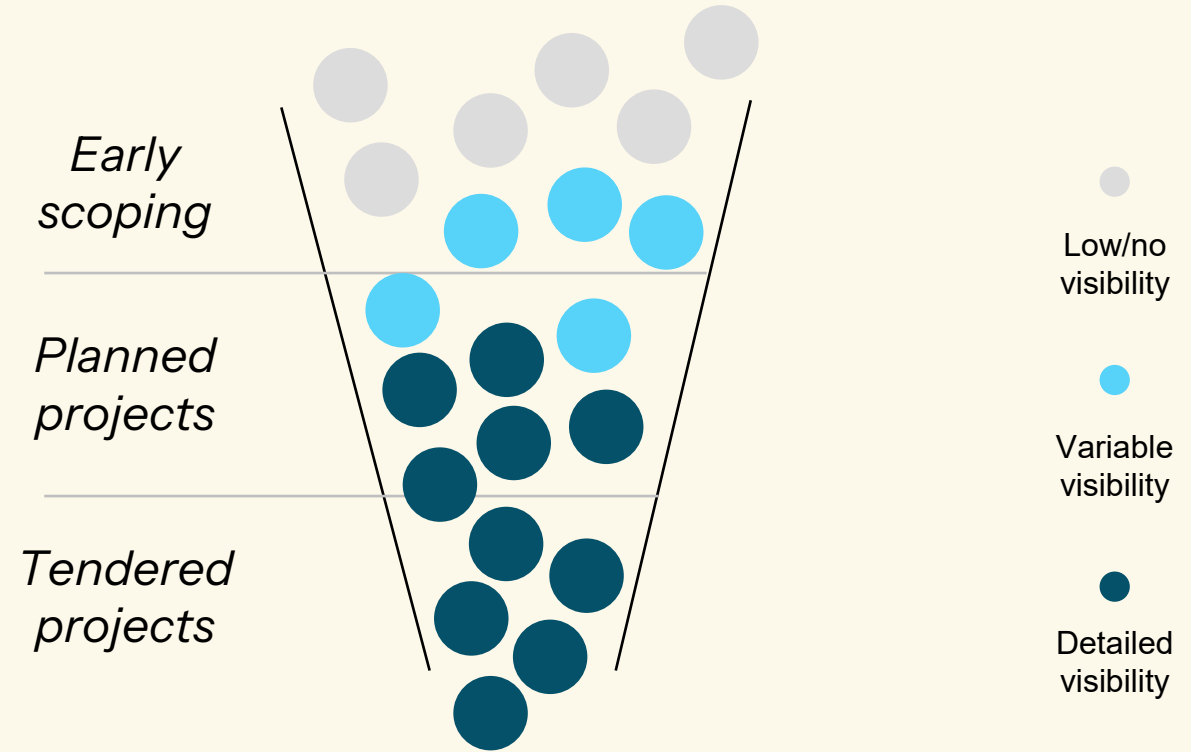
WHAT ARE WE TRYING TO ACHIEVE?

The consolidated pipeline pilot is trying to answer a key question of bidders:
What projects are funded and when are they happening?

Historical pipeline visibility:



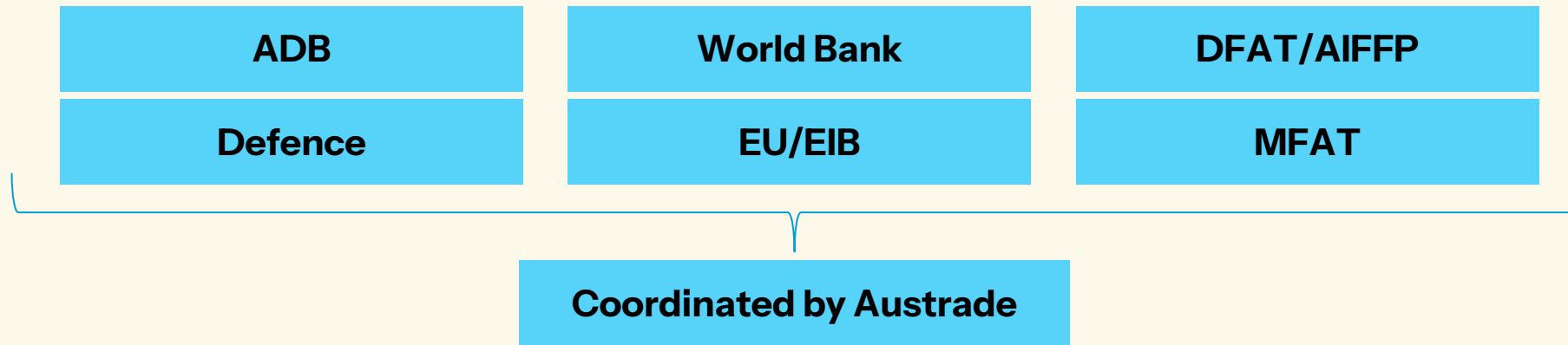
Current pipeline visibility:



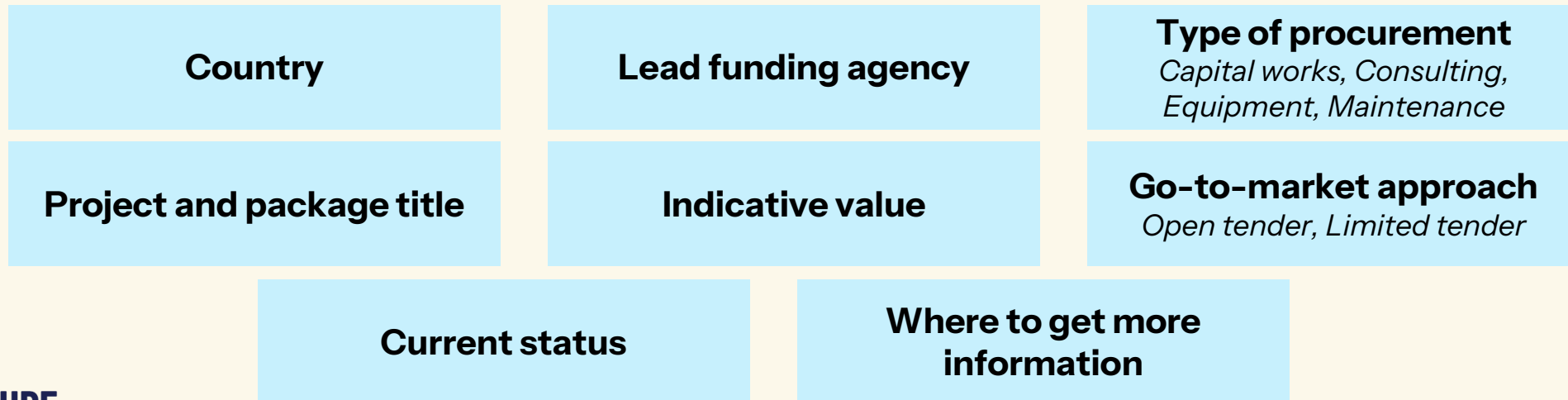
1. What is a consolidated infrastructure pipeline and what are we trying to achieve?

WHAT IS INCLUDED IN THE PIPELINE?

Who is included in the pipeline:



What is included:



NO PIPELINE IS PERFECT

1

The consolidated pipeline **is not exhaustive and does not intend to be**

2

Projects and packages are only included where the partner is confident of an indicative procurement timetable – and **they are still subject to change**

3

Procuring agencies have differing databases, **making extracting all required data challenging**

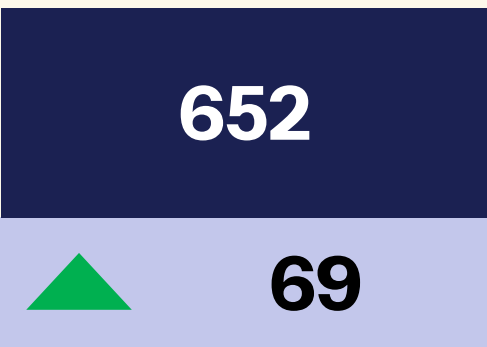
3. Summary of the consolidated infrastructure pipeline outputs

HIGH LEVEL OUTPUTS OF THE AUGUST 2025 PIPELINE

Note: Defence values excluded



in package value
variance from February 2025



in # of packages
variance from February 2025

	Capital works – 309 packages
	Equipment – 30 packages
	Consulting – 307 packages
	Other – 8 packages
US\$3.1M Average package value	
US\$230,000 Median package value	

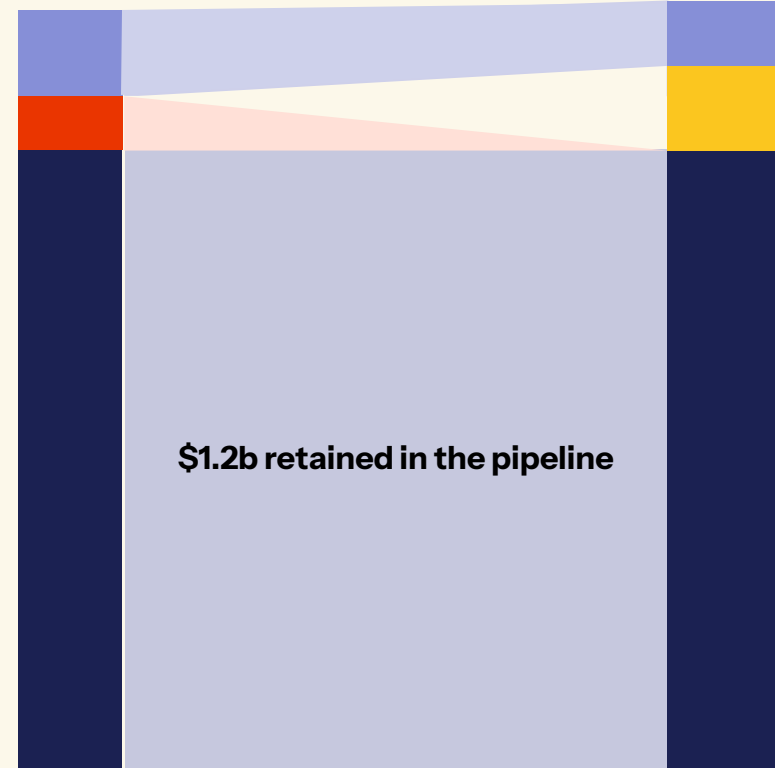
3. Summary of the consolidated infrastructure pipeline outputs

FEBRUARY 2025 TO AUGUST 2025 - WHAT'S CHANGED? (\$10M+)

February 2025
\$1.46B

August 2025
\$1.50B

7 packages worth \$105m have either been procured or are in procurement since February



5 packages worth \$159m have been rescope, reducing their collective value by \$27.5m

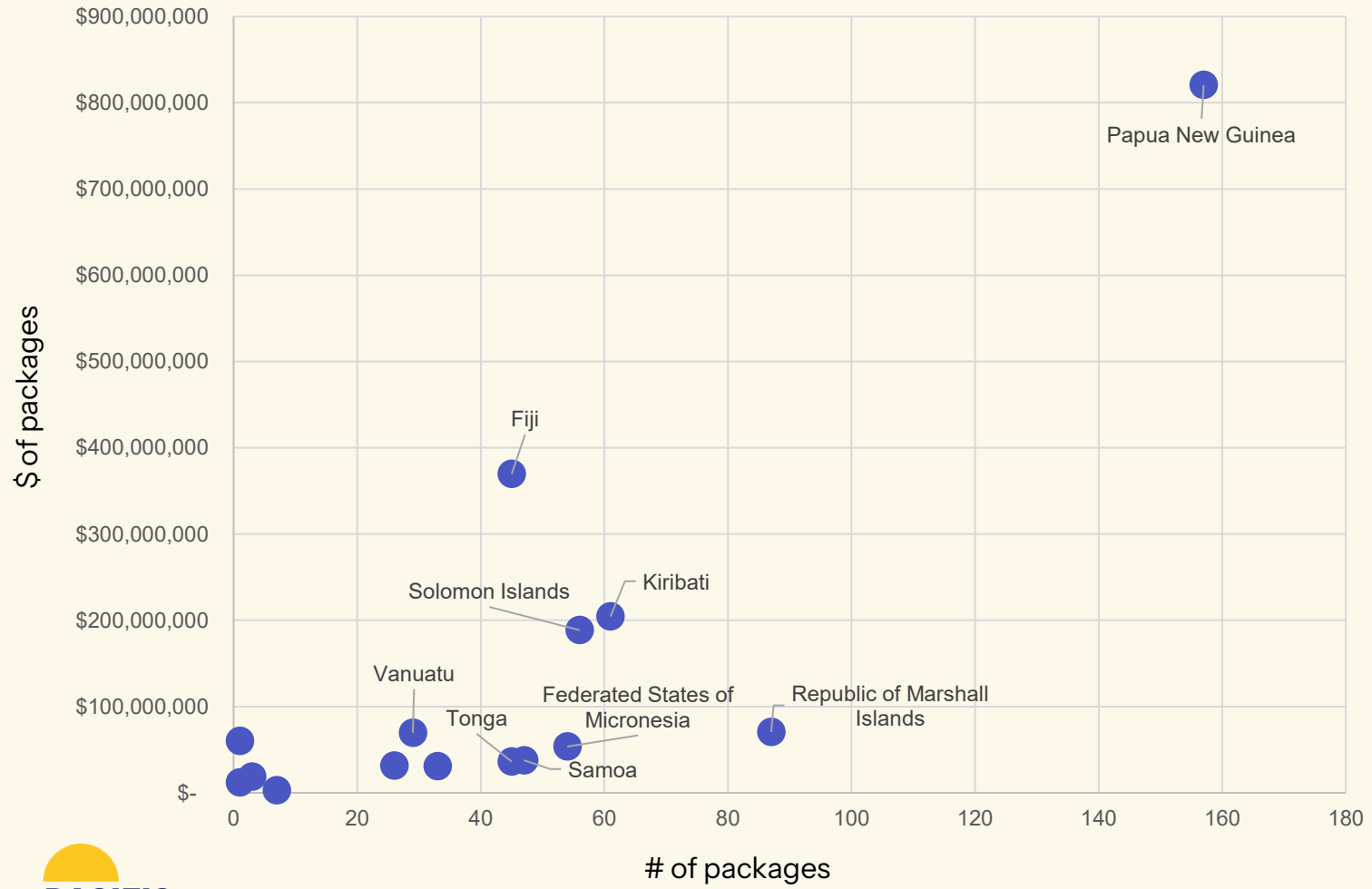
10 packages worth \$167m have been added to the pipeline since February

New packages added - highlights

- \$31M**
Solomon Islands - Supply and installation of solar panels, inverters and batteries (Renewable Energy Development Project - ADB)
- \$24M**
Solomon Islands - Augmentation and rehabilitation of Kongulai water treatment plant (Rebidding, ADB)
- \$20M**
PNG - Output and Performance Based Maintenance on Ramu Highway (OPBC) from Waterais Junction to Yenema Bridge - 83 KM (World Bank)
- \$15M**
Palau - EPC - Integration of grid upgrades, solar farm modifications and upgrade (DFAT/AIFFP)

3. Summary of the consolidated infrastructure pipeline outputs

HIGH LEVEL OUTPUTS BY MARKET



Key highlights

An increase of **\$102m in the infrastructure pipeline in the Solomon Islands**

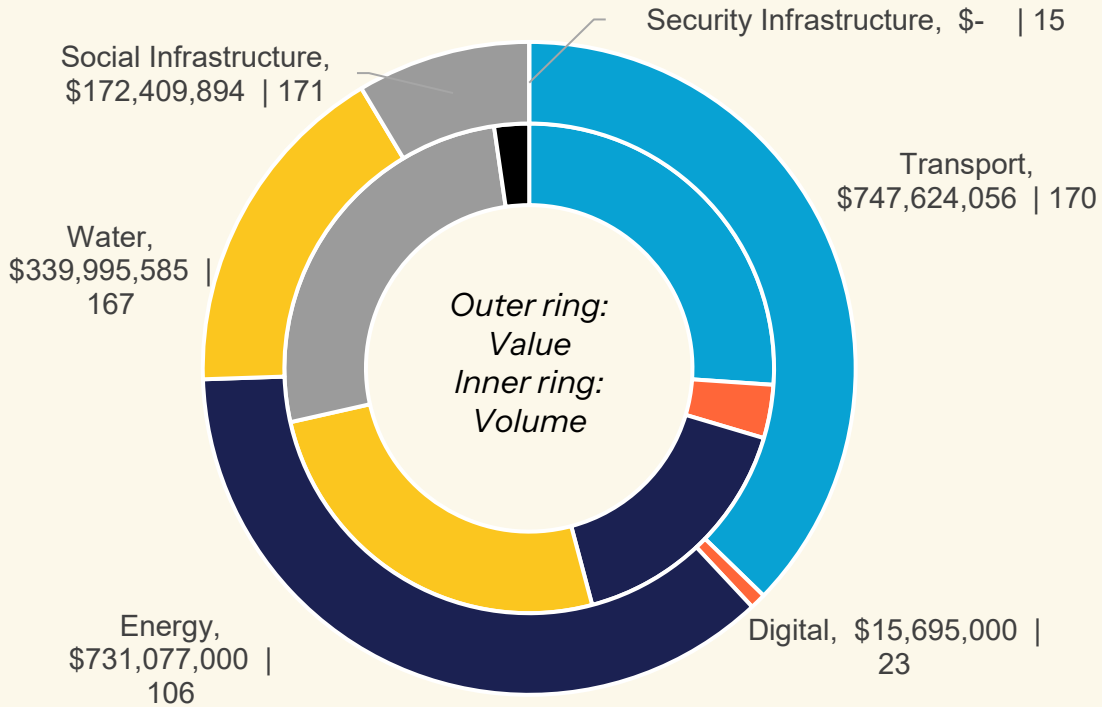
An increase of **\$58m and 72 packages in the Marshall Islands**

Any earthquake recovery activities in **Vanuatu are yet to hit the pipeline**, with a reduction of \$31m

3. Summary of the consolidated infrastructure pipeline outputs

HIGH LEVEL OUTPUTS BY SECTOR

Package volume and value by sector



Key highlights

There are four key sectors in the pipeline: **transport, water, social infrastructure and energy**

While Energy has relatively few packages, the average package value remains significantly higher than other sectors

Compared to 6 months ago, there has been an uptick in the number of Digital packages, up to 23 valued at \$16m

3. Summary of the consolidated infrastructure pipeline outputs

LEAD FUNDING SOURCE

Note: Defence values excluded

	Feb 2025		August 2025		Variance	
	# of packages	\$ of packages	# of packages	\$ of packages	# of packages	\$ of packages
World Bank	118	\$231M	89	\$243M	-29	\$12M
DFAT (AIFFP)	13	\$334M	15	\$350M	2	\$16M
EU / EIB	13	\$453M	13	\$453M	0	\$-
MFAT	4	\$21M	4	\$23M	0	\$2M
ADB	418	\$843M	516	\$938M	98	\$95M

3. Summary of the consolidated infrastructure pipeline outputs

PACKAGE VALUE IN DETAIL

Note: Defence values excluded





INTRODUCING THE PACIFIC INFRASTRUCTURE BRAND



Coordinate among development partners on:

Updates to the pipeline

**Pilot initiatives to enhance industry
engagement**

Events and information dissemination



PACIFIC INFRASTRUCTURE ROADSHOW

Asian Development Bank

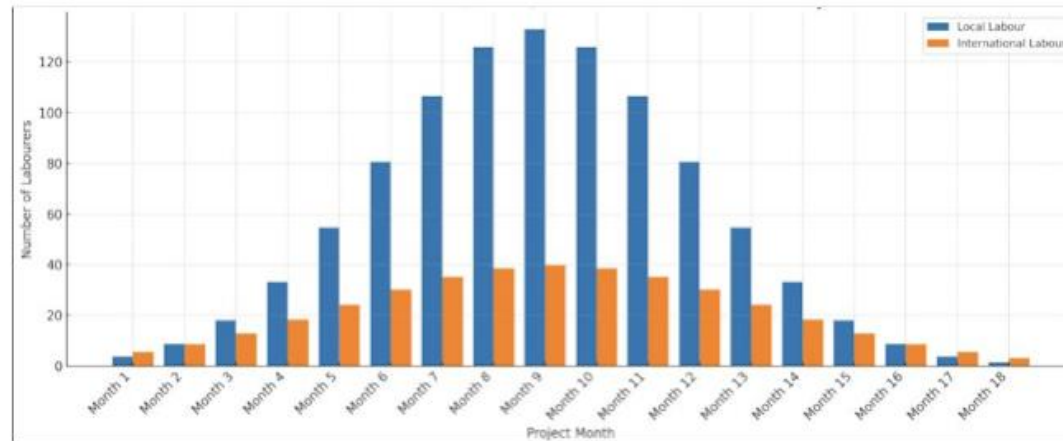


Approach

Qualification Criteria

- As a minimum, **50 % of the workforce (person-days) shall be local labor**
- Applicable on 1 January 2026; transition arrangements will apply.
- Lower threshold permitted in certain situations (e.g., SIDS) if justified in procurement strategy.
- **Calculation by person days**

Required on internationally advertised contracts (works), recommended elsewhere





Approach

Merit Point Criteria

- Option to include scoring up to 15 % in MPC evaluation for:
 - Maximizing use of local resources (JV, subcontractors, materials, equipment labor)
 - Local job creation (exceeding thresholds outlined above)
 - Local skills development proposals
- **Skills Development** covers on the job training, structured trainings, knowledge transfer etc.
- **Local Partnerships** in Innovation and Technology Transfer
- **Social Value** – impact and opportunities for local communities
- ADB collaborated with GIZ the **Build4Skills** program, establishing the template for inclusion of construction traineeship in projects.

Ongoing bidding

- **Fiji - Rural Electrification Support Project**
 - PP-1: Expansion and Upgrading of 100 kW Mini Hydropower Facility at Buca Village
 - PP-2: 100 kW Solar PV- (Mini Grid) - With Battery Energy Storage System, Tiliva Village
- **Tuvalu – Funafuti Water and Sanitation Supply Project**
 - Main works (Desalination+ Wastewater Plant, Reservoir, Network - Design, Build, O&M Support)
- **Solomon Is - Integrated Solid Waste Management Project for Climate and Disaster Resilient Honiara**
 - CW-01 Works
 - Lot 1: Construction of new landfill site and associated infrastructure at Tenaru
 - Lot 2: Construction of new waste transfer station at Ranadi, and rehabilitation of the existing dumpsite at Ranadi
- **Nauru - Sustainable Resilient Urban Development Project**
 - CW-1 :Water Supply package
 - CW-2: Sanitation package

Upcoming bidding

- **Kiribati - South Tarawa Renewable Energy Project (Phase 2)**
 - Design, supply, installation, testing & commissioning of transmission and distribution network and grid connections
 - Floating Solar, e-vehicle and charging stations
- **Tuvalu- Increasing Access to Renewable Energy Project (Additional Financing)**
 - Floating Solar, e-boat, e-carts and charging stations
 - LV Supply and Upgrade
- **PNG - Power Sector Development Project (PSDP-P-02)**
 - Lot 1: MV/LV Distribution Works & Households Connection-Ramu(Madang)
 - Lot 2: MV/LV Distribution Works & Households Connections Pom: Motukea, Gomore Feeders
 - Lot 3: MV/LV Distribution Works & Households Connections WNP
- **Fiji – Kinoya Wastewater Treatment Plant**

Recent/ Upcoming tenders

- Various PMU individual consultants
- Circular Pacific via Regional Recycling Network – Feasibility Study
- Rostered Consultant Firms
- Procurement Consultant Panel



PACIFIC INFRASTRUCTURE ROADSHOW

DEPARTMENT OF DEFENCE





PACIFIC DIVISION – WHO WE ARE

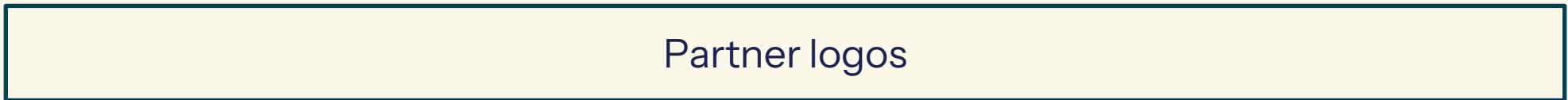
▶ OUR VISION

“ Pacific Division is translating whole-of-government ‘National Defence’ objectives into tangible, valued practical outcomes for Defence and the Pacific region. ”



The Pacific Division is spread across five branches:

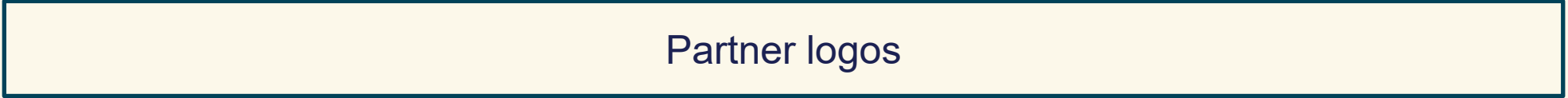
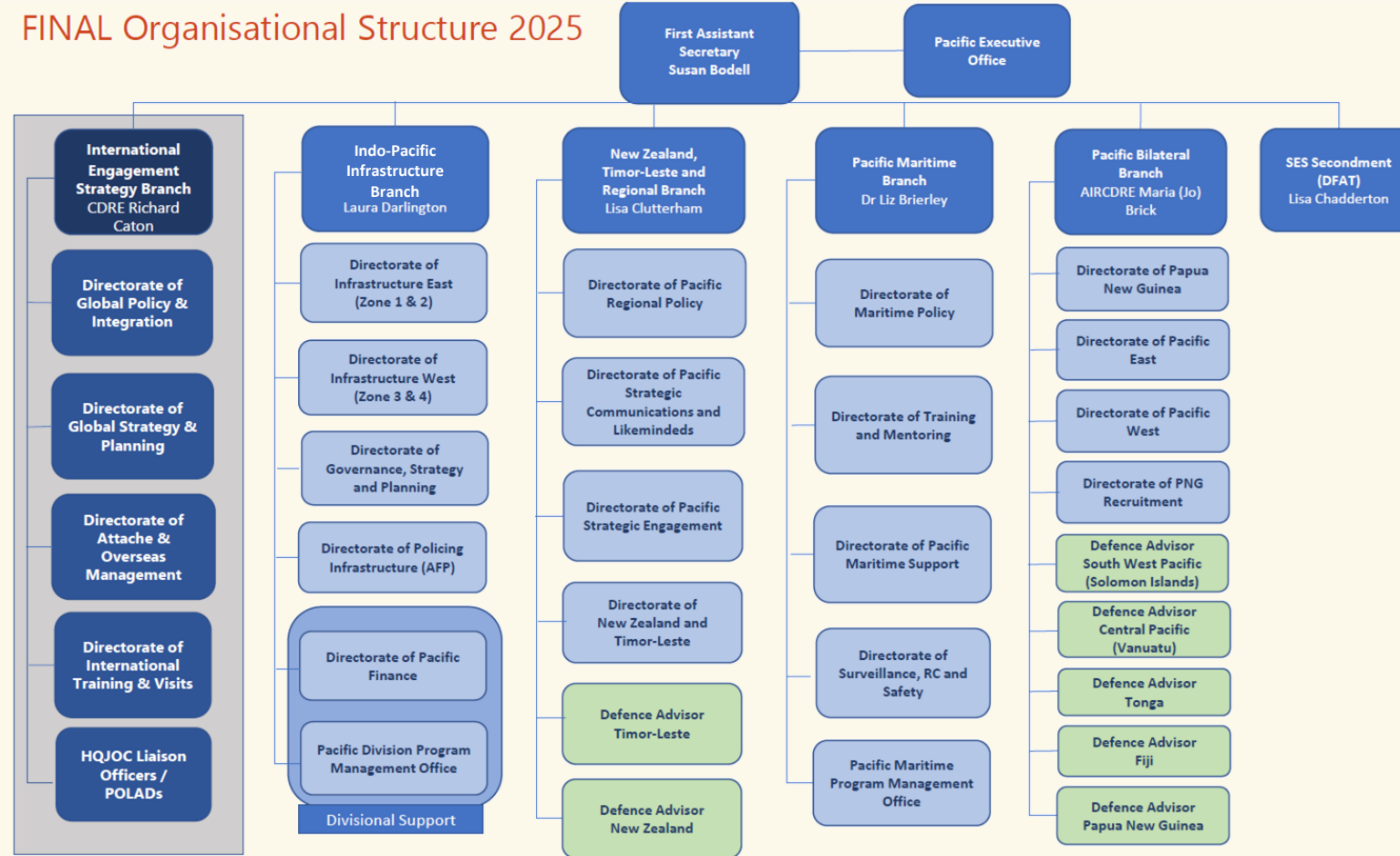
- 1  **Indo-Pacific Infrastructure**
- 2  **Pacific Maritime**
- 3  **New Zealand, Timor-Leste & Regional**
- 4  **Pacific Bilateral**
- 5  **International Engagement Strategy**





DIVISION STRUCTURE

FINAL Organisational Structure 2025





INFRASTRUCTURE BRANCH STRUCTURE

Assistant Secretary Indo-Pacific Infrastructure
Laura Darlington

← *Infrastructure focussed* → ← *Division focussed* →



Partner logos



INFRASTRUCTURE BRANCH STRUCTURE

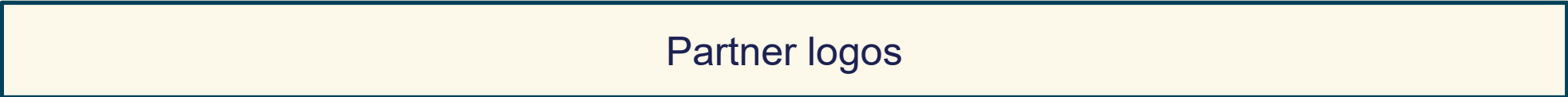


Partner logos



UPCOMING PACKAGES (1 OF 2)

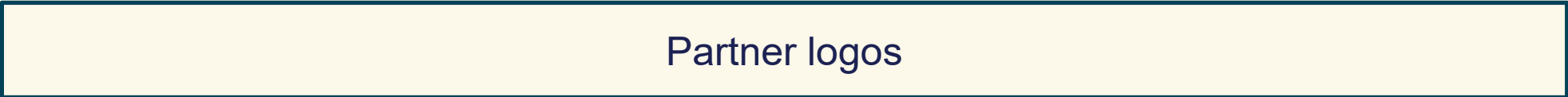
Location	Description	Expected Contract Type	Est timeline	ATM Status/ Type
Solomon Islands	Solomon Islands - Eastern Border Outpost - Works Package 2	Head Contract (Design & Construct)	Q3 2026	PANEL TENDER
Solomon Islands	Solomon Islands - Eastern Border Outpost - Works Package 3	Head Contract (Design & Construct)	Q3 2026	OPEN TENDER
Solomon Islands	Solomon Islands - Eastern Border Outpost - Works Package 4	Head Contract (Design & Construct)	Q1 2028	OPEN TENDER
Tonga	His Majesty's Armed Forces (HMAF) Air Wing Hangar, Taliai Military Camp	Medium Works Contract	29 SEP 2025	AWARDED
Papua New Guinea	Essential Services - Goldie River Training Depot	Head Contract (Construct)	Q1 2026	OPEN TENDER
Papua New Guinea	Essential Services - Igam Barracks	Head Contract (Construct)	Q4 2026	OPEN TENDER
Papua New Guinea	Sustainment & Maintenance Contract - HMPNGS Tarangau, Manus Island	Head Maintenance Contract	Q1 2026	OPEN TENDER





UPCOMING PACKAGES (2 OF 2)

Location	Description	Expected Contract Type	Est timeline	ATM Status/ Type
Solomon Islands	Regional Fisheries Surveillance Centre	Design Services Contractor	Q4 2025	UNDERWAY
Samoa, Fiji, Vanuatu, Papua New Guinea	Pacific Policing Initiatives – Regional Centres of Excellence	Project Manager/Contract Administrator Design Services Contractor Head Contract (Construct)	Q4 2025 (PMCA) Q4 2025 (DSC) Q2 2027 (HC)	PANEL PANEL OPEN TENDER
Kiribati	Pacific Police Infrastructure Program – Kiribati Police Headquarters	Medium Works Contract (Design & Construct)	Q4 2025	OPEN TENDER





PACIFIC INFRASTRUCTURE ROADSHOW

WORLD BANK



WORLD BANK FINANCED PROJECT SPOTLIGHT

Federated States of Micronesia (FSM)

P177073 – Strategic Climate-Oriented Roads Enhancement Project

Vulnerability Affected Roads, 4 lots in Chuuk, Yap, Pohnpei and Kosrae

Estimated: USD16 million

Planned Procurement Commencement Date: April 2026

EME Plan Date: TBC

WORLD BANK FINANCED PROJECT SPOTLIGHT

Fiji

P178694 – Fiji Tourism Development Program in Vanua Levu

1. Labasa Pavement & Carpark (Asphalt overly, remarking, stormwater management and other works) &
2. Savusavu Pavement (Base reconstruction, Seawall Remediation, Stormwater, Drainage maintenance, Pavement maintenance and Airside Services - Conduits)

Estimated: USD7.5 million

Planned Procurement Commencement Date: January 2026

WORLD BANK FINANCED PROJECT SPOTLIGHT

Kiribati

P506425 – Kiribati Kiritimati Infrastructure Project

Civil Works for Cassidy Airport and London Town roads

Estimated: USD85 million

Planned Procurement Commencement Date: March 2027

EME Plan Date: October 2026

WORLD BANK FINANCED PROJECT SPOTLIGHT

Kiribati

P506425 – Kiribati Kiritimati Infrastructure Project

Supply and Installation of Equipment for Cassidy Airport

Estimated: USD10.8 million

Planned Procurement Commencement Date: March 2027

EME Plan Date: June 2026

WORLD BANK FINANCED PROJECT SPOTLIGHT

Kiribati

P176306 – Kiribati Health Systems Strengthening Project

Construction of New Kiritimati District Hospital & Equipped

Estimated: USD13 million

Planned Procurement Commencement Date: January 2026

WORLD BANK FINANCED PROJECT SPOTLIGHT

Kiribati

P176478 – South Tarawa Sanitation Project

Sewerage Connections - Bikenibeu, Bairiki, Betio - Design and Build

Estimated: USD10.8 million

Planned Procurement Commencement Date: October 2025

WORLD BANK FINANCED PROJECT SPOTLIGHT

Papua New Guinea:

P166991 – Resilient Transport Project

Output and Performance Based Maintenance on Ramu Highway (OPBC) from Waterais Junction to Yenema Bridge - 83 KM

Estimated: USD20.3 million

Planned Procurement Commencement Date: October 2025

EME Plan Date: Not yet scheduled

WORLD BANK FINANCED PROJECT SPOTLIGHT

Papua New Guinea:

P167820 – Energy Utility Performance and Reliability Project (EUPRIP)

Medium Voltage Distribution Network Upgrades - Lae and Port Moresby

Estimated: USD10 million

Planned Procurement Commencement Date: October 2025

EME: Already concluded in August 2025

WORLD BANK FINANCED PROJECT SPOTLIGHT

Samoa

P176272 – Samoa Aviation and Roads Investment Project

Supply & Installation of NAVAIDS Equipment for Faleolo International Airport

Estimated: USD7 million

Planned Procurement Commencement Date: November 2025

WORLD BANK FINANCED PROJECT SPOTLIGHT

Samoa

P181456 – Samoa Finance Sector Resilience and Development Project

NDIDS/CRVS Systems Integrator (IT system procurement)

Estimated: USD5.6 million

Planned Procurement Commencement Date: January 2026

WORLD BANK FINANCED PROJECT SPOTLIGHT

Solomon Islands:

P176548 – Second Solomon Islands Roads and Aviation Project

Suavanao Airfield (Runway upgrading with drainage improvement)

Estimated: USD15 million

Planned Procurement Commencement Date: October 2025

WORLD BANK FINANCED PROJECT SPOTLIGHT

Tonga

P180965 – Health Enhancement and Resiliency in Tonga Project (HEART)

Rebuilding, retrofitting and equipping Prince Wellington Ngu Hospital

Estimated: USD15 million

Planned Procurement Commencement Date: September 2026

EME: July 2026

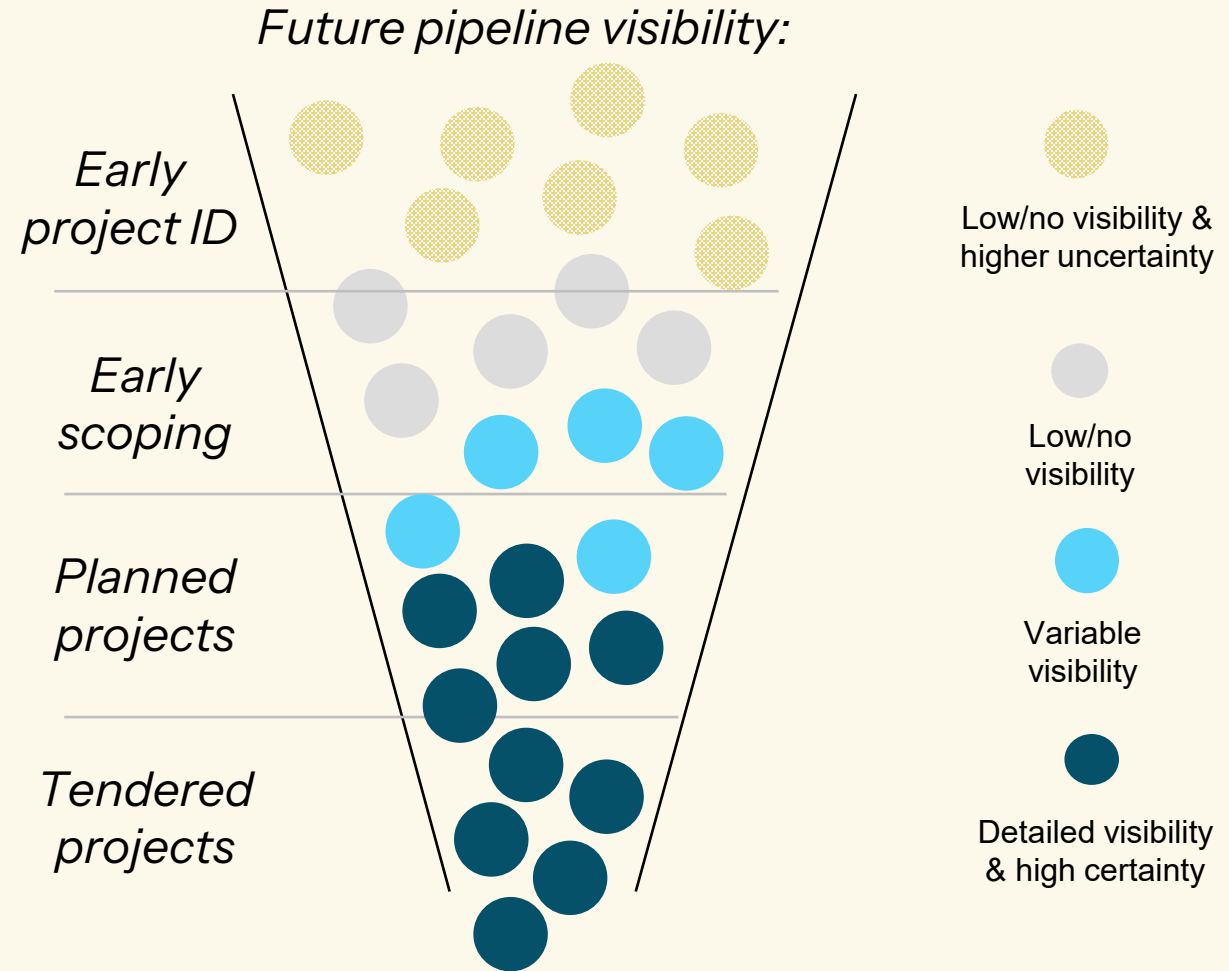


PACIFIC INFRASTRUCTURE

ONLINE PIPELINE DEVELOPMENT

DEVELOPING THE ONLINE PIPELINE

- Emerging markets work better with long-term information.
- PIC Governments have longer-term (5-10 year) projects being identified and under very-early scoping (through NIIPs).
- Combined, over 1,100 projects and packages from all sources.
- Potential scale and scope of market can be better understood.
- Online Pipeline being developed like ANZIP (<https://infrastructurepipeline.org/>).
- Software developer on-board.
- Launch end 2025.



DEVELOPING THE ONLINE PIPELINE

Key features:

- Fuller scope of projects and packages from NIIPs through to current tenders.
- User accounts/login.
- Higher frequency updates (including API when possible).
- Customable user searches and data aggregations by entry attributes (e.g. location, project stage, sector etc.).
- Standardized charts and data tables etc.
- Basic downloads of data based on searches.
- Links to project details (where available).
- Mapping of project locations (where data available).
- *Note:* Notifications of launch will be sent.



PACIFIC INFRASTRUCTURE PIPELINE UPDATE



Contact Austrade via the Go Global Toolkit to access the consolidated infrastructure pipeline



Connect on LinkedIn for regular updates