Scaling Australia's social housing construction: A critical review of barriers

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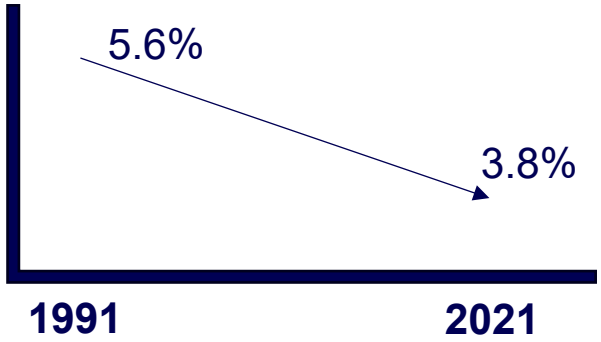
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Background



Social housing is declining as a proportion of total housing.

(NHSAC, 2024)



2.4%

increase in ‘greatest needs’ households on public housing waiting lists during the 2022–23 financial year.

(Productivity Commission, 2024)

565,000

households

occupying social housing or actively seeking such accommodation.

AHURI, 2023)

Forward projections suggest this demand will increase to

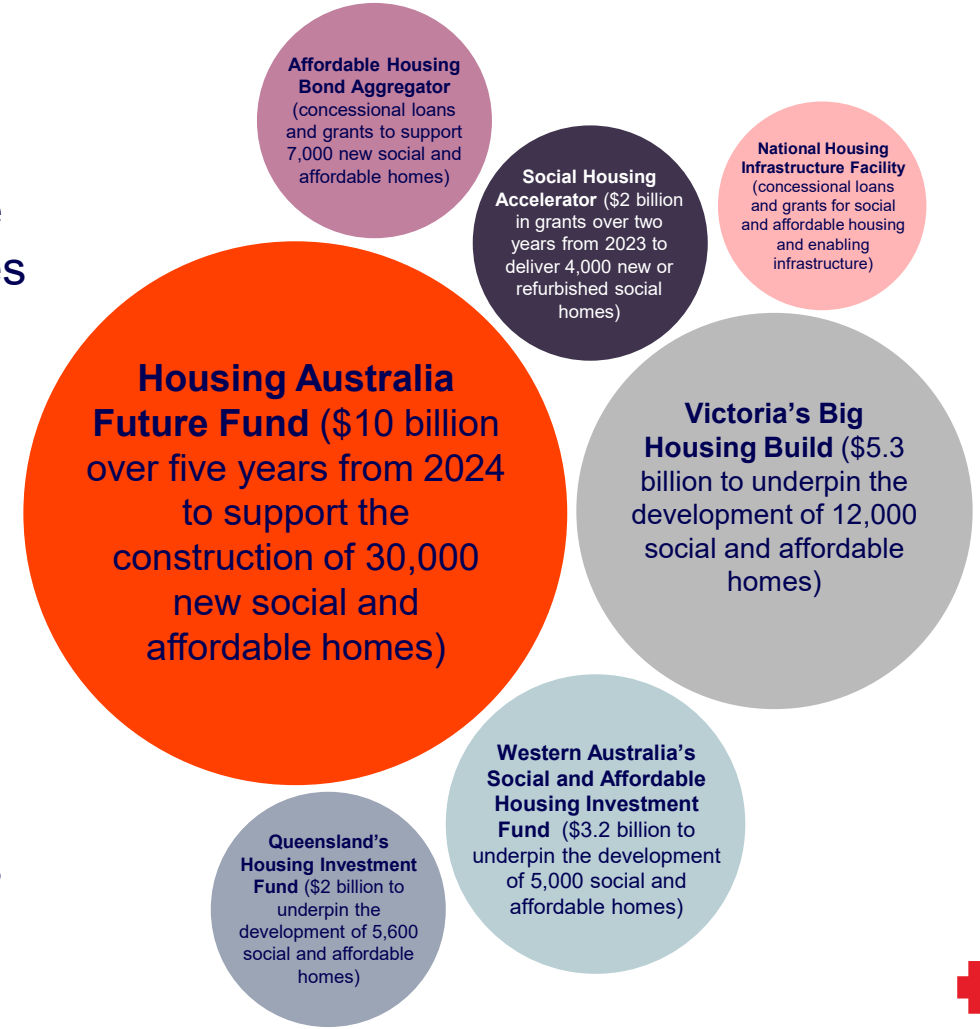
1.1 MILLION

dwellings by 2037.

(Lawson et al., 2018)

Background

Recent federal, state and territory initiatives signal a renewed investment commitment.



Yet significant delivery challenges persist!

Research Aim

Translating the increased funding commitments into proportional increases in social housing supply requires enhanced **scalability**.



Scalability is defined as the ability of a system, network or process to handle a growing amount of work gracefully, or its ability to be enlarged to accommodate that growth.

(Bondi, 2000)

The study aims to investigate the challenges in the implementation of scalable delivery of social housing projects.

Theoretical Lens

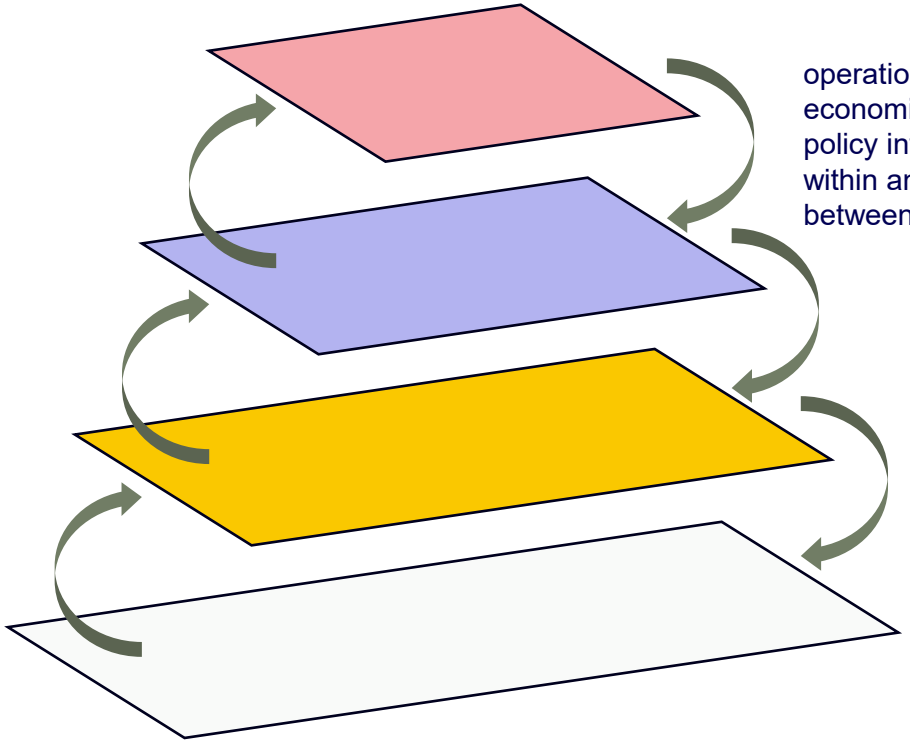
Social housing construction as a system-of-systems:

Sectoral level
broader social housebuilding sector

Organisational level
builders, CHPs, manufacturers, suppliers, government bodies and financial institutions

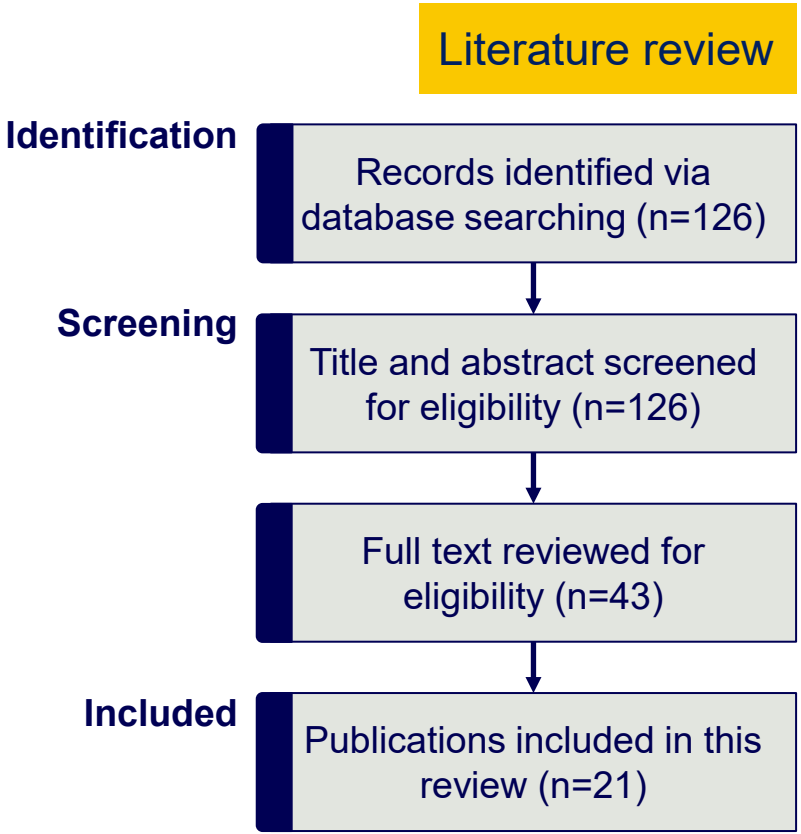
Team level
engineering, design, transportation and assembly teams

Individual level
engineers, designers, labourers, decision-makers and end users



operations, economics and policy interactions within and in between levels

Methods



Step 1

Step 2

Multiple-case study

VIC, QLD & WA

Step 3

Systems analysis

Findings

Operations

- One-off project-based delivery
- Fragmentation
- Low innovation
- Skills shortage
- Workforce issues
- Materials shortage

Productivity Commission (2025), Woods and Houghton (2025), Khan et al. (2024), Productivity Commission (2024), Islam et al. (2023), Raynor and Coenen (2022), Zolghadr et al. (2022), Kraatz and Jayawardena (2020), Mostafa et al. (2020), Milligan et al. (2017), Ariffin et al. (2016), London and Siva (2011), Watson (2007)

Economics

- Budget constraints
- Short-termism
- Layered funding

Raynor and Coenen (2022), Pawson et al. (2019). Raynor (2019), Milligan et al. (2017), Gilmour and Milligan (2016), London and Siva (2011)

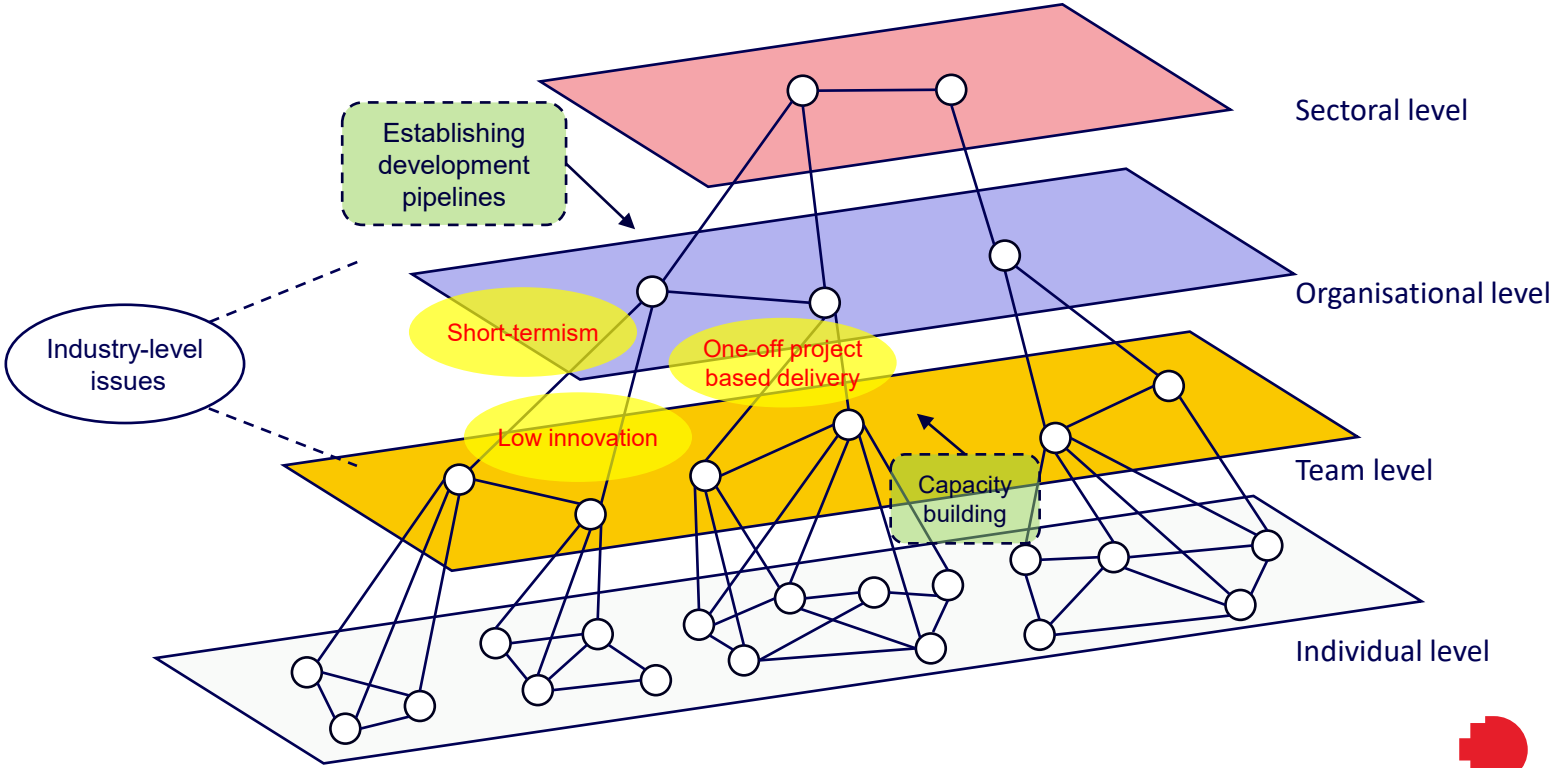
Policy

- Decentralised regulatory system
- Overregulation
- Changing regulatory requirements
- Adversarial relationships
- Contract structure
- Resistant to change

Productivity Commission (2025), Schnabel and Souris (2024), NHSAC (2023), Bowles and Morgan (2016), Dalton et al. (2013), London and Siva (2011)

Findings

Scalability as an emergent property of the social housing construction system



Limitations and Future Directions

- Empirical studies to test and refine the factors identified in the literature
- Develop and evaluate targeted interventions
- Learn from how scalability has been operationalised in other sectors

Thank You!

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