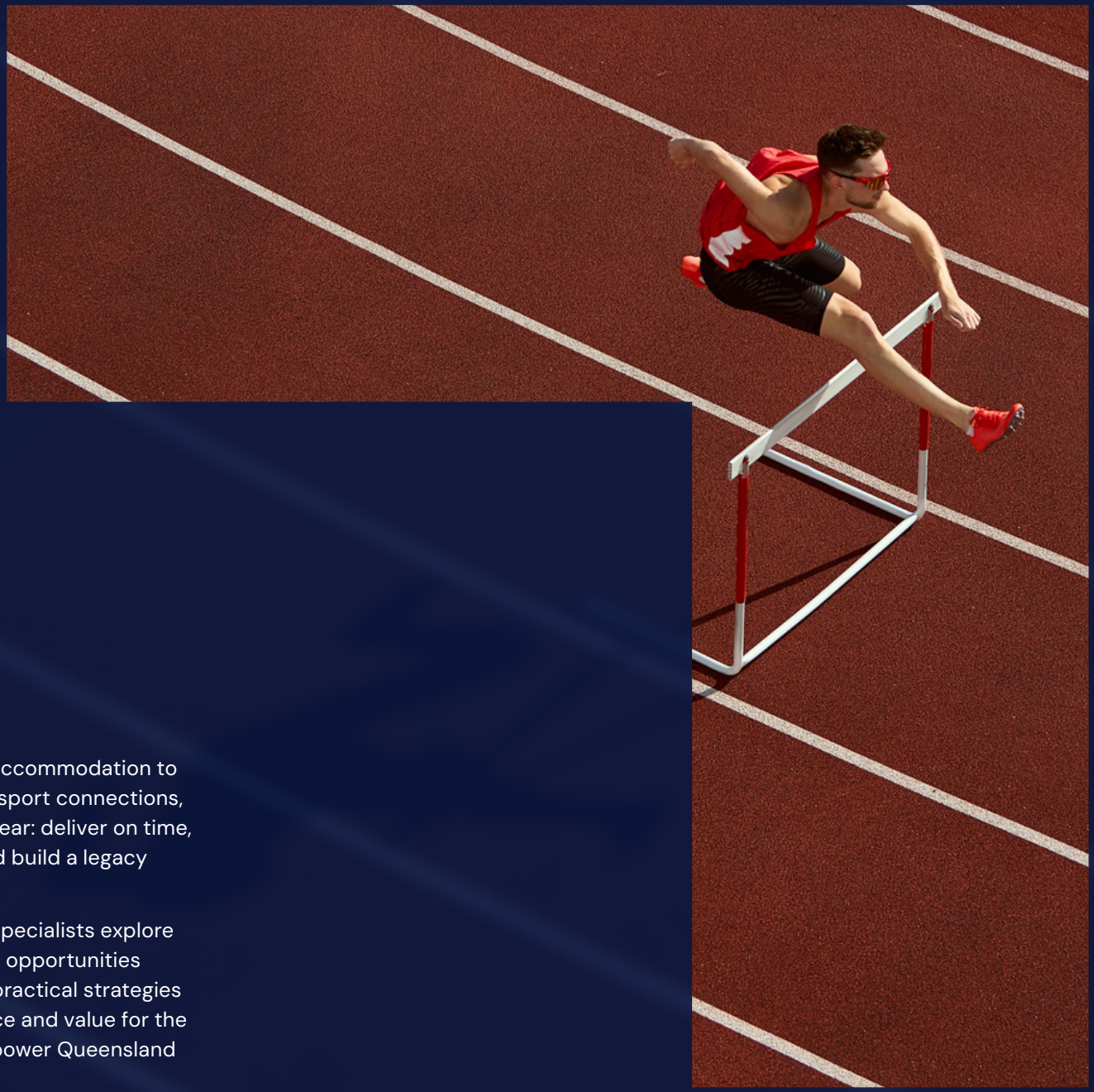
From vision to legacy: a game plan for Brisbane 2032 and beyond

Empowering growth.

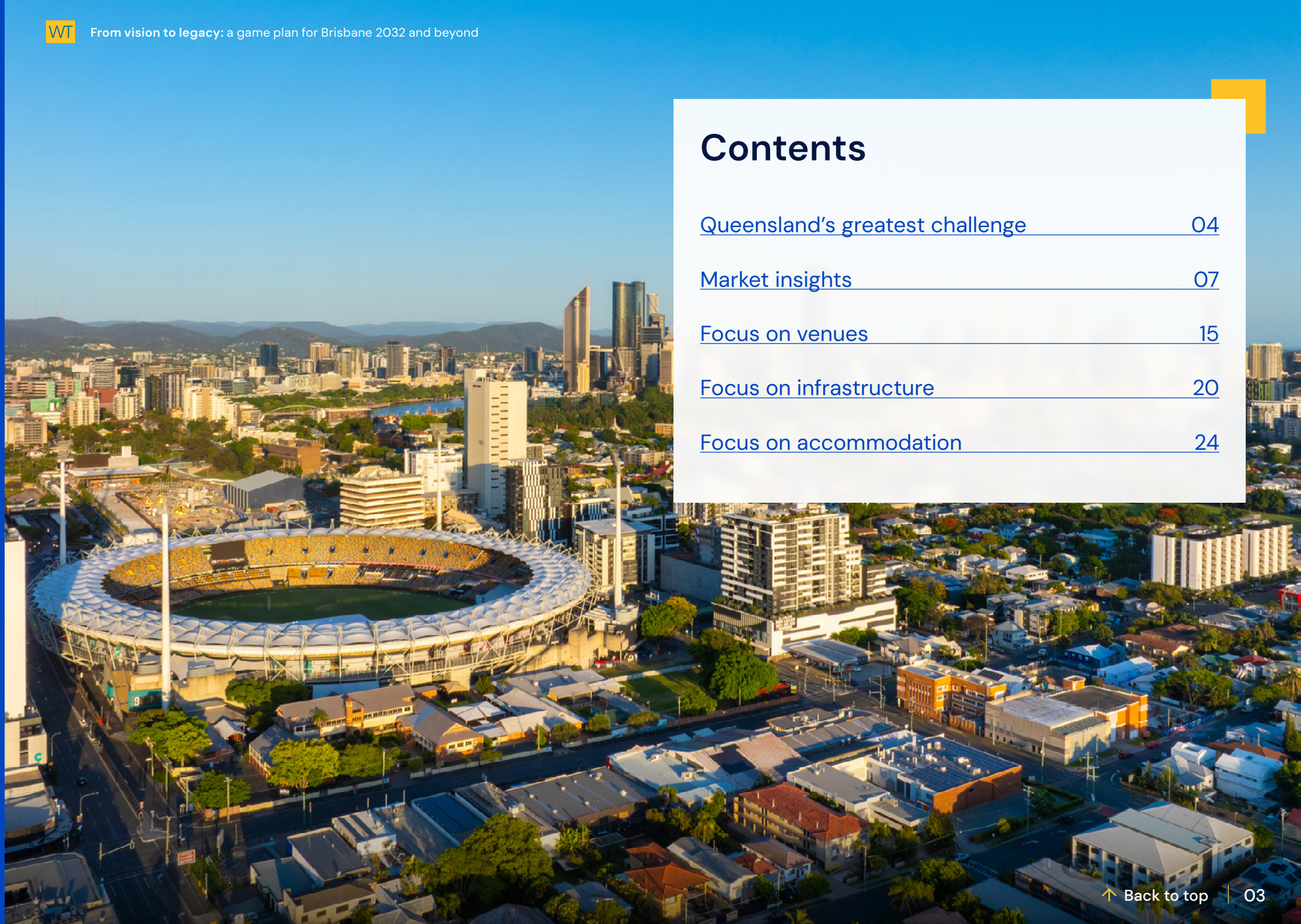


It’s both a sprint and a marathon

The Brisbane 2032 Olympic and Paralympic Games gives Queensland a once-in-a-generation infrastructure opportunity and challenge: hosting a world-class event while also delivering a sustainable social, economic and environmental legacy. It’s both a sprint and a marathon.

From venues and accommodation to precincts and transport connections, the game plan is clear: deliver on time, stay on budget and build a legacy that lasts.

In this report, our specialists explore the challenges and opportunities ahead, proposing practical strategies to realise excellence and value for the Games and to empower Queensland for generations.



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Queensland's greatest challenge

Queensland's infrastructure delivery program isn't just ambitious. It's unprecedented.

Never before has the state faced a pipeline of this scale: world-class venues, accommodation, precincts and transport links all under a global spotlight.

> Success won't be measured only by what's ready on day 1. It will be judged by **quality, value and legacy**.

Budgets will be under extreme public scrutiny. The expectations from athletes, media and visitors will be sky high. And Queenslanders will deserve long-lasting value from the giant spend.

To turn the heat up, throw in cost escalation, labour competition, and industry-wide constraints on productivity.

Construction in Queensland is already under serious strain. Major health, energy and housing projects are already competing for skilled labour. Infrastructure Australia warns we'll need another 18,000 engineers in Queensland by 2032 – not to mention the thousands of tradies, project managers and other specialists needed.

Across Australia, projects are blowing out, driven by inflation, risk premiums and labour shortages. Every delay, every vague scope, every procurement misstep comes at a hefty cost.

The consequences of falling short are untenable. Think of previous Games that haven't gone swimmingly – leaving unfinished assets or expensive white elephants that sit underused and over budget after the closing ceremony.

But there's still **time to get it right**.

Queensland's greatest challenge

It starts with **cost clarity**. Not loose estimates, but robust forecasting based on live market intelligence, local insights and credible modelling.

We need to understand not only the cost to build, but also the real cost to run, maintain, adapt and evolve every asset over decades.

Rigorous cost control must follow. Without cost discipline from the outset, capital outlay and delivery outcomes will drift further apart. The right balance of functionality, finishes and whole-of-life value needs to be found early.

We must **plan realistically** for inevitable constraints. Strategic staging and packaging of projects will be critical. The right procurement approaches can incentivise performance, encourage innovation, support rapid mobilisation and accelerate delivery.

There's no doubt we'll have to build faster and better. Some Queensland construction sites are averaging just 2.5 productive days a week. With a skilled labour shortfall and tight timelines, this won't cut it.

Modular construction, offsite manufacturing and preassembled components are gaining traction. They can dramatically lift efficiency, accelerate build times, and reduce labour intensity on site. But they need to be **integrated from the outset**, not as a late-stage resort.

Crucially, Queensland must **build a legacy**. Every new build must have a life beyond the Games – whether that's a venue converted into a multipurpose community facility, or an athlete's village transformed into social and affordable housing or student accommodation, or infrastructure that can cater for long-term growth in what is already Australia's fastest growing region.

It means designing for flexibility, lower lifecycle costs and long-term sustainability. It means choosing low-maintenance and high-durability materials, embedding energy efficiency and renewable electricity, and planning for adaptive reuse.

The road to 2032 is steep and the clock is ticking. If we don't act with urgency, we risk falling behind. It's time to get real about the bottlenecks and how we can unlock the delivery strategies that will get us across the line.

With the right strategies and partnerships, Queensland has the potential to deliver an exceptional Games and define the future of Australian infrastructure.

Queensland's greatest challenge

Getting real about bottlenecks

Challenges

- Need for long-lasting value and legacy
- Budgets under pressure and scrutiny
- Fixed deadlines
- Industry-wide constraints on productivity
- Intense labour competition
- Cost escalation, inflation, risk premiums

Opportunities

- Designing for flexibility, lower lifecycle costs and long-term sustainability
- Scope and cost clarity
- Strategic staging and packaging of projects
- Modular construction, offsite manufacturing and preassembled components
- Strategic procurement approaches, additional labour capacity through apprenticeships and migration
- Productivity improvements, increased labour capacity and rigorous cost control

Market insights

There is a huge amount of work to be done across Queensland's building and infrastructure sectors ahead of 2032 – with a footprint estimated at $120 billion.

Productivity and cost escalation will be key to whether this can be delivered, including whether best value for money outcomes are achieved.

Market insights

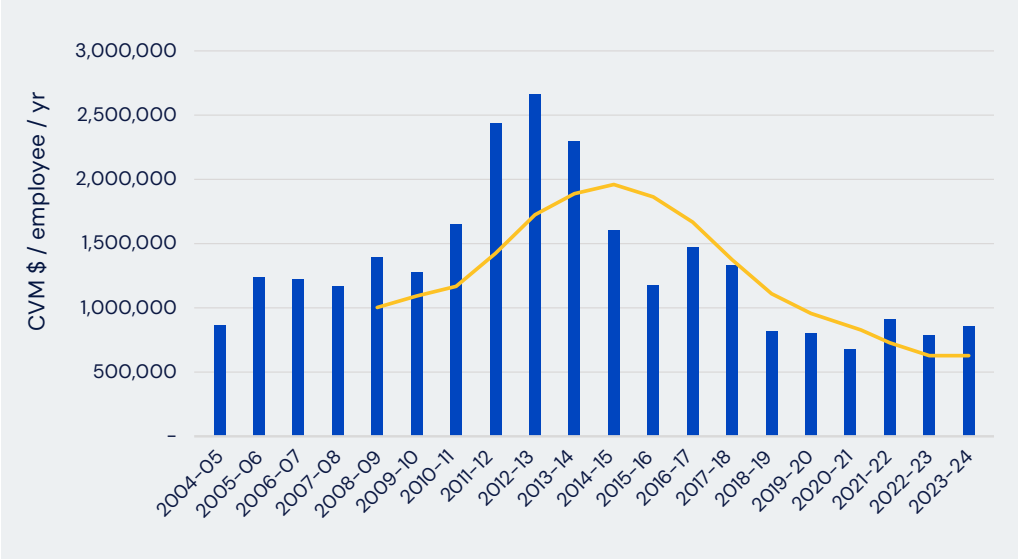
Productivity

Queensland's construction sector is entering a defining period.

The introduction of the Queensland Procurement Policy 2026 (QPP 2026) establishes the most consistent whole-of-government procurement settings the state has seen, removing longstanding variability in contract terms, risk allocation and documentation across agencies. Combined with the findings of the Queensland Productivity Commission's (QPC) construction productivity inquiry, the policy environment now removes several structural barriers that have suppressed productivity for over a decade.

The 'so what' is significant: with clearer settings, simpler rules and fewer constraints, industry now has the conditions required to reverse the steep productivity decline shown in the Queensland Major Contractors Association's 2025 *Productivity Issues Paper*. The QPC quantified the cost of stagnation to Queensland. Had productivity held at 2018 levels, an additional 77,000 homes could have been delivered, a stark reminder of the economic and social value at stake.

Productivity – value of work delivered per employee



Legend Annual work done 5 year rolling average

Source: Queensland Major Contractors Association (QMCA) 2025, Building and Construction Industry Productivity Issues Paper, Figure 5, p 14.

Cross River Rail, Roma Street Station (render), Brisbane

Market insights

What will drive the impact?

Impact will be driven by a coordinated uplift across policy, culture, capability and project-level execution. The QPC's 5 recommended policy actions collectively form the backbone of this shift:

- **Removal of Best-practice Industry Conditions (BPICs) and easing of subcontractor prequalification** reduces administrative burden and opens competition, enabling faster mobilisation and smoother subcontractor engagement.
- **Improved WHS regime operation** targets clarity and consistency, reducing rework and downtime.
- **Setting expectations for productivity on government sites** gives industry a clearer performance anchor.
- **Cultural change initiatives** address behaviours that slow decision-making and collaboration.
- **Mechanisms to strengthen dialogue between parties** support earlier issue resolution and more efficient risk management.

When paired with QPP 2026's standardised procurement environment, these drivers form a coordinated, whole-of-sector reform platform. This alignment is what will generate the step change needed, moving the industry from compliance-driven delivery to productivity-focused performance.

How does it hit cost?

Improved productivity directly reduces the cost of delivering Queensland's Big Build. Every percentage point of productivity regained lowers:

- **labour costs** through fewer hours per output
- **preliminaries and overheads** via shorter project durations
- **contingencies and risk premiums** as better collaboration and clearer rules reduce uncertainty
- **rework and duplication** by tightening WHS clarity and simplifying procurement steps.

In a constrained market mirroring the dynamics of the mining boom, these savings materially influence the state's ability to deliver its pipeline. Greater productivity is not just an efficiency measure; it is a cost-avoidance mechanism that enhances the purchasing power of public investment.

What mitigations are available?

While policy settings are improving, risks remain, particularly the sector's capacity to absorb the surge in activity. Key mitigations include:

- **engaging early with market capability** to match project packaging and staging with available skills and capacity
- **embedding productivity expectations into procurement documents and KPIs** to translate policy intent into delivery outcomes
- **leveraging standardised QPP 2026 templates** to reduce negotiation cycles and accelerate award timelines
- **strengthening industry-government forums** to identify emerging bottlenecks before they escalate
- **fostering workforce innovation**, including new delivery models, modular methods and targeted attraction strategies.

Queensland now has the policy settings, clarity and alignment needed to lift construction productivity after a decade of decline. The combination of QPP 2026 and the QPC's reform pathway creates a genuine opportunity to deliver more infrastructure faster and at a lower cost to the state.

The challenge ahead is execution. If government and industry maintain momentum, hold to consistent standards, and stay disciplined in how productivity expectations are embedded in projects, Queensland can turn the current surge in activity into a lasting uplift in capability.

The prize is substantial: a more efficient sector, better value for every dollar spent, and the capacity to deliver the Big Build without compromising the pipeline that follows.

Market insights

Cost escalation

What is the likely path forward for construction cost escalation in Brisbane, the south-east and across Queensland more generally?

WT releases the Australian Construction Market Conditions Report twice yearly, examining key factors explaining the current state of play and sector conditions (and how these could persist). This offers crucial insight into why construction cost escalation in Queensland remains well above long-term averages, and why it is likely to increase in coming years.

Based on key sector features and the expected surge in construction to come, WT expects building-sector escalation in Brisbane to climb to 8% in 2027 and then to 10% in 2028, with Gold Coast and Sunshine Coast expected to be similar. The impact on infrastructure escalation is not expected to be as strong, climbing to 7% and 8% in 2027 and 2028 respectively in Brisbane. *Why is this the case?*

The construction labour market in Queensland is tight

This might seem obvious – but is worth exploring further.

In a Queensland construction labour force[1] of just over 311,000, the Australian Bureau of Statistics (ABS) reports that only 5,800 (1.9%) are without a job (November 2025 data). The situation is not quite as acute as in late 2022, when only 3,100 construction workers (or 1.2% of the construction labour force) were unemployed, but it is not far off.

Data on job vacancies provides more granularity by geography. For Brisbane, job vacancies in construction occupations reflect broad Queensland trends. November 2025 data reported 4,055 construction job vacancies in Brisbane – 21% below the October 2023 peak. However, the post-pandemic period's strength in labour demand meant that the November figure was stronger than pre-COVID levels of job vacancies for Brisbane back to August 2012.

Furthermore, when job vacancies for the Gold Coast and Sunshine Coast are considered, November 2025 data is above pre-COVID levels back to December 2011. The post-COVID peak (March 2023) was above any time since the global financial crisis (GFC).

[1] Where construction labour force is defined as construction employment and construction unemployment (those unemployed whose last job was in construction).

Market insights

Help is on the way – but more is needed

The Queensland construction labour force averaged 269,000 in 2022/23, 286,000 in 2023/24 and 292,000 in 2024/25. November 2025 data saw the average for 2025 up to 296,000. So, the market is responding to the forthcoming strength in the pipeline.

Encouragingly, this is coming from multiple sources. Visas for construction trades into Queensland jumped to 3,224 in 2024/25, the strongest figure since 2011/12. Numbers completing apprenticeships in Queensland increased to 7,729 in 2024/25, almost a third above 2023/24 and a quarter above the previous record annual figure.

However, much more is required. We forecast construction commencements – the total value of projects started in any given year – in Queensland to hit an all-time high of $72.1 billion in 2026/27 and $67.2 billion in 2027/28. While commencements highlight activity growth in the sector, calculating the labour force required is more nuanced due to the size and length of the projects driving the record commencements. The labour force peak lags behind the peak of commencements. Our analysis considers a rolling 3-year average for forecast labour shortfall, assuming all forecasted projects are funded.

According to the Queensland Major Contractors Association's 2025 *Productivity Issues Paper*, the value of unfunded projects increases each year from 16% of the pipeline value in 2024/25 to 42-48% of the pipeline value over 2026/27 to 2028/29. Once additional traineeships / apprenticeship and international migration are counted, we forecast a 3-year average of the labour shortage at 27,200 in 2026/27, 43,400 in 2027/28 and 46,000 in 2028/29. This assumes that sector productivity per worker remains the same as in 2024/25 and that no existing workers are lost to retirement, interstate/overseas migration or shifting into other sectors. The shortfall would need to be filled by domestic and New Zealand migrants (noting NZ is not included in the visa count of international arrivals) or by people moving into construction from other industries.

An uplift in productivity and a targeted employment push would clearly help. However, the most likely response is that the eventual spend and associated labour demand spread out as more projects are put on hold or cancelled due to labour shortages and associated cost pressures (aside from time-critical projects such as the Olympic program).

Finding ways to quickly ramp up the Queensland labour force is a significant challenge, but it also presents a massive opportunity to reduce the overall demand for labour by further modernising the industry throughout the project lifecycle.

Queensland's construction labour force challenge

	2025/26	2026/27	2027/28	2028/29
Project commencements (value)	$58.6 billion	$72.1 billion	$67.2 billion	$61.4 billion
Construction labour force needed*	308,800	380,000	354,000	323,400
Indicative labour force shortfall – 3-year average**		**27,200**	**43,400**	**46,000**

* If sector productivity remains at 2024/25 level

** Workers required if sector productivity remains at 2024/25 level ex new trainees and new workers from overseas (outside of New Zealand)

Market insights

History shows that the construction workforce can be slower to increase than construction activity – which emphasises the importance of enabling measures to boost trades numbers now.

The signs of interstate movement are not good so far. Average annual net interstate migration (NIM) into Queensland over the last decade (excluding pandemic years) is 22,800. NIM in 2024/25 was 21,600. If we assume 20% are construction workers, that is only 4,300 on 2024/25 numbers. Without more affordable and available rental accommodation, it may be hard to increase the interstate impetus.

Ways to increase entrants and re-entrants into the Queensland construction market

- Reintroduce the Boosting Apprenticeship Commencements (BAC) and Completing Apprenticeships Commencements (CAC) schemes, which were introduced in 2020 and closed in 2022. According to QPC, these schemes boosted commencements by 80%.
- Address apprenticeship completion rates. From 2020 to 2024, withdrawals outpaced completions. This is correcting thanks to BAC and CAC changes made earlier in the decade. Further efforts can be made to screen candidates and provide clearer information so candidates can make sound decisions.
- Provide a pathway for apprentices to transfer their skills.
- Review financial incentives and subsidies.
- Increase skilled migration in construction. According to Stockland, only 2.8% of migrants coming to Australia over the past 5 years have had skills relevant to construction, not aligning with the approximately 10% proportion of employees working in construction.
- Encourage skilled trades from New Zealand, where the construction pipeline is diminishing.
- Provide incentives for state-based migration.
- Increase availability and affordability of rental accommodation.

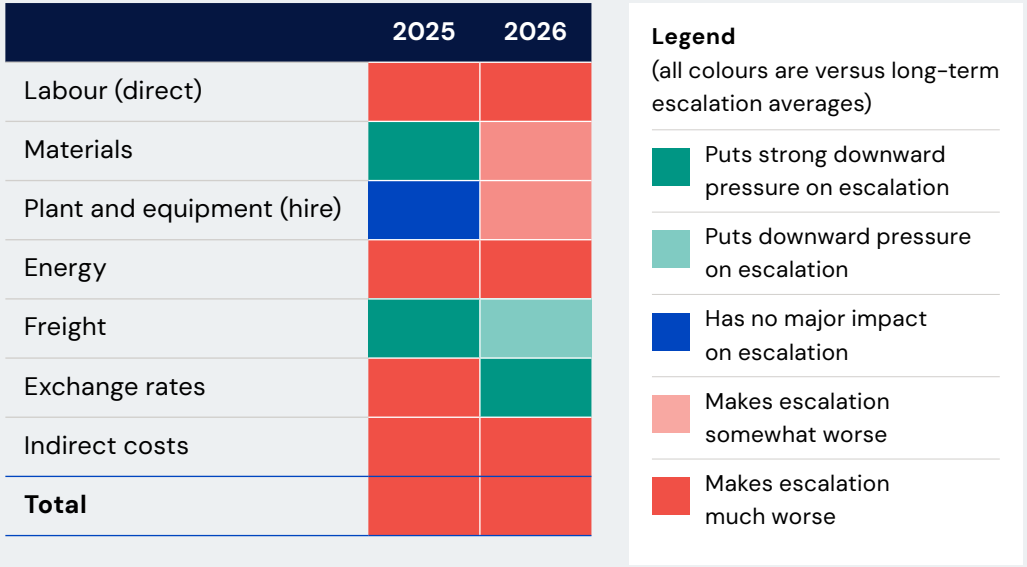
Cost escalation – building (2025–28)

	2025	2026	2027	2028
Brisbane	6.8%	6.0%	8.0%	10.0%
Cairns	5.0%	5.5%	6.8%	7.3%
Gold Coast	7.0%	6.3%	7.5%	9.5%
Sunshine Coast	6.5%	6.8%	7.0%	9.0%

Cost escalation – infrastructure (2025–28)

	2025	2026	2027	2028
Brisbane	6.5%	5.8%	7.0%	8.0%
Cairns	5.5%	5.2%	6.5%	6.5%
Gold Coast	5.8%	5.5%	6.3%	6.8%
Sunshine Coast	4.8%	6.5%	5.8%	8.5%

Drivers of cost escalation for Brisbane



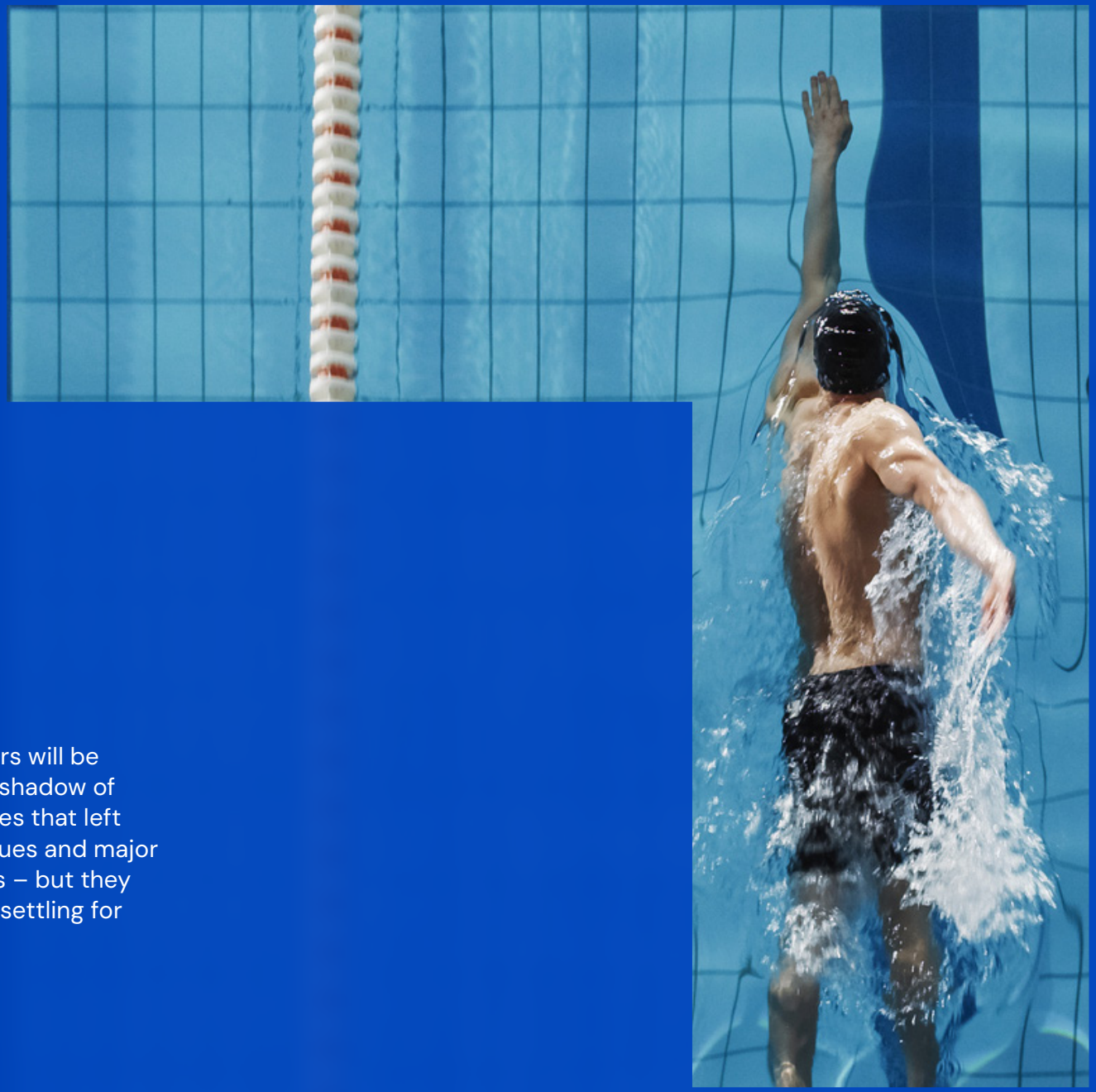
Market insights

The cost escalation drivers table on page 12 shows significant impacts on escalation across a range of cost inputs. Now we take a more detailed look at the factors at play, their impact on escalation, and **what can be done** to mitigate their cost effects.

	What will drive impact	How it hits cost	Mitigations
Labour (direct)	■ Structural shortage of skilled trades and supervisors in south-east Queensland (SEQ), coinciding with peak Olympic packages and ongoing energy, housing and water programs ■ Enterprise bargaining uplifts, Fair Work Act settings, site productivity constraints, and roster/fatigue management for metropolitan works ■ Delays and rework from tight interfaces and brownfield constraints driving overtime, shift penalties, and productivity loss	■ Higher base rates, allowances and site on-costs, plus productivity drag that compounds unit rates ■ Scarcity premiums for critical skills (quantity-surveyors, planners, rail systems techs, tunnellers, crane crews)	■ Phase and smooth packages to avoid coincidental peaks and apply capacity assessments in gate approvals ■ Lock in project labour agreements early with productivity clauses tied to program certainty ■ Invest in skills pipeline now: targeted apprenticeships, returning-workers programs, and streamlined skilled migration for niche roles ■ Design for constructability to reduce labour intensity; shift to offsite manufacturing where feasible
Materials	■ Global demand cycles for steel, cement and fabricated components, alongside decarbonisation costs (cementitious substitutions, EAF steel premiums) ■ Quarry and asphalt capacity in SEQ, bitumen tied to oil price, and specification creep (over-conservatism) ■ Lead times for electrical and rail systems, switchgear, signalling, cables and specialist valves	■ Unit rate escalation on core commodities (rebar, structural steel, cement, aggregates, asphalt, electrical gear) ■ Variability in long-lead procurement affects preliminaries, float erosion and claims	■ Standardise specifications across packages, enable like-for-like alternatives, and approve recycled/ low-carbon substitutes early ■ Bulk-buy and novate long-lead items across multiple projects with framework agreements ■ Dual source critical components, prequalify domestic fabricators, and secure quarry/asphalt allocations with take-or-pay structures ■ Early design freeze on high-value systems to enable forward orders
Plant and equipment (hire)	■ High utilisation across SEQ raising hire rates for cranes, piling rigs, TBM support, specialised rail plant, MEWPs and trucking ■ OEM lead times, parts availability and emissions compliance raising ownership and maintenance costs for suppliers ■ Fuel price volatility passing through to wet hire	■ Higher wet and dry hire rates, mobilisation/ demobilisation premiums and standby exposure during approvals or utility conflicts	■ Aggregate plant demand in multi-project frameworks, with rate cards and utilisation commitments to secure priority access ■ Sequence works to minimise idle time; adopt 24/6 windows for critical plant where feasible ■ Use productivity KPIs and shared dashboards to reduce standby, and adopt digital planning and clash detection to derisk windows ■ Consider owner's procurement/novated plant for ultra-scarce items where justified by NPV

Market insights

	What will drive impact	How it hits cost	Mitigations
Energy	■ Electricity price volatility from network constraints and generation mix, and diesel price volatility influenced by geopolitics and refining spreads ■ Tightening environmental requirements pushing temporary power to hybrid/battery solutions	■ Escalation in temporary power, site compounds, tunnelling, dewatering, asphalt production and transport	■ Hedge diesel bands or adopt fuel adjustment formulas in contracts with transparent pass-through ■ Prioritise grid connections and temporary substations early, with battery storage for peaks and night works ■ Specify energy-efficient plant and low temp asphalt, and schedule energy-intensive activities to off-peak tariffs where practical
Freight	■ Competition for container slots and domestic road freight capacity, driver shortages and port/terminal congestion ■ Oversize-overmass (OSOM) permitting windows and police escort availability for large components	■ Higher linehaul and last-mile rates, schedule risk from shipping delays, and premium airfreight during slippages	■ Lock freight capacity under program-level agreements with flexible allocations across projects ■ Shift to coastal shipping for bulky cargo where viable, and pre-clear OSOM routes and laydown sites ■ Build schedule float for logistics, consolidate loads, and localise fabrication to cut import exposure
Exchange rates	■ AUD volatility against USD, EUR, JPY driving cost of imported plant, rollingstock systems, switchgear, rail and ITS components ■ Long-dated payment profiles for OEM milestones amplifying FX risk	■ FX uplifts in supplier quotes and risk premiums, especially where suppliers lack hedging sophistication	■ Set a program-level FX policy: designate base currency, hedge key exposures at the client side, and novate hedges to delivery partners ■ Require suppliers to price in base currency with defined FX adjustment mechanisms and transparent reference rates ■ Purchase critical imported systems in advance where design is stable
Indirect costs	■ Tight labour market for PMO talent, planners, QSRA specialists, design leads, and commercial managers ■ Insurance hard market (PI, construction risks, cyber), bonding limits and rising compliance costs (HSEC, ESG reporting, modern slavery, digital by default) ■ Extended approvals and interface management leading to longer preliminaries	■ Higher prelims and overhead and profit, costlier insurances and securities, more owner's costs to assure governance and reporting	■ Lean, federated PMO with shared services across projects, and common digital platforms and data standards to avoid duplication ■ Early insurer engagement, portfolio-level placements, and realistic caps and retentions to reduce premiums ■ Streamline approvals with agreed service levels, delegated authorities, and use of enabling works packages to keep prelims tight ■ Standardise contract conditions and reporting to cut transaction costs for market participants



Focus on venues

Everyone wants a world-class venue – but at what cost?

Sports venues are among the most scrutinised Olympic investments because of their size, visibility and costs. In any Olympic host city, new or upgraded stadiums and sporting venues are major investments with a very long list of stakeholders.

These stakeholders will be well aware of the shadow of history, with Games that left underutilised venues and major budget blow-outs – but they won't be keen on settling for second-best.

Focus on venues

Under stakeholder pressure, what starts as a well-defined concept can quickly evolve into a project burdened by add-ons that weren't part of the original scope or budget. This can place governments and developers in an unenviable squeeze between the risk of cost overruns and the inevitability of cutting corners at the eleventh hour.

> One of the most effective defences against design creep is a **robust scope definition** process early in the project lifecycle.

This means clearly identifying stakeholder requirements from the outset, prioritising must-haves versus nice-to-haves, and locking the scope in early. Design options should be weighed up based on their long-term impact and ability to serve the community's future needs.

It's not a perfect world, so some changes are almost certainly going to be required. Building in smart contingencies can help prevent costs from spiralling out of control.

Tracking every change is paramount. When project stakeholders can see the projected cost and program implications of every change clearly mapped out, they'll be far more empowered in their decision-making.

Planning for legacy use and value

Planning for legacy means maximising the chances of the Games investment resulting in long-term, real value for Queenslanders over generations. This needs to be front of mind from the start – yet planning for long-term value is challenging when it is still unclear how venues will be used after the Games. Too often, host cities have invested in large-scale venues with limited or unclear post-Games uses.

Stakeholder engagement is essential for delivering what future generations need. A key outcome of the Games Independent Infrastructure and Coordination Authority's (GIICA) 100-day review was a public consultation process. This received over 5,000 submissions from the public, construction professionals, transport experts, planners, sporting and community organisations, and athletes. Some of the most mentioned requests were for public and active transport infrastructure, and ensuring the investment in sporting venues will meet Queensland's long-term needs.

Marvel Stadium, Melbourne

These views helped inform GIICA's recommendations to Government and the subsequent Delivery Plan. This bodes well for achieving a lasting legacy for the communities of Queensland.

Raising the bar for sustainable Olympic venues

The International Olympic Committee (IOC) developed a strategy for sustainability as part of the Olympic Agenda 2020 – and it set high standards. It recognised that true sustainability is as much about money and legacy as it is about environmentally friendly buildings. One of Brisbane 2032's strongest sustainability credentials lies in its commitment to reuse and adapt existing facilities. When demolishing a building, especially a sports venue, it's important to factor in the energy costs of demolition pollutants, landfill waste and carbon emissions. These have a large environmental impact.

Sydney's Olympic Stadium at Homebush

Just two decades after Sydney's Olympic Stadium opened, it was slated to be demolished and rebuilt, sparking community and stakeholder backlash. The eventual decision to refurbish rather than rebuild highlights the importance of whole-of-life thinking – and whole-of-life cost modelling.

This approach takes a more realistic view of the genuine legacy and sustainability of a structure, with a lens that extends beyond the initial capital outlay and encompasses ongoing maintenance, adaptability, revenue potential, and even regeneration/redevelopment costs.

Focus on venues

It's great to see that the Queensland Government has taken note of this and heeded the IOC's sustainability strategy. The Delivery Plan is repurposing 11 of the 17 venues it is delivering. This includes the Brisbane Showgrounds, Queensland Tennis Centre, Sunshine Coast Stadium, Gold Coast Hockey Centre, Brisbane International Shooting Centre, Anna Meares Velodrome, Barlow Park and Toowoomba Showgrounds.

The road ahead

Brisbane 2032 presents an incredible opportunity not only to host a memorable Games, but to leave a sustainable built legacy that benefits Brisbane and its regions for decades. Navigating this amongst headwinds of rising costs, limited capital and diminishing time is possible, but it will require a whole-of-industry approach.

The planning and regulation initiatives coming on board will help, including the Queensland Government's decision to suspend Best Practice Industry Conditions and the federal government's decision to pause the next round of updates to the National Construction Code. But more needs to be done.

A whole-of-industry approach should extend to early engagement with builders of prefabricated or modular options so that off-site manufacturing pipelines and capacity can be established. This will help boost productivity while putting downward pressure on on-site trade labour constraints.

"What's needed now are smart, strategic decisions on planning, design, procurement and delivery, so that every dollar spent today continues to deliver value tomorrow."

Tim Bessell National Sports & Venues Sector Lead

Macquarie Point Multipurpose Stadium (render), Hobart

London 2012:
Procurement discipline and early risk reduction

London remains a global benchmark for Olympic delivery, particularly in procurement, commercial strategy and legacy.

The use of procurement contracts that have collaboration, transparency and disciplined change management clauses embedded within them helped keep the program on track. The Olympic Stadium's target cost with pain/share mechanism aligned incentives and strengthened cost control.

Perhaps London's greatest masterstroke was preparing the Stratford site through a comprehensive early works program: demolition (with an extraordinary 98% recycling rate), contamination removal and capping with a 600 mm layer of engineered fill. This significantly reduced ground risk, shortened construction timeframes and enabled more competitive tendering from head contractors.

Modern methods of construction (MMC) are also shaping the next generation of UK venues. Everton's new 52,000-seat stadium – built using prefabricated beams, precast floors, MEP modules and even pre-commissioned WC pans – was delivered in just over 3 years on site, supported by efficient off-site fabrication.

Paris 2024:
Integration, innovation and community legacy

Paris demonstrated what happens when venues are treated not as one-off investments, but as anchors for broader urban and social outcomes.

At La Défense Arena, the integration of 31,000m² of commercial office space into the southern wing created a diversified revenue stream, helping fund the stadium and improving its long-term viability. It's a reminder that co-located uses shouldn't be an afterthought; they are part of the business case.

Operationally, Paris highlighted the scale required to run a safe, seamless Games: 300,000 patrons per day supported by 30,000 police and military personnel, and a transport task involving 500 buses, 700 coaches and 4,000 drivers per day.

There were also standout sustainability and legacy initiatives. Paris spent €1.5 billion cleaning the Seine – an investment that enabled marathon swimming and triathlon events and will benefit the city for generations. The new Aquatics Centre is powered in part by excess heat from a neighbouring data centre, while its location in Saint-Denis ensures long-term community access in an area previously underserved by aquatic facilities.

Focus on venues

The path forward for Brisbane

Brisbane can take confidence in the fact that many of the challenges it now faces have already been solved elsewhere in the world. The cities that thrive are those that:

- integrate commercial outcomes into venue planning
- reduce risk early and deliberately
- adopt procurement frameworks that reward collaboration
- embrace prefabrication and digital delivery to compress timeframes
- treat legacy as part of the design (not as an afterthought).

The next decade will define Queensland's future. With disciplined planning and smart delivery, the 2032 Games can leave a lasting legacy that extends well beyond the podium.

Strategies for venue success

- Integrating commercial outcomes into venue planning
- Ensuring clear post-Games uses
- Early, robust scope definition process
- Clearly identifying stakeholder requirements
- Prioritising must-haves versus nice-to-haves
- Reducing risk early and deliberately, including scope lock
- Weighing design options by long-term impact/legacy
- Industry-wide investment in MMC and off-site fabrication – increasing productivity and reducing on-site labour requirements
- Adopting procurement frameworks that reward collaboration
- Including smart contingencies
- Tracking every change
- Repurposing where possible
- Staggering the Olympic and Big Build programs

Kardinia Park, Geelong

Focus on infrastructure

Transport and utilities networks may not draw the same headlines as new stadiums, but history shows they can make or break the Olympic experience.

It's this supporting infrastructure – the roads, transport, utilities and public spaces – that will tie the Games together, and get the city and region ready to welcome the world.

For government stakeholders tasked with planning, funding and delivering this crucial backbone infrastructure, the challenge will be coordinating an enormous program of work across multiple agencies, contractors and timelines, all within the fixed deadline of the Games.

Focus on infrastructure

So many moving parts

Supporting infrastructure for a Games program is not one project – it is hundreds of interconnected activities. For Brisbane, the list includes the Direct Sunshine Coast Rail Line (Beerwah to Caloundra, Stage 1), the Wave – Sunshine Coast Transit Corridor, the Inner North Transport Corridor (INTOC) enhancements, South Bank interchange and cultural precinct upgrades, and the complex integration of Brisbane Metro with Cross River Rail. When this is overlaid with the need to upgrade renewable energy systems and invest in water, wastewater and flood resilience infrastructure, the result is a vast and fragmented delivery picture.

Each of these projects has its own timelines, stakeholders and risks. Without proper coordination, overlaps, duplications and gaps can easily emerge. What's needed is a bird's-eye view of costs across the whole program to ensure everything lines up and to avoid nasty surprises. With a whole-of-program lens, interdependencies, duplications, efficiencies and risks can be tracked across agencies, packages and precincts. This gives a single source of truth – and more visibility and control for decision makers.

Moving millions

London 2012 faced the challenge of weaving together £17 billion of transport upgrades, from high-speed 'Javelin' trains to the Docklands Light Railway extension – while also maintaining progress on the mega Crossrail project. The city used an Olympic Route Network to control flows and avoid gridlock. London's investment unlocked the regeneration of East London, with new rail lines and power tunnels supporting long-term growth.

Paris 2024 focused on spreading investment across metro expansions, tram upgrades, and an unprecedented 415 km of new cycleways, while delivering the Grand Paris Express mega-metro. Paris leaned into bundled procurement and rapid-response coordination to keep services running even amid arson attacks on its rail lines. Paris made sustainability and carbon reduction central, with its transport networks now the foundation of a greener, more connected city.

> "Trade-offs among speed, cost, risk and quality shouldn't ever be made lightly, but they can be made with a higher degree of confidence when based on real data and rigorous analysis."
>
> **Jack Shelley** Queensland State Lead

Competition is everywhere

The atmosphere of competition isn't only on the track. Brisbane's Olympic works are entering an already overheated southeast Queensland construction market, where major road, rail and energy projects are all competing for the same contractors, materials and labour.

Tender prices will rise, supply chains will stretch, and lead times will lengthen. This is where smart procurement can be the difference between control and chaos.

Great timing needs to be matched with the right technique. Securing resources in a constrained and competitive market may need a range of interventions, including bundling strategies, early contractor involvement (ECI), or framework agreements to navigate market pressure.

Does faster always mean pricier?

When the clock's ticking, costs usually go up. Naturally, extended shifts, overtime, express approvals and fast-tracked designs all add to the bill when everyone is racing to the same hard deadline of the opening ceremony. The usual result of delivery pressure is having to pay a premium, and it can add significantly to the ultimate bottom line.

Could there be **smarter sequencing and delivery options** that better balance time, cost, and risk across the range of infrastructure in the pipeline?

Should the South Bank Interchange be delivered in one compressed push, or staged to reduce disruption and cost? Should the Sunshine Coast rail line leverage modular or prefabricated methods to accelerate delivery, even at a higher upfront price?

London opted for brute-force expansion; Paris used flexible solutions such as demountable venues to manage cost and time pressures. Brisbane's challenge will be to find its own balance of speed, cost, risk and quality. But to unlock informed, sensible decision-making, you need good information. Scenario-based modelling can help uncover whether a project could be fast-tracked at a higher cost (and what that contingency might look like) or whether the pressure could be reduced through staging delivery, using modular or prefabricated construction, or adjusting the scope and design to match available timeframes without unduly compromising key criteria.

Focus on infrastructure

Getting on with building a legacy

Getting Brisbane 2032's supporting infrastructure right is about much more than venues and accommodation, and much longer than the short window of the Games. It's about setting up southeast Queensland for a stronger, more connected future for generations.

Roads, transport links, utilities, and enabling works **will shape how the region functions** long into the future.

For Brisbane, the opportunity lies in creating a truly connected southeast Queensland. Direct Sunshine Coast Rail, INTOC, and Brisbane Metro – Cross River Rail will change how the region moves. Renewable energy integration and water/flood resilience projects will hard-wire sustainability into the Games footprint. And if designed with foresight, these projects will serve communities from Cairns to the Gold Coast long after the flame is extinguished.

The path to legacy is complex and will require significant foresight and visibility. With Brisbane's Olympic challenge now firmly in motion, there's never been a more critical time to plan smarter and deliver better.

Strategies for infrastructure success

- Ensuring coordination across multiple agencies, contractors and timelines
- Maintaining a bird's-eye view of costs across the whole program
- Tracking interdependencies, duplications, efficiencies and risks across agencies
- Smart procurement – including bundling strategies, early contractor involvement (ECI), or framework agreements
- Smarter sequencing and delivery options
- Scenario-based modelling based on real data and rigorous analysis
- Sustainability focus including renewable energy, climate resilience
- Setting up a connected legacy for generations

Focus on accommodation

One of the most complex and high-stakes elements of Olympic infrastructure is accommodation.

Athletes' villages, hotels and short-term housing sit at the intersection of public need, private opportunity and long-term legacy.

For government stakeholders and private developers alike, these projects have a dual challenge: designing accommodation that successfully hosts millions of athletes, officials, media and visitors for a few weeks in 2032, as well as leaving quality assets that last for generations to come.

Focus on accommodation

Games first, then what?

Games accommodation must remain fit-for-purpose and commercially viable after 2032. For Brisbane, this means that the RNA Showgrounds Athlete Village (Bowen Hills), Northshore Hamilton athletes' village, Gold Coast's Royal Pines village and the Sunshine Coast Horizon Centre village in Maroochydore need to be designed with future conversion firmly in mind.

Unlike Olympic sporting venues, which are often reused for future events, accommodation must quickly pivot to serve broader urban needs, typically as build-to-sell or build-to-rent residential, student housing, aged care, social and affordable housing or mixed-use developments. But layouts designed for high-density, short-term stays don't always translate easily to long-term housing. Retrofitting services, upgrading finishes or reconfiguring floor plans can be costly if not planned for upfront.

Success lies in holding both the Games setup and the post-Games conversion **in mind from the start** and throughout all design choices.

Proponents should test design against multiple lifecycle scenarios, mindful of opportunities that could reduce conversion costs later – such as modular construction, separable buildings and flexible layouts.

Early estimation of lifecycle costs across both the temporary and subsequent phases increases the likelihood of getting feasibility studies and funding decisions across the line and achieving buy-in from stakeholders.

Lessons from **London and Paris**

London 2012 and Paris 2024 offer benchmark examples of post-Games conversion. The East Village in Stratford – initially housing 17,000 athletes – transitioned into more than 2,800 new homes, including affordable housing. Paris 2024's Seine-Saint-Denis village was designed to become a mixed residential and commercial precinct serving 6,000 new residents and 6,000 workers.

Both cities achieved success despite market uncertainties. London delivered its village during the fallout from the global financial crisis, while Paris grappled with inflation and supply chain volatility post-COVID. London mitigated cost and delivery risks with strict scope control and detailed milestone tracking. Paris leaned heavily on modular and flexible solutions to keep the accommodation on program.

London showed how Games accommodation could regenerate entire neighbourhoods. Paris took the baton further, embedding sustainability and social inclusion into its legacy plans.

Focus on accommodation

Finding confidence in an uncertain market

Accommodation developments for the Games are being planned now, but many won't break ground for several years and won't reach completion until the end of the decade.

> The market conditions in which Brisbane's villages and hotels are conceived today **will not be the same as those in which they're delivered**.

Projects such as the Woolloongabba Hotel Towers, Broadbeach Hotel Tower (Manors Gate Group) and the Mooloolaba Hotel may not open until the late 2020s or even 2030.

Like London and Paris, Brisbane faces its own uncertainty in the lead-up to the Games, with high population growth, a national housing crisis, volatile interest rates and stretched construction markets.

The alternative to guesswork is up-to-the-minute forecasting to plan around real-world market conditions. Real-time models can offer insight into changing costs of materials, new lending conditions, shifts in residential demand and other market factors that will make or break feasibility. Developers can test sensitivities and assess risk profiles before committing to a project structure or delivery model – underpinning decisive action.

Maintaining quality and delivery under pressure

The lead-up to 2032 will see intense competition for skilled labour, materials and supply chains. Pressure to award contracts quickly can lead to poor decisions around selection, sequencing and terms. In a stretched construction industry, quality can drop and delays creep in, especially if the wrong builder is picked. For developers and governments alike, the risks of defects, overruns and reputational damage are too big to ignore.

Queensland's recognition of the need for an alternative lodging strategy involving options such as cruise ships highlights the scale of the challenge – not every bed can be purpose-built, and the Games will require creativity, flexibility and resilience in delivery. Overlay this with the South Bank cultural and hospitality upgrades and the Mount Coot-tha eco-tourism precinct and the picture becomes clear: competition for labour and supply chains will be fierce, and quality cannot be compromised.

There's always a danger that tenders could be underbaked to win work, risking overruns and variations. Brisbane can benefit by applying lessons from London's strict scope control and detailed milestone tracking as well as Paris's embrace of modular and flexible programming solutions. Brisbane must combine both approaches – with rigorous benchmarking, capable contractors, and tight accountability across every scope, spend and delivery milestone.

Focus on accommodation

> "Now is the time to ensure robust and strategic planning that balances risk and opportunity within a long-term vision, so that what's built for 2032 can continue to deliver for generations."
>
> **Amy Chen** Queensland Residential Sector Lead

Maximising Brisbane's legacy opportunity

Southeast Queensland is one of Australia's fastest growing areas but it's already facing a significant housing crisis. To address this, planning Brisbane's Games accommodation must be far more than an exercise in logistics. Post-Games conversion of the Northshore Hamilton village into a mixed retail and leisure precinct, or the RNA Showgrounds village into high-quality residential, could unlock long-term value.

Build-to-rent projects in Indooroopilly, Valley, Newstead and Quay Street could absorb demand for long-term rental housing, while tourism-oriented assets like the Gold Coast and Sunshine Coast villages and the Broadbeach Hotel Tower can expand the region's visitor economy.

Brisbane has the chance to unlock supply and address the housing crisis while creating mixed, vibrant communities that support growth across the southeast. This opportunity won't realise itself. Now is the time to ensure robust and strategic planning that balances risk and opportunity within a long-term vision, so that what's built for 2032 can continue to deliver for generations.

The task ahead is daunting, yet some practical steps can smooth the path to success – if implemented now. The keys are cost clarity and rigour, careful planning and programming, strategic procurement approaches, and smarter ways to build.

Costing accurately from the start

Developers should seek cost certainty early – not only for construction, but across each asset's full lifecycle. Live market intelligence, credible escalation modelling and realistic contingency allowances will contribute to a more transparent and reliable cost estimate. Those with experience of Southeast Queensland will be able to reveal more specific location-based cost impacts and strategies to engage effectively with suppliers and reduce overheads.

The best time to balance the ledger between capital outlay, functionality, finishes and whole-of-life value is right from the start. It should be everyone's priority to tease out feasible value opportunities where alternative materials or methods can realise savings without compromising the overall vision.

It's also crucial that the scope is progressively refined and then locked down, with a shared understanding of what is achievable within the capital envelope. When contractors have confidence in the comprehensiveness and validity of the cost estimate, there's less need for inflated contingencies.

Keeping cost control

Understanding the full cost picture is one thing. It's another to keep costs reined in as projects progress.

Cost control relies on having the right systems in place to implement value opportunities, monitor and report regularly on progress and spending, and manage variations and risks. With inflation and competition likely to continue to drive escalation in the costs of materials and labour, cost discipline and structured cost reviews will be essential to delivering on expectations.

Mitigating the labour challenge with strategic procurement and innovative construction methods

The shortage of skilled labour makes early planning and workforce analysis increasingly critical. Program analysis should explore how the design, procurement and construction phases could be staged or packaged strategically to match real-world constraints on resource availability and avoid clashes across overlapping programs.

Modular construction holds significant potential for reducing construction cost and timeframes and mitigating the challenge of labour shortages. It can deliver a level of precision, quality control and speed that ticks a lot of boxes.

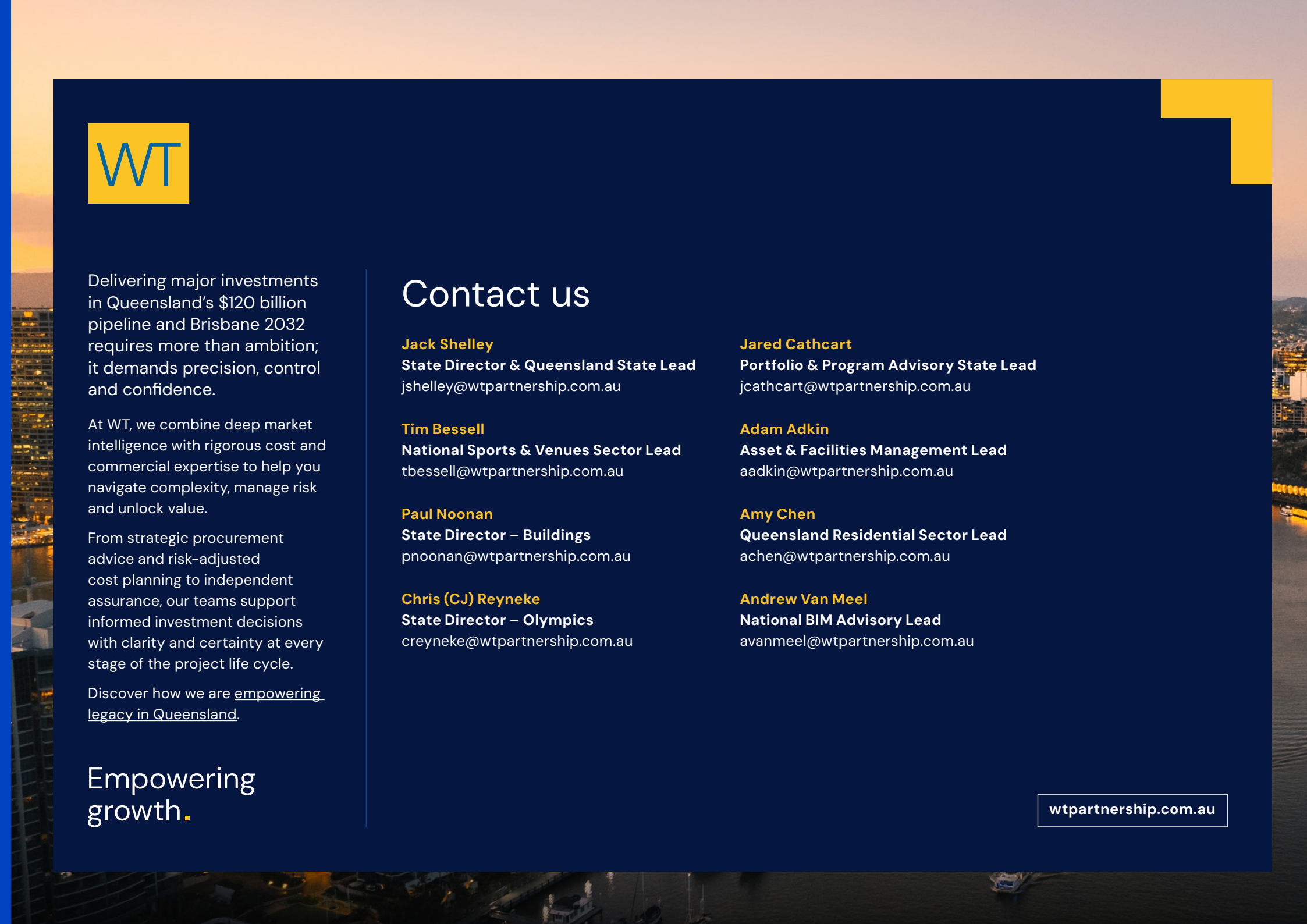
Focus on accommodation

Leveraging digital solutions for greater productivity and certainty

Embracing advanced digital technologies is a must. BIM (Building Information Modelling) is only the beginning. Digital twins, AI and automation all offer opportunities to revolutionise the speed, control and quality of builds through design, construction and operation. These tools provide greater transparency and precision, encouraging collaboration, accelerating decision-making and avoiding rework. However, robust governance is needed to ensure that digital tools are set up for success and remain accurate, comprehensive and useful in the long term.

Strategies for accommodation success

- Ensuring robust and strategic planning with a long-term legacy vision
- Early estimation of lifecycle costs across both temporary and subsequent phases
- Testing design against multiple lifecycle scenarios
- Up-to-the-minute forecasting using real-time models to test sensitivities and assess risk profiles
- Teasing out feasible value opportunities, including those that reduce conversion costs
- Considering alternative, flexible and resilient lodging strategies
- Rigorous benchmarking
- Strategic procurement approaches and engaging capable contractors
- Keeping tight scope, milestone and cost control
- Flexible programming, staging or packing solutions
- Embracing modular and innovative construction methods
- Leveraging well-governed digital tools and technologies



Delivering major investments in Queensland's $120 billion pipeline and Brisbane 2032 requires more than ambition; it demands precision, control and confidence.

At WT, we combine deep market intelligence with rigorous cost and commercial expertise to help you navigate complexity, manage risk and unlock value.

From strategic procurement advice and risk-adjusted cost planning to independent assurance, our teams support informed investment decisions with clarity and certainty at every stage of the project life cycle.

Discover how we are empowering legacy in Queensland.

Empowering growth.

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