

PPA CONFERENCE 2025



Regional Infrastructure Opportunities
and the
Energy Sector Pipeline

DRIVING DEEPER VISIBILITY OF UPCOMING INFRASTRUCTURE PROJECTS



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



2. Three lenses on infrastructure opportunities



3. Summary of the consolidated infrastructure pipeline outputs

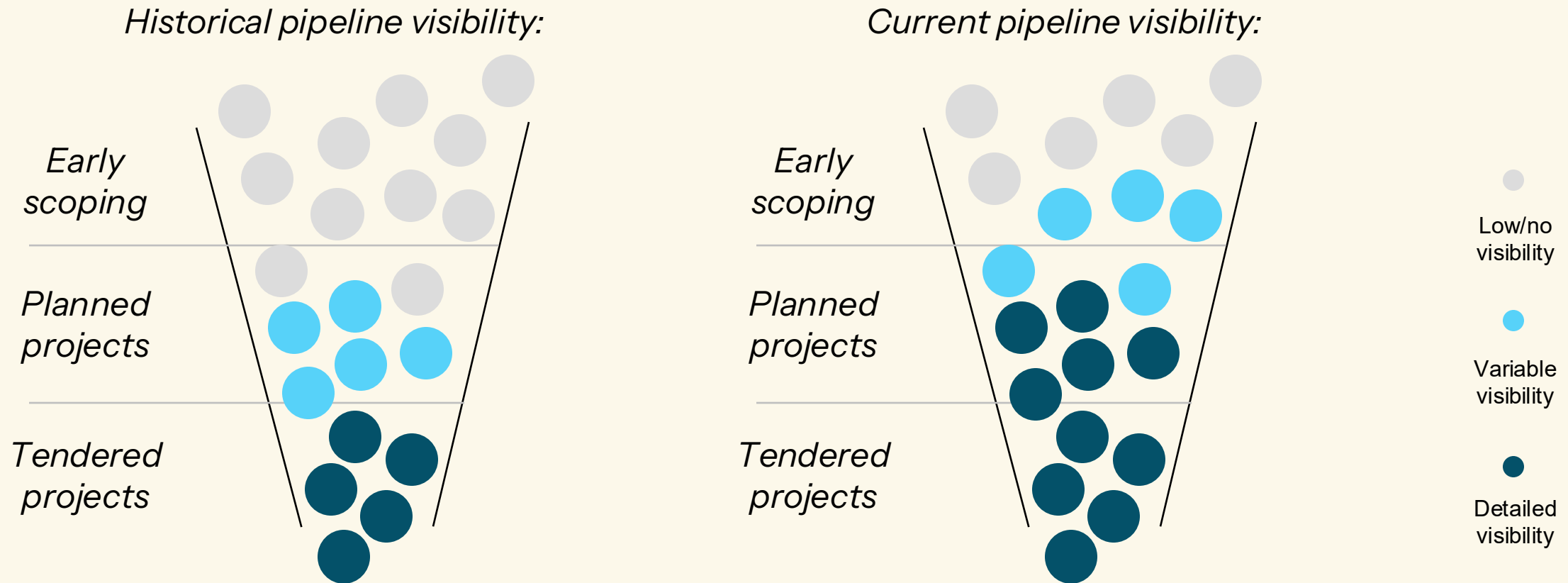


4. Watch this space - what's coming next



WHAT ARE WE TRYING TO ACHIEVE?

The consolidated pipeline pilot will answer a key question of bidders:
What projects are planned, funded, and when will they happen?

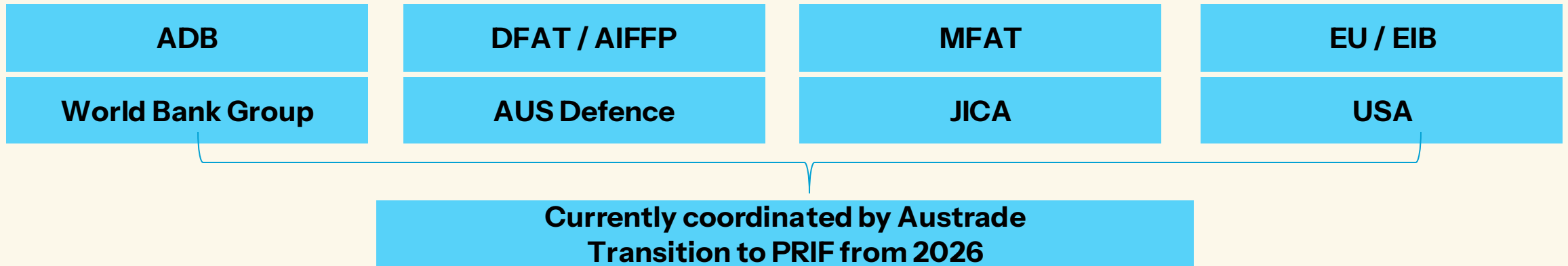


1. What is a consolidated infrastructure pipeline and what are we trying to achieve?

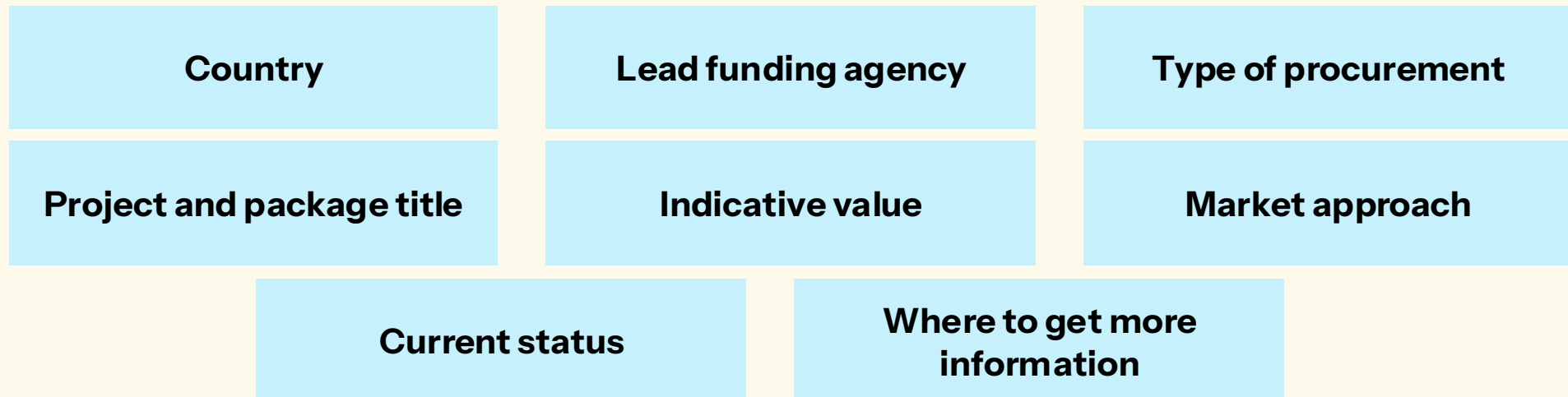


WHAT IS INCLUDED IN THE PIPELINE?

Who is included in the pipeline:



What is included in the pipeline:



Components of the consolidated pipeline

Short term

The immediate pipeline includes confirmed procurement opportunities going to market in the next 12-18 months.

PRIF

The PRIF Partner pipeline looks out about 3 years including projects in development that are included in partner funding strategies.

NIIPs

The longer-term NIIP pipeline includes projects that are national priorities seeking funding, often with a 3-5+ year horizon.

notes

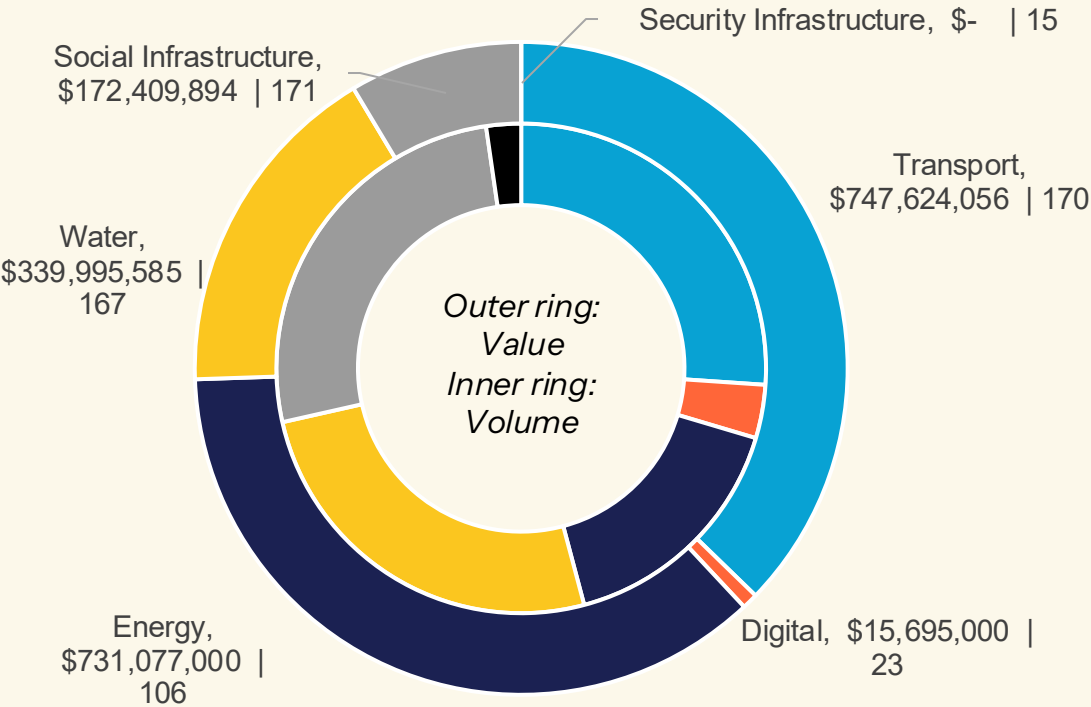
1. The pipeline is not exhaustive – some projects and territories not included
2. Projects and packages are subject to change
3. Database integration is challenging

THE IMMEDIATE PIPELINE - CONSOLIDATED



THE IMMEDIATE PIPELINE - BY SECTOR

Package volume and value by sector



Key highlights

There are four main sectors in the pipeline: **transport, energy, water, social infrastructure.**

Energy is 35% of immediate opportunities, at \$731M, with average package value significantly higher.

THE IMMEDIATE PIPELINE - FUNDING SOURCE

August 2025

	US\$ packages	# of packages
ADB	\$983M	516
EU / EIB	\$453M	13
DFAT / AIFFP	\$350M	15
World Bank	\$243M	89
MFAT	\$23M	4

THE IMMEDIATE PIPELINE - PACKAGE VALUE

Under \$100k

194

\$100k-\$1m

269

\$1m-\$10m

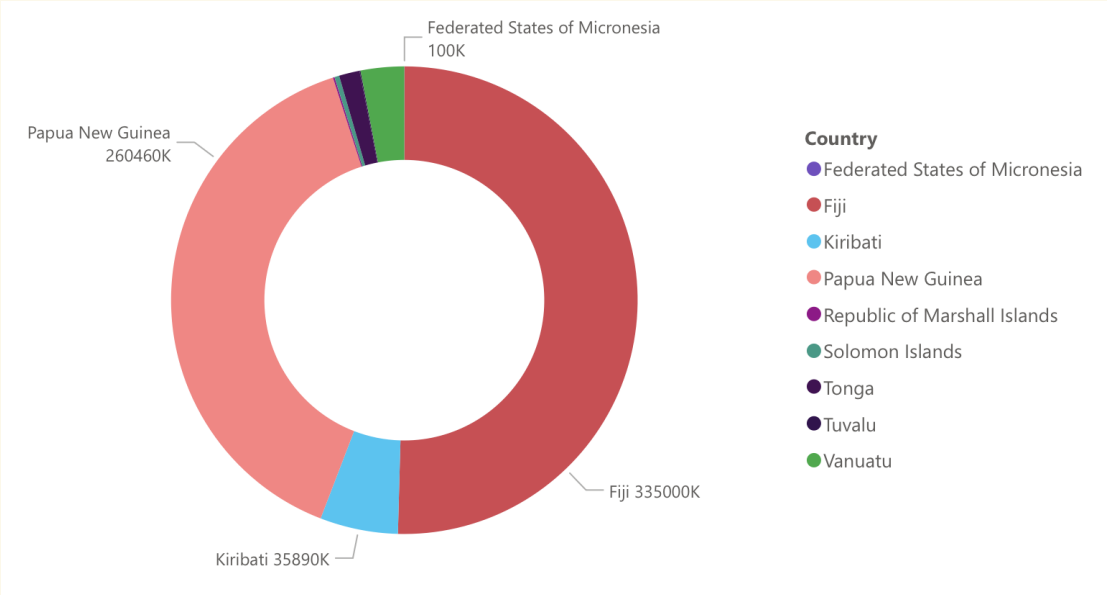
129

\$10m+

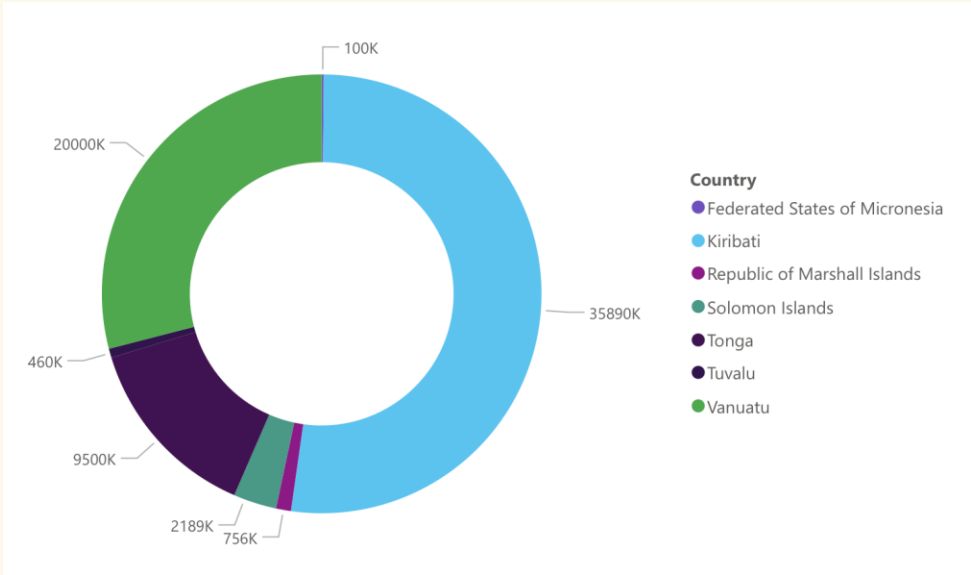
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THE IMMEDIATE ENERGY PIPELINE

Pacific Countries



Pacific minus PNG and Fiji



PNG \$260M
FIJ \$335M

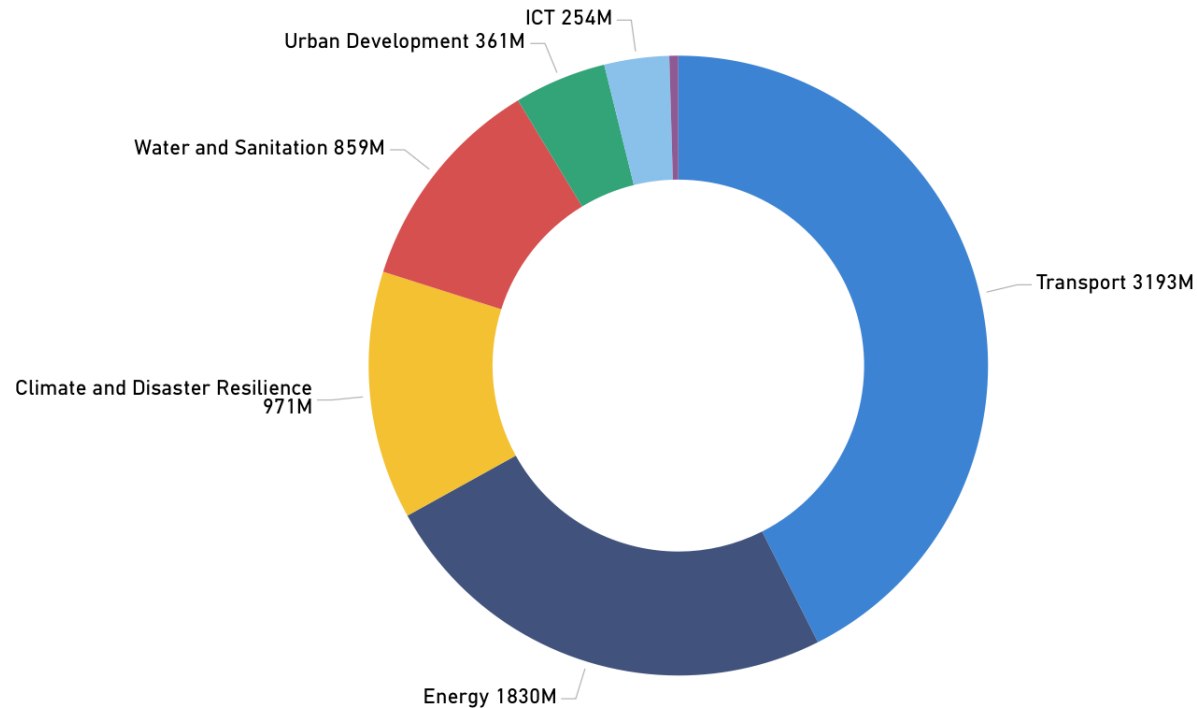
KIR \$36M
VAN \$20M
TON \$9.5M

SOL \$2.2M
RMI \$0.75M
TUV \$0.5M

4. How the market-facing pipeline is evolving

PRIF PARTNER PIPELINE BY SECTOR

Project value by sector



Key highlights

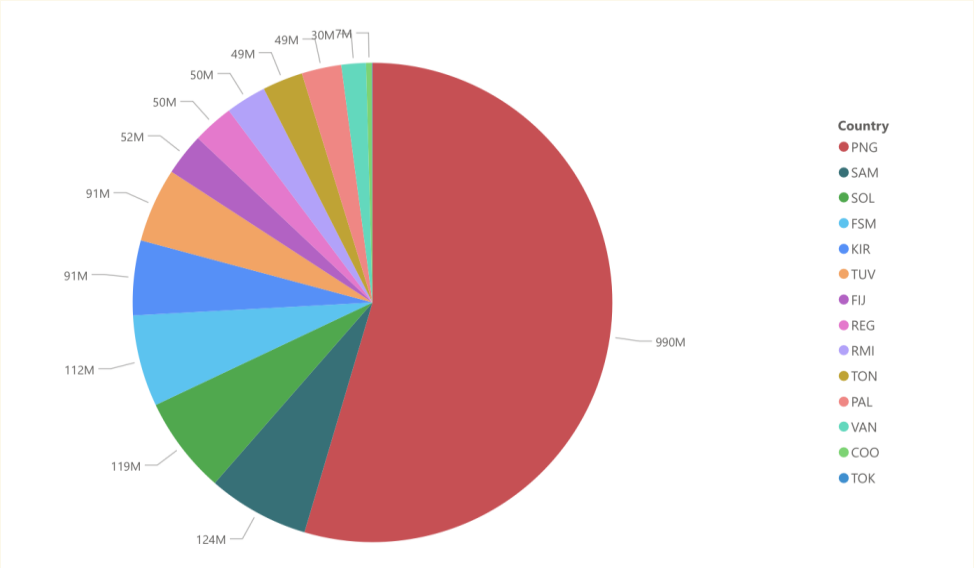
PRIF partners (ADB, DFAT, EU, EIB, JICA, MFAT, WBG, US) provide about 80% of external finance for infrastructure in the Pacific region

Total expected value 2025-2029 = \$7.6 billion

Energy is at 24% for \$1.8 billion

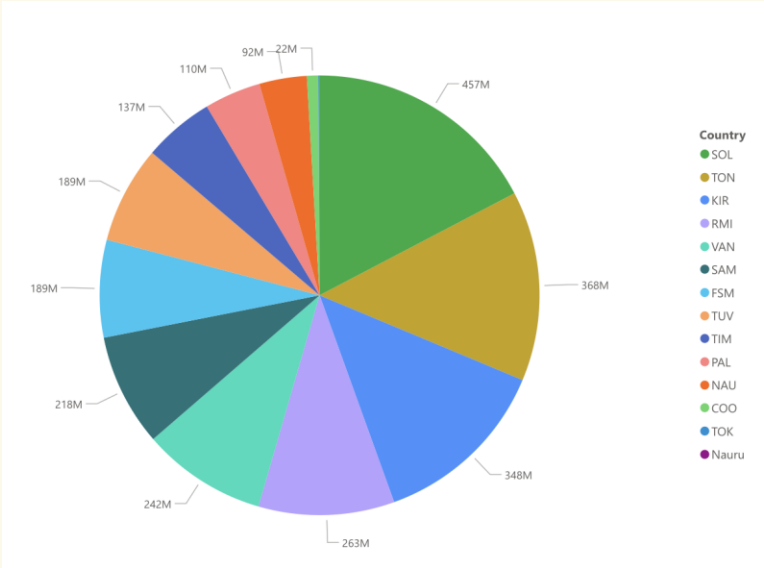
PRIF PARTNER ENERGY PIPELINE: ABOUT 3 YEARS

Pacific Countries



PNG \$990M
FIJ \$52M

Pacific minus PNG and Fiji



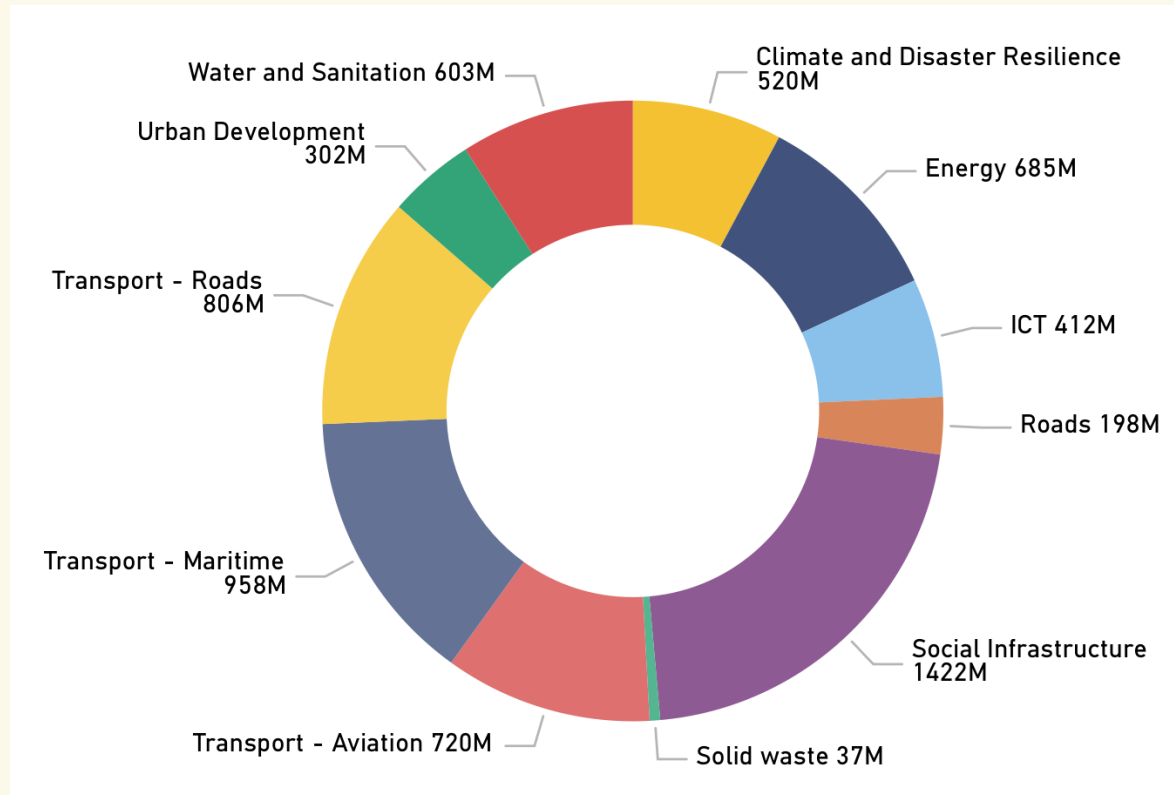
KIR \$348M
VAN \$242M
TON \$368M
SAM \$218M
PAL \$110M

SOL \$457M
RMI \$263M
TUV \$189M
FSM \$189M
NAU \$92M

4. How the market-facing pipeline is evolving

NIIPs BY SECTOR

Project value by sector



Key highlights

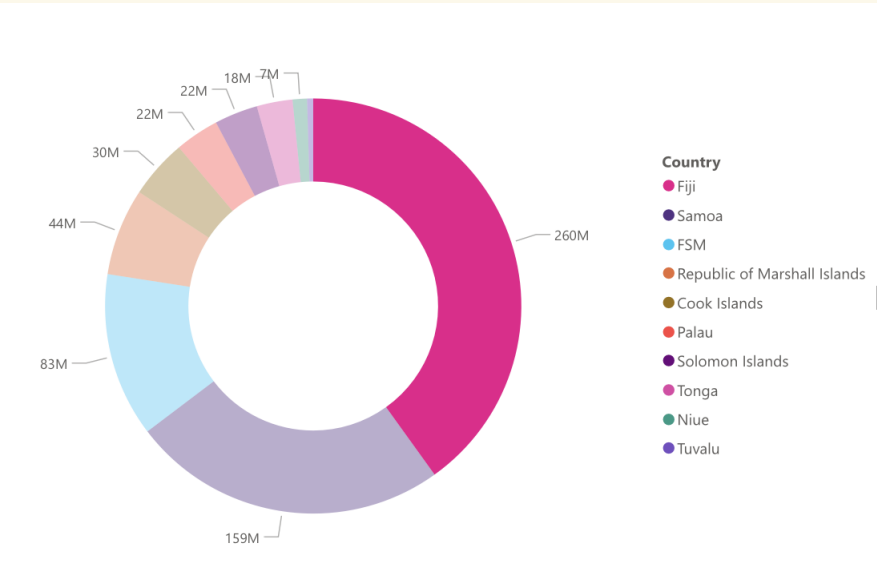
National Infrastructure Investment plans represent government priorities for forward planning

Total value seeking funding = \$6.7 billion

Energy is \$685 million

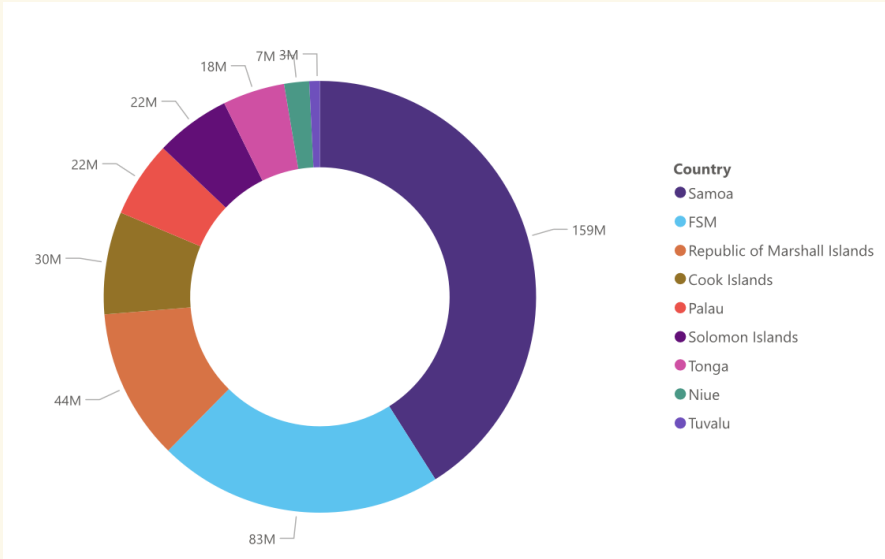
NIIP ENERGY PIPELINE – 3-5 YEARS

Pacific Countries



FIJ\$260M \$260M
PNG not included

Pacific minus PNG and Fiji



SAM \$159M
FSM \$83M
RMI \$44M
TON \$18M

COO \$30M
PAL \$22M
SOL \$22M
NIU \$7.3M

WEBSITE DEVELOPMENT

Timeline and addresses

Integration

The three lenses on future opportunities will be located in once database, searchable by country, sector, type of procurement, and market approach.

Timeline

Available by December 2025

Addresses

Now: suva@austrade.gov.au

Soon: www.pacificinfrastructure.org

Everything else: www.theprif.org