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Delivering Social and Affordable Housing at Scale: Turning Challenges into Opportunities

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Preface

The Sustainable Built Environment National Research Centre Australia, the successor to the Cooperative Research Centre for Construction Innovation, remains committed to making a leading contribution to innovation across the Australian built environment industry after more than two decades of operation. We are dedicated to working collaboratively with industry and government to develop and apply practical research outcomes that improve industry practice and enhance our nation's competitiveness.

We encourage you to continue to draw on the results of our Centre's applied research to deliver tangible outcomes for your operations. By working together, we can transform our industry and communities through enhanced and sustainable business processes, environmental performance and productivity.



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Executive Summary

This report presents the key findings and recommendations from a research project examining systemic challenges to the scalable delivery of social and affordable housing in Australia. The research responds to growing concern about the sector's capacity to deliver social and affordable housing at the pace and scale required, to meet current and projected need.

What We Did

The research adopted a qualitative, multiple-case study approach to draw on the experiences of 25 professionals involved in delivering three social and affordable housing projects in Victoria, Queensland and Western Australia. The selected cases reflect a range of delivery models, scales, typologies and regulatory contexts. The research focused on understanding the issues affecting housing delivery through a System-of-Systems perspective. This perspective was used to identify emergent systemic strengths, weaknesses and potential leverage points, where change could most effectively improve housing delivery capacity and scalability to meet current and future demand.

What We Found Out

The research found that scalability in social and affordable housing is affected by misalignment across policy settings, funding conditions and delivery practices. This misalignment is reflected in 12 interrelated factors identified across the cases, which together shape the ability to deliver at scale. Funding arrangements create tensions between project requirements, such as design quality and sustainability, and what is financially feasible. While multiple funding sources enable projects to proceed, they introduce complexity and slow decision-making. Costs tend to become clear late in the process, when there is limited flexibility to adjust designs without delays. Contracting approaches further constrain adaptability by locking in decisions before constructability and cost are validated. Planning and approval processes vary across jurisdictions, limiting predictability and replication. As projects increase in scale, community concerns about quality and local impact become more pronounced. Operationally, project-based delivery restricts repetition and efficiency gains. Siloed decision-making embeds inefficiencies early, while risk-averse environments limit innovation and prevent successful approaches from transferring across projects. Modern Methods of Construction (MMC) remain underutilised because their lifecycle and productivity benefits are not recognised in current funding and procurement settings. Finally, workforce and material constraints further limit the pace and scale of delivery.

What Can Be Done

The findings indicate there is no 'silver bullet' solution. However, meaningful progress can be achieved through strategically aligned action across the delivery system, including federal, state and local governments, housing authorities, commercial investors, community housing providers, private developers, consultants, builders, suppliers and tenancy and asset managers. The report sets out recommendations across five levers for system-level change: shifting funding from project-based to program-based models to provide pipeline certainty; improving alignment in planning and approval processes to enhance predictability and support replication; enabling innovation, particularly through the adoption of MMC and the transfer of learning across projects; addressing capacity constraints across workforce, materials and organisations; and bringing cost, constructability and risk considerations earlier into project development, including through early contractor involvement and broader market engagement. Through coordinated action across these levers, Australia's housing system can deliver more homes, more efficiently and at scale.

Summary Findings

Key Factors Affecting the Scalability of Social and Affordable Housing	
Policy: Principles of action shaping delivery behaviour	
Funding-Linked Governance	**P1:** Funding conditions can create tensions between design ambition and project viability when they are not aligned with prevailing delivery norms
Regulatory Frameworks	**P2:** Decentralised and jurisdiction-specific regulatory systems reduce predictability and limit opportunities for replication and scale
Community Acceptance and Legitimacy	**P3:** Increased scale and concerns about quality heighten community sensitivity to the inclusion of social and affordable housing
Contractual Arrangements and Risk Allocation	**P4:** Contractual rigidity and transferring risk downstream lock in early design decisions before constructability and cost are validated, creating pricing uncertainty and reactive value management
Economics: Financial structures influencing delivery decisions	
Funding Models	**E1:** Funding projects from multiple sources enables projects but increases governance and organisational complexity
Cost Visibility Under Supply Chain Volatility	**E2:** True project costs often only become clear later, after flexibility has been lost, which can disrupt project viability
Operations: Actions translating intent into delivery outcomes	
Delivery Approaches	**O1:** Project-based delivery limits opportunities for repetition and associated efficiency gains
Supply Chain Structure	**O2:** Siloed and cumulative decision-making embeds avoidable inefficiencies early in the delivery process
Innovation Practices and Learning	**O3:** Risk-averse delivery environments and weak learning mechanisms limit experimentation and prevent innovation from accumulating across projects
Value Recognition in Modern Methods of Construction (MMC)	**O4:** The current housing delivery system undervalues the time, lifecycle and productivity benefits of MMC, reinforcing perceptions of higher cost and risk
Materials and Workforce Capacity	**O5:** Finite industry capacity and competition for labour and materials constrain both the scale and pace of delivery

Recommendations	
Funding	**Recommendation 1: Shift from Project to Program-Based Funding** Reconfigure funding frameworks to support sustained program-scale delivery, reduce cumulative complexity and provide the certainty required to scale social and affordable housing delivery
Regulation	**Recommendation 2: Reframe Regulation to Enable Rather than Constrain** Reconfigure regulatory and planning frameworks to enable adaptability and repetition in housing delivery at scale while safeguarding sustainability, design quality and community outcomes
Innovation	**Recommendation 3: Enable Innovation and Knowledge Transfer in Delivery** Create conditions that support innovation and enable successful delivery solutions to be captured, shared and replicated across projects, signalling their value through funding frameworks, project scoping and regulatory requirements
Capacity	**Recommendation 4: Build Material Supply, Workforce and Organisational Capacity** Invest in building materials supply, workforce and organisational capacity to support the sustained delivery of social and affordable housing at scale
Foresight	**Recommendation 5: Embed Early Cost, Constructability and Risk Insight** Bring cost, constructability and risk insight forward into early project definition and design development to support informed decision-making before key project parameters are fixed

1.0 Introduction

Social and affordable housing is essential infrastructure that plays a critical role in addressing homelessness and poverty, while contributing to the development of more inclusive communities. In Australia, the supply of social and affordable housing has failed to keep pace with rapidly growing demand, as worsening housing affordability is placing increasing pressure on vulnerable groups, particularly low-income households.

In response, recent federal initiatives demonstrate a renewed commitment to investment in social and affordable housing, including the Housing Australia Future Fund (HAFF), the National Housing Accord, the Social Housing Accelerator, the Affordable Housing Bond Aggregator and the National Housing Infrastructure Facility (Albanese, 2023; Chalmers, 2022; Collins, 2023). State and territory governments have also increased support through programs such as Victoria's Big Housing Build (BHB), Queensland's Housing Investment Fund (HIF) and Western Australia's (WA) Social and Affordable Housing Investment Fund. Despite this renewed momentum, significant delivery challenges persist.

Translating the increased funding commitments into proportional increases in housing delivered on the ground requires enhanced scalability. In the context of this research, scalability refers to the ability of a housing delivery system to increase output, measured by the number of dwellings delivered without impacting the overall cost, quality or delivery time. While funding availability has improved, the industry lacks a consolidated understanding of the systemic factors that constrain scalability, as well as clarity on where the most effective opportunities exist to unlock greater, more reliable delivery capacity.

This report addresses this gap by examining the barriers and enablers to scaling social and affordable housing delivery, drawing on evidence from three case studies across three Australian states.

1.1 Aim and Objectives

This project investigated systemic factors influencing the scalable delivery of social and affordable housing in Australia, with a focus on how construction processes, supply chains and delivery models influence cost, quality, time and sustainability outcomes. Specifically, the research:

- identified key barriers to scalability in social and affordable housing delivery
- examined delivery processes with the potential to support scale
- developed strategic recommendations to support government, industry and community housing providers (CHP) to overcome scalability challenges in delivery processes and enable more efficient, effective and environmentally sustainable housing delivery at scale.



Sam Richter (Source: Adobe Stock)

2.1 Definitions and Delivery System

Social and affordable housing differs fundamentally from private rental markets, as housing is distributed according to need rather than through market competition and it provides longer term, secure rental accommodation beyond emergency housing solutions (Australian Housing and Urban Research Institute (AHURI), 2023).

The National Housing Supply and Affordability Council (NHSAC) defines six housing tenure types in Australia: home ownership, housing co-operative, private rental, affordable housing, social housing and crisis and transitional housing (see Figure 1). Social housing consists of "dwellings rented to households in the first and second quintiles of the income distribution (that is, the lowest income households), at a rent related to the tenant's income" (National Housing Supply and Affordability Council (NHSAC), 2024, p. 17). Rents are set at 25–30% of tenants' income, which helps ensure they are not exposed to rent increases they cannot afford. Social housing has specific requirements beyond the National Construction Code (NCC), especially to accommodate the mobility needs of a non-typical demographic. Affordable housing, by contrast, is "dwellings provided to households in the second and third quintiles of the income distribution at discounted market rents" (NHSAC, 2024, p. 17). Affordable housing may not be required to exceed NCC requirements.

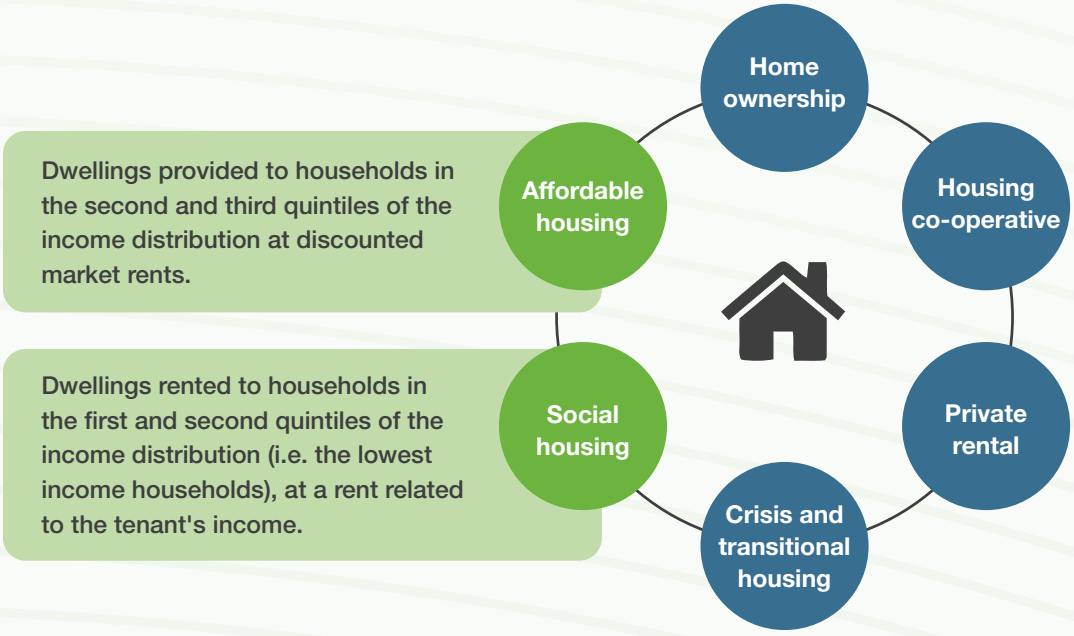

Figure 1. Housing tenure types in Australia (adapted from NHSAC (2024))

Australia's social and affordable housing is delivered through a range of models, including state-owned and managed housing; state-owned housing managed by CHPs/Community Housing Organisations (CHOs); CHP/CHO-owned and managed housing; and privately owned, CHP/CHO-managed with the help of government (NHSAC, 2024). Effective provision across these models relies on a complex ecosystem of supporting institutions, networks and actors, including government agencies and regulatory systems, industry peak bodies, tenant organisations and specialist service providers covering training, consulting and research services (Milligan et al., 2016).

2.2 Policy Agenda-Setting Ambition

Recent housing initiatives across federal, state and territory governments signal a significant coordinated commitment to increasing the supply of social and affordable housing. Collectively, these programs establish ambitious targets for housing delivery, supported by substantial public investment, new financing mechanisms and complementary policy reforms. Table 1 provides a high-level summary of the scale of the commitments and opportunities across the federal government and the three states where the case studies in this research are located.

Table 1. Major federal and state policy initiatives for social and affordable housing

Scheme	Support	Expenditure	Target
Housing Australia Future Fund (HAFF)	Subsidy	Up to $500 million annually from returns of a $10 billion investment fund, over 5 years from 2024	20,000 new social homes and 10,000 new affordable homes
National Housing Accord Facility (NHAF)	Subsidy	$350 million over 5 years from June 2024	10,000 affordable homes
Social Housing Accelerator	Cash grants to state and territory governments	$2 billion over 2 years from June 2023	4,000 social homes
Victoria Big Housing Build (BHB)	A range of financial mechanisms	$5.3 billion, announced 2020; funding committed through 2024–25, with delivery staged through the mid-2020s	12,000 social and affordable homes, 25% in regional Victoria
Queensland Housing Investment Fund (HIF)	A range of financial mechanisms	$130 million yearly, from 2021 through to 30 June 2027	5,600 social and affordable homes
Western Australia Social and Affordable Housing Investment Fund (SAHIF)	A range of financial mechanisms	$3.2 billion from June 2021, with delivery staged through the 2020s	5,000 social and affordable homes

The scale of ambition established by these policy targets places significant pressure on the housing delivery system to perform – to deliver more projects faster, more sustainably, more consistently and at a greater scale.

These housing initiatives also sit alongside a broader set of national commitments relating to climate change mitigation, energy performance and sustainability, which are directly relevant to how social and affordable housing is delivered. National targets for net zero emissions and built environment decarbonisation position housing as a critical lever for reducing both embodied and operational emissions. While stronger energy and sustainability standards have been introduced through national policy and the NCC, subsequent pauses and revisions indicate ongoing tensions between ambition and the industry's capacity to meet costs and deliver.

These policy settings reinforce the idea that how housing is delivered at scale matters as much as the quantity delivered. Delivery will materially influence Australia's ability to meet its climate and sustainability objectives.

3.1 A System-of-Systems Perspective

Understanding social and affordable housing delivery, and its scalability challenges, requires a perspective that can accommodate the sector's inherent complexity and interconnectedness. System-level performance and scalability are shaped less by individual project efficiency and more by the alignment of interacting actors, structures and decision-making processes across the delivery system (Zolghadr, 2023). As with other complex industries, these outcomes cannot be improved through individual action alone.

To capture these dynamics, the research adopted a System-of-Systems (SoS) perspective to examine the barriers and enablers affecting the scaling of social and affordable housing delivery. Rather than focusing on individual projects or organisations in isolation, the analysis examined how outcomes emerge from the interactions across system levels (individual, team, organisational and sectoral levels) and system dimensions: policy, economics and operations (see Table 2).

Table 2. Definition of system dimensions

System Dimension	Definition
Policy	The actors' principles of action that shape their behaviour: rules, regulations, norms, governance arrangements and institutional settings
Economics	The financial structures and transactions that influence the actors' decisions and capabilities: costs, prices, funding arrangements and market conditions
Operations	The delivery structures and actions that translate intents into outcomes: processes, procedures, practices and technologies

From this perspective, the system-level behaviour of the social and affordable housing delivery system can be described in terms of the simultaneous effects of a series of interactions, where changes in the behaviour of an autonomous actor feed back into the system, resulting in changes in the behaviour of other actors and the system as a whole (see Figure 2). This perspective enables the identification of systemic strengths, weaknesses and leverage points, highlighting where coordinated change across the system can most effectively improve the delivery outcomes and scalability.

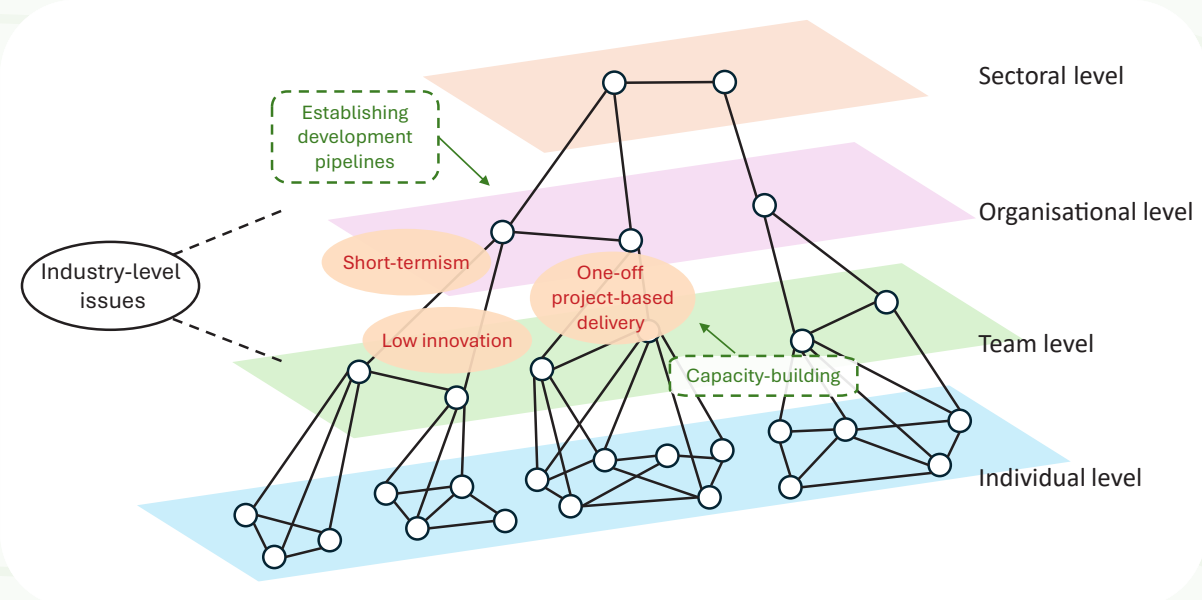

Figure 2. Scalability as an emergent property of the social and affordable housing delivery system (Ghafoor et al., 2025)

4.0 Methods

The research employed a two-phase research design combining a systematic literature review with qualitative case-study investigations across social and affordable housing projects in three Australian states, namely Victoria, Queensland and WA (see Figure 3).

- Phase 1 synthesised existing academic research, industry reports and policy documents to identify key barriers affecting scalability in housing construction, with particular attention to the Australian context. The findings served as the basis for the case analysis and informed the interview protocol.
- Phase 2 involved semi-structured interviews with actors involved in the planning, funding, design, construction and operation of three social/affordable housing case studies. Interviews were supplemented with site visits and the review of project documentation.

Findings were analysed from an SoS perspective, examining how outcomes emerge from interactions across the policy, economics and operational dimensions.

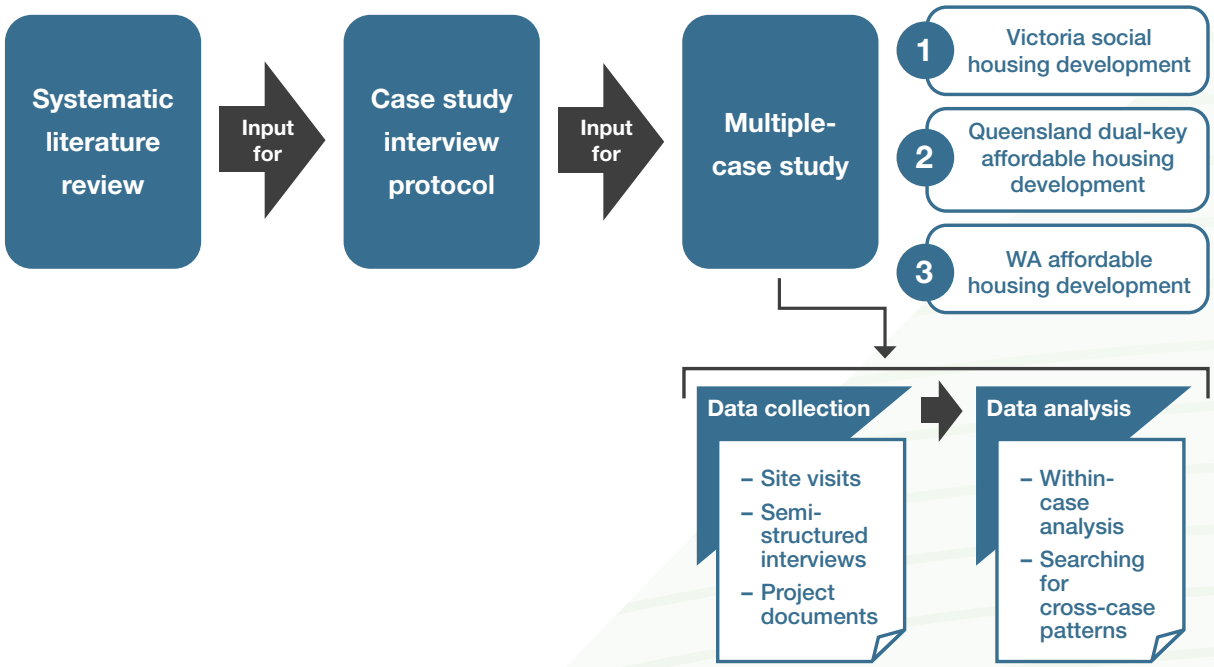

Figure 3. Research design

4.1 The Case Studies

The three cases were purposefully selected to capture geographic variation, differences in project scale and diversity in building systems (see Table 3).

Table 3. Overview of selected case studies

	Case Study 1	Case Study 2	Case Study 3
Location	Victoria	Queensland	Western Australia
Development context	Regional	Greenfield	Metropolitan
Number of sites	1	4	1
Project type	Social housing	Affordable housing	Affordable housing
Building type	Three five-storey apartment buildings	Dual-key housing	An 11-storey apartment building with two basement levels
Number of units	73	483	171
Building technology	In-situ reinforced concrete structure with precast concrete wall panels	Onsite steel-framed construction	Precast reinforced concrete structure
Interview participants	14	6 (2 core, 4 context)	5



diesirai (Source: Adobe Stock)

In the Victorian case, a church provides the land via a long-term ground lease. Homes Victoria leads capital funding through the BHB, supplemented by a philanthropic contribution by a church member and an intercompany loan from the CHP's parent organisation as part of its broader social housing strategy. The project later secured an availability payment through the HAFF, supporting 25-year operational viability and enabling loan repayment. The CHP acts as project sponsor and client, structuring the capital stack and leading key decisions. An external project manager and superintendent oversee delivery, while a Tier-1 contractor delivers the project under a novated Design and Construct (D&C) contract. On completion, the CHP assumes responsibility for tenancy allocation and asset management (Figure 4).

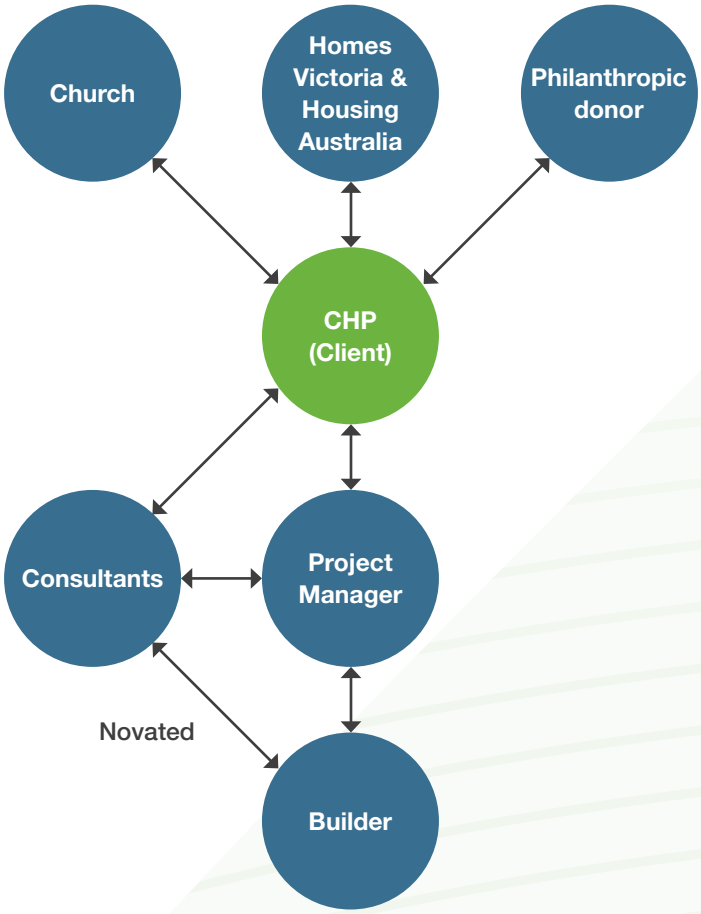

Figure 4. Victoria case study

In the Queensland case, land is sourced through a mix of landholdings secured through agreements with both government and private landowners. The program is primarily financed through the HIF. Delivery is led by a four-organisation consortium that integrates complementary capabilities across investment, property development, construction and long-term tenancy and asset management. The consortium operates as the project client. The builder has been engaged under an amended D&C contract following an Early Contractor Involvement (ECI) phase. Upon completion, the dwellings are allocated to affordable housing, with 20-year tenancy and asset management arrangements in place (Figure 5).

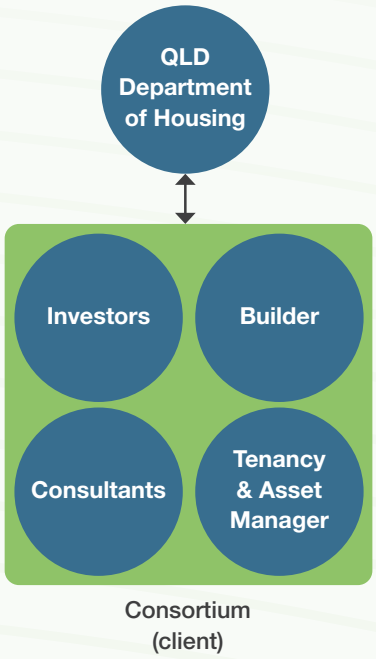

Figure 5. Queensland case study

In the WA case, the land is privately owned by the client. The project is backed by a private infrastructure investment firm, which has established a dedicated Special Purpose Vehicle to act as the project client and investment vehicle. A builder is engaged under a novated D&C contract following an ECI phase. Upon completion, the development will operate as affordable rental housing for 40 years, with a contracted Affordable Housing Provider responsible for tenancy and asset management (Figure 6).

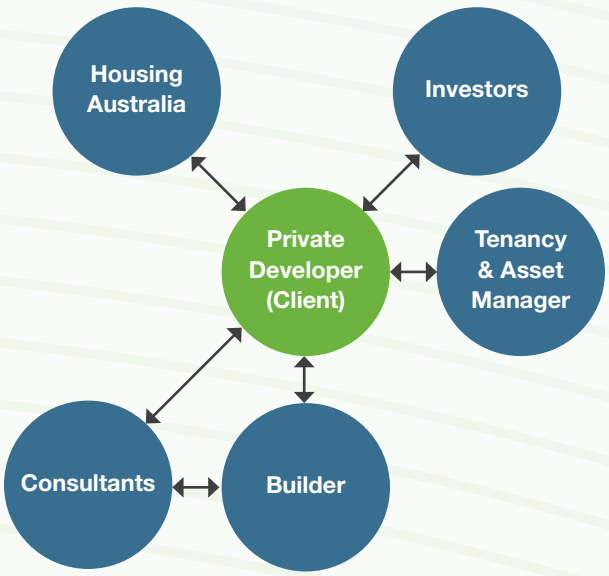

Figure 6. WA case study

5.0 Key Factors Influencing Scalability

The research findings have been organised around three interrelated system dimensions – policy, economics and operations – through which the factors influencing scalability were most clearly expressed. This structure is used to illustrate the significant opportunities to support scalability across the system: how the system's policy settings, funding structures and delivery practices interact and impact housing outcomes. Findings distinguish between the following key conditions that inform the recommendations presented later in the report:

- observed barriers to delivery
- enabling conditions identified through practice
- system-level implications.

Figure 7 shows a summary of the findings.

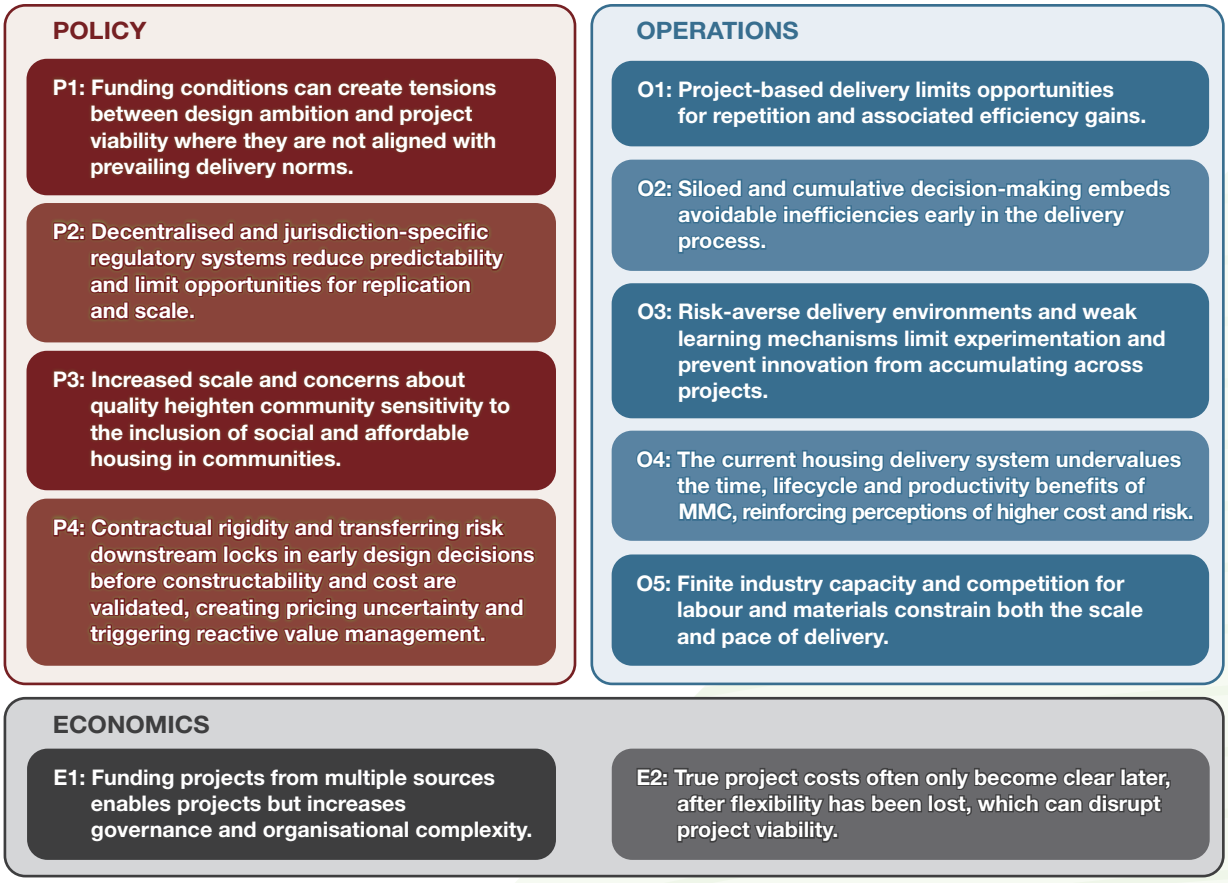

Figure 7. Key factors influencing the scalability of social and affordable housing

5.1 Policy: Principles of Action Shaping Delivery Behaviour

5.1.1 Funding-Linked Governance

Funding arrangements operate not only as financial mechanisms, but also as a form of governance, shaping project scope, design and delivery through prescribed performance requirements. When calibrated effectively, these requirements can enable scalable delivery by maintaining flexibility. These dynamics are reflected in how funding-linked governance operates in practice.

Funding-linked requirements create tensions between design ambition and project viability.

Government-led funding is tied to detailed contractual and prescribed performance requirements (for example, NatHERS, Green Star, Livable Housing Design). These requirements address important social, environmental and long-term performance objectives, particularly for social housing cohorts, and are widely supported in principle. However, where they differ from prevailing market norms, they result in housing that is, as one interviewee stated, *"a lot more tailored and involved"*. Additionally, when they are not matched by proportional funding, projects risk becoming unviable.

Capacity for value management is limited once funding-linked requirements are embedded.

Unlike private developers, who can optimise layouts and specifications to maintain feasibility, social housing developers are required to deliver highly prescribed and specified quality outcomes within fixed funding envelopes, with minimal flexibility to trade off requirements against viability. As one interviewee noted: *"It does get really difficult to value-manage a social housing project because there's really not a whole lot that we can adjust. It's kind of set, and that is what it is."*

Development approvals-ready requirements constrain design optimisation.

Funding rounds increasingly favour projects with pre-existing development approvals. Although this reduces planning risk and expedites delivery, it effectively locks in design assumptions before the developer/builder engagement, limiting opportunities for optimisation. Substantive changes then risk triggering new approval processes and jeopardising funding eligibility. Strict 'build-by' deadlines further limit iteration. For example, in the WA case, a lower cost parking redesign was not pursued due to concerns that revised approvals would miss HAFF timelines.

P1: Funding conditions can create tensions between design ambition and project viability when they are not aligned with prevailing delivery norms.

5.1.2 Regulatory Frameworks

Regulatory frameworks shape housing delivery by establishing the planning, approval and compliance conditions under which projects are developed. They can support scalable delivery by providing consistency and predictability while enabling efficient approval and adaptation across different jurisdictions. These dynamics are reflected in how regulatory frameworks operate in practice.

Variation among jurisdictions limits replication and standardisation.

Australia's decentralised, jurisdiction-specific regulatory systems create variability in compliance pathways, with similar projects subject to different requirements across locations. This variability restricts the use of standardised design templates and repeatable solutions. As one interviewee reflected: *"Everything is reinvented in every project."* It also undermines cumulative learning and cross-project efficiency. Interviewees consistently framed multiple approval gateways and variability across jurisdictions as a greater barrier to scale than the ambition of regulatory requirements themselves.

Local discretion introduces planning uncertainty.

Council support for social and affordable housing varies considerably. In some jurisdictions, planning processes were described as influenced by local political dynamics and vocal community opposition. Regulation was thereby perceived as operating in an *"ad hoc"* manner, rather than within a coherent national framework, increasing approval risk and reducing predictability.

Streamlined approval pathways improve certainty but do not reduce regulatory complexity.

State-level, fast-track mechanisms (for example, Victoria's Clause 52.20) were widely seen to accelerate approvals and mitigate appeal risk, with processes occurring *"a lot smoother and a lot quicker"*. However, overall compliance effort does not substantially decrease; local requirements are effectively replaced by intensified state-level scrutiny. While streamlining enhances timing certainty, regulatory complexity remains, relocated in the system rather than simplified, and continues to vary nationally.

Program-scale aggregation can partially offset decentralised regulatory inefficiencies.

In the Queensland case, for example, planning approvals across four sites were aggregated and negotiated collectively at program scale rather than pursued site by site. This reduced sequential approval delays and aligned planning processes with delivery logic. Planning was reframed from a series of gatekeeping events into a coordinating mechanism supporting program-scale implementation. While statutory controls remained unchanged, this administrative innovation demonstrated that structural fragmentation can be mitigated, though not eliminated, through coordinated program-level engagement.

P2: Decentralised and jurisdiction-specific regulatory systems reduce predictability and limit opportunities for replication and scale.

5.1.3 Community Acceptance and Legitimacy

Social and affordable housing delivery operates within existing communities, where acceptance and perceived legitimacy are critical to enabling projects to proceed, particularly at scale. These dynamics are reflected in how legitimacy is challenged, negotiated and established in practice.

Community opposition intensifies as social and affordable housing projects scale up, manifesting as NIMBY ('Not In My Backyard') dynamics.

While smaller proposals may attract limited attention, resistance escalated when projects were perceived as larger, denser or more visually prominent. Objections commonly centred on building height, parking pressures and underlying concerns about resident compatibility. Interviewees noted that such dynamics are widespread – *"You get it everywhere"* – and can be particularly pronounced in regional settings, where developments are more visible and socially embedded.

Church-owned land introduces a dual-layer negotiation over the legitimacy of scale.

Where land was held in a church trust, scale required negotiation both externally with neighbours and internally with church stakeholders. While church stakeholders were described as supportive of social purpose, discussions about larger scale initiatives triggered careful deliberation over management, mission alignment and reputational risk. Church land was recognised as strategically valuable due to its location in communities, but scaling on such lands requires intensive alignment-building.

Legitimacy must be actively constructed.

Design-led strategies – such as increased setbacks, articulated building forms and publicly accessible pedestrian links – were deployed to counter stigma. Transparency around governance and tenant management formed part of broader reassurance efforts. Streamlined planning pathways (for example, Clause 52.20 of the Victoria Planning Provisions) reduced procedural avenues for delay and were described as critical to achieving scale. However, while streamlining mitigated regulatory blockage, it did not remove underlying legitimacy tensions. Opposition operates both procedurally and socially; the former can be accelerated, but the latter requires ongoing negotiation.

P3: Increased scale and concerns about quality heighten community sensitivity to the inclusion of social and affordable housing in communities.

5.1.4 Contractual Arrangements and Risk Allocation

Contractual arrangements define how risk, responsibility and decision-making are distributed. To support delivery at scale, contracts need to allocate risk and structure engagement in ways that maintain market participation, enable informed decision-making and avoid pricing inefficiencies. These dynamics are reflected in how contractual arrangements operate in practice.

D&C contract forms enable the delivery of complex projects through risk transfer but lock in key early design decisions.

Novated D&Cs have been adopted as standard practice and regarded as a format the industry can *"respond to reasonably well"*. Its primary appeal lies in transferring design risk to builders in complex projects. However, tenders are typically issued when design is 70–80% complete, locking in key early decisions before builders can meaningfully influence constructability or cost. As one interviewee noted: *"You come to market with a design that's been done by a consultancy team and ask the builder to price it. Then you've already made a lot of catastrophically bad decisions."* In this model, value management becomes a late corrective mechanism under commercial pressure.

ECI and design flexibility soften the constraints imposed by contractual rigidity.

ECI was framed as critical to *"open up the design and validate the design"*, embedding constructability, cost and due diligence considerations early enough to shape outcomes rather than react to them. However, interviewees noted *"ECI fatigue"* among builders, who are reluctant to invest early effort without award certainty. Concerns were also raised about reduced competitive tension and dependency on a single builder. In response, a broader market-aligned strategy alongside formal ECI was adopted. For example, in the WA case, this involved engaging multiple builders to understand system preferences and price drivers, and using these insights to iteratively adapt the design. Caution was raised against specifying construction systems unfamiliar to the local market, as this could narrow competition and inflate prices. Design was therefore deliberately structured to remain flexible, allowing builders to price based on their preferred systems. Consequently, tendering was reframed from pricing a fixed solution to co-shaping a deliverable outcome aligned with market realities, reducing the risk of absorbing a late price shock.

Shared ownership of risk enables program-scale delivery.

In the Queensland case, for example, the scale and complexity of delivery led to a consortium structure that redistributed risk across partners rather than concentrating it solely on the builder. As one participant stated: *"We all need to share a little bit of risk … Otherwise, builders aren't going to want to get involved."* By treating delivery as a collective undertaking rather than a transactional contract exchange, the consortium model aligned incentives and supported sustained market participation. At scale, shared risk governance and ownership were positioned as a prerequisite for viable delivery.

P4: Contractual rigidity and transferring risk downstream locks in early design decisions before constructability and cost are validated, creating pricing uncertainty and triggering reactive value management.



5.2 Economics: Financial Structures Influencing Delivery Decisions

5.2.1 Funding Models

Funding models enable the delivery of social and affordable housing by structuring how capital is assembled and deployed. For scaling delivery, they need to support financial feasibility while enabling organisations to operate in increasingly complex and commercially oriented funding environments. These dynamics are reflected in how funding models operate in practice.

Layered funding enables delivery but compounds governance complexity.

Layered funding arrangements, combining multiple funding sources, were typical across the case studies. Consequently, baseline government requirements were overlaid with funder-specific criteria across design, construction and, in some cases, the long-term operation of projects. Each contributor introduced distinct criteria and reporting obligations, creating *"checkpoints throughout"* and increasing the burden at key decision gateways. As one interviewee observed: *"The more stakeholders involved, the more people that need to approve things … which can make things a little bit more difficult."* While effective in mobilising capital, these arrangements introduced cumulative coordination, compliance and governance requirements that intensified as delivery scaled.

Transitioning from grant-led to blended commercial models presents structural challenges for CHPs.

Interviewees acknowledged that current grant-led funding reflects a rare alignment of policy and capital – *"the stars aligning"* – and is unlikely to be sustained long term. Moving towards commercially blended structures introduces new governance demands, including asset control constraints, constitutional limitations and the need to recalibrate organisational risk appetite. Without corresponding organisational capacity and governance reform, the complexity of layered finance risks becomes a constraint on scale rather than an enabler.

E1: Funding projects from multiple sources enables projects but increases governance and organisational complexity.

5.2.2 Cost Visibility Under Supply Chain Volatility

Cost visibility plays a critical role in shaping project feasibility, particularly under conditions of supply chain volatility where prices and availability are subject to rapid change. For scaling delivery, project structures need to enable timely and reliable cost insight to support informed decision-making and reduce exposure to uncertainty. These dynamics are reflected in how cost insight is developed and acted upon in practice.

Locking scope before confirming costs threatens viability of projects.

Rigorous cost visibility typically occurred at the tender stage, after project scope, approvals and funding commitments were largely locked in. In a volatile supply chain environment, where labour and material availability and prices change faster than conventional cost-planning tools can predict, this sequencing turns cost escalation into a threat to project viability. Reliance on early estimates based on industry-average rates further introduces blind spots, underrepresenting the scope and specifications typical of social and affordable housing projects. Although value management is commonly undertaken in response to cost escalation, interviewees described it as *"reactive adjustments"*. Its effectiveness is therefore constrained because many cost drivers are already fixed by planning approvals, funding agreements or agreed quality outcomes.

Early engagement and program-scale delivery moderate exposure to volatility.

ECI brought cost and constructability knowledge forward, allowing builders to validate assumptions, such as latent conditions, before committing to a price. The consortium structure extended this logic. For example, in the Queensland case, by integrating the builder, financier, development partner and asset manager and operating at program scale, the project secured pipeline certainty and strengthened bargaining power with trades and suppliers.

E2: True project costs often only become clear later, after flexibility has been lost, which can disrupt project viability.

5.3 Operations: Actions Translating Intent into Delivery Outcomes

5.3.1 Delivery Approaches

Delivery approaches shape how housing is produced. For scalable delivery, these approaches need to support repetition, continuity and learning, allowing efficiencies to accumulate rather than reset with each development. These dynamics are reflected in how delivery is structured in practice.

One-off project-based delivery reinforces bespoke outcomes.

Social and affordable housing delivery was typically organised as discrete, one-off projects rather than part of a coordinated pipeline. While often treated as a sector characteristic, interviewees suggested this bespoke nature is actively reinforced through cumulative planning, funding and design decisions that erode opportunities for repetition, learning and productivity gains. As one participant observed: *"There is a lot of wasted output in the sector for repetitive design … how many architects are designing kitchens for the same outcome?"* Even when interviewees sought to introduce standardisation, the cumulative requirements of planning, funding, heritage and design-quality conditions, together with the need to address community concerns, progressively eroded repeatability.

Program-scale coordination enables repetition.

Organising delivery at a program scale in the Queensland case (483 dwellings across four sites), for example, created the conditions for repetition. As one interviewee explained: *"The scale … completely changed how we had to run our projects … we had to move into a true program delivery model so we could keep consistency and control across hundreds of dwellings."* Repetition emerged from structuring work in consistent ways across sites. Delivery followed standardised construction-ready requirements and used Lean, Manufacturing Operating System practices and Takt Planning to organise tasks, dependencies and labour capacity. At the same time, repetition was reinforced through a limited set of five housing typologies, bulk planning approvals for the sites and aligned labour and materials scheduling. By using the same typologies, workflows and sequencing across multiple sites, teams were able to repeat tasks and refine them over time, rather than resolving delivery challenges separately within each site.

O1: Project-based delivery limits opportunities for repetition and associated efficiency gains.

5.3.2 Supply Chain Structure

Construction supply chains involve multiple actors, disciplines and processes that must interact to deliver projects. For scaling delivery, supply chain structures need to enable collaboration and shared understanding, aligning decisions, information and risk while managing fragmentation–integration trade-offs. These dynamics are reflected in how these structures coordinate decisions in practice.

Siloed and cumulative decision-making embeds avoidable inefficiencies.

Actors were generally competent within their own domains but operated in professional and organisational silos, with limited alignment around whole-of-project outcomes. As one interviewee observed, responsibilities were dispersed among actors who *"think in different ways"*. Fragmentation was particularly evident in sequential decision-making, with design routinely advanced and locked through planning approvals before cost, constructability and supply-chain constraints were fully understood. This misalignment forced builders to inherit inefficiencies rather than prevent them, triggering reactive redesign, late-stage value management and cascading impacts across disciplines. Interviewees described this as creating *"an endless cycle"* of reactive adjustments. The issue is not fragmentation itself, but rather the absence of mechanisms to manage it across the delivery system.

Integration may mitigate fragmentation but introduces different trade-offs.

Two responses to fragmentation emerged: vertical and horizontal integration. In the WA case, for example, vertical integration between a builder and a precast concrete supplier reduced coordination effort and enabled the project to proceed predominantly in precast construction. However, interviewees cautioned that tightly coupled commercial relationships can reduce agility and increase systemic vulnerability, noting that when companies *"all rely on each other … the whole thing crumbles"*. By contrast, the Queensland case, for example, addressed fragmentation through horizontal integration within a consortium structure that embedded development, construction, financing and operational expertise within a single delivery arrangement. While this improved coordination across project interfaces, it also required more sophisticated management systems and organisational capability to manage wider system dependencies and risks. At the same time, interviewees emphasised that the separation of roles and independent review processes remains important for maintaining accountability, safety and appropriate risk distribution.

O2: Siloed and cumulative decision-making embeds avoidable inefficiencies early in the delivery process.



Doublelee (Source: Adobe Stock)

5.3.3 Innovation Practices and Learning

Innovation practices and learning mechanisms define how new approaches are developed, tested and embedded within housing delivery systems. To support delivery at scale, these systems need to enable experimentation and foster cumulative innovation, enabling the systematic refinement of delivery approaches over time. These dynamics are reflected in how innovation is pursued in practice.

Risk-averse delivery environments discourage experimentation.

Innovation was limited and, where it occurred, tended to be conservative rather than transformative. Interviewees did not frame these limitations as resistance to change. Rather, they described a delivery environment in which regulatory obligations, funding conditions and risk exposure made experimentation difficult to implement and sustain across projects. That is, delivery certainty and risk reduction are prioritised, reinforcing reliance on familiar construction methods and incremental adjustments rather than more substantive innovation.

Weak learning mechanisms prevent innovation from accumulating across projects.

Interviewees highlighted the lack of mechanisms to capture and transfer new solutions across projects. Builders were described as repeatedly *"starting again from zero"*, reproducing similar inefficiencies rather than embedding improvements into standard practice. As one interviewee reflected, the industry operates in a cycle where *"we don't learn … we just repeat the same things over and over again"*. Even where innovation occurs, it rarely translates into broader industry capability because knowledge remains project-bound rather than systematised through shared processes or knowledge repositories.

O3: Risk-averse delivery environments and weak learning mechanisms limit experimentation and prevent innovation from accumulating across projects.



Greg Brave (Source: Adobe Stock)

5.3.4 Value Recognition in MMC

MMC (referred to by interviewees as modular, precast or offsite construction) represents an alternative production approach with the potential to support delivery at scale. Realising this potential depends on how its value is understood and evaluated within project decision-making. These dynamics are reflected in how MMC is assessed and adopted in practice.

Upfront cost comparisons obscure MMC's benefits.

MMC was widely regarded as *"worthwhile"* or *"a great option"* in principle. However, it was often perceived as more expensive than conventional in-situ construction, reinforcing a baseline assumption that MMC represents a cost premium. As one interviewee noted: *"There's a lot of resistance and … scepticism about its cost."* Interviewees emphasised that MMC should be understood as a cost–time trade-off, where higher upfront costs may be offset by faster delivery and earlier rental income. As another interviewee explained: *"The faster you can finish the project and get the people in … that is where your success is."* However, these whole-of-project benefits are rarely captured in procurement or evaluation frameworks, meaning MMC often *"looks expensive on paper"* despite its potential lifecycle advantages. These perceptions are reinforced when MMC is introduced into the project. If introduced after key decisions are made, builders must price unfamiliar systems under time and information constraints, leading to additional contingency and distorting like-for-like comparisons. By contrast, earlier integration through design-for-manufacture and assembly (DfMA) allows greater optimisation of structure, program and site inputs, reducing rework and delivery risk and enabling productivity benefits to be realised.

Builder risk perceptions constrain MMC adoption.

The absence of repetition and pipeline certainty made MMC efficiencies difficult to trust or confidently price, leading builders to retain contingencies rather than pass on potential savings. As one interviewee observed, MMC *"looks expensive on paper because people haven't experienced it enough to trust it"*. In this context, decisions about MMC adoption are often mediated by builder risk preferences rather than whole-of-project optimisation. This reinforces conservative delivery choices and limits opportunities for learning, standardisation and scale. As one interviewee noted: *"We'd love to do precast, but they're not going to reduce their price … the builder doesn't give back the prelims … so the developer says, 'what's in it for me?'"*

O4: The current housing delivery system undervalues the time, lifecycle and productivity benefits of MMC, reinforcing perceptions of higher cost and risk.



Tom Rumble (Source: Unsplash)

5.3.5 Materials and Workforce Capacity

Capacity conditions in materials and the workforce play a critical role in shaping the housing system's ability to deliver projects at scale. Sufficient and reliable access to labour, materials and production capacity is required to support continuity, manage demand and sustain delivery over time. These dynamics are reflected in how labour and material capacity are allocated and competed for in practice.

Workforce constraints limit delivery at scale.

Workforce constraints extend beyond general skills shortages to the limited number of builders and subcontractors capable of operating at scale. Interviewees described a finite pool of firms capable of managing multiple concurrent projects, complex funding and contractual arrangements, and the risk profiles associated with large housing programs. Attempts to stabilise labour availability through longer term trade engagement, such as the multi-year service agreements used in the Queensland case, were seen as partial solutions but depended heavily on established relationships and pipeline certainty. Industrial capacity constraints also affect MMC competitiveness. Only a small number of MMC providers were identified as capable of delivering at scale, and their capacity was seen as easily saturated under concurrent demands.

Competition for materials and labour constrains delivery capacity.

Competition from higher margin infrastructure and mining projects intensified pressures, with subcontractors able to prioritise alternative work where demand was stronger and margins higher. As one interviewee observed: *"There's only a certain amount of construction trades … who can take on large-scale projects."* Material supply constraints mirrored these workforce pressures and reinforced the same structural dynamics. Interviewees described housing projects as disadvantaged in supply-constrained markets, where materials were routinely diverted to large infrastructure projects able to offer higher volumes and more attractive commercial terms. As one interviewee explained: *"The big infrastructure jobs can pay more, and they're ordering in volume, so suppliers can pick and choose where they send their materials. Housing just can't compete with that."* Volatility in material availability and pricing also created risks not only for cost certainty, but also for delivery at scale, with extended lead times and certification requirements delaying construction and tenancy commencement. These pressures were amplified during periods of heightened demand and supply chain disruption (for example, COVID-19).

O5: Finite industry capacity and competition for labour and materials constrain both the scale and pace of delivery.



Kateryna (Source: Adobe Stock)

6.0 Recommendations for Delivering Social and Affordable Housing at Scale

The findings confirm that there is no 'silver bullet' solution for improving the pace and scale of social and affordable housing delivery. Scalability is fundamentally a system challenge, shaped by the combined actions of diverse actors operating across different stages of the housing delivery process and exercising varying levels of influence. Many of the barriers identified should therefore not be interpreted as symptoms of individual lack of capacity or unwillingness to improve. Rather, they reflect misalignments of policy settings, economics and delivery practices. These misalignments produce structural constraints that limit the sector's ability to transition towards scalable delivery, even when individual actors act rationally within their mandates and scope of influence. In response to the research findings, five recommendations are proposed that target key points within the system where coordinated action has significant potential to shift behaviours and improve conditions for scalable housing delivery. The recommended actions are organised into Structural Shifts and Targeted Actions, to distinguish between system-level reforms and practical interventions to support implementation:

- **Structural Shifts:** Changes to the operating logic of the system, with potential for significant impact: institutions, governance structures, regulatory frameworks, delivery models or incentive structures.
- **Targeted Actions:** Specific tools, mechanisms or practices that improve how actors operate within the system.

Each recommendation also identifies key actors who operate across the housing delivery system and possess the influence and resources required to support and lead action. Table 4 illustrates these key actors, grouped by primary function.

Table 4. List of key actors and their primary function

Group	Actor	Code
Policy and System Stewardship Actors responsible for shaping policy, regulatory and governance settings that structure housing delivery	Federal government	FG
	State government	SG
	Local government	LG
	Housing authorities (e.g. Housing Australia, Homes Victoria)	HA
	Standard-setting bodies (e.g. NCC)	SB
	Industry bodies (e.g. Master Builders Australia)	IB
	Educational institutes	EI
Capital and Land Provision Actors that provide or facilitate the financial capital or land required to enable housing development	Private funders (e.g. banks, institutional investors)	PF
	Philanthropic organisations/foundations (e.g. faith-based organisations)	P
Delivery and Operations Actors responsible for the design, construction and operation of social and affordable housing projects	Community housing providers	CHP
	Private developers	PD
	Builders	B
	MMC suppliers	MMC
	Consultants (e.g. architects, engineers)	C
	Tenancy and asset managers	TAM

6.1 Recommendation 1: Shift from Project to Program-Based Funding

What

Reconfigure funding frameworks to support sustained program-scale delivery, reduce cumulative complexity and provide the certainty required to scale social and affordable housing delivery.

Why

Funding arrangements currently operate not only as financial mechanisms, but also as a form of governance, influencing project scope, design and delivery through contractual requirements, prescribed performance standards and layered reporting obligations. While these requirements support accountability and quality assurance, they also introduce complex cumulative compliance and coordination burdens that intensify as project scale and funding sources diversify. Consolidating and aligning funding source requirements through program-based funding models would reduce cumulative complexity, support flexibility and better deliver on project- and program-level ambitions.

How and by Whom

STRUCTURAL SHIFTS

1.1 Build a consistent, long-term program-level funding pipeline to provide certainty, strengthen market confidence and enable industry investment in expanding system capacity. FG SG HA

1.2 Rebalance funding conditions to support calibrated trade-offs between design ambition, cost and project viability. FG SG PF

1.3 Incentivise private investment in the social and affordable housing sector. FG SG PF P

1.4 Align funding frameworks with program-scale delivery models rather than individual project approvals. FG SG HA

TARGETED ACTIONS

1.5 Reduce and align cumulative funding compliance, reporting and coordination requirements across programs. FG SG HA

DESIRED FUTURE STATE: Housing funding operates through stable, long-term program pipelines rather than fragmented project-by-project allocations. Funding frameworks allow calibrated trade-offs between design ambition, cost and project viability, enabling projects to respond flexibly to market conditions. Compliance and reporting requirements across funding programs are aligned, reducing administrative complexity as delivery scales. With predictable funding horizons and clearer investment conditions, private and institutional capital play a larger and more stable role in financing social and affordable housing delivery, expanding the capital base available to the sector.

6.2 Recommendation 2: Reframe Regulation to Enable Rather than Constrain

What

Reconfigure regulatory and planning frameworks to enable adaptability and repetition in housing delivery at scale, while safeguarding sustainability, design quality and community outcomes.

Why

Decentralised and jurisdiction-specific regulatory systems, combined with community sensitivity to scale and design quality, reduce predictability and repeatability and thereby the pace and scale of delivery. Structuring approval pathways and compliance processes to enable the transfer of compliance knowledge between projects and to standardise design can reduce duplication and the need to continually reinvent solutions.

How and by Whom

STRUCTURAL SHIFTS

2.1 Reduce the variability created by jurisdiction-specific interpretation of planning and regulatory frameworks to improve predictability in compliance requirements. FG SG LG SB

2.2 Harmonise elements of social and affordable housing standards nationally while retaining discretion to address context-sensitive issues. FG SG SB

2.3 Re-scale planning approvals from individual projects to program-level permissions and approved pipelines. SG LG

TARGETED ACTIONS

2.4 Reframe design quality assessment to value repeatable solutions alongside contextual design responses. SG LG SB

2.5 Encourage integrated modelling (Building Information Modelling-level coordination) before tender. SG HA CHP

2.6 Pair streamlined approvals with structured community reassurance processes, shifting engagement from consultation to legitimacy-building. SG LG CHP

2.7 Standardise reporting procedures and regulatory submission requirements to create a transparent 'trail of evidence' and reduce iterative rework. SG LG HA

2.8. Provide support to:

- establish mechanisms to formally transfer compliance learnings between projects and jurisdictions (for example, 'compliance playbooks') SG HA
- develop social and affordable housing pattern books (templates) and module libraries (for example, kitchens, bathrooms) with pre-resolved compliance pathways SG IB CHP
- develop heritage-responsive template variants (for example, for church-owned sites). SG LG

DESIRED FUTURE STATE: Regulatory and planning frameworks operate with greater consistency and predictability across jurisdictions. Core elements of social and affordable housing construction are harmonised nationally, and approval pathways support program-level delivery. Design assessment frameworks recognise repeatable housing solutions. Streamlined planning processes are paired with structured community reassurance approaches that build trust and legitimacy. Compliance knowledge-sharing and standardised reporting procedures allow regulatory learning to accumulate.

6.3 Recommendation 3: Enable Innovation and Knowledge Transfer in Delivery

What

Create conditions that support innovation and enable successful delivery solutions to be captured, shared and replicated across projects, signalling their value through funding frameworks, project scoping and regulatory requirements.

Why

Delivery environments are structured around regulatory obligations, funding conditions and risk exposure, prioritising delivery certainty and risk reduction. This reinforces reliance on familiar methods and incremental adjustments, rather than enabling more substantive innovation. At the same time, weak learning mechanisms and the absence of processes for capturing and transferring new solutions across projects prevent innovation from accumulating over time. Creating clearer signals that innovation is valued, alongside mechanisms to support experimentation and knowledge transfer, is necessary to enable the diffusion and scaling of improved delivery approaches.

How and by Whom

STRUCTURAL SHIFTS

3.1 Signal support for innovation through funding frameworks and contract conditions. FG SG HA

3.2 Value non-price criteria in procurement processes, including MMC, sustainable outcomes, project management processes and long-term performance. SG HA CHP PD

3.3 Enhance pipeline certainty to justify investment in new methods of working and the infrastructure and training required to support it. FG SG HA

3.4 Support risk-sharing arrangements to create conditions for project innovation across the client and delivery team. SG HA PD CHP

TARGETED ACTIONS

3.5 Establish shared repositories of tested solutions, delivery insights and lessons learned to support sector-wide learning. HA IB CHP PD

3.6 Formalise cross-discipline decision forums at key project gates to enable integrated problem-solving. PD CHP B

3.7 Strengthen feedback loops and knowledge-transfer mechanisms between projects and programs. HA PD CHP B C

3.8 Normalise MMC through briefing, education and exemplars. HA IB MMC

DESIRED FUTURE STATE: Innovation is embedded in the delivery system. Procurement processes recognise broader project value beyond price, including MMC, sustainability outcomes, delivery capability and long-term performance. Sector learning systems capture tested solutions and deliver insights, allowing innovation to accumulate and spread across projects and programs. Cross-disciplinary collaboration, knowledge-sharing mechanisms and demonstration initiatives support experimentation with new delivery approaches.

6.4 Recommendation 4: Build Workforce, Supply Chain and Organisational Capacity

What

Invest in building materials supply, workforce and organisational capacity to support the sustained delivery of social and affordable housing at scale.

Why

Limited workforce availability, material supply constraints and organisational capacity present structural limits to the pace and scale of delivery. A relatively small pool of builders and subcontractors can manage the complexity and risk associated with large delivery programs, while competition from higher margin infrastructure and mining projects diverts labour and materials away from social and affordable housing. Addressing these constraints requires deliberate investment in delivery capacity to expand system capability and sustain delivery at scale.

How and by Whom

STRUCTURAL SHIFTS

4.1 Support expansion of an appropriately skilled workforce to meet demand. FG SG IB

4.2 Commit to stable program and project pipelines to provide market certainty, enable investment in local capacity and improve price stability. FG SG HA

4.3 Build supply chain capacity to meet sustainability requirements. FG SG

4.4 Strategically time social and affordable housing projects and programs to take advantage of opportunities that arise when private market activity is low. FG SG HA

TARGETED ACTIONS

4.5 Build capability to operate at program scale, including repeatable construction and delivery models. PD CHP B C MMC

4.6 Improve early visibility of material lead times and availability. PD CHP C

4.7 Support workforce capacity development across entry pathways and critical supervisory, management (for example, Lean) and specialist roles. FG SG IB EI

4.8 Support skills development for emerging construction methods, including MMC-related training, through continuous professional development. IB EI

4.9 Build CHP capability for blended finance and partnerships. FG SG HA CHP

4.10 Strengthen client-side capabilities to engage more effectively with the technical aspects of the project. PD CHP

DESIRED FUTURE STATE: Workforce development pathways expand the pool of skilled labour, while improved supply chain visibility and capacity reduce volatility in materials and delivery timelines. Developers possess the technical, managerial and commercial capabilities required to operate large-scale housing programs and to form effective partnerships. Program pipelines and planning that smooths out market peaks and troughs to stabilise demand, allowing industry to invest confidently in workforce and delivery systems.

6.5 Recommendation 5: Embed Early Cost, Constructability and Risk Insight

What

Bring cost, constructability and risk insight forward into early project definition and design development to support informed decision-making before key project parameters are fixed.

Why

Across projects, cost certainty is often established only after key design, scope and approval decisions have already constrained project flexibility. Bringing cost, constructability and risk insights, including DfMA considerations, earlier into the project definition process enables informed trade-offs before commitments are locked in.

How and by Whom

STRUCTURAL SHIFTS

5.1 Embed cost, constructability and manufacturing-informed insight earlier in the project process to reduce the need for late-stage adjustments and funding gaps. PD CHP C

5.2 Adopt procurement strategies such as ECI to formally embed early constructability input and de-risk projects. PD CHP

TARGETED ACTIONS

5.3 Ensure cost estimation methods are market-informed and have currency, and assumptions are reliable (for example, through early market sounding). PD CHP C B

5.4 Engage builders, manufacturers and key suppliers early to test assumptions concerning materials, methods and delivery sequencing to reduce risk. PD CHP

5.5 Maintain design flexibility in structural and system choices to allow potential builders to nominate and price their preferred delivery solutions. PD CHP C

DESIRED FUTURE STATE: Early engagement with builders, suppliers and manufacturers improves visibility of materials, methods and delivery sequencing, while procurement approaches such as ECI help identify risks before they escalate. Maintaining design flexibility in early stages allows delivery teams to propose efficient construction solutions. Projects move forward with greater certainty, reducing reactive redesign, cost escalation and delivery risk.

7.0 Conclusion

Scaling social and affordable housing delivery requires more than increased funding commitments. While recent policy initiatives have boosted investment in the sector, research shows that effective delivery ultimately depends on how the system works as a whole.

Across the case studies, constraints on scalability emerged not from a single actor or stage of delivery, but from cumulative interactions among policy frameworks, funding structures and delivery practices. Many of the challenges are structural rather than project-specific and therefore difficult to resolve through incremental improvements at the individual project level alone. Addressing these challenges requires coordinated action across governments, industry and delivery partners to better align the systems that shape how housing is planned, funded and delivered.

The report identifies five system-level levers to support the successful, scalable delivery of social and affordable housing (see Figure 8). By focusing on these leverage points, the sector can move beyond one-off project delivery towards a more stable, repeatable and scalable pipeline capable of meeting Australia's growing social and affordable housing needs.



Figure 8. Recommendations for scaling social and affordable housing supply

8.0 Moving Forward

The findings of this report provide a foundation for advancing more scalable delivery of social and affordable housing. Moving forward, there is a need to translate these insights into industry-led implementation through cross-sector collaboration. In particular, further work is needed to explore how innovative delivery approaches, particularly MMC, can be effectively integrated into social and affordable housing delivery systems at scale, alongside the procurement, funding and regulatory conditions required to support their uptake. Such efforts will be critical to enabling more efficient, repeatable and scalable delivery pathways while maintaining quality.



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Project webpage:

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https://sbenrc.com.au/project/1-10-1-delivering-social-housing-at-scale-turning-challenges-into-opportunities

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