

Infrastructure Pipeline Industry Briefing

14 May 2026





Acknowledgement of Country

I/We respectfully acknowledge
the Traditional Custodians of the
land and waters on which we
work, live and learn.

We pay respect to Elders past
and present.

Agenda

01

Overview of our 5-year capital investment

02

Our programs and projects

03

Delivery panels and how industry can engage

04

Q&A



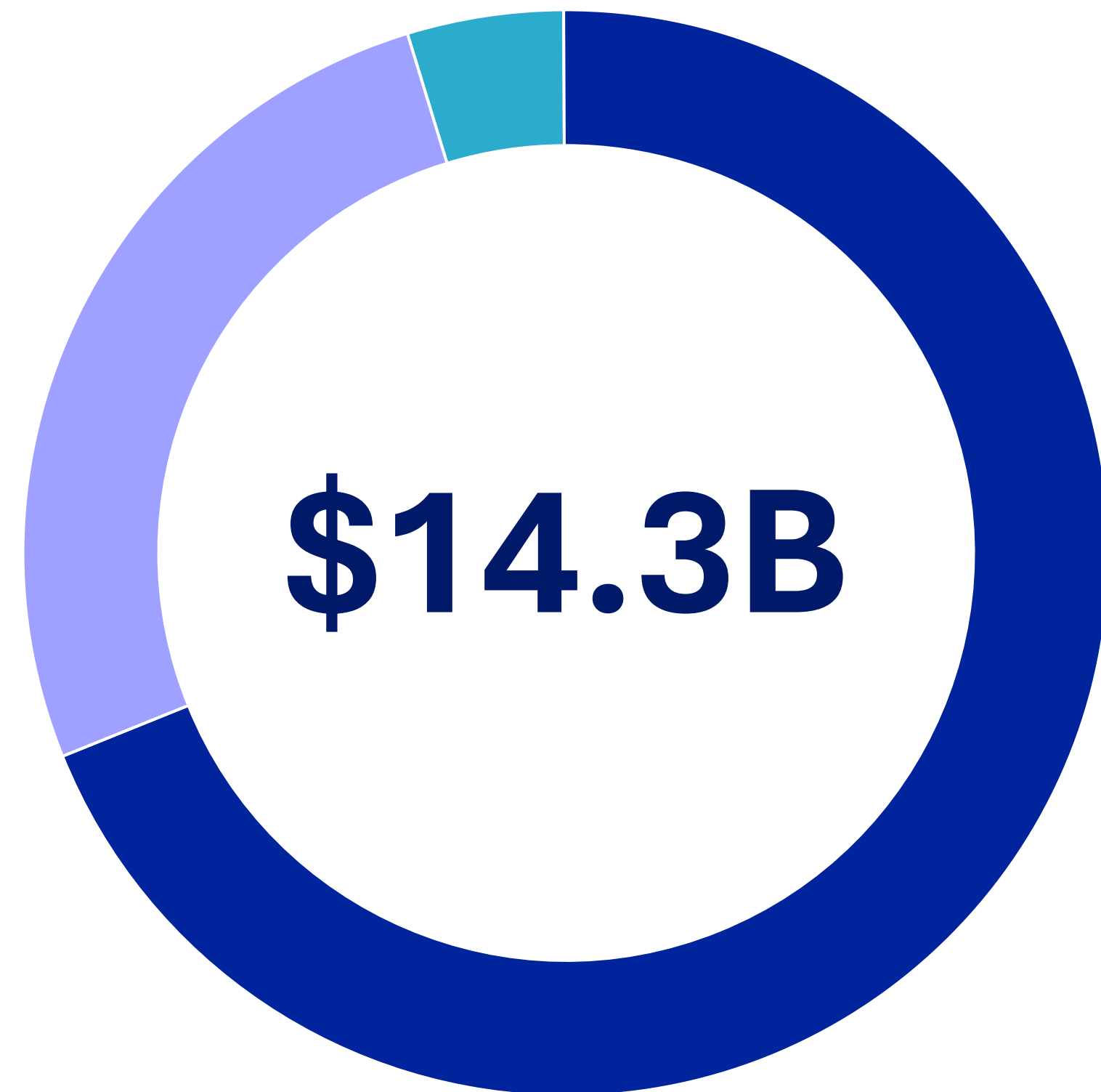
Welcome

Today is about providing clarity on our pipeline – what's coming, when, and how you can engage.

This session builds on insights from the Supply Chain Expo, offering a clearer, more practical view of the work ahead and what it will take to deliver it.



Our capital program is creating sustained delivery opportunities



Pre-Delivery: 34 per cent

Progressing a strong pipeline of projects through development and approvals

Delivery: 63 per cent

A large share of projects are in delivery

Completion: 3 per cent

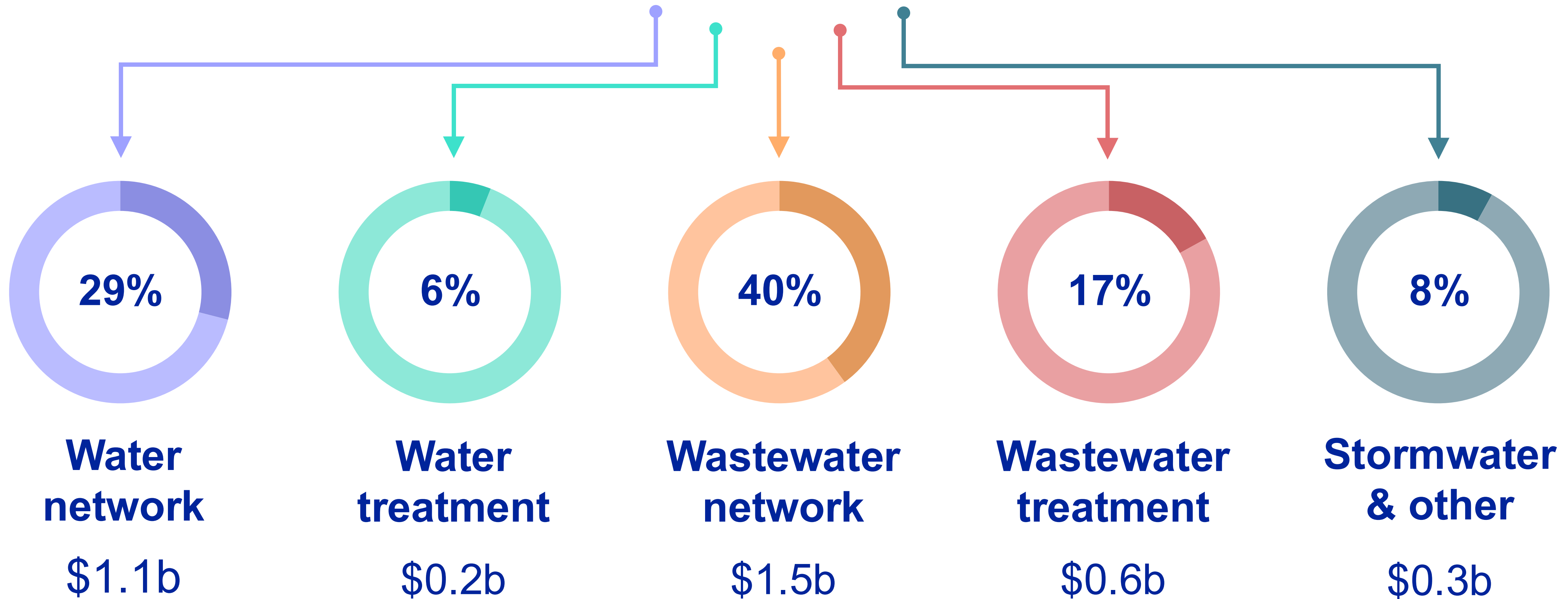
Projects in finalisation and close-out

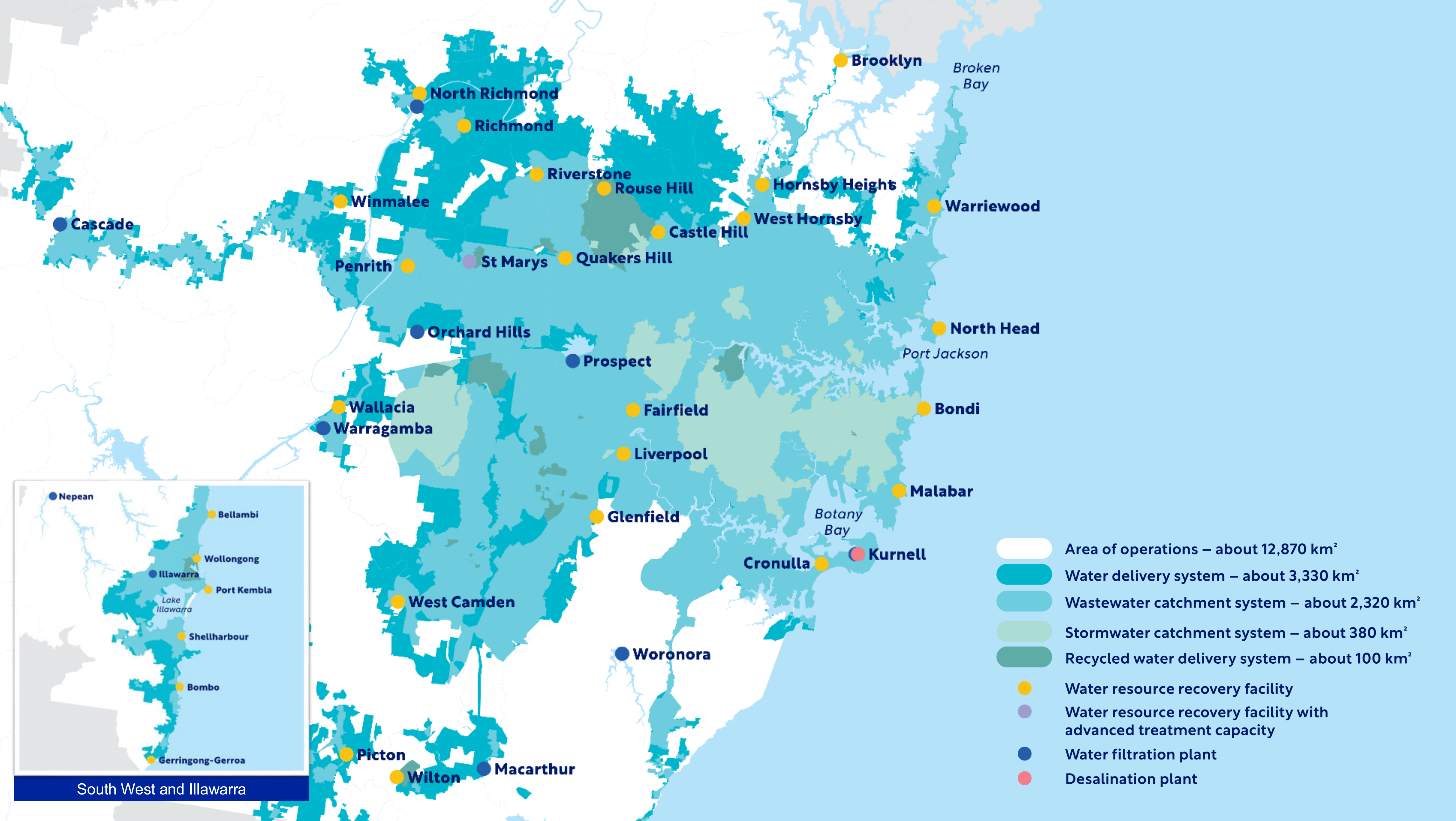


All timelines presented are subject to investment and other approvals.

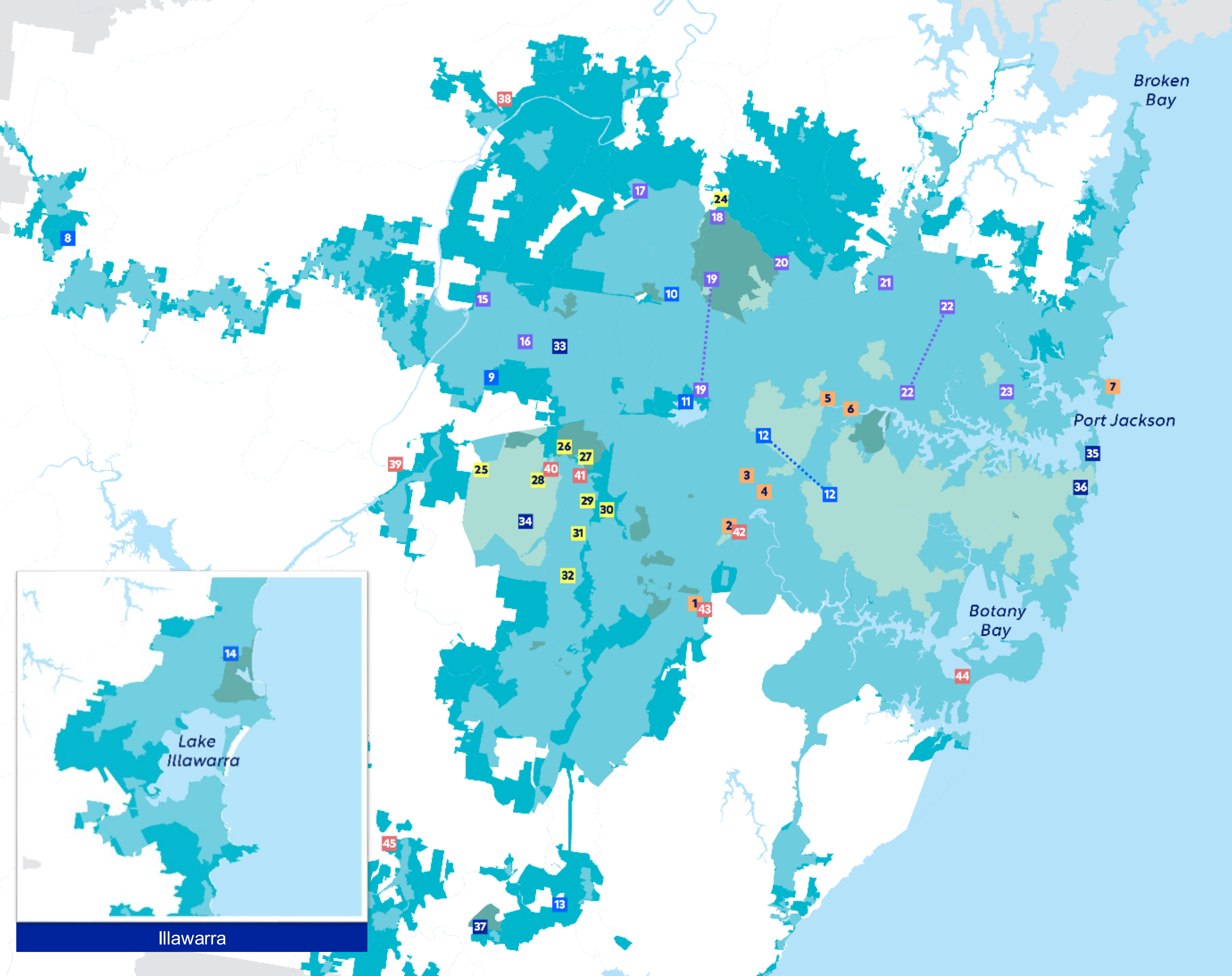
Our 5-year renewals budget

\$3.8b





South West and Illawarra



East

- 1 MSIP Glenfield WRRF
- 2 MSIP Liverpool WRRF
- 3 MSIP Fairfield WRRF
- 4 North Georges River Submain
- 5 New Camellia WRRF
- 6 GOPP Integrated Water
- 7 NSOOS

South and water

- 8 Cascades Water Filtration Plant
- 9 Orchard Hills Water Filtration Plant
- 10 Quakers Hill Water Resource Recovery Facility
- 11 Prospect Water Filtration Plant
- 12 Potts Hill to Pipehead watermain renewal
- 13 Macarthur Water Filtration Plant
- 14 Wollongong Water Recycling Plant

North

- 15 Penrith Water Resource Recovery Facility
- 16 Greater Penrith and Eastern Creek Program
- 17 Riverstone WRRF
- 18 Rouse Hill WRRF
- 19 North West Drinking Water Supply
- 20 Castle Hill WRRF
- 21 Thornleigh inlet/outlet main
- 22 Ryde to Pymble drinking water transfer main
- 23 Willoughby submain amplification

West

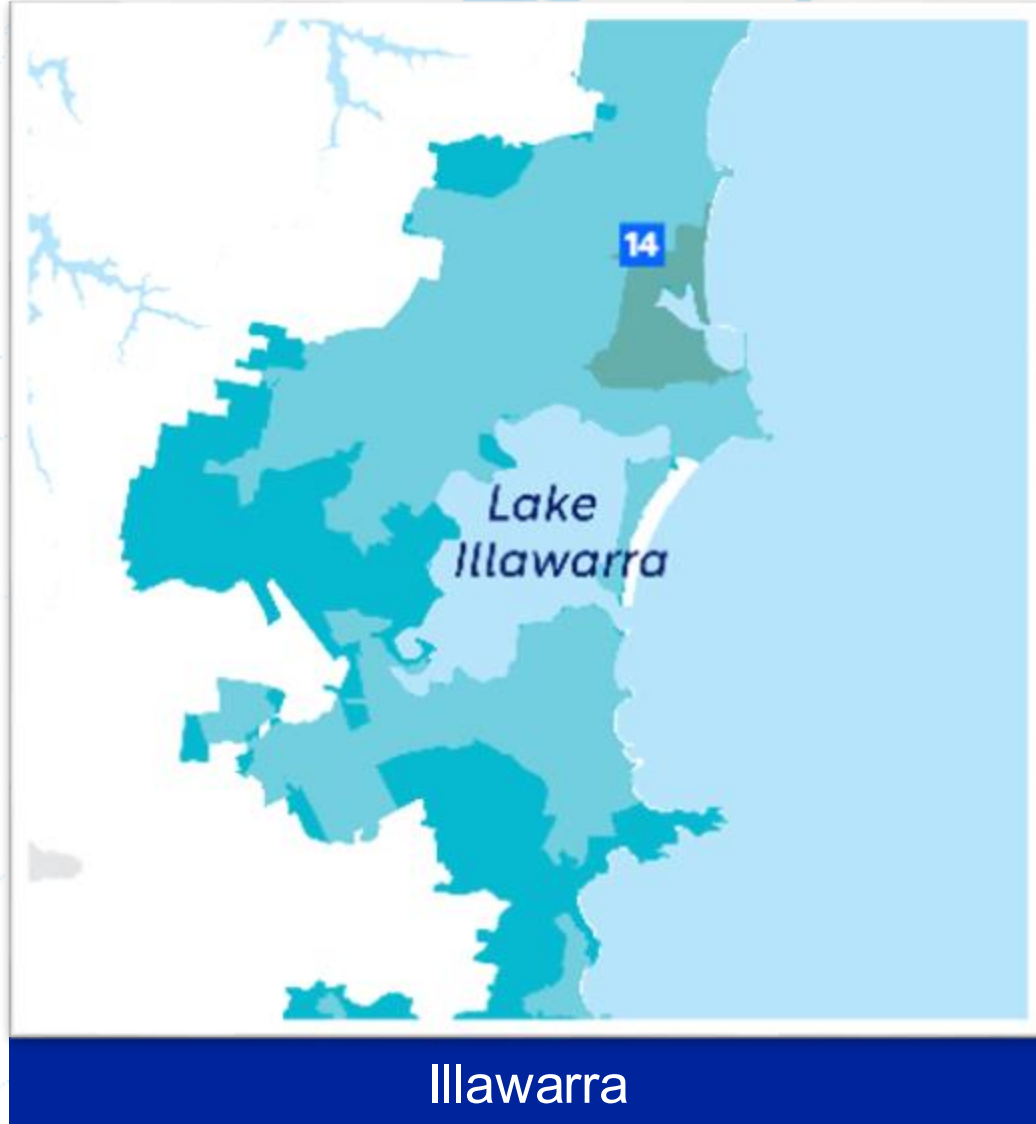
- 24 Zone C stage 1 and 2
- 25 WSAGA drinking water trunk infrastructure stage 3
- 26 USC Advanced Water Recycling Centre
- 27 Mamre Road stage 2
- 28 Upper South Creek Networks
- 29 Kemps Creek Pressure Main / Bonds Creek Carrier Extension
- 30 SWGA Austral - DN750 drinking water main
- 31 SWGA Austral - Liverpool drinking water service
- 32 SWGA Leppington North - Camden drinking water service

Stormwater and other

- 33 Mamre Road Precinct IWCM
- 34 Aerotropolis IWCM
- 35 Refresh Vacluse Diamond Bay
- 36 Bondi Reliability Program
- 37 Wilton Integrated Servicing

Program Delivery

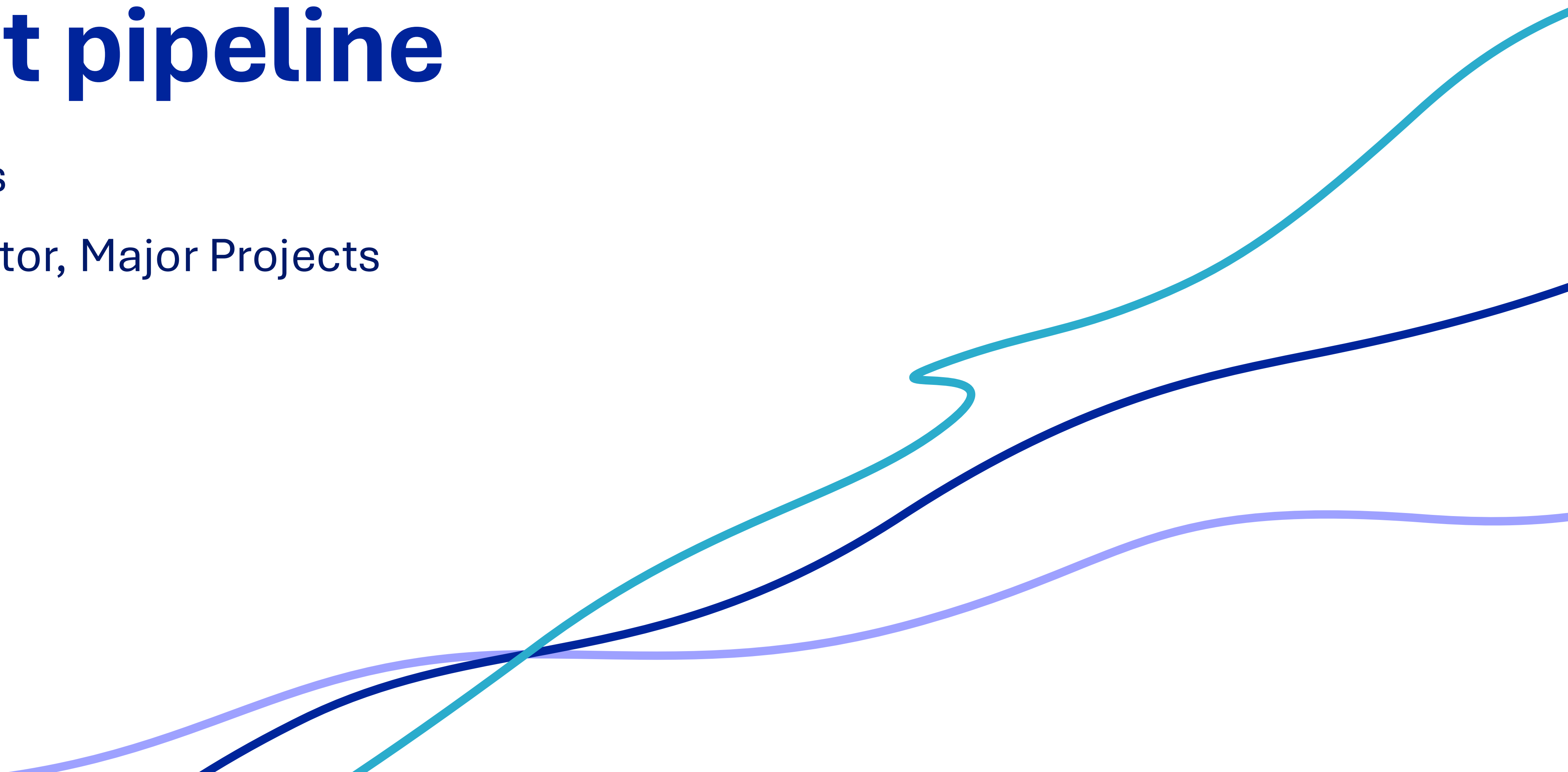
- 38 Redbank wastewater revision
- 39 Wallacia WRRF minor works
- 40 Badgerys Creek growth
- 41 Upper South Creek network optimisation
- 42 Georges River SP0287 upgrade
- 43 Glenfield SUB SEC 4 rehab
- 44 Cronulla SP0362 upgrade
- 45 Picton WRRF amplification



Project pipeline

Caine Mertens

Program Director, Major Projects



Portfolio overview – East

Regional drivers



Supporting housing



Waterway health



Enhancing resilience



Renewing our assets

Projects

In development:

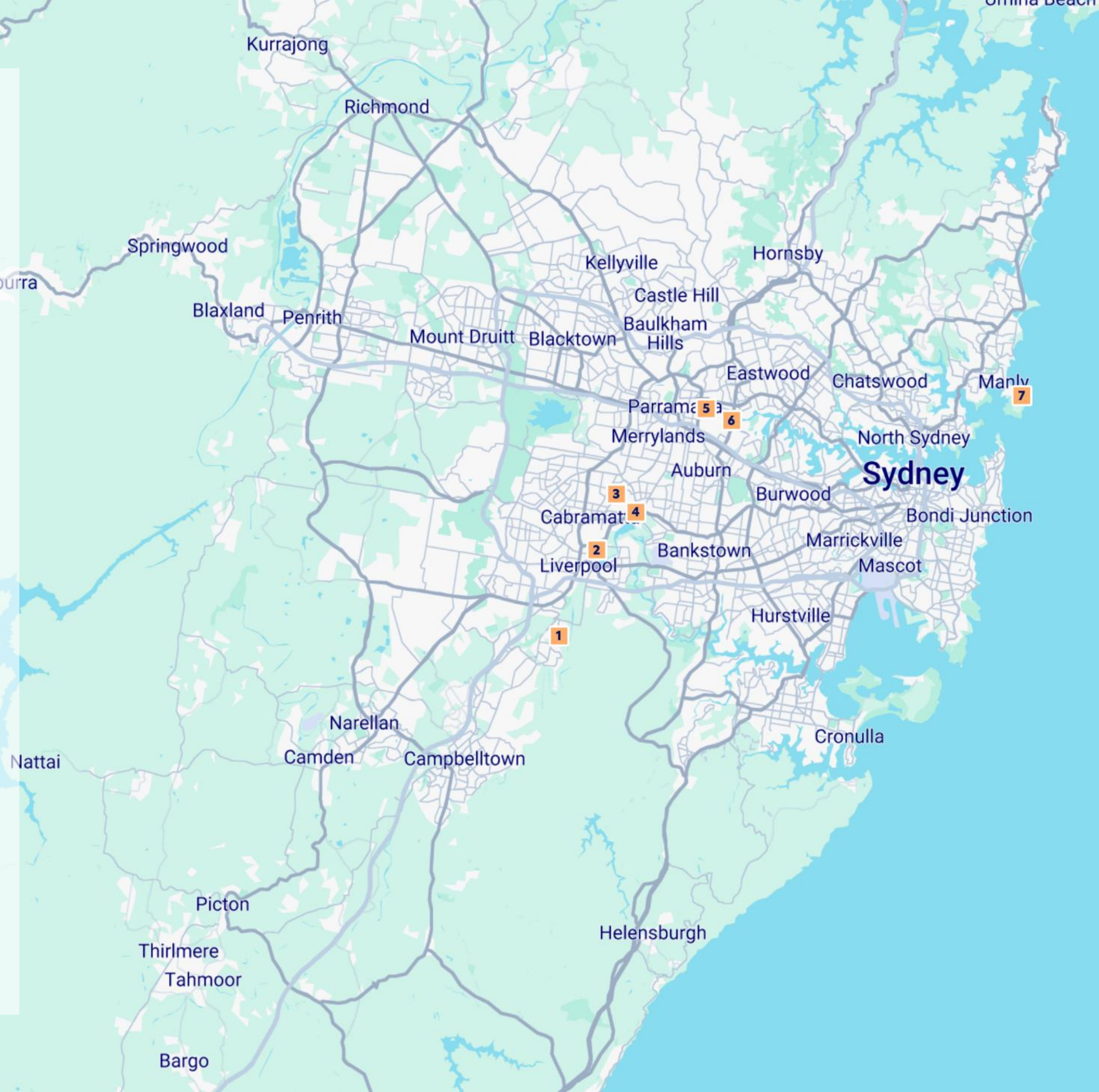
- MSIP Pkg C – Western Branch Sub Main Augmentation
- GOPP - Integrated Water (Camellia)
- Avoid Fail North
- Bondi Reliability Program

In procurement:

- GOPP Integrated Water - Enabling Works

In delivery:

- MSIP Pkg A – Liverpool and Glenfield WRRF Upgrades
- MSIP Pkg B – Fairfield WRRF and LAP
- Avoid Fail North
- Refresh Vaucluse Diamond Bay



Malabar System Investment Program – Package A

Scope

- Upgrades at Glenfield WRRF including new inlet works, primary sedimentation tank upgrades, new odour control facility and ancillary infrastructure.
- Upgrades at Liverpool WRRF including primary treatment process, new secondary treatment train (Aerobic Granular Sludge), new biosolids handling, odour control and ancillary infrastructure.

Cost scale: \$500m - \$1b

Timeline

Q4 2025	Contract award Malabar System Alliance (Acciona, Acciona Agua, SMEC, SW)
Q2 2026	Commence on site
Q2 2029	Operational completion



Malabar System Investment Program – Package C

Scope

- Extension of Liverpool Ashfield Pipeline
- 1.8km slip lining of existing water main to repurpose as wastewater main (1000 diameter)
- New 1.3km HDD drilled wastewater main in the Inner West (1000 diameter)

Cost scale: \$50m - \$100m

Timeline

Q2 2030	Commence procurement
Q2 2031	Contract award
Q2 2033	Operational completion



Malabar System Improvement Program – Mid Term

Scope

- Upgrades at Liverpool WRRF
 - Disconnection of Liverpool and Glenfield WRRF's from Malabar system
 - Advanced treatment of Glenfield and Liverpool flows at Liverpool WRRF
 - Release pipeline to local waterways
 - New brine line to North Georges River Submain

Cost scale: \$1b+

Timeline

2026-2027	Option confirmation and Ref Design
2028	Approvals and Investment Decision
Q2 2029	Commence construction
Q2 2033	Operational completion



GPOP – Integrated Water

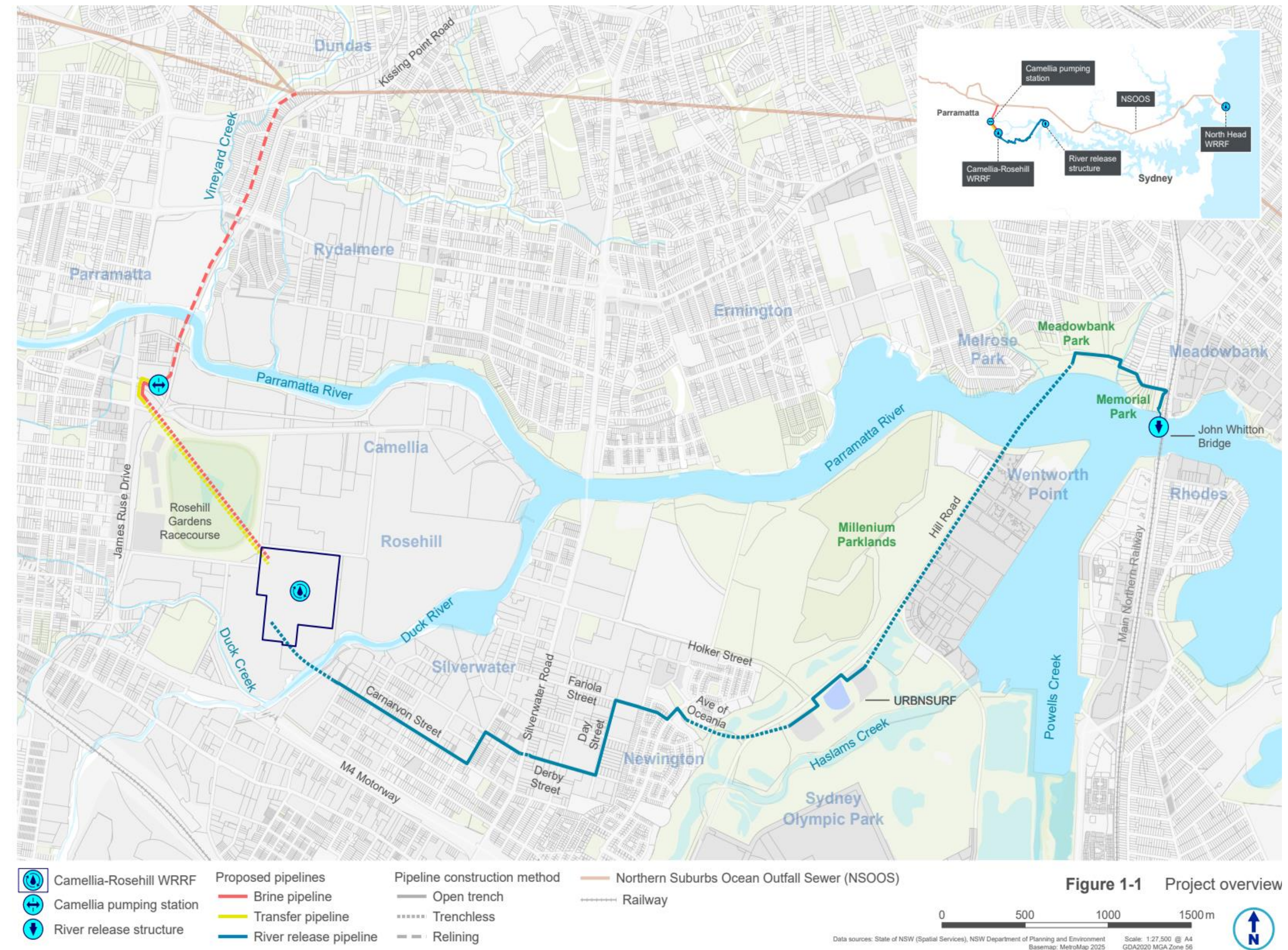
Scope

- New 35-70MLD WRRF at Camellia with secondary and advanced treatment.
- Upgrades to the Camellia pumping station (SP067).
- Networks assets including new wastewater and brine pipelines upstream of Camellia and a new pipeline and release point for advanced treated water to the Parramatta River at John Whitton Bridge, Meadowbank.

Cost scale: \$1b+

Timeline

Q1/2 2027	Commence procurement: ROI -> EOI -> ECI
2028	Contract award
2029	Commence construction
2033	Operational completion



GPOP – Enabling Works

Scope

- Site acquired in 2024
- Site remediation and capping work (height of 1.7m)
- Water main relocation and retaining wall along eastern site boundary

Cost scale: <\$50m

Timeline

Q2 2026	In progress. Complete capping and remediation work by end June 2026
Q2 2026	Contract award June 2026 and start water main relocation and retaining wall work
Q1 2027	Complete water main relocation and retaining wall work



Critical Sewer - Northern Suburbs Ocean Outfall Sewer

Scope

- Delivery of a new access cavern at North Head WRRF to provide safe operational access.
- Desilting and Rehabilitation of the critical sewer network.
- Relining of sections of the NSOOS.

Cost scale: \$500m - \$1b

Timeline (indicative)

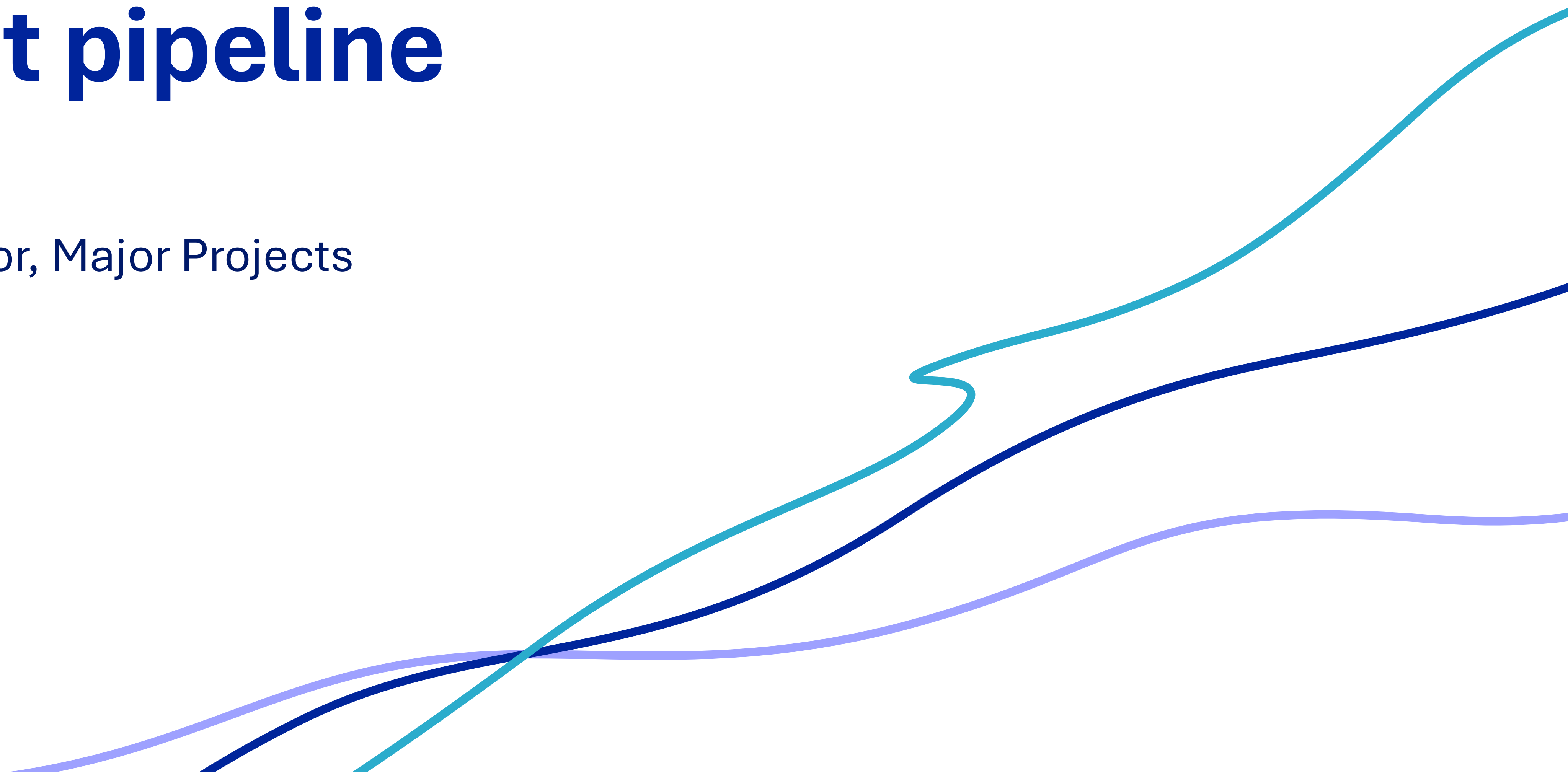
Q2 2027	Access Cavern at North Head delivered. Commence Procurement Process for Desilting and rehabilitation packages
Q4 2027	Mobilisation of critical desilting and rehabilitation works



Project pipeline

Shree Pawar

Project Director, Major Projects



Portfolio overview – South and water

Regional drivers



Supporting housing



Safe and clean drinking water



Waterway health



Enhancing resilience

Projects

In development

- Cascade WFP Upgrade – pretreatment
- Macarthur WFP Upgrade – pretreatment
- Critical watermain renewals – Potts Hill to Pipehead
- Wollongong WRRF amplification

In procurement

- Prospect WFP Upgrade – Package 2 and 3 works
- Quakers Hill WRRF advanced treatment upgrade

In delivery

- Orchard Hills WFP – pretreatment



Orchard Hills Water Filtration Plant (WFP) Upgrade

Scope

- New 190 ML/d pre-treatment plant
- Sludge thickening, dewatering and out-loading facilities.
- Upgrade chemical storage and handling, power supply and other site works

Cost scale: \$100m - \$250m

Timeline

Now	Contract awarded to CPB/Veolia in February 2026. Design in progress
Q4 2028	Operational completion



Prospect Water Filtration Plant (WFP) upgrade – Package 2 and 3

Scope

- New flow diversion gate to protect the water filtration plant from raw water inundation
- Upgrades to solids and residual handling systems and new backwash recovery pumps

Cost scale: To be confirmed

Timeline

Now	Direct negotiation with Prospect Water Partnership
Q4 2026	Contract award
Q4 2029	Operational completion



Quakers Hill Water Resource Recovery Facility (WRRF) advanced treatment upgrade

Scope

- Stage 1: Secondary and advanced treatment upgrades to the Quakers Hill WRRF (includes decommissioning, power supply and a brine management solution)
- Stage 2 (by 2036): Expansion of advanced treatment plant and pipelines for supply of treated water and brine.

Cost scale: \$500m - \$1b

Timeline

Now	Stage 1 procurement
Q4 2026	Stage 1 contract award
Q4 2030	Stage 1 Operational Completion



Cascade Water Filtration Plant (WFP) upgrade

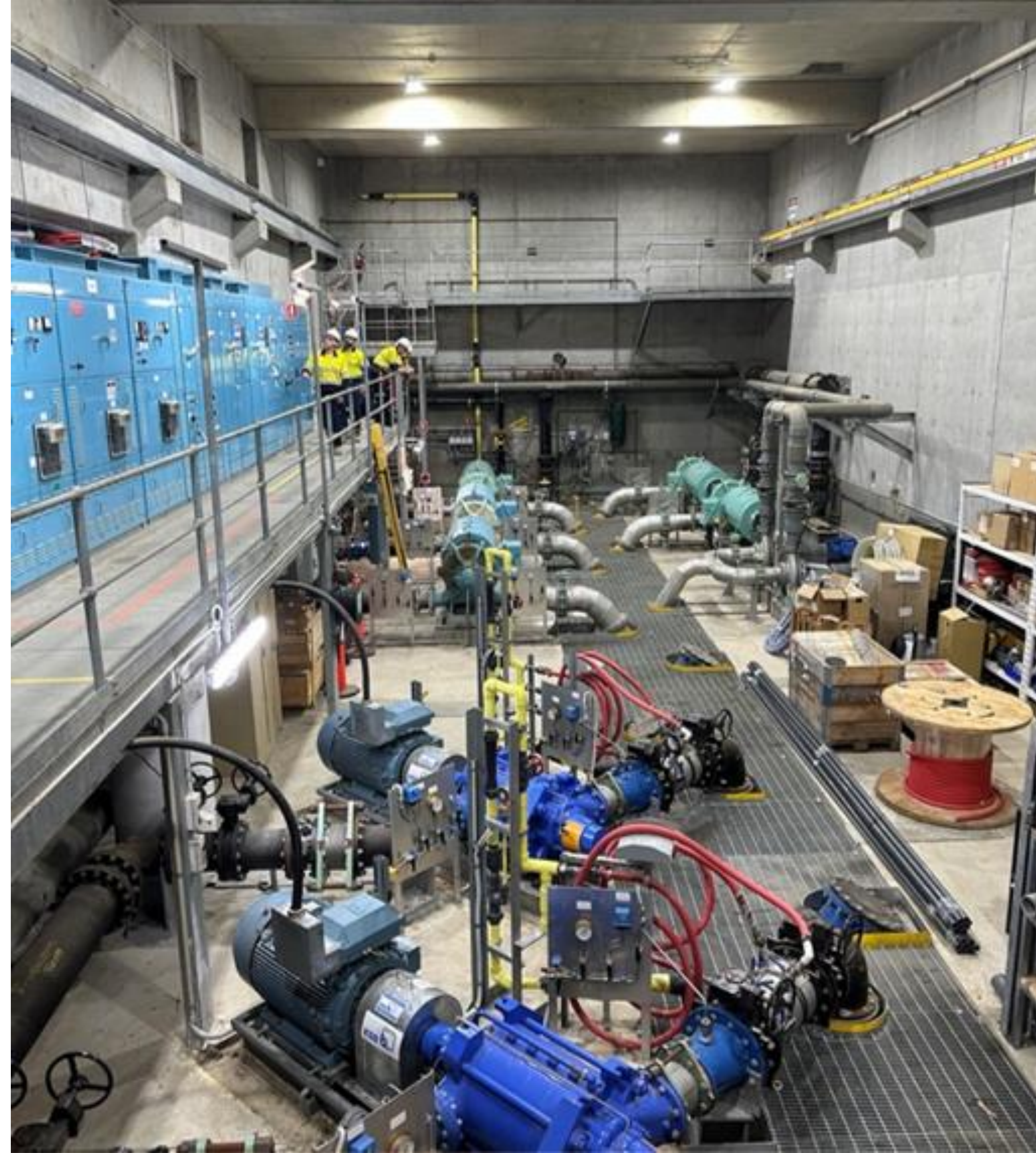
Scope

- New pretreatment plant including upgraded HV/LV power supply.
- Additional plant enhancements.

Cost scale: \$100m - \$250m

Timeline

Now	Project development in progress
Q4 2026	Engage market for reference design & technology supply
Q1 2028	Procure for delivery
Q3 2028	Contract award
Q3 2031	Operational completion



Wollongong Water Resource Recovery Facility (WRRF) amplification

Scope

- Increase treatment capacity of existing facility to support growth.
- Scope is being refined to align service requirement with investment limits and delivery timeframes.

Cost scale: \$250m - \$500m

Timeline

Now	Reference design
Q2 2027	Investment approvals (to be confirmed)
Q4 2027	Procure for delivery
Q4 2028	Contract award
2034	Project completion



Macarthur Water Filtration Plant (WFP) Upgrade

Scope

- Design and development of a new pretreatment plant solution at Macarthur WFP.

Cost scale: \$250m - \$500m

Timeline

Now	Development of optimised pretreatment solution
Q2 2028	Completion of reference design
Q3 2028	Procure for delivery
Q2 2029	Contract award
Q2 2032	Project completion



Critical watermain renewals – Potts Hill to Pipehead

Scope

- Replacement of 7.2 km of DN1800 water main

Cost scale: to be confirmed

Timeline

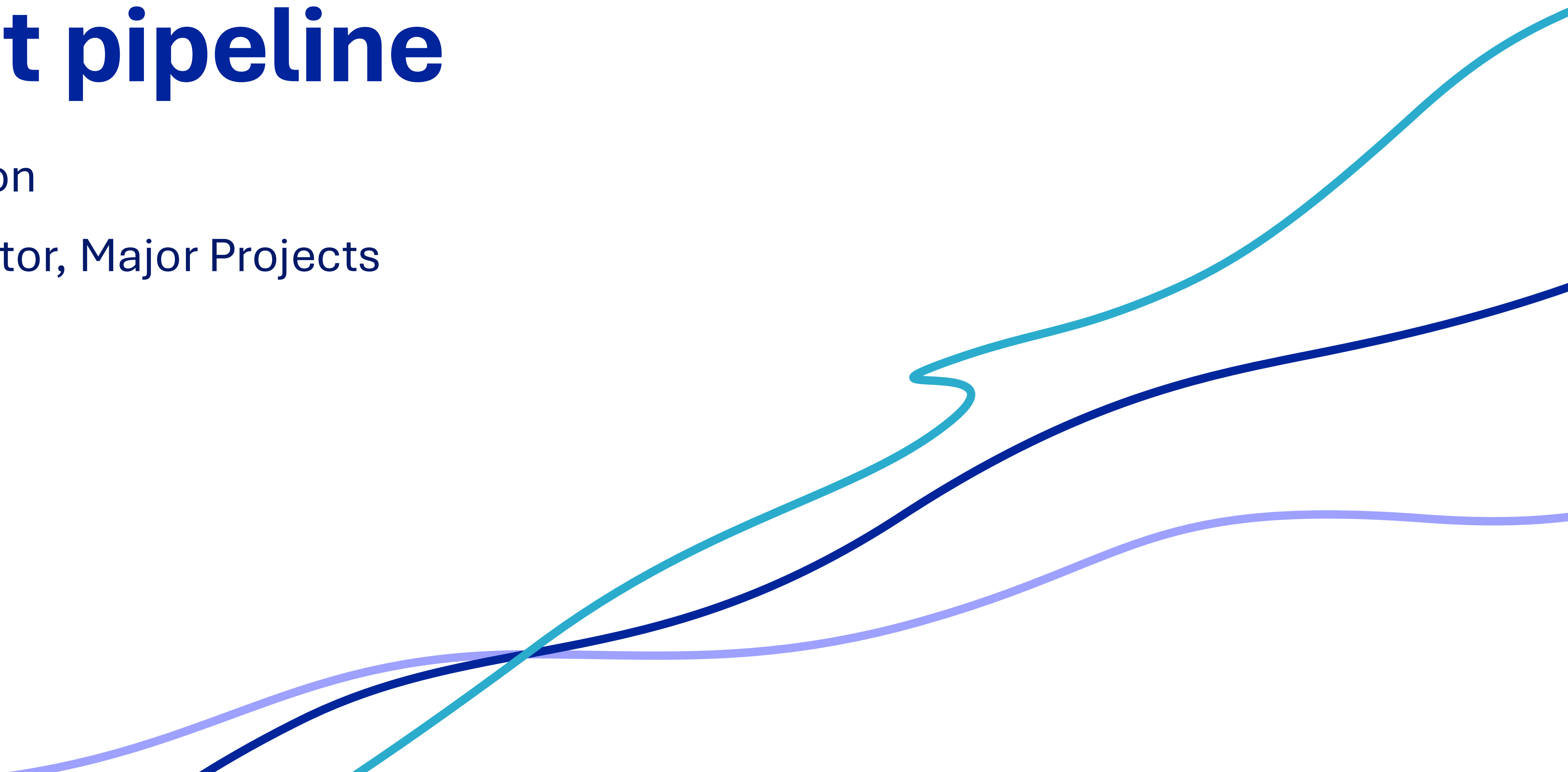
Now	Project development works in progress
Q2 2028	Investment approvals (to be confirmed)
Q4 2028	Procure for delivery
Q4 2029	Contract award
2035	Project completion



Project pipeline

Darren Wharton

Program Director, Major Projects



Portfolio overview – North

Regional drivers



Supporting housing



Safe and clean drinking water



Waterway health



Enhancing resilience and reliability

Projects

In development:

- Northwest Drinking Water Supply
- Greater Penrith and Eastern Creek Program major works

In procurement:

- Willoughby submain amplification

In delivery:

- North West Treatment Hub (NWITH) Growth Program
- Ryde to Pymble (RP03) drinking water transfer main

Nearing completion:

- Thornleigh inlet/outlet main
- Metro North West – SP1022 pumping station and rising main
- NWTH compliance project



North West Treatment Hub Growth Program

Scope

- Capacity upgrades at Rouse Hill, Riverstone and Castle Hill WRRFs.
- In delivery (North West Hub Alliance – John Holland, Stantec, KBR):
 - Scheme 1– Rouse Hill WRRF liquids and Riverstone WRRF biosolids carbonisation
 - Scheme 2 – Riverstone liquids.
- In development (scope and timing TBC):
 - Scheme 3 – Castle Hill WRRF liquids
 - Schemes 4/5 – Riverstone WRRF inlet works upgrade, further liquid capacity upgrade, Rouse Hill biosolids upgrade.

Cost scale: \$1b+

Timeline

Now	Scheme 1 and 2 delivery (to 2029)
2027	Scheme 3 development
2028	Scheme 3 investment approval (TBC)
2031-35	Schemes 4-5 development



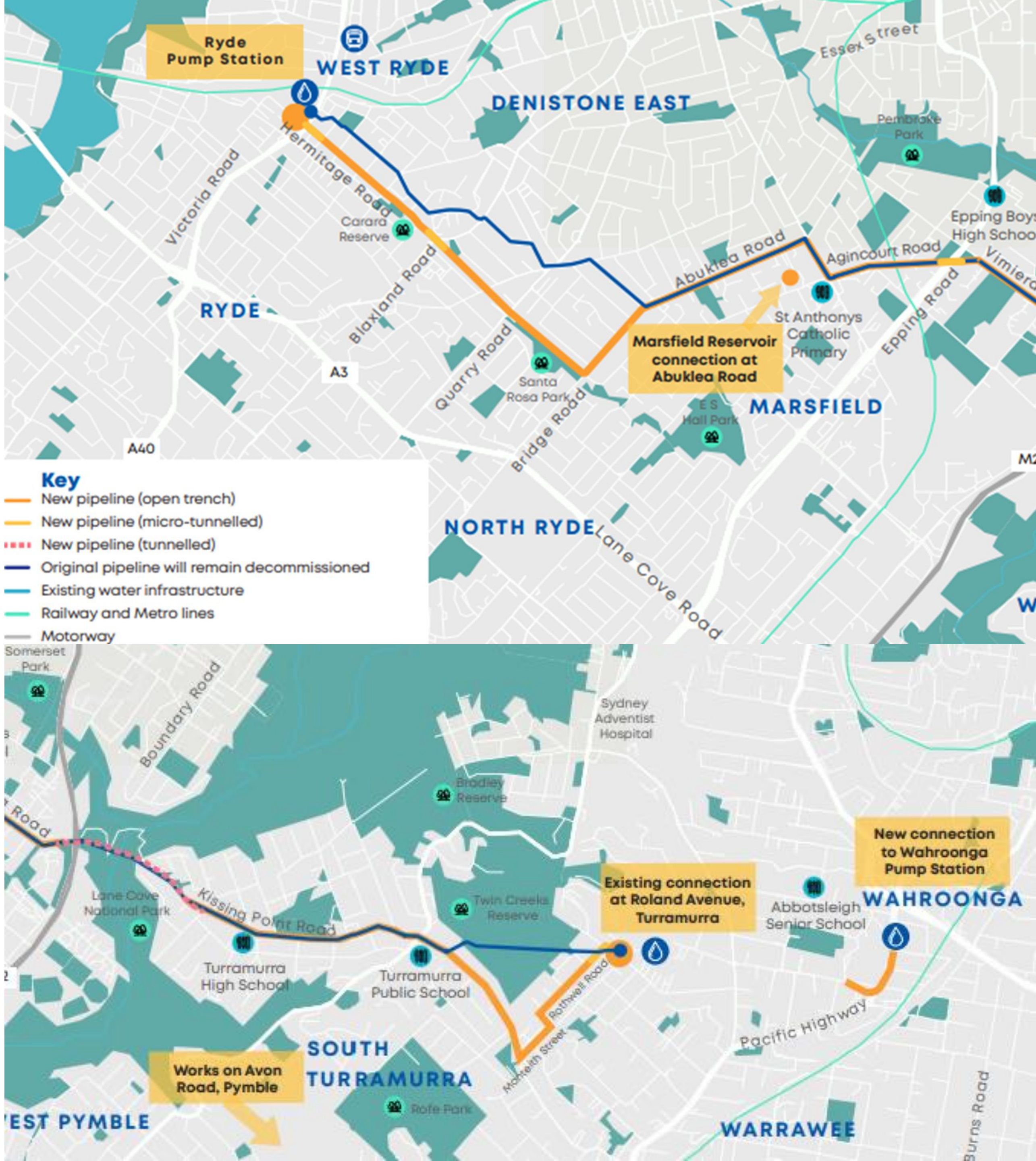
Ryde to Pymble (RP03) Drinking Water Transfer Main

Scope

- New 10km DN900 drinking water main from Ryde to Pymble.
- 400 metre water main along Pacific Highway at Wahroonga.
- In delivery with McConnell Dowell Gamuda JV.

Cost scale: \$100m - \$250m

Timeline	
Now	Detailed design and delivery
Q3 2027	Operational completion



Willoughby Submain Amplification

Scope

- New 2.7 km DN1800 wastewater submain, tunnelled from Artarmon to Cammeray.
- Connections from Naremburn Submain and Crows Nest Carrier.
- Connection to the Northern Suburbs Ocean Outfall Sewer (NSOOS).
- Competitive early contractor involvement phase currently underway with two proponents: Gamuda McConnell Dowell JV and Abergeldie Murphy JV.

Cost scale: \$100m - \$250m

Timeline

Now	Early Contractor Involvement
Q4 2026	Investment approval (TBC)
2027-29	Project delivery
Q2 2029	Project completion



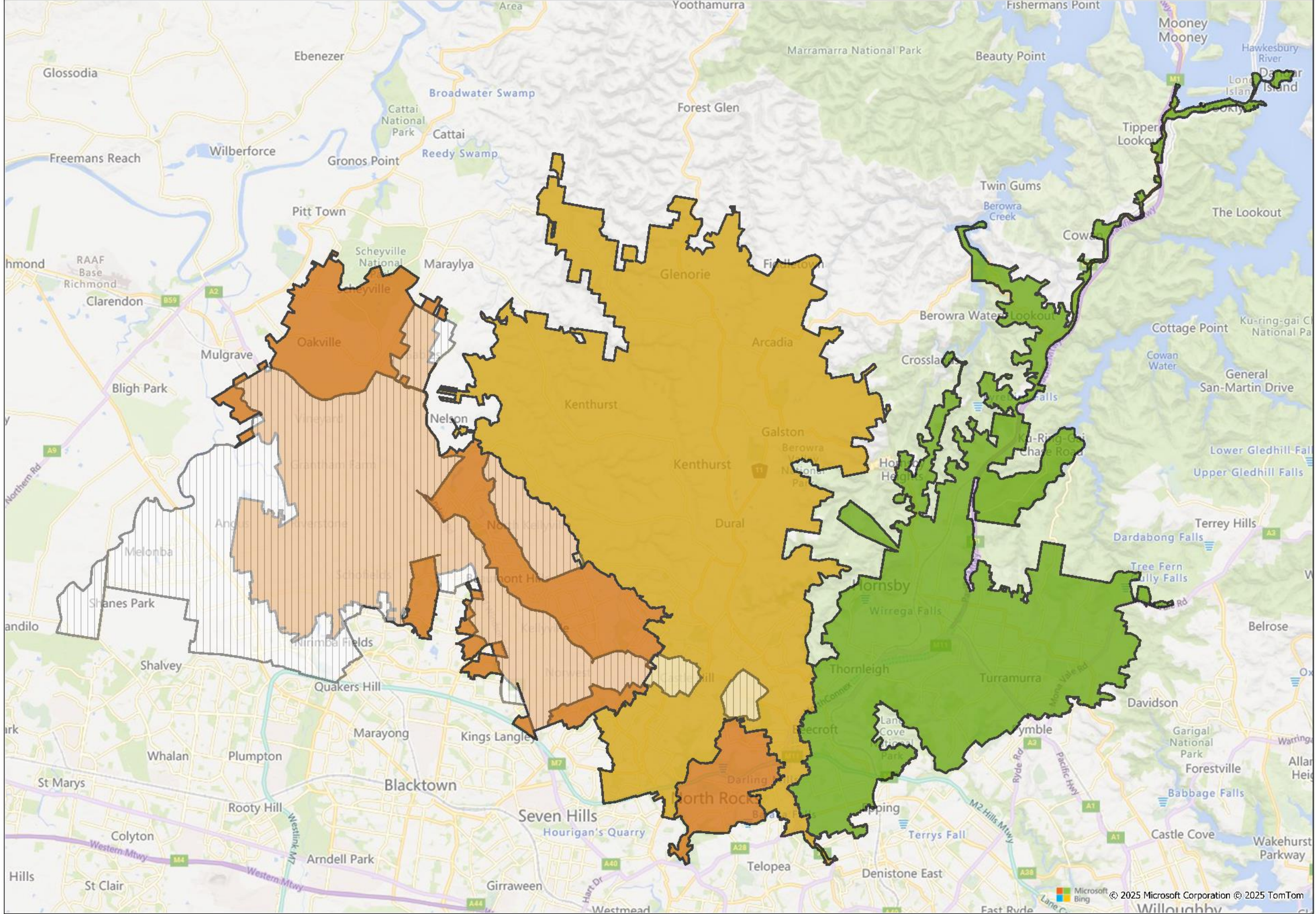
Northwest (WP200) Drinking Water Supply

Scope

- New 250 kL/d water pumping station (WP200) at Prospect.
- 11 km DN1400 water main from Prospect to Parklea, delivered using a mix of trenching and trenchless construction.
- New 60 ML reservoir at Parklea.

Cost scale: \$500m - \$1b

Timeline	
Now	Concept design, condition assessments, REF, site investigations
2027	Investment approvals (TBC)
2028	Procurement and contract award
2029-31	Detailed design and delivery
Q4 2031	Operational completion



Northwest Growth Area (as determined by DPHI)
 Hills Suburbs Distribution System (NDWS Service Area)

Hills Suburbs Distribution System
 Hornsby Distribution System

Greater Penrith to Eastern Creek Program Major Works

Scope

Penrith WRRF

- Upgrade ageing critical equipment (including inlet works, odour control systems and tertiary filters) to improve reliability, safety and environmental performance.

St Marys WRRF

- Upgrades to the biosolids process, inlet works and tertiary filters to address process constraints.

Cost scale: \$500m - \$1b

Timeline

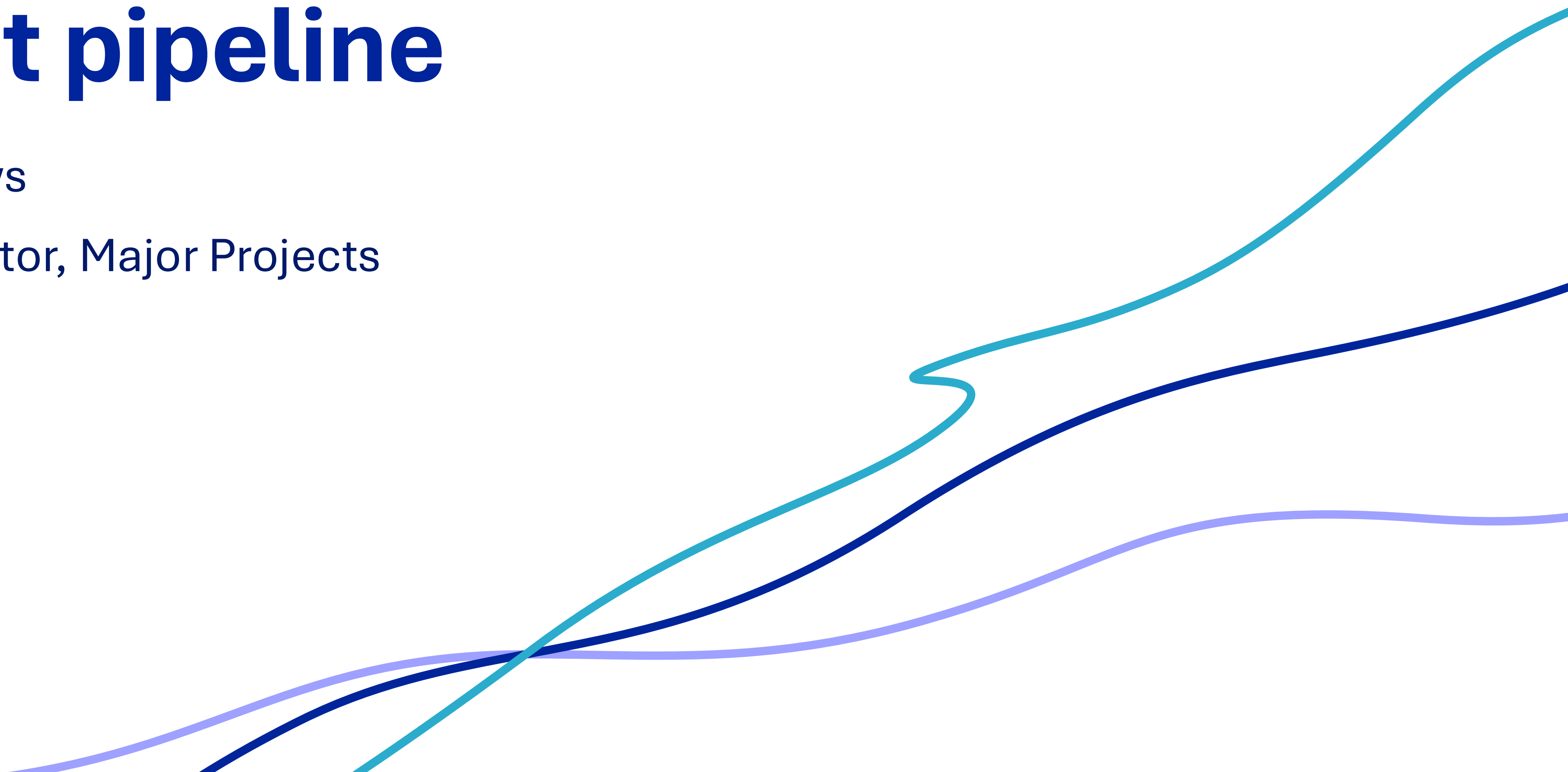
Now	Detailed asset planning, options development, condition assessment
2029	Investment approvals (TBC)
2030-2034	Staged delivery
2034	Project complete



Project pipeline

Peter Matthews

Program Director, Major Projects



Portfolio overview – West

Regional drivers



Supporting housing



Waterway health

Projects

In development:

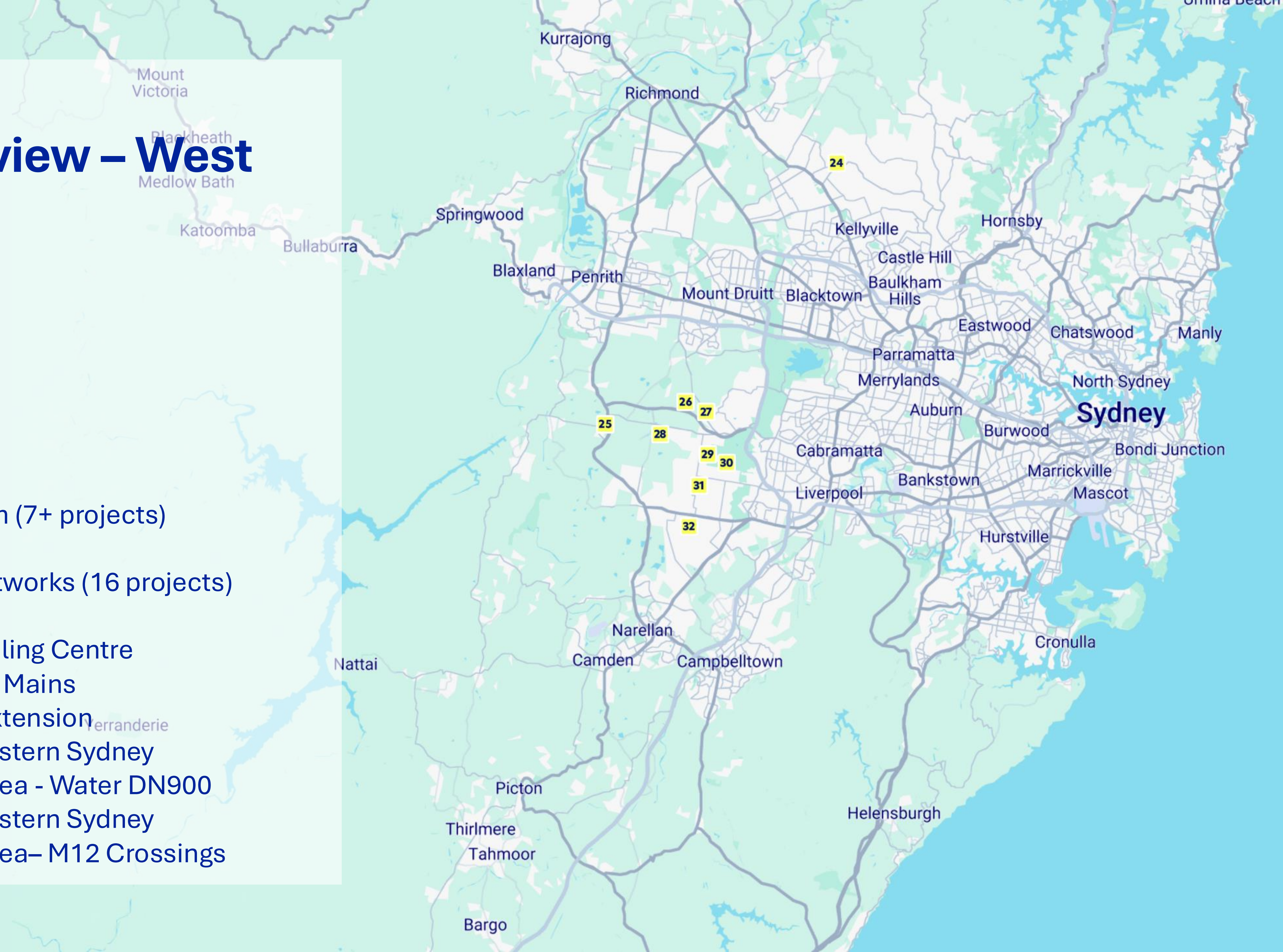
- Drinking Water Program (7+ projects)

In delivery:

- Upper South Creek Networks (16 projects)

Nearing completion:

- Advanced Water Recycling Centre
- Kemps Creek Pressure Mains
- Bonds Creek Carrier Extension
- Upper South Creek Western Sydney Aerotropolis Growth Area - Water DN900
- Upper South Creek Western Sydney Aerotropolis Growth Area– M12 Crossings



Delivery

Upper South Creek Networks Program

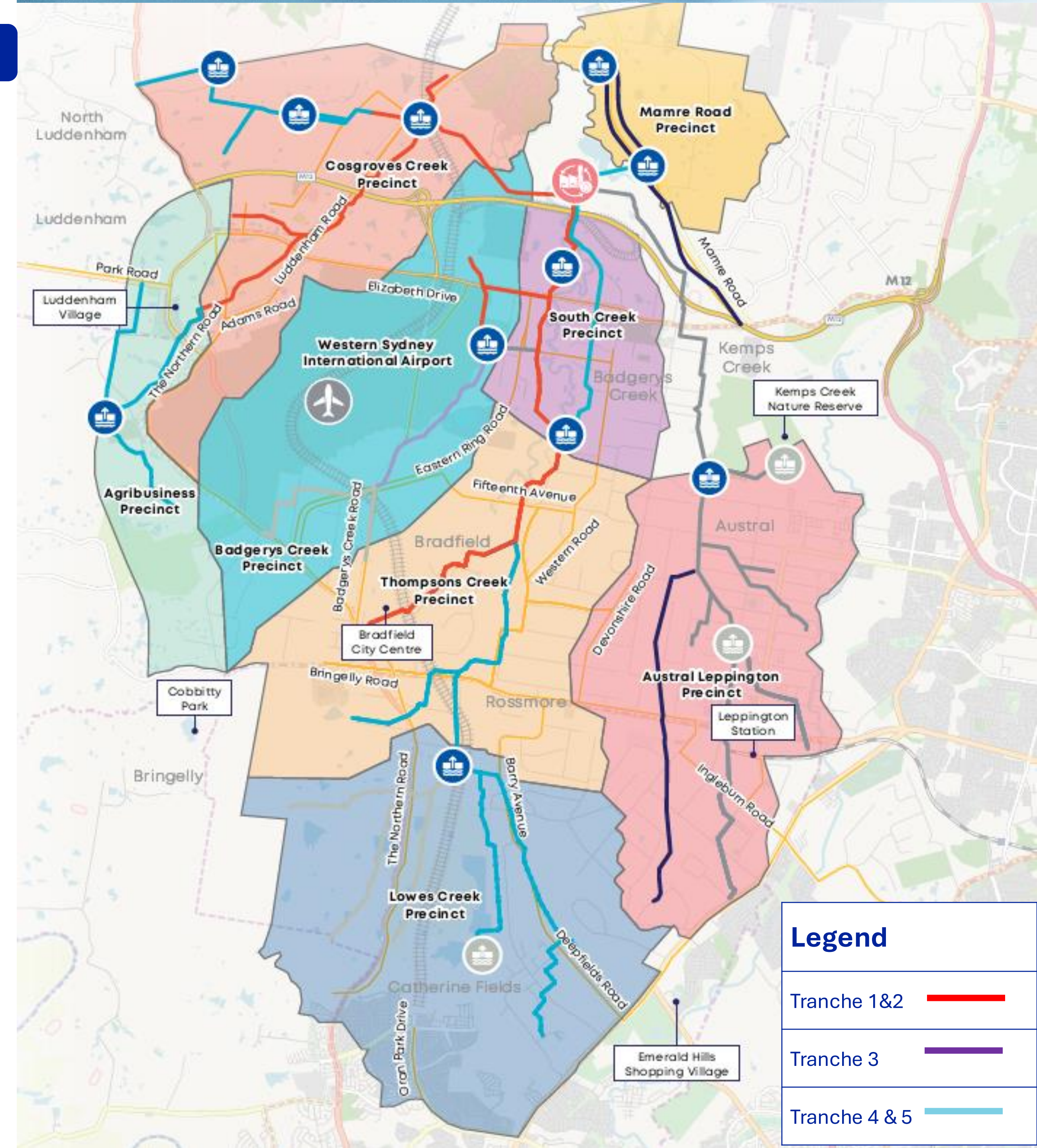
Scope

- The Upper South Creek Networks (USCN) Program will deliver a new wastewater network to service growth and transfer flows to the new Advanced Water Recycling Centre (AWRC). Engineering, procurement and construction management via Creek Connect utilising the Delivery Contractors panel.
- The Program will deliver over 115 km of wastewater pipelines and 11 pumping stations

Cost scale: \$2b+

Timeline

Tranche 1 & 2	3 pump stations 36km pipelines	In delivery
Tranche 3	3 pump stations 25km pipelines	In procurement
Tranche 4	5 pump stations 44km pipelines	In concept design, procurement commencing 2027
Tranche 5	10km pipelines	In early planning – procurement ~ 2031



Drinking water program

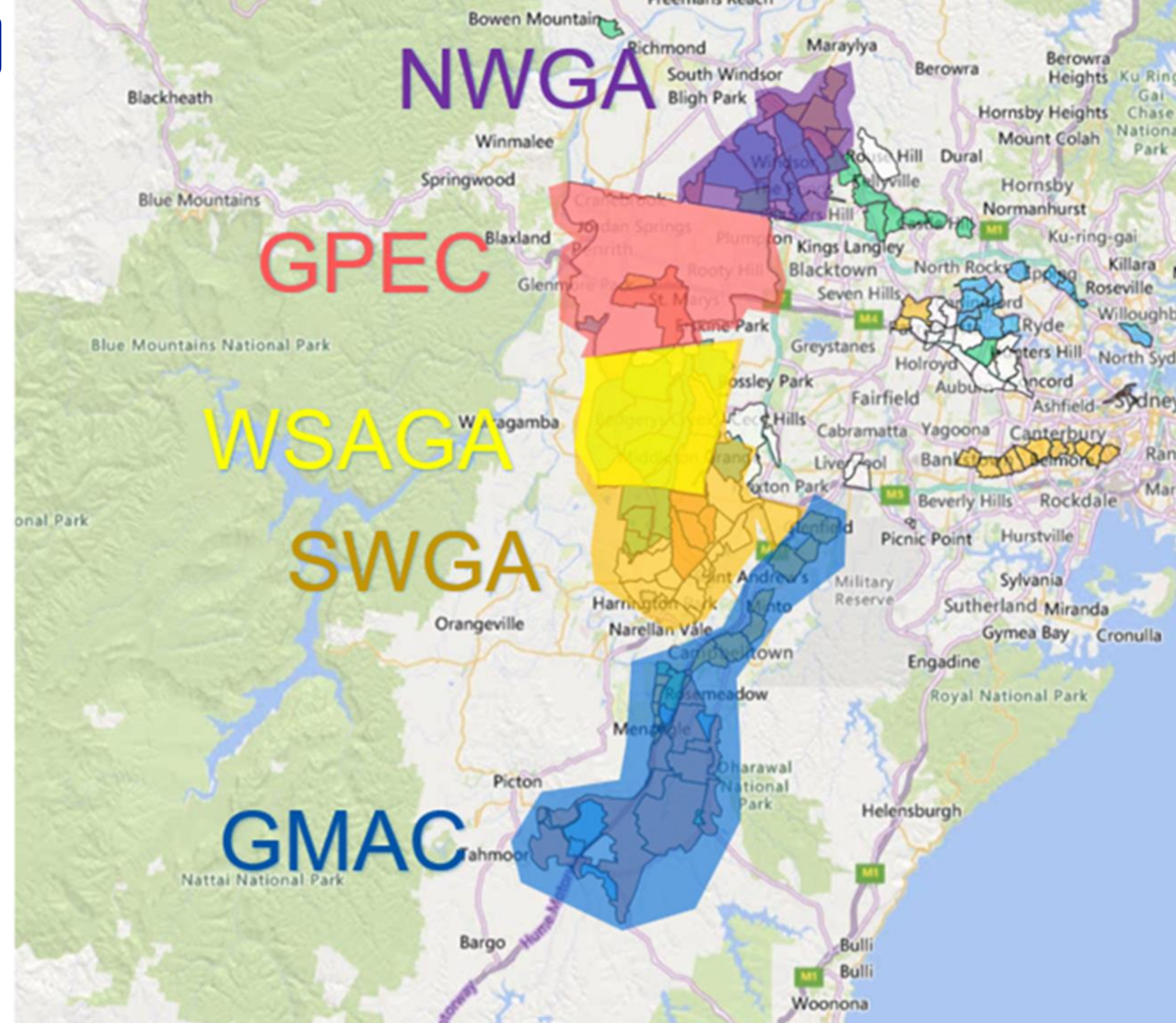
Scope

- Serving growth in the Western Sydney Aerotropolis Growth Area, South-West Growth Area and North West Growth Areas (WSAGA, SWGA, and NWGA) – new homes, new jobs, and new cities.
- 7 network projects across the WSAGA, SWGA, and NWGA Priority Growth Precincts.
- Around 40 km of pipelines to be delivered by 2032.
- 3 pump station upgrades, new pump station and a reservoir.
- Delivery via Delivery Contractors panel

Cost scale: \$200m - \$400m * additional projects being assessed

Timelines

Now	Concept design, site investigations REFs
2026-27	Investment Approvals, procurement and contract award (delivery)
2026-32	Construction
Q4 2028	Operational completion



NWGA: North-West Growth Area

GPEC: Greater Penrith to Eastern Creek

WSAGA: Western Sydney Aerotropolis Growth Area

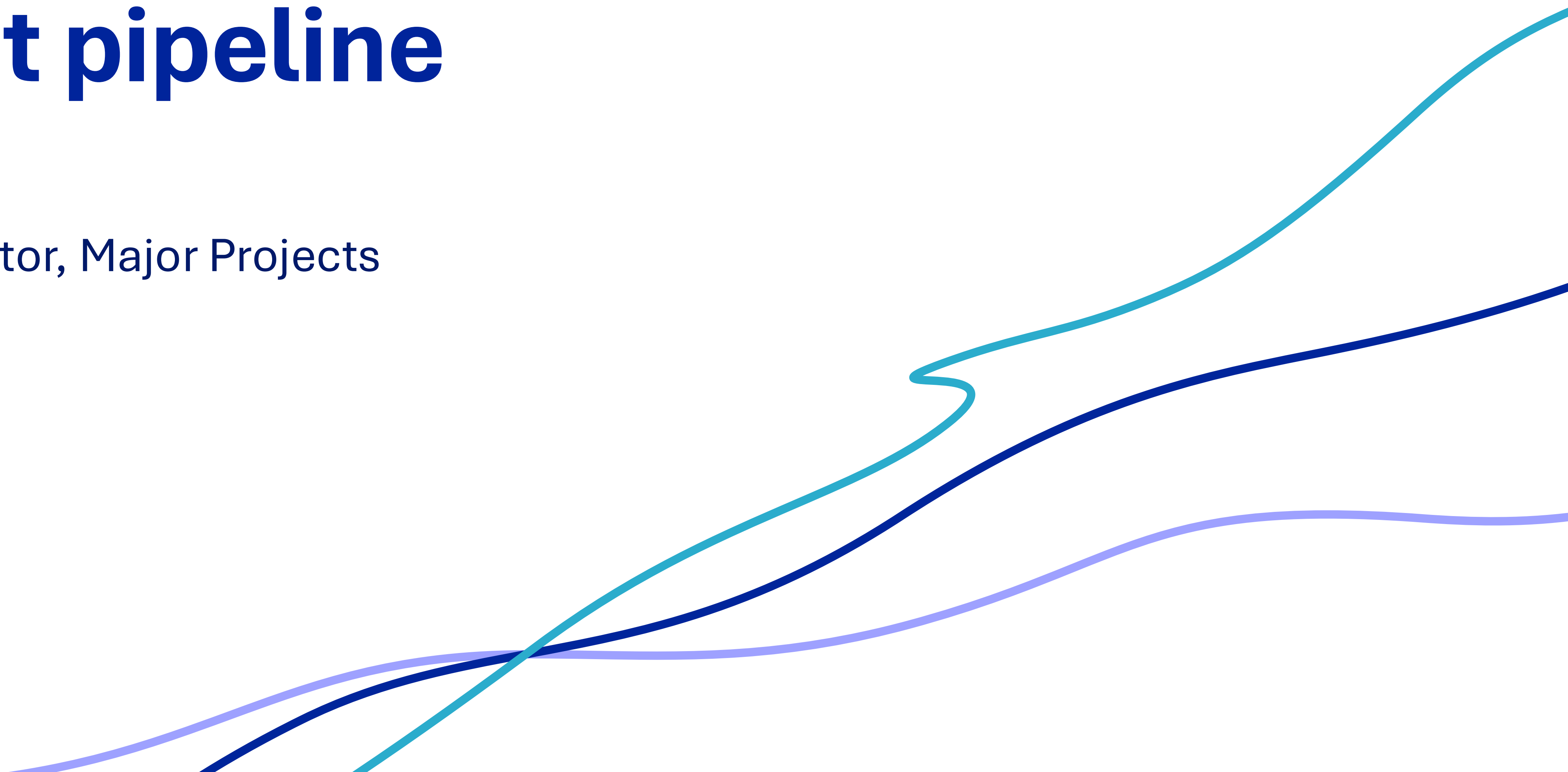
SWGA: South-West Growth Area

GMAC: Greater MacArthur Growth Area

Project pipeline

Steven Blanch

Program Director, Major Projects



Portfolio overview – Stormwater and other

Regional drivers



Supporting housing



Safe and clean drinking water



Waterway health



Enhancing resilience and reliability

Projects

In Planning/Procurement

- IWCM - Aerotropolis Initial Precincts
- Wilton Integrated Servicing Project Stage 2
- Bondi Reliability Program

In Delivery

- IWCM - Mamre Road Precinct
- Wilton Integrated Servicing Project Stage 1
- Refresh Vaucluse Diamond Bay



Integrated Water Cycle Management- Mamre Road Precinct

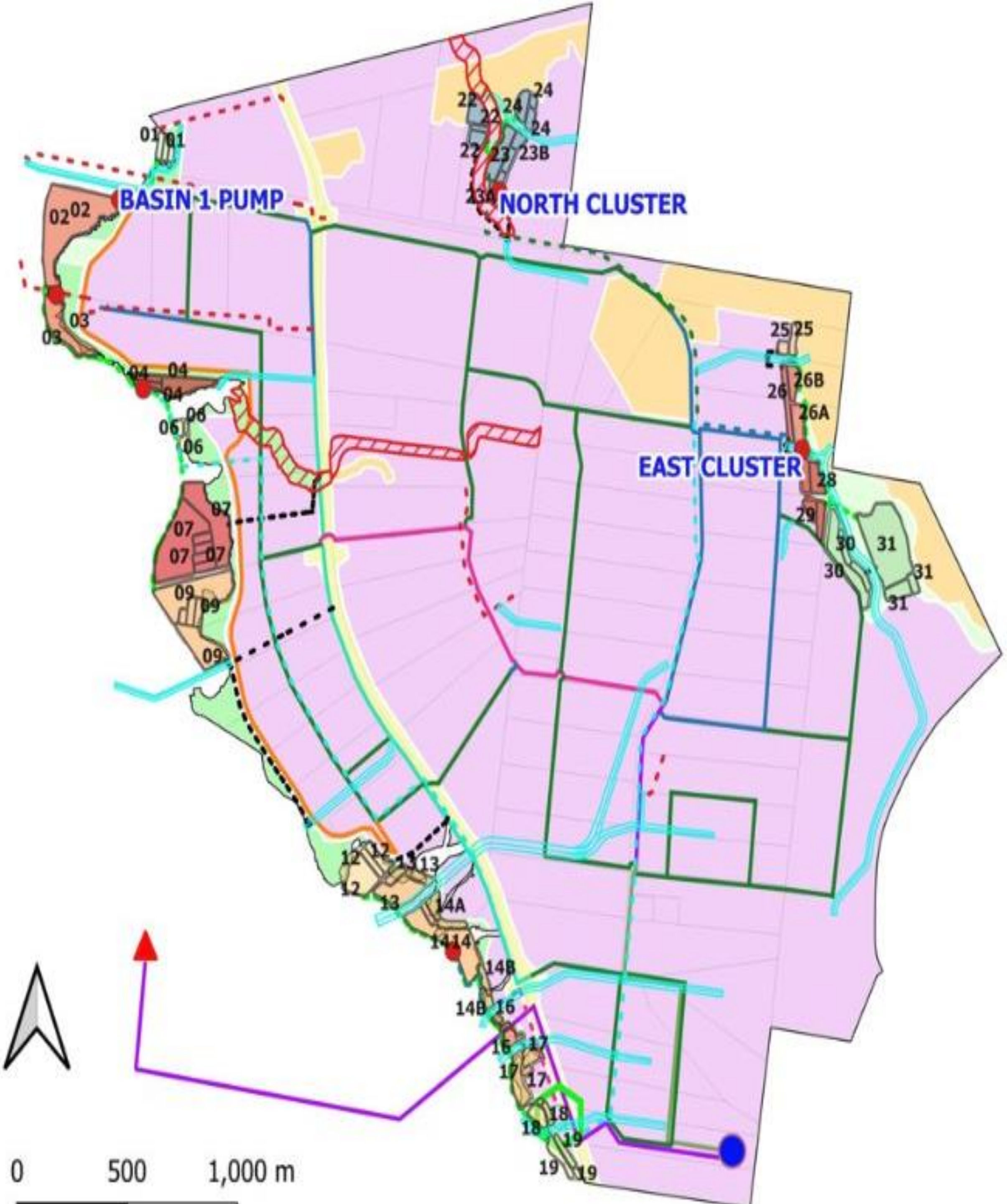
Scope

- Design of the Mamre IWCM scheme
- 6ML recycled water reservoir
- 5ML/d stormwater treatment plant at Upper South Creek AWRC
- Recycled water trunk and reticulation network
- Naturalised stormwater basins and channels
- Stormwater collection network and pumps

Cost scale: \$500m - \$700m project FY24 - FY32

Timeline

Now	Concept design complete or progressing across all elements
Q3 2026	Construction RFT – reservoir and trunk network
Q4 2026	Design and construction RFTs – stormwater mains and pumps
FY26–30	Detailed design and construction of basins, wetlands and drainage channels (mostly developer-led, some Sydney Water)



Development and delivery

Integrated Water Cycle Management- Mamre Road and Aerotropolis Stormwater Treatment Plant

Scope

- New stormwater treatment plant, initially 5 ML/D scaling to 56 ML/D.
- Treating harvested stormwater collected from Mamre and Aerotropolis schemes.
- Connection to AWRC recycled water where insufficient stormwater.

Timeline

Q3 2026	D&C RFT
Q1 2027	D&C contract award for scalable stormwater treatment plant
TBC	D&C completion and operational commencement
2030+	Expansion of stormwater treatment plant



IWCM - Aerotropolis Initial Precincts

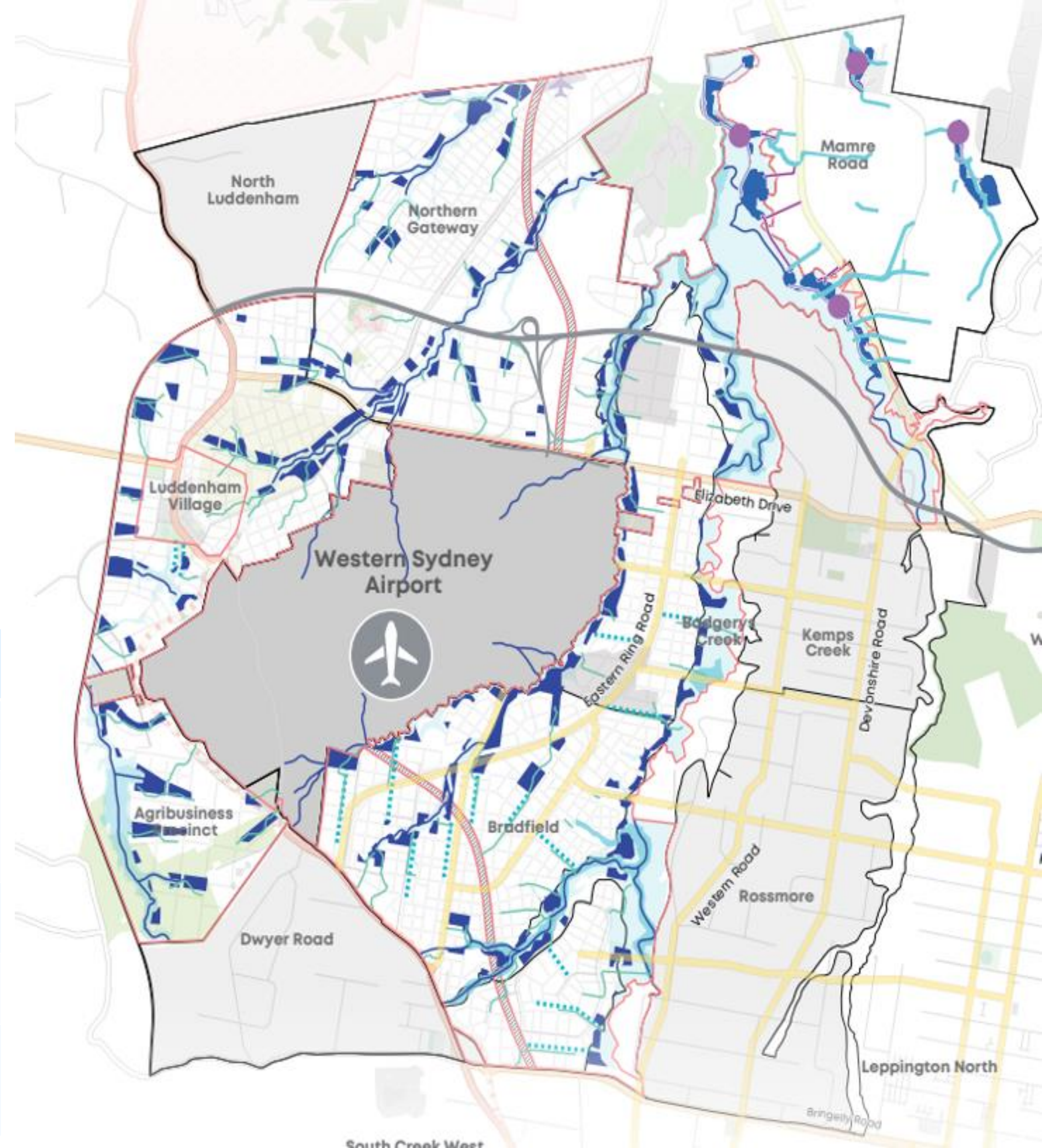
Scope

- Concept design of the Aerotropolis IWCM Scheme.
- Recycled water reservoirs (likely to be 3).
- Stormwater treatment plant (expanded AWRC).
- Recycled water trunk and reticulation network.
- Naturalised stormwater basins and channels.
- Stormwater collection network and pumps.

Cost scale: \$3.5b - \$4.5b over 20 years

Timeline

Now	IWCM concept design RFT open
FY26+	Procurement packaging – recycled water system; stormwater collection and transfer
FY27+	Delivery of reservoirs, trunk mains, pumping stations
FY31	Recycled water system operational
FY26+	Basins and channels delivered progressively, mostly by developers



Development and delivery

Wilton

Scope

Stage 1 – servicing 4,000 households

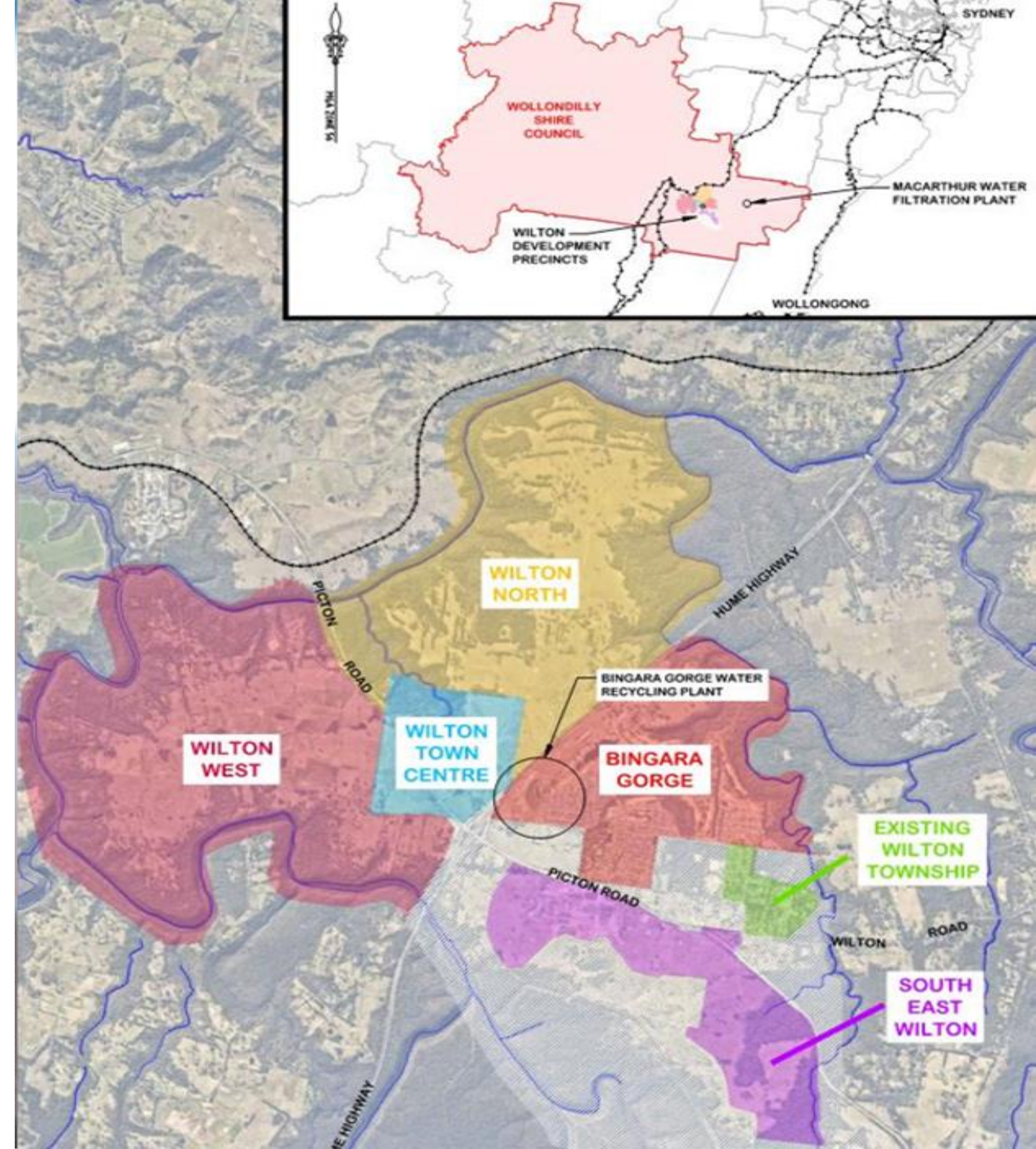
- Works in Bingarra Gorge, existing Wilton Town Centre, part of South East Wilton and part of Wilton North.
- Eight work packages including site facilities, 6ML drinking water reservoir, 2ML recycled water reservoir, expansion of Bingarra/Wilton WRRF, two wastewater pumping stations, drinking water, recycled water and wastewater networks.
- Acciona appointed Sydney Water's delivery partner
- All packages taken to detailed design and construct only

Stage 2 – servicing 8,000 households

- Works in Wilton Town Centre and expanded Wilton North and South East Wilton
- Still in planning – expansion of water and wastewater networks, including multiple wastewater pumping stations.

Timeline

Q3 2027	Stage 1 Packages 1–6 & 8 complete
Q4 2027	Stage 1 Package 7 complete
FY26-30	Stage 2 planned and delivered.



Bondi Reliability Program

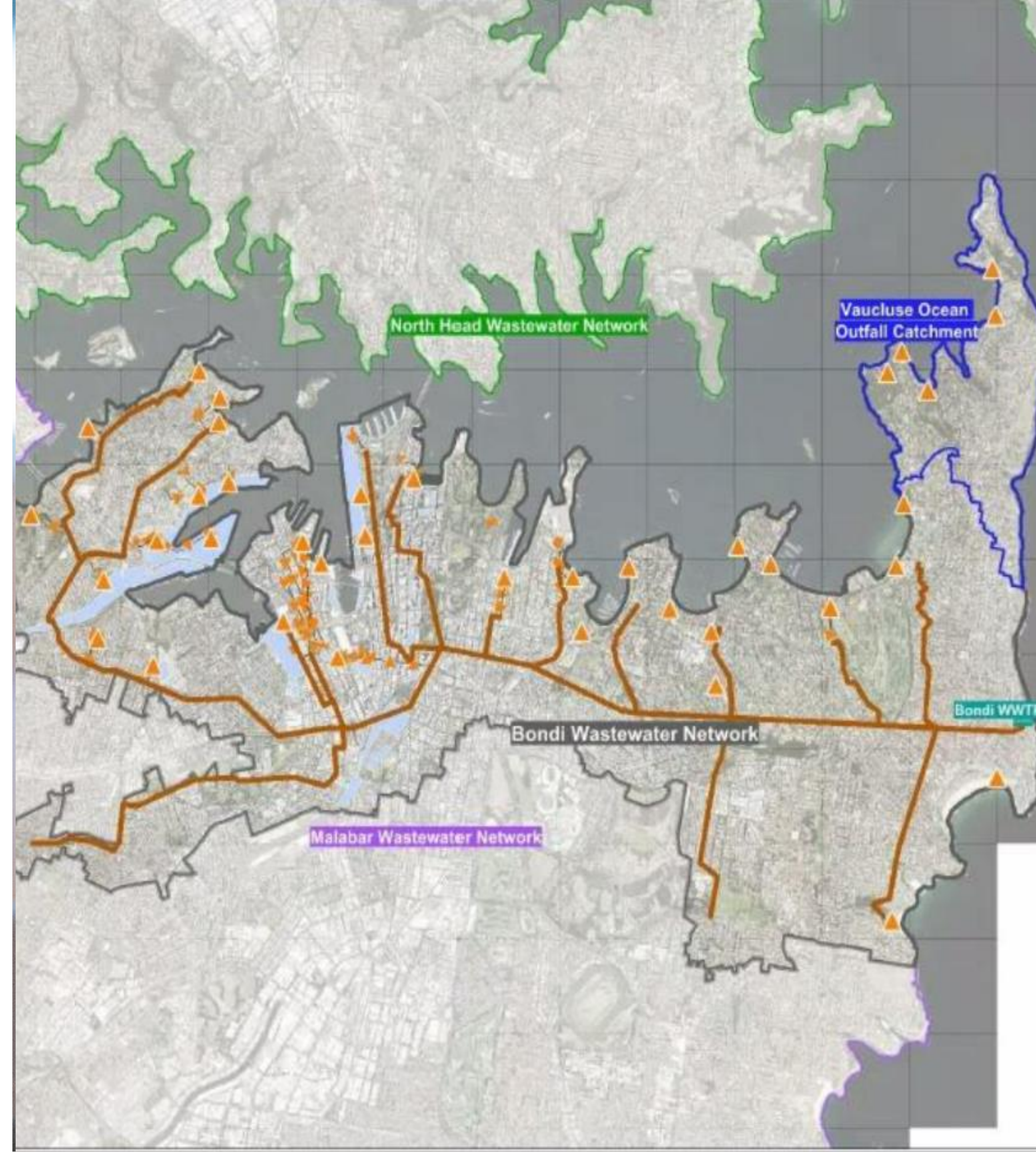
Scope

- Upgrade of Bondi WRRF wastewater treatment processes, equipment and facilities
- Concept design is underway
- Delivery strategy and work packaging in development
- Rehabilitation of high-risk sections of the Bondi Ocean Outfall Sewer (BOOS) affected by deterioration and corrosion.

Cost scale: \$1b over 10-year program

Timeline

FY26-27	Bondi WRRF delivery strategy developed
FY28-32	Bondi WRRF construction and works
FY29	BOOS delivery strategy developed
FY30	BOOS construction commences



Development and delivery

Refresh Vaucluse Diamond Bay

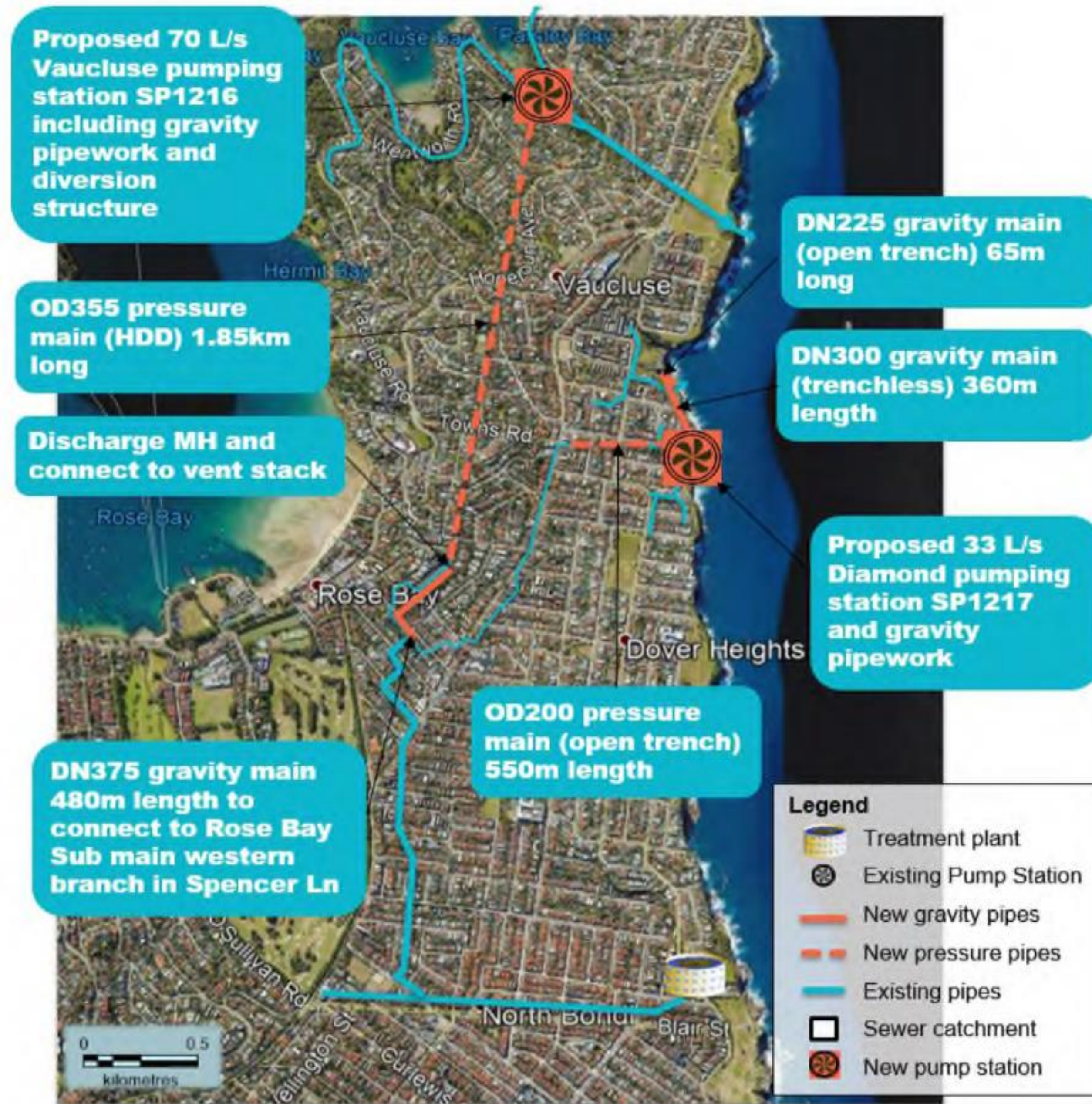
Scope

- Works to divert wastewater flows to the Bondi WRRF
- New wastewater pumping station at Parsley Bay, Vaucluse and connection to existing mains.
- New wastewater pumping station at Eastern Avenue Reserve, Dover Heights
- 3.6km of wastewater mains connecting the pumping stations to existing outfalls and network
- Construction of a new amenity block and care park at Parsley Bay

Timeline

Now	Concept design complete, with detailed design for Eastern Avenue Reserve progressing
Q3 2026	Connection to existing wastewater mains at Parsley Bay
Q4 2026	Wastewater pumping station construction complete at Parsley Bay Construction commences at Eastern Avenue Reserve

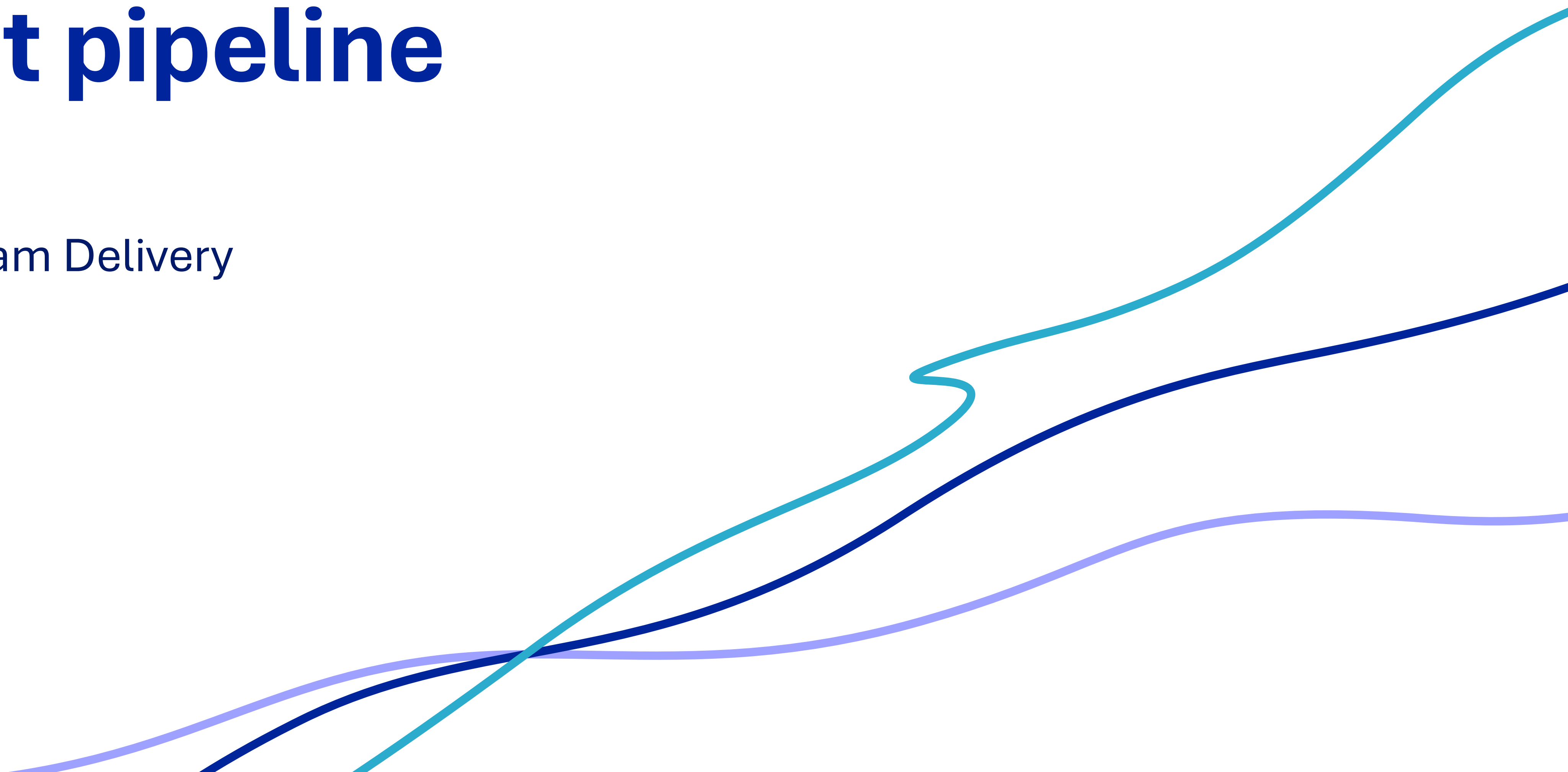
Refresh Vaucluse Diamond Bay Recommended Option Schematic



Project pipeline

Karl Phillips

Head of Program Delivery



Program Delivery

Scope

- Program Delivery ensures Sydney Water’s critical investment program is delivered safely, efficiently, and with strong customer and community outcomes.
- Working in partnership with Regional Delivery Partners and other Delivery Contractors, it delivers water, wastewater, and stormwater infrastructure and manages maintenance services to support reliable, resilient, and trusted services.

Delivery Contractor Panels Timeline

Out to market	1 Pump Station	Tranche 1
Out to market	1 HDD/MT	Tranche 1
Q4 2026/Q1 2027	4 Pump Stations	Tranche 1
Q3/Q4 2026	3 Pipeline	Tranche 1



Program Delivery

Projects

- Wallacia WRRF minor works
- Cronulla SP0362 upgrade
- Glenfield SUB SEC 4 rehabilitation
- Picton WRRF amplification
- Redbank wastewater revision
- Upper South Creek network optimisation
- Georges River SP0287 upgrade
- Badgerys Creek growth



Questions



Responses to questions on notice

During the Infrastructure Pipeline Industry Briefing, we received questions that required follow-up or came in after the session finished. Please see our responses below.

1. What is the process for organisations to join the Delivery Contractor Panel? Will the panel open to new providers in the future?

Sydney Water established the Delivery Contractor Panel following an open Expression of Interest in 2025, based on the pipeline of work we need to deliver. At this stage, we're not expanding the panel. We set it up to match the current and forecast program, so we have the right capability in place to deliver reliably. We regularly review the panel to make sure it continues to meet our needs. If that changes, we'll run a new sourcing process to bring in additional providers with the right skills and experience. The Delivery Contractor Portal is only available to existing panel members. If you're already on the panel and need support, please contact your Client Representative.

2. Can Sydney Water provide an update on Purified Recycled Water (PRW)?

We are working with regulators and government on the Securing Our Water Supply – Quakers Hill to Prospect project as we work to obtain the essential approvals. In the meantime, we're continuing essential background work that will be required to secure the planning and investment approvals to proceed with the project.

We're also continuing our community education on purified recycled water as an option to help secure Sydney's long-term water supply.

View the full recording of the industry briefing and Q&A [here](#).

Plan with confidence

Our online pipeline = the single source of truth

The most **accurate, current view** of Sydney Water's Infrastructure Delivery work.

Designed to help you **plan people, capability and investment**.

More renewals projects coming soon – visibility will continue to grow.

Moving toward a **single view of the full delivery portfolio**.

Transparency by design – **better visibility and better engagement**.



Scan the QR code to see what's in the pipeline

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A scenic coastal landscape at sunset. The sky is filled with soft, orange and yellow clouds. In the foreground, a rocky beach with dark, wet stones leads to a calm body of water. The background features a steep, rocky cliffside with some sparse vegetation and a few houses perched on the edge. The overall mood is peaceful and serene.

Thank you

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