

Key Insights

By becoming a digital infrastructure hub, Australia stands to benefit from:

\$134 billion
cumulative GDP lift

Net present value (2025 – 2050), discounted at 7% p.a.



14,300
additional jobs

Full time equivalent, average additional jobs (2025 – 2050)

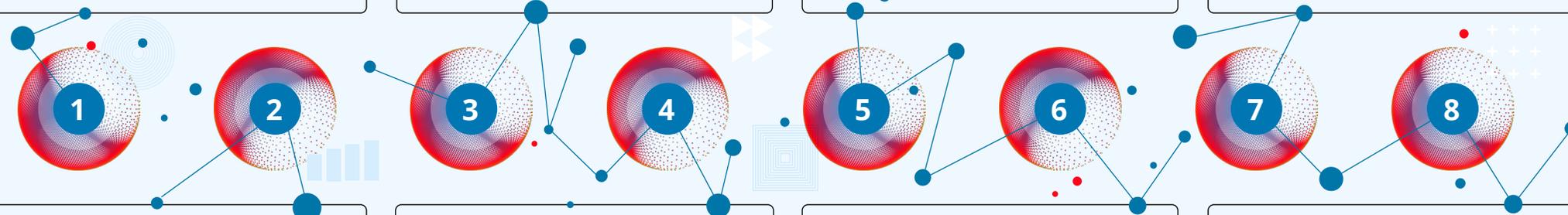
over and above an organic growth scenario

Australia has the **opportunity to become a regional digital infrastructure hub** that enables the needs of the Asia Pacific. Becoming a hub means developing onshore infrastructure to power the region with at least 3.1 GW of high-quality compute, supported by subsea and terrestrial connectivity, and investing in the right enabling infrastructure.

Australia has the **right foundations** with access to available land, renewable energy, resources and workforce to secure the investment needed. Failure to capitalise on these advantages could see Australia miss out on a significant economic opportunity.

Providing the region with **digital services and compute capacity could add an additional \$14 billion to GDP**, with output expected to peak immediately after construction of digital infrastructure, and falling over time as Australia's growing digital ecosystem generates greater local demand for compute.

Investing in digital infrastructure delivers a suite of **broader benefits** including making the nation more resilient and secure, fortifying Australia's cyber security, supporting decarbonisation, elevating Australia's global reputation as a knowledge economy and creating policy sovereignty.



Timing is critical. The investment decisions are being made now. **Once built, countries with the right digital infrastructure will capture an outsized share of the economic benefits of the next technological wave** for at least fifteen years.

A digital infrastructure hub means a strong digital ecosystem with higher productivity growth across the economy. This opportunity is worth up to **\$134 billion in additional GDP over 25 years**, and 14,300 average additional jobs (peaking at 19,100 jobs in 2030). These benefits will occur **over and above** the benefits Australia is expected to realise from general AI adoption without significant infrastructure build out.

Significant digital infrastructure can **catalyse renewable energy investment** through data centres that act as 'anchor tenants' with commitments to underpin the development of additional clean energy generation, assets that are crucial for the energy transition.

Australia has **defined its ambition** to become a digital infrastructure hub. It should act now to put in place **regulations that support** its development and secure the private sector **investment required** to achieve that vision.

Executive summary

Artificial intelligence (AI) is the technological breakthrough of a generation, and its promise of economic returns is driving significant global investment. **In the Asia Pacific, investment in AI will exceed \$165 billion* by 2028.**¹

This boom in spending is accompanied by physical investments in digital infrastructure – the data centres, subsea and terrestrial cables and utilities that will enable access to AI tools and services for billions of people.

This infrastructure is a critical opportunity that Australia can grasp to secure its long-term place as an AI leader in the Asia Pacific, bringing economic benefits that go beyond AI adoption alone. The chance to build a digital ecosystem spanning the entire value chain presents an economic upside which adds to the dividend already expected from the use of AI. However, this infrastructure opportunity cannot be achieved without a vision, and ultimately a plan, to seize it.

The economic upside of AI has been widely-considered in other work. This report explores the opportunity of Australia becoming a **digital infrastructure hub** and the economic benefits this could generate, **over and above** adopting AI. Specifically, it contributes to the conversation in three ways:

- **Unlocking digital infrastructure leadership:** Chapter 1 explains how digital infrastructure both requires and unlocks new forms of economic activity.
- **Highlighting the opportunity gap:** Chapter 2 outlines the specific infrastructure and investment needed to become a digital infrastructure hub and discusses the relative advantages of Australia and its competitors.
- **Estimating the benefits:** Chapter 3 models the economic impact of digital infrastructure, under a 'digital infrastructure hub' scenario. The results demonstrate the benefits across sectors, and for Australia's productivity.



Early movers won't just drive the digital infrastructure boom – they'll capture an outsized share of the returns for at least fifteen years

Projections of AI demand in the Asia Pacific range from 55GW² to 92GW³ of compute capacity by 2030. While the precise figure is unknowable, even the most conservative estimates suggest that **the majority of enabling infrastructure is yet to be built.** This creates a major opening for countries that move within the next two years, successfully establishing themselves as market leaders.

By constructing and hosting digital infrastructure, Australia can support unique, high-value activities like AI research and development, developing advanced enterprise and consumer applications, localising regional supply chains and deploying location-dependent edge computing. Markets home to these activities will be the ones that attract global talent, anchor venture capital, shape international norms and standards, and capture the greatest benefits from AI's global user base.



Australia is better placed than many regional competitors to develop digital infrastructure

When it comes to the next generation of AI-ready infrastructure, the inputs are evident: building digital infrastructure requires **land, capital, electricity, labour, water, supportive regulation, and time.** Importantly, Australia is less constrained on many dimensions than others in the region. However, despite Australia's natural advantages, other countries are moving fast to develop their pipelines of digital infrastructure. **Australia has the foundations to win this race, but lack of deliberate action could see the country miss out.**



Becoming a digital infrastructure hub could grow Australia's economy, lifting productivity in new and established industries

Australia's digital infrastructure is already projected to grow at 16% p.a.,⁵ reaching 3.3GW of data centre capacity by 2030. **Australia has an opportunity to expand its digital infrastructure beyond this baseline,** by adding a further 3.1 GW of AI-ready compute that will bring concentration benefits. With decisive action, this expansion is technically and economically feasible by 2030.

By 2050, this investment sees Australia add a cumulative \$134 billion to the economy. This economic uplift creates an average additional 14,300 jobs in the same period. The economic benefits are wide – construction and utilities gain from the build-out and operation of infrastructure; established industries like mining, healthcare and financial services gain an edge from more accessible compute, while Australia's IT, software and startup ecosystem flourishes from the crowding-in of AI activity. Importantly, digital infrastructure can catalyse clean energy investment, including through long-term power purchase agreements that make projects viable.



Seizing the opportunity will require deliberate action by industry, investors and government

- **Refocussing the conversation:** Put digital infrastructure at the forefront of domestic discussions on boosting Australia's international competitiveness and unlocking its ambitions for its economy, technological progress and energy.
- **Get regulatory settings right:** Policymakers should enable infrastructure investment with fit-for-purpose regulation on data, energy, and planning.
- **Invest with confidence:** Informed by rigorous assessment of specific opportunities, the private sector should invest in digital infrastructure that puts Australia at the heart of the Asia Pacific economy.

* All figures presented in the report are in AUD, unless otherwise stated.

The value of becoming a digital infrastructure hub

\$134 billion
cumulative GDP lift

Net present value (2025 – 2050), discounted at 7% p.a.

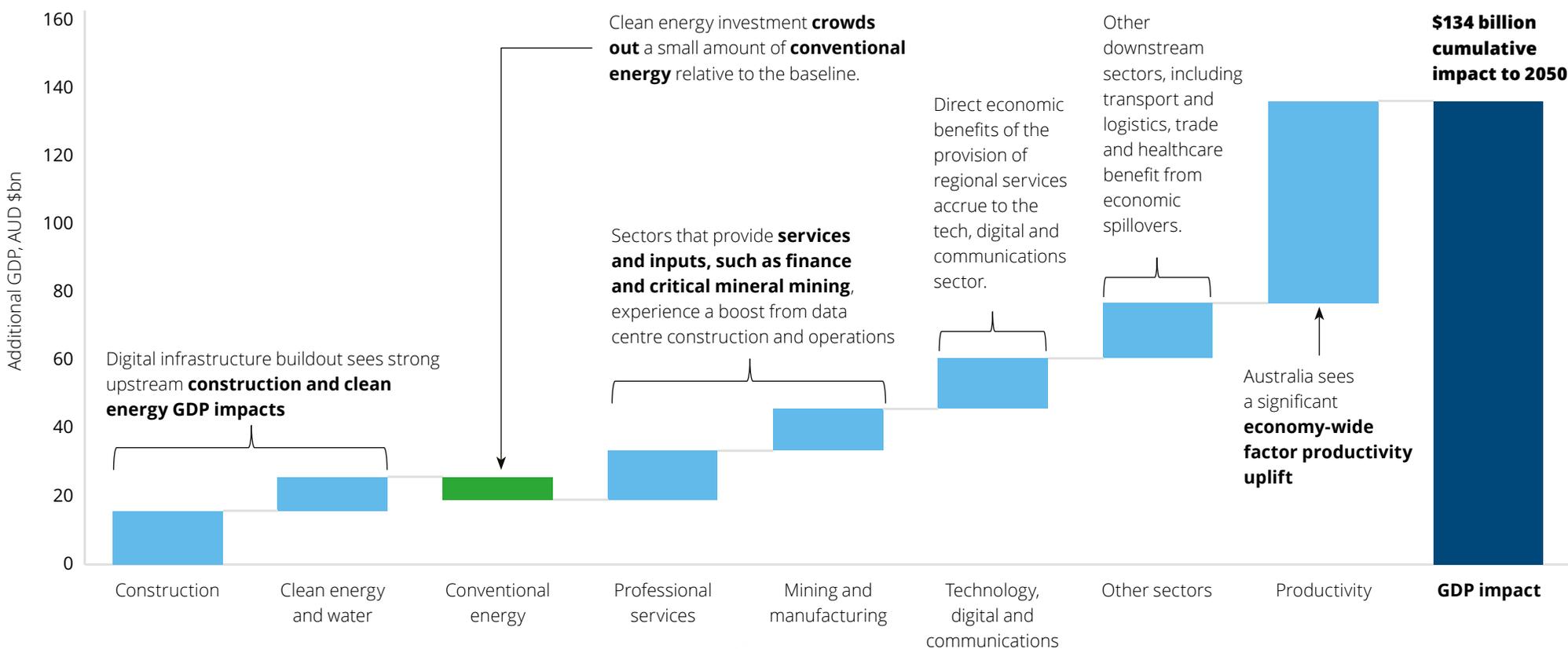


14,300
additional jobs

Full time equivalent, average additional jobs (2025 – 2050)

over and above an organic growth scenario

Digital infrastructure expansion generates industry-specific GDP gains across all project phases, while creating economy-wide productivity gains.



What would it mean to become a digital infrastructure hub?



Focus on the Asia Pacific

Digital infrastructure hubs already exist; however, they are concentrated in North America and Europe. **Across the world, new digital infrastructure hubs are emerging and Australia can lead in the Asia Pacific.**



North America	• Texas	• Ohio			
Europe	• Germany	• UK	• Italy		
Asia Pacific	• Singapore	• Malaysia	• Japan	• India	• Australia?

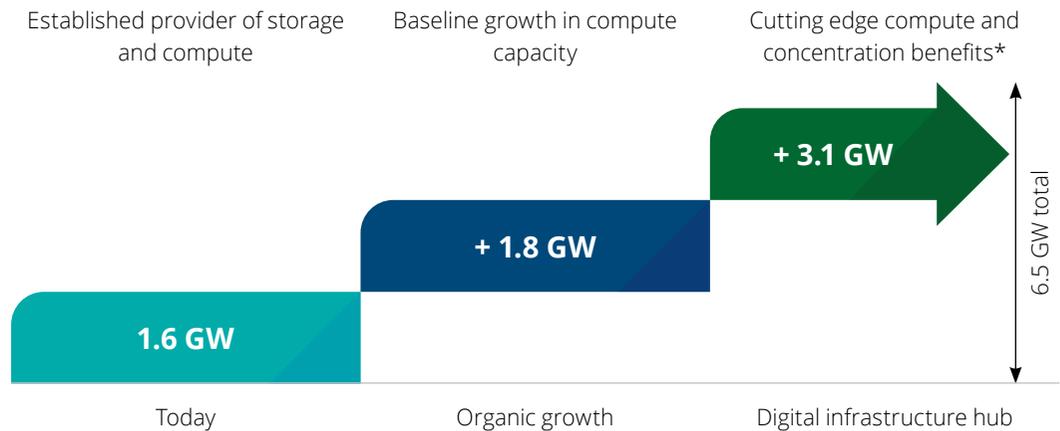


Add to organic growth

There is no question that Australia needs more digital infrastructure. **Becoming a hub means aiming higher than the status quo – bringing with it the potential for greater returns.**



** The scenario modelled for this report examines the economic opportunities of becoming a digital infrastructure hub, over and above organic (or baseline) growth*



Leverage strengths

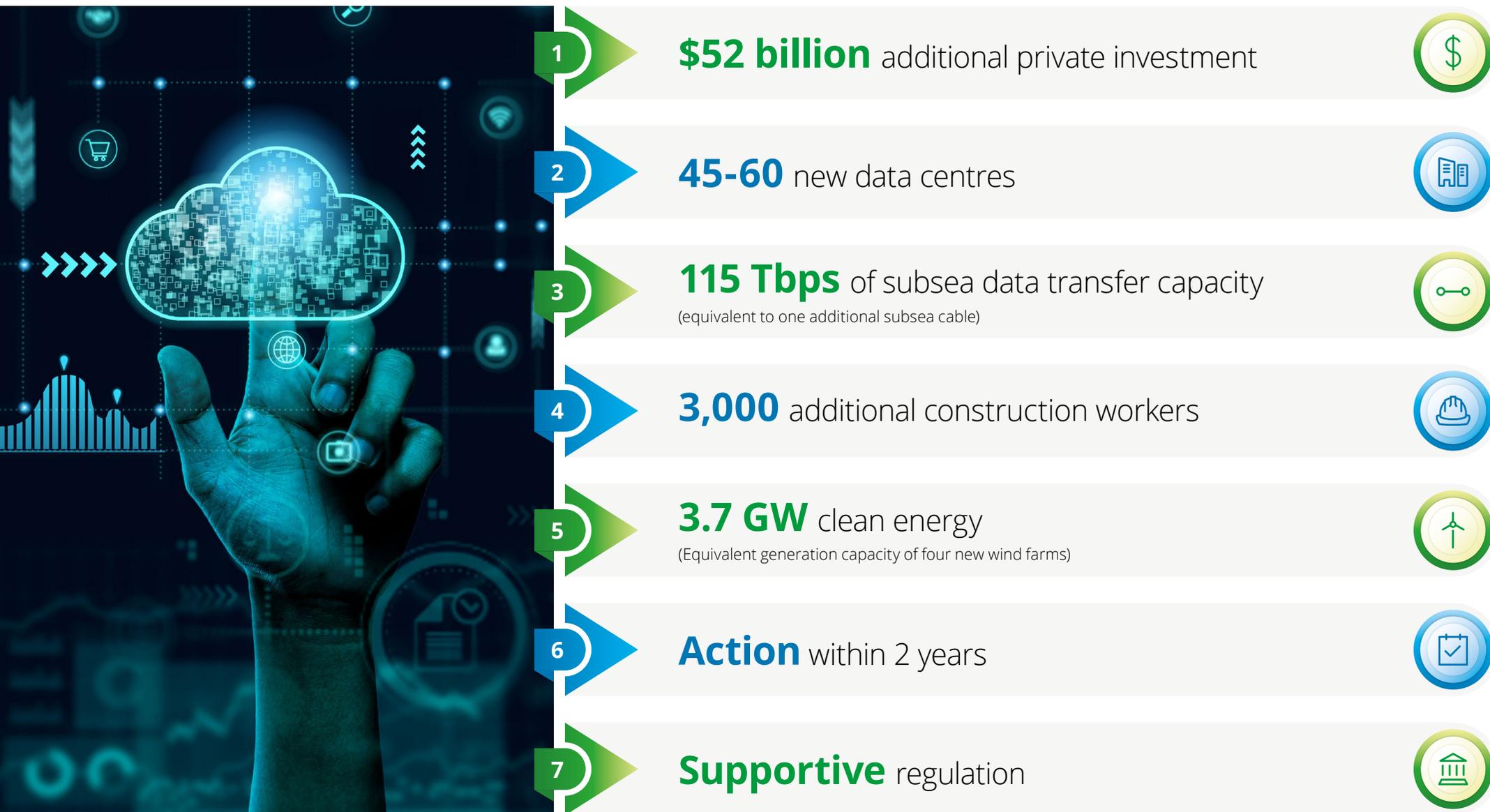
Australia is better positioned than most of its competitors to leverage its strong resource base, **but time is running out.**



Rapid investment, enabled by supportive regulation, is needed for Australia to take advantage of its natural strengths.

Land	Capital	Electricity
Labour	Water	Regulation
Demand	Time	

What's needed to make it happen?



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Digital infrastructure leadership

Digital infrastructure demand is surging

Rapid uptake of AI is driving global growth in digital infrastructure, especially in the Asia Pacific.

The next generation of digital infrastructure is being built

Digital infrastructure is not new. For generations, the world's computing and telecommunications systems have been underpinned by a network of physical hardware. As technological capabilities have evolved, so too has infrastructure – in recent years, characterised by the emergence of data centres that enable the cloud.

Today, the catalytic potential of artificial intelligence (AI) is driving the next generation of digital infrastructure, including new, highly-advanced data centres, subsea and terrestrial cables, and supporting energy and water assets. Globally, the number of hyperscale data centres doubled between 2018 and 2023,¹ while capacity is expected to triple again as AI surpasses 70% of data centre workload by 2030.²

Digital infrastructure growth will be amplified in the Asia Pacific region

The Asia Pacific is emerging as a hotspot for digital infrastructure. If momentum is maintained, the region will comprise 50% of global GDP by 2050,³ compounding the rapid adoption of digital technologies (Table 1).

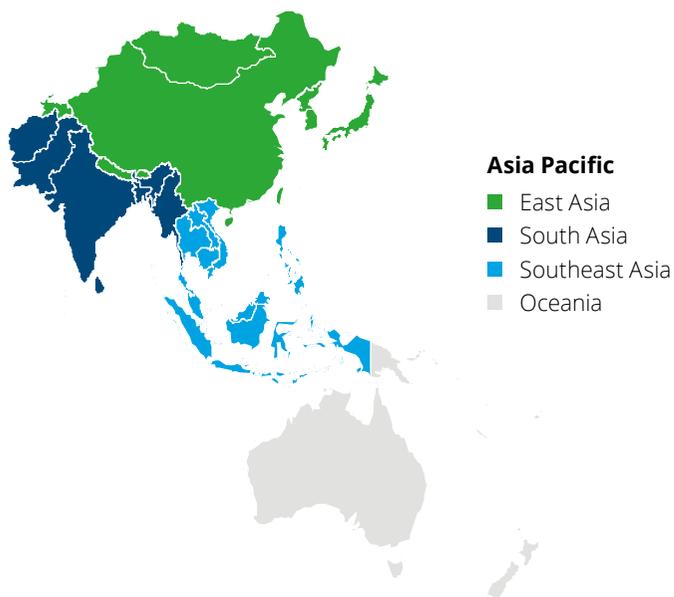


Figure 1: AI is driving a digital infrastructure boom, led by data centres and cables

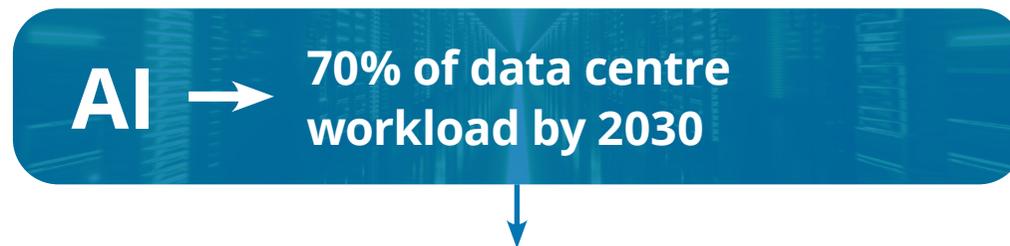


Table 1: Generative AI adoption in selected Asia Pacific economies

Economy	Generative AI adoption (2024)*
India	88%
Southeast Asia average	77%
Singapore	73%
Asia Pacific average	67%
New Zealand	55%
Australia	54%

Source: Deloitte (2024). "Generative AI in Asia Pacific: Young employees lead as employers play catch-up".

*Adoption rates refer to generative AI adoption only. Generative AI is a type of AI that learns patterns to create new content.

In the race to meet demand, digital infrastructure hubs will emerge

The foundation of AI leadership starts with world-class infrastructure and strong local ecosystems.

AI requires high-quality local infrastructure

The next generation of digital infrastructure often depends on local factors:

- **Data centres:** High-quality AI relies on data centres located close to end users, where reduced latency enables effective edge computing.
- **Terrestrial and subsea cables:** High-speed cable links allow efficient and secure movement of vast amounts of data, connecting regions to the global economy.
- **Energy:** A stable supply of local clean energy is critical to power high-performance compute, while minimising carbon footprint. New generation capacity, such as that funded through power purchase agreements is needed to minimise risks associated with energy access, and to ensure clean energy makes up the majority of energy use.

This infrastructure is the backbone of AI, enabling creativity, connectivity and deployment.

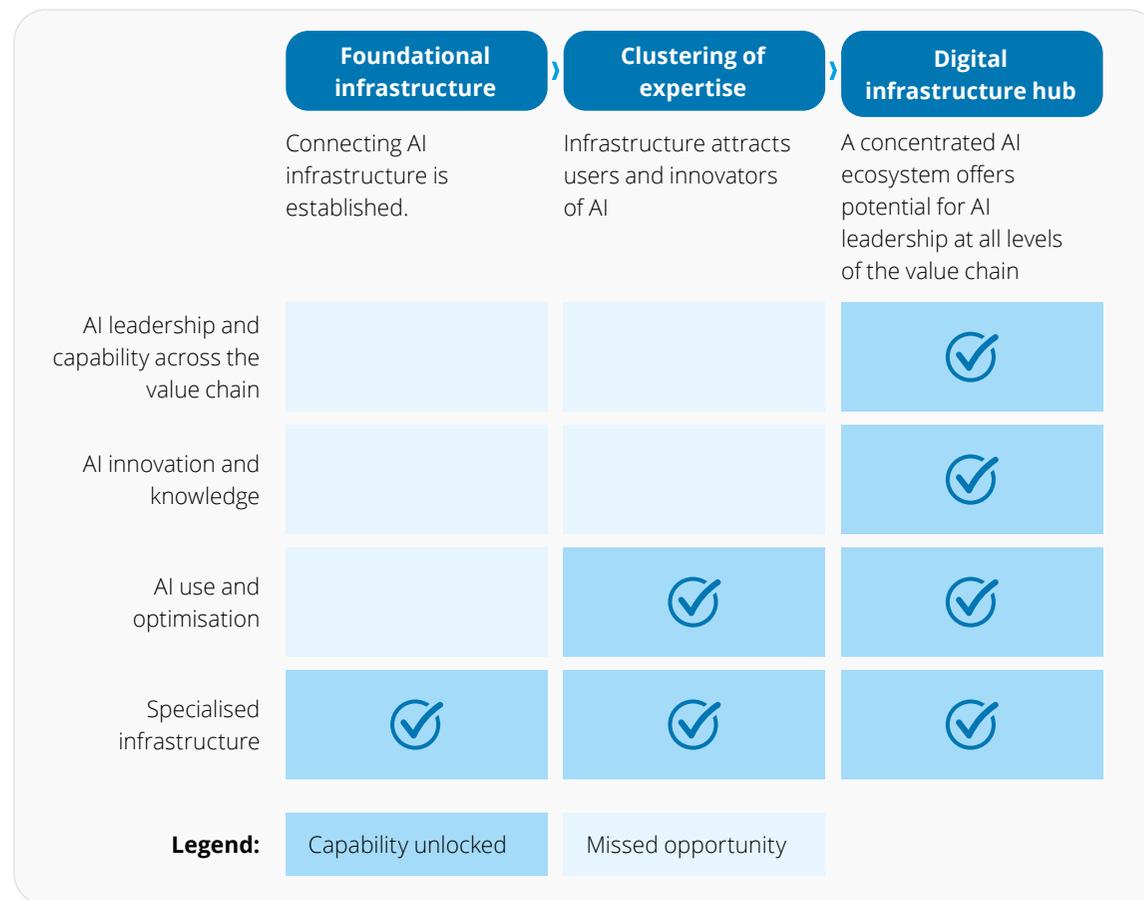
Hubs will emerge as users and innovators cluster around digital infrastructure

Digital infrastructure is foundational. It links existing players and attracts new entrants, causing a co-location of talent and expertise. This pattern is evident in emerging hubs such as Mumbai. **Infrastructure lays the foundation, expertise follows.**

As the next generation of AI-ready infrastructure is developed, clusters of expertise will drive the formation and transformation of digital ecosystems. AI **innovators** will develop new AI technologies, **implementers** will apply them in industry, and **enablers** will create the conditions for AI to thrive. For Australia, a strong ecosystem means strong capability – giving the country the **opportunity to lead across all levels of the AI value chain.**

Becoming a digital infrastructure hub means attracting talent and investment throughout the entire AI ecosystem, allowing Australia to build strong end-to-end capability across the value-chain.

Figure 2: Digital infrastructure hubs enable countries to operate across the value chain



Australia can become a digital infrastructure hub, but time is running out

The digital infrastructure boom could last 2-3 years. Australia is lagging behind regional competitors, but there is still time to close the gap.

The race is on

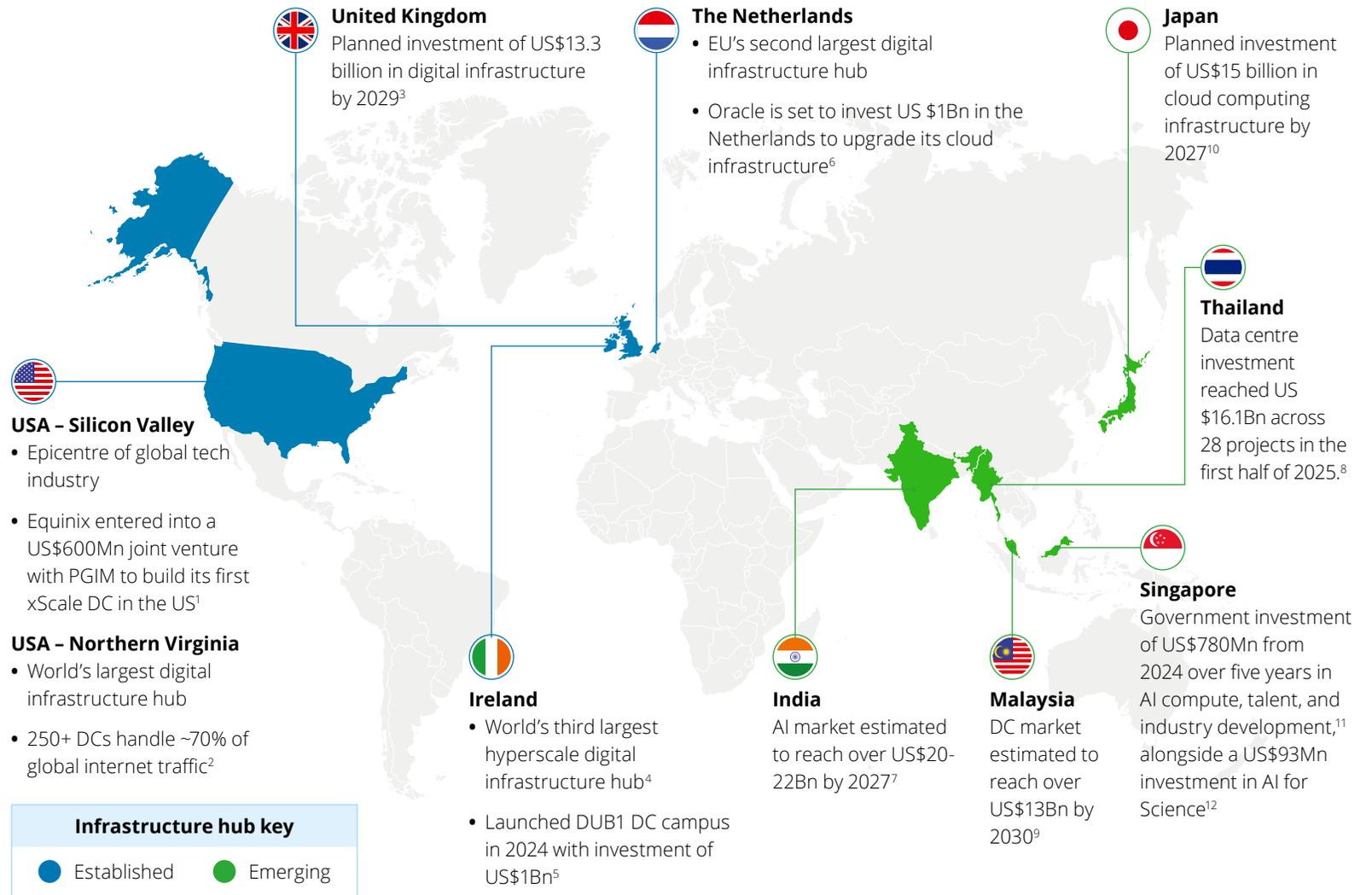
Digital infrastructure hubs are rapidly emerging across the globe, with data centres clustering in locations that offer the right mix of connectivity and talent. The United States and Europe are currently leading the charge, demonstrating the importance of data centre hubs, but there are still opportunities to join the race.

The opportunity for Australia

Surging demand for compute power in Asia Pacific signals that the region could be the next frontier. Countries such as India are mobilising capital and planning infrastructure development, but the window of opportunity is still open for Australia. Australia can service demand in the Asia Pacific as the region's digital infrastructure hub and claim a seat among global AI leaders.

Timing is vital

This window of opportunity will not remain open indefinitely. As illustrated in the map to the right, digital infrastructure hubs are emerging as Asia Pacific countries invest billions in new capacity. If Australia does not move quickly, demand for digital infrastructure will be satisfied by these countries, who will reap the economic benefits of higher productivity.

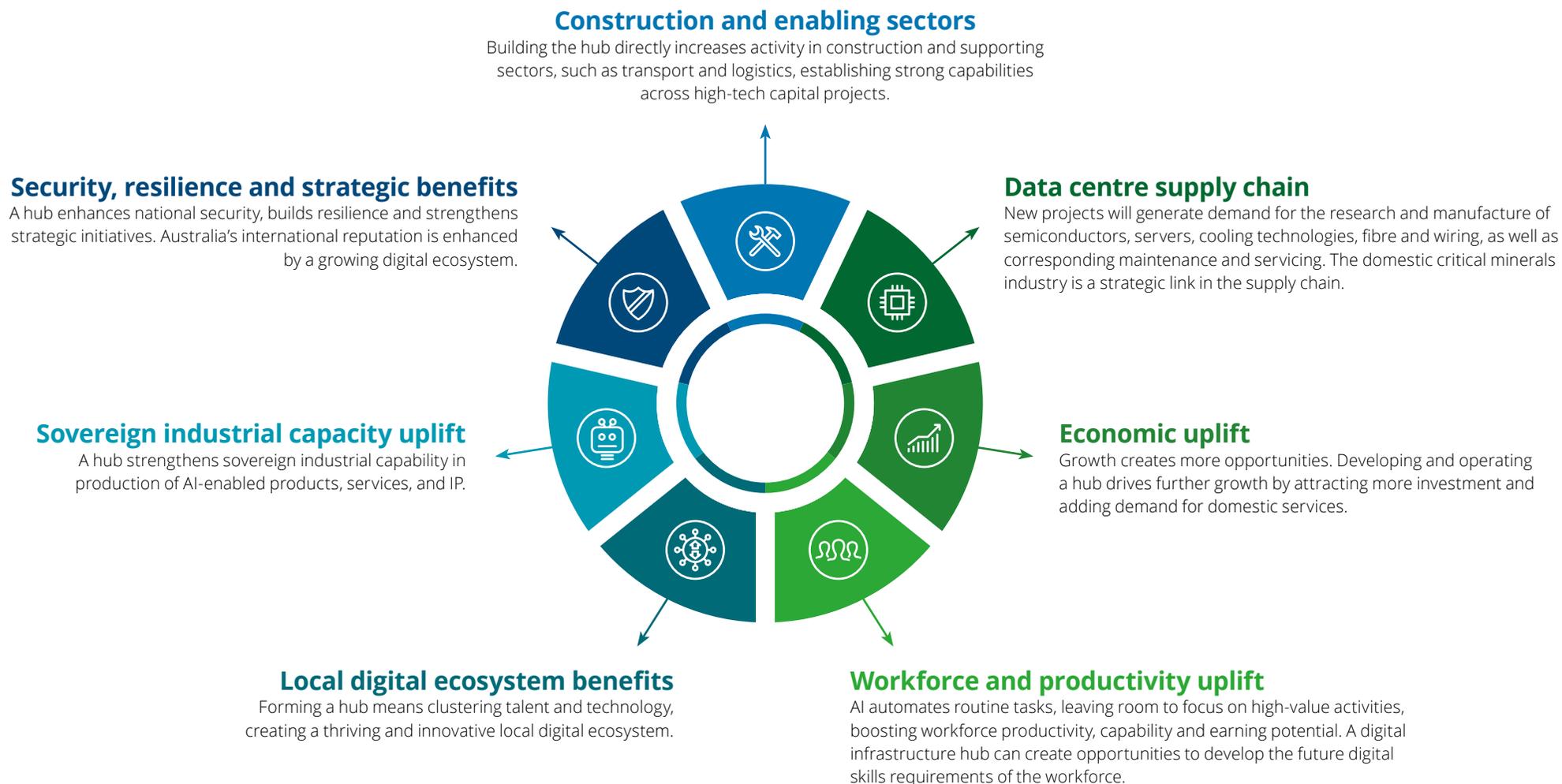


Note: Investments highlighted are illustrative of momentum in each country. Country-wide digital infrastructure investment figures are not always available; where available these have been cited.

Economic benefits will be concentrated in a digital infrastructure hub

Australia could experience a broad range of benefits from becoming a digital infrastructure hub.

The benefits of becoming a digital infrastructure hub



Becoming a hub is an effective way to achieve Australia's AI ambitions

AI is identified as a national priority for Australia. Developing digital infrastructure is an important first step.

Australia recognises the role of AI in addressing national challenges

The Federal Government has developed a range of strategies and discussion papers that articulate the value of AI in addressing national challenges (Figure 3). Central among these challenges is the imperative to lift Australia's productivity, which can be achieved through more efficient delivery of goods and services, and the creation of entirely new products and markets using AI.

To achieve this goal, the Treasurer has urged Australia to embrace AI as a transformative force, to maximise the country's opportunities and position itself as a global leader in AI innovation.¹

Figure 3: Australian Government strategies and discussion papers recognise the potential of AI



Digital infrastructure is a 'no regrets' move to unlock AI capabilities

While AI adoption is possible – and indeed expected – in places that do not host large-scale digital infrastructure, building digital infrastructure can catalyse innovation and applications that would otherwise not occur:

- **Training AI models:** Through highly advanced data centres, housing the world's best GPUs and TPUs, Australia could train AI models and shape the development of this transformative technology.
- **Boosting adoption among local users:** With local compute assets and high-speed cables connecting Australia, startups and major companies alike could access cutting-edge compute to stay competitive. This could unlock edge computing with applications across health and medtech.²
- **Building community awareness:** The visible presence of infrastructure can help Australia catch up to Asia Pacific peers – which are currently ahead in AI adoption – by signalling that AI capabilities are powered by trusted, local systems.

The national conversation is a step behind Australia's global engagement

Australia's overseas representatives are actively pitching for digital infrastructure investment. However, local discussions are often silent on the role of infrastructure in unlocking AI and other digital capabilities. **To become a digital infrastructure hub will require Australians at home to put infrastructure at the forefront of the conversation.**

Department of Industry, Science and Resources
National AI Plan, 2025

[Australia's] abundant renewable energy potential, robust privacy protections and strategic Indo-Pacific location can make Australia an AI hub for the region. Working closely with international partners, Australia can capture economic and social benefits that advance digital sovereignty, sustainability and innovation.

Digital infrastructure can catalyse substantial new investment in renewables

While the renewable energy task is modest compared with traditional energy-intensive users, digital infrastructure can underwrite new renewable energy capacity, including new supply into the grid.

Many digital infrastructure providers have clean energy commitments

Although often labelled energy-intensive, continuous innovation and efficiency gains keep digital infrastructure energy consumption relatively modest - especially when compared to traditional heavy industries.

Nevertheless, digital infrastructure does require significant energy input, prompting moves across industry to procure electricity from clean sources.

Some digital infrastructure providers go a step further, bringing their own electricity through power purchase agreements (PPAs), underpinning additional new generation, and investing in new clean technologies

Data centres are a powerful tool to catalyse the energy transition. In the U.S., data centres already account for about 50% of corporate clean energy procurement, positioning them as frontrunners in large-scale energy procurement.¹

New digital infrastructure - particularly new hyperscale data centres - are increasingly designed to **bring their own energy**, by pairing construction with the development of new renewable power sources. New data centres are often accompanied by renewable PPAs, providing the certainty needed to underwrite both their own clean energy supply and the expansion of transmission, generation and supporting infrastructure. By bringing data centres onshore, Australia can stimulate new supply and capacity across the national grid.



Many data centre operators in Australia have committed to **100% renewable energy** by 2030



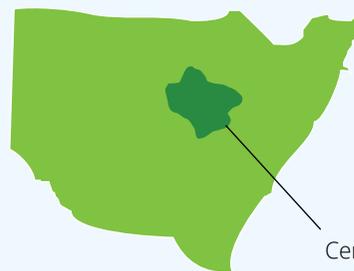
~1 GW Renewable energy capacity invested by digital infrastructure providers in Australia to date²

Renewable Energy Zones – supplying the green energy demanded by digital infrastructure of the future

Renewable Energy Zones (REZs) are dedicated areas in New South Wales where new wind and solar generation will be concentrated so energy can be efficiently stored and transmitted. The zones are designed to attract investment in new renewable energy generation to replace retiring coal-fired power stations.

The Central West-Orana region is one of five REZs in New South Wales. It is approximately 20,000 square kilometres centred by Dubbo and Dunedoo.

The Central West REZ is in the delivery phase, and is on track to unlock at least **4.5 gigawatts** of new generation capacity by the late-2020s, more than the renewable capacity needed for Australia to become a digital infrastructure hub.³



Central West-Orana REZ



To become a digital infrastructure hub, Australia needs private sector investment

Building digital infrastructure fit for the AI age can drive economic growth, protect critical assets, and attract foreign investment.

AI is becoming increasingly embedded within Australian businesses, but national AI investment is lagging

As AI capabilities continue to evolve, AI use in Australia will undoubtedly continue to grow. **Australian businesses are already increasingly embedding these technologies within their operations**, with AI investment by Australian businesses projected to jump five-fold between 2022 and 2030, eventually reaching \$19.4 billion in 2030.¹ Furthermore, within the next two years, 60% of businesses expect to be using AI.²

Australia has been a strong player in data centre construction, attracting the second highest investment levels in 2024 (Figure 4)³. Despite strong interest in data centre infrastructure, Australia has been slow to lead in AI innovation, and lags many of its peer economies when it comes to private investment in AI itself. A lack of adequate targeted national investment in Australia's AI capacity and capability means that Australia's strong investment in data centres alone is not enough to prevent the nation from falling behind its peers, both in the APAC region and globally. Australia needs to both continue and grow targeted investment in critical infrastructure, such as data centres, as well as facilitate greater investment into AI research and development, skills, and government frameworks, in order to ensure effective deployment.

If Australia is to seize the AI opportunity and become a regional innovator of AI solutions, it needs a rapid and decisive lift in investment

Domestic AI is a key economic opportunity, but other countries are investing in their AI capabilities more than Australia. Currently, 88% of AI model development is concentrated in the US and China.⁴ Without building domestic AI capabilities, as well as owning, operating and controlling physical and data infrastructure, Australia risks falling behind. Establishing domestic AI capabilities in Australia will safeguard national interests, enable greater control over the critical and high-value datasets, and ensure ethical alignment with cultural values and domestic regulatory standards.

The Federal Government has a key role to play in building domestic AI capabilities, especially in fostering additional investment in critical infrastructure, such as data centres and other network and computing infrastructure. Other priorities include supporting talent development to increase AI expertise, incentivising R&D, and creating an accountable and adaptive regulatory environment.

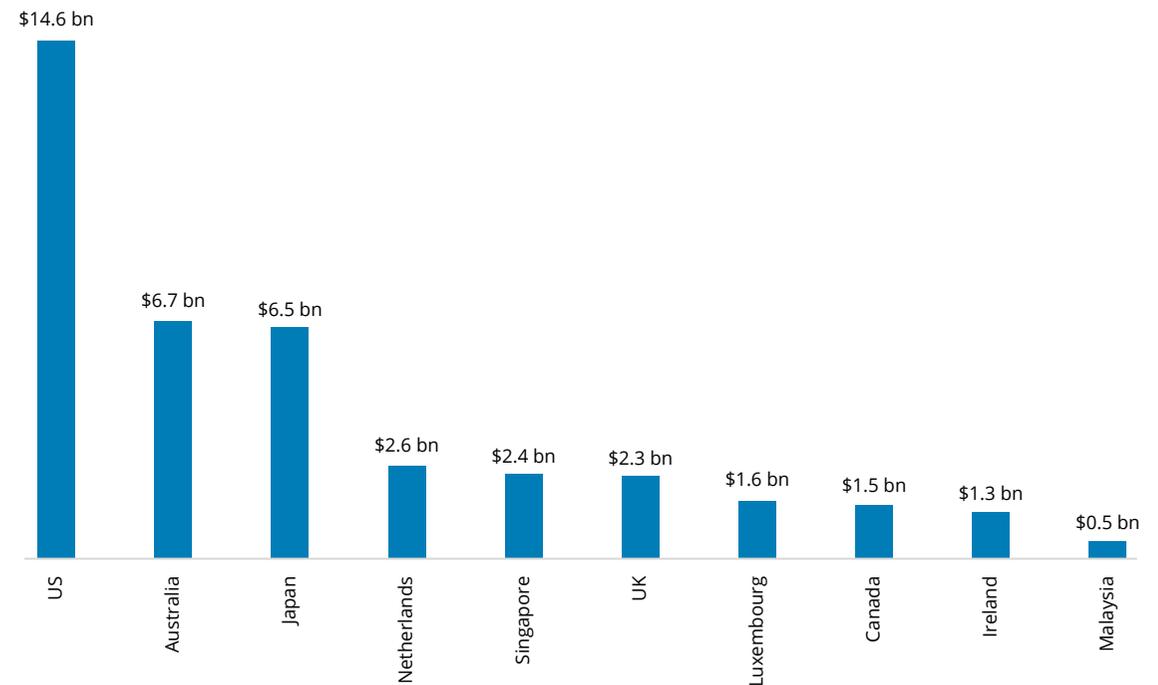


Five-fold growth in Australian business AI investment forecast from 2022 to 2030



88% of AI model development currently occurs in the US and China

Figure 4: Investment in data centres by country, USD (2024)



Source: Deloitte Access Economics, using data from Knight Frank (2025).⁵



Seizing the opportunity

Australia's capability gap

Significant investment is needed to ensure Australia's digital infrastructure can cater to the capacity requirements of the future.



While Australia has a solid foundation in digital infrastructure, more investment is needed to support future capacity needs

Australia has strong digital infrastructure foundations. Australia ranks among the top ten countries globally for data centre capacity, which is a core element of digital infrastructure.¹ While private investment has historically driven expansion, public-private partnerships are also contributing to the digital landscape in Australia.²

Despite strong foundations, Australia's current digital infrastructure capacity will not cater to future requirements driven by AI. Australia risks falling behind other nations in infrastructure investment and therefore forsaking the potential economic benefits of AI and other digital technologies.

Expanding digital infrastructure requires investment in a suite of physical infrastructure, not just data centres, as illustrated in Table 2 overleaf. In particular, investment in energy infrastructure is crucial to meet the significant electricity needs of data centres.

Figure 5: Key digital infrastructure investment areas



Data centre construction and infrastructure

The design, building and operation of secure facilities housing computing equipment.



Hardware

Physical servers, storage and networking devices that perform core computational tasks and form the backbone of digital operations.



Energy infrastructure

The generation, distribution and storage of power essential for sustaining continuous hardware operation.



Terrestrial and subsea telecommunications infrastructure

Data cables on land and undersea which enable global communication and connect Australia to global markets for digital services.

Australia's capacity uplift need

Some \$52 billion in infrastructure investment is required over 2026-2030 to scale capacity, enable advanced AI applications, and secure long-term competitiveness.

Table 2: Uplift needed from current capacity to become a digital infrastructure hub

	Current capacity	Uplift needed*
 Data centres	1.6 GW	+ 4.9 GW
 Terrestrial and subsea cables	350 Tbps	+ 115 Tbps (at least one new cable)
 Total energy generation in Australia (2024)	284 TWh ³	+ 8.9%
 Total utility scale water in Australia (2021-22)	13,449 GL ⁴	+ 0.4%

+1.8 GW of this uplift is already expected in the baseline. In addition to this growth, +3.1 GW of capacity is added in the digital infrastructure hub scenario.

*Uplift from current capacity needed to become a digital infrastructure hub, under the scenario modelled for this report. For further detail on the scenarios and data sources, see the Appendix.

Eight factors can be a source of competitive advantage

Effective planning can enable digital infrastructure expansion by leveraging Australia's strengths.

There are eight key factors needed for developing digital infrastructure and unlocking the future potential of AI.

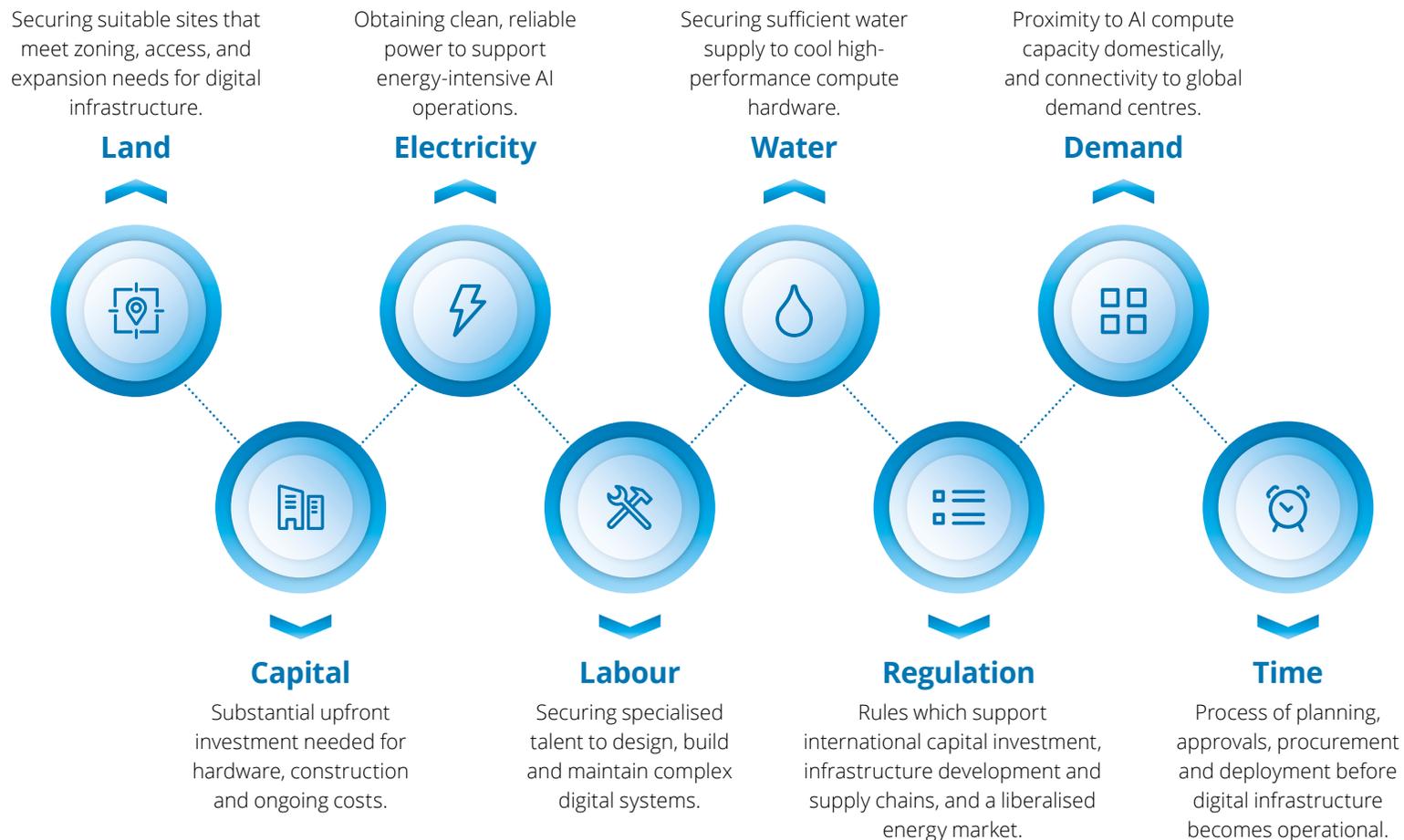
For some countries, these factors are *de facto* barriers, however for Australia they are a source of competitive advantage.

Australia benefits from abundant natural resources, placing it ahead of many Asia Pacific peers. Despite this, community concerns and perceptions around resource use, particularly land, water and energy need to be addressed and communicated.

Australia's ability to become a digital infrastructure hub depends on whether it can evolve its industries, systems and rules to enable its competitive advantages to be truly harnessed. A coherent base of supportive regulation is needed to:

- Encourage the investment of international infrastructure capital that is footloose.
- Facilitate rapid infrastructure delivery which, if delayed, could hamper further growth.
- Support long-term renewable energy investments that balance capital intensity against sustainable returns.

Figure 6: Key factors in the establishment of digital infrastructure



Australia is well-placed to lead in the Asia Pacific

Australia's position on the doorstep to Asia gives it opportunities to exploit natural advantages and lead in the regional infrastructure race.

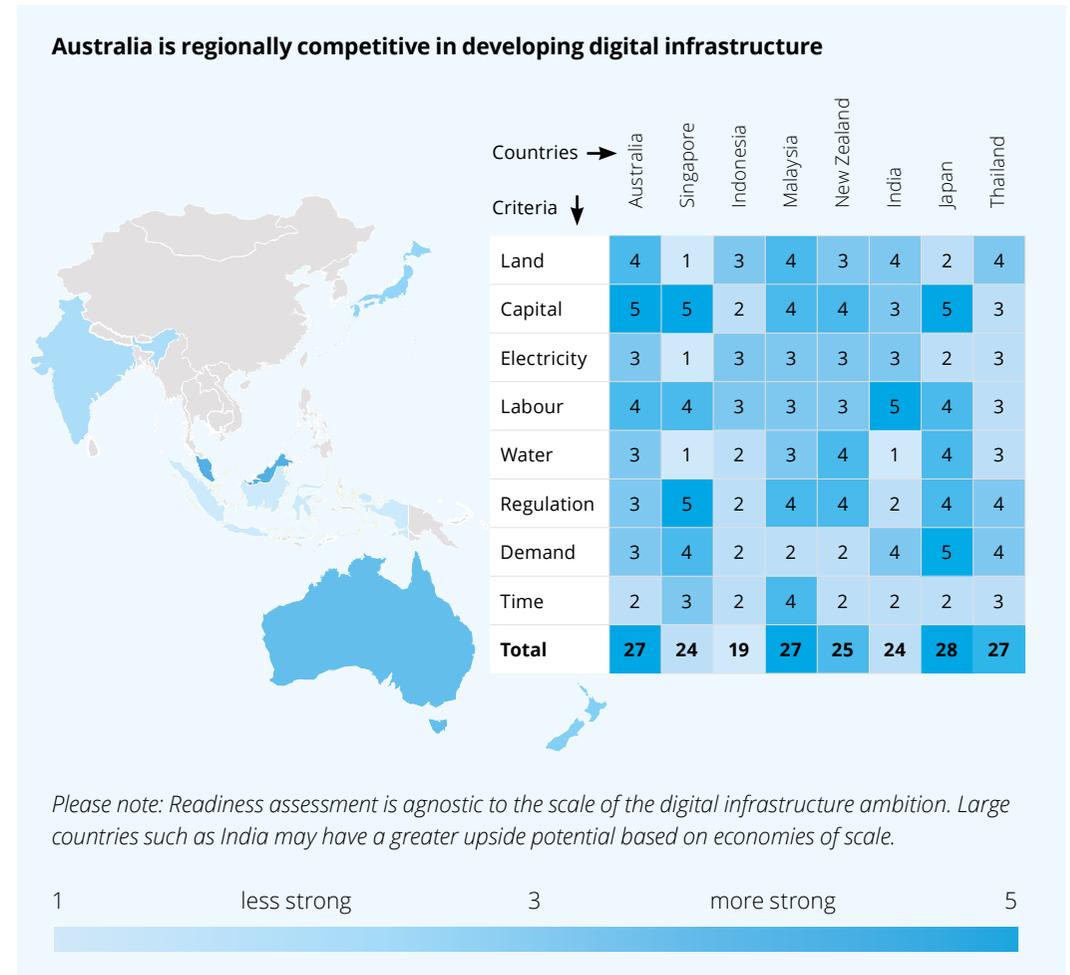
Australia has the potential to win the digital infrastructure race, but it needs to provide clear investment signals before it's too late

Considering the underlying drivers of a country's ability to develop digital infrastructure, Australia can do better in some aspects, but overall, the nation has a number of favourable conditions:

- **Land:** Where geography or population constrains its neighbours, Australia is the world's sixth largest country. Though its population is concentrated in the south (away from Asia Pacific markets), its population density is among the world's lowest.
- **Capital:** Australia has deep and sophisticated debt and equity markets that punch above their global weight, complemented by strict foreign investment rules. The key will be in attracting both Australian and international investors to direct infrastructure investments here.
- **Electricity:** Australia has the world's best solar resources, supported by domestic gas. While the country is a regional energy exporter, prices are currently high.
- **Labour:** Australia's talent ranks fourth in the world for Future Skills, evidence of an innovative population that overcomes otherwise high labour costs.
- **Water:** Australia has high-functioning water markets that support efficient access to otherwise highly distributed resources.
- **Regulation:** Despite a lack of AI-specific laws, AI is governed in Australia by a strong existing suite of legislation. However, its technology rules are constantly evolving, creating some risk for investment.
- **Demand:** Australia is proximate to growing demand centres in the Asia Pacific and at home.
- **Time:** Australia's regulatory environment means approvals can take time, diminishing its attraction as an investment destination.

In a growth industry like digital infrastructure, a country needs to run at the pace of investors if it wants to attract their capital. **Clear roadmaps, strategies and rules help international stakeholders to understand the country context, deploy capital at scale, and build the infrastructure needed to establish a regional hub.** If Australia could improve the *time* it takes for developers to get their projects off the ground (and move from a 2 to a 4-5), as well as provide regulatory certainty, it could become the frontrunner for digital infrastructure development in the region.

Figure 7: Asia Pacific countries' potential to develop digital infrastructure, based on relative strengths



Note: Refer to Appendix A for sources behind the Asia Pacific cross-country comparison.

The risk of missing out

If Australia fails to invest in AI infrastructure now, it risks missing a major opportunity to boost competitiveness and economic growth.

The risks Australia faces if it misses out

Being left behind could make Australia **reliant on infrastructure located in other countries**, exposing the country to strategic and regulatory shifts overseas and reducing Australia's potential to exert strategic influence over the global regulatory landscape. Without a trusted network of underlying infrastructure, Australia could face the dual challenge of missed economic opportunities and limited ability to shape AI governance and norms.

If Australia fails to invest in AI infrastructure now, **it risks seeing a highly impactful opportunity slip through its fingers**. There is opportunity to service rapidly growing demand for digital services in the Asia Pacific, but without the capability and productivity benefits of becoming a digital infrastructure hub, the Australian economy risks losing its competitiveness, underscoring further declines in living standards.

The next 2-3 years of investment will determine where digital infrastructure is located for the foreseeable future. The buildings that house digital infrastructure can last beyond 50 years,¹ so there is a window to build this infrastructure before it is set in place for a generation. Without timely investment, Australia risks missing the opportunity to develop digital infrastructure and serve neighbouring markets. As more countries join the race to build recognised digital infrastructure hubs, Australia may lose its chance to become a leader and miss out on the foreign direct investment this would attract.

Why Australia could miss out

Policy certainty is key to investor confidence. Without clear government support, business and capital providers face uncertainty about long-term priorities and expected returns. This hesitation could slow scale-up of essential infrastructure needed to become a digital infrastructure hub. At the same time, investment that does occur may be fragmented or result in duplications, inefficiencies and gaps in projects needed to build necessary infrastructure, weakening Australia's competitiveness.

Without a clear vision, deliberate policy settings and investment plans, Australia is near guaranteed to miss out. However, with the right choices, Australia can seize its natural advantages to lead in the Asia Pacific.



We know that we have to lean in to capture the economic opportunity of artificial intelligence for Australia. We will be a poorer nation if we do not do this.



Andrew Charlton MP

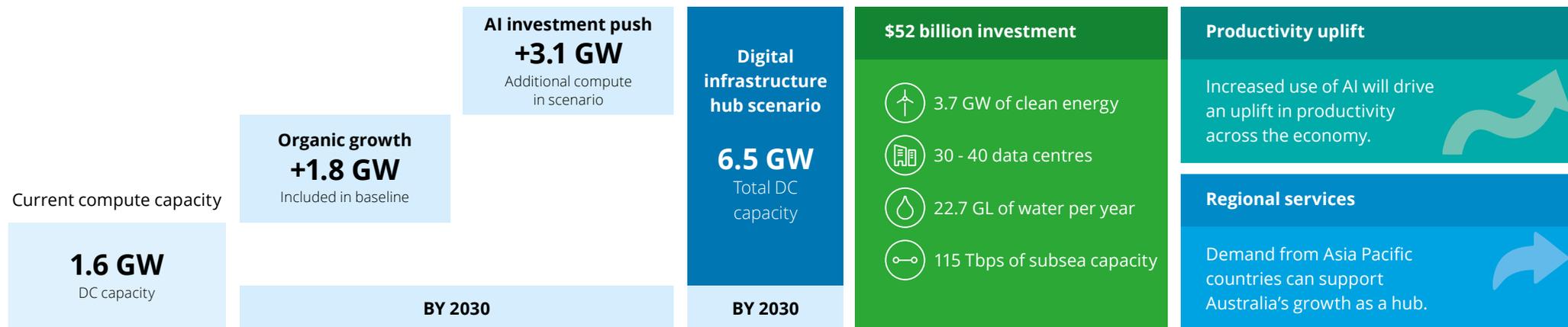
The Assistant Minister for Science, Technology and the Digital Economy speaks at the AI Leadership Summit in Brisbane 21 October, 2025



The size of the opportunity

Defining the digital infrastructure hub scenario

Understanding the economic opportunity of becoming a digital infrastructure hub starts with a vision for what this could look like for Australia.



The vision and capability gap

- Australia's current data centre capacity is currently 1.6 GW.
- To achieve a vision where Australia becomes a digital infrastructure hub will require a capacity expansion of 4.9 GW to reach 6.5 GW by 2030.
- This includes an uplift in DC capacity in line with organic growth, as well **as an additional 3.1 GW** above baseline growth in compute.
- This would see Australia grow to almost 7% of the Asia Pacific's total compute. Considered against Australia's population size, this would be an ambitious yet achievable increment on top of organic growth.¹



Investment required

- At least \$52 billion investment in physical infrastructure and AI hardware is required to support the 3.1 GW uplift in digital infrastructure capacity under the digital infrastructure hub scenario. This includes energy, data centre, water and communications.
- Both capital- and knowledge-based industries will benefit from this investment.

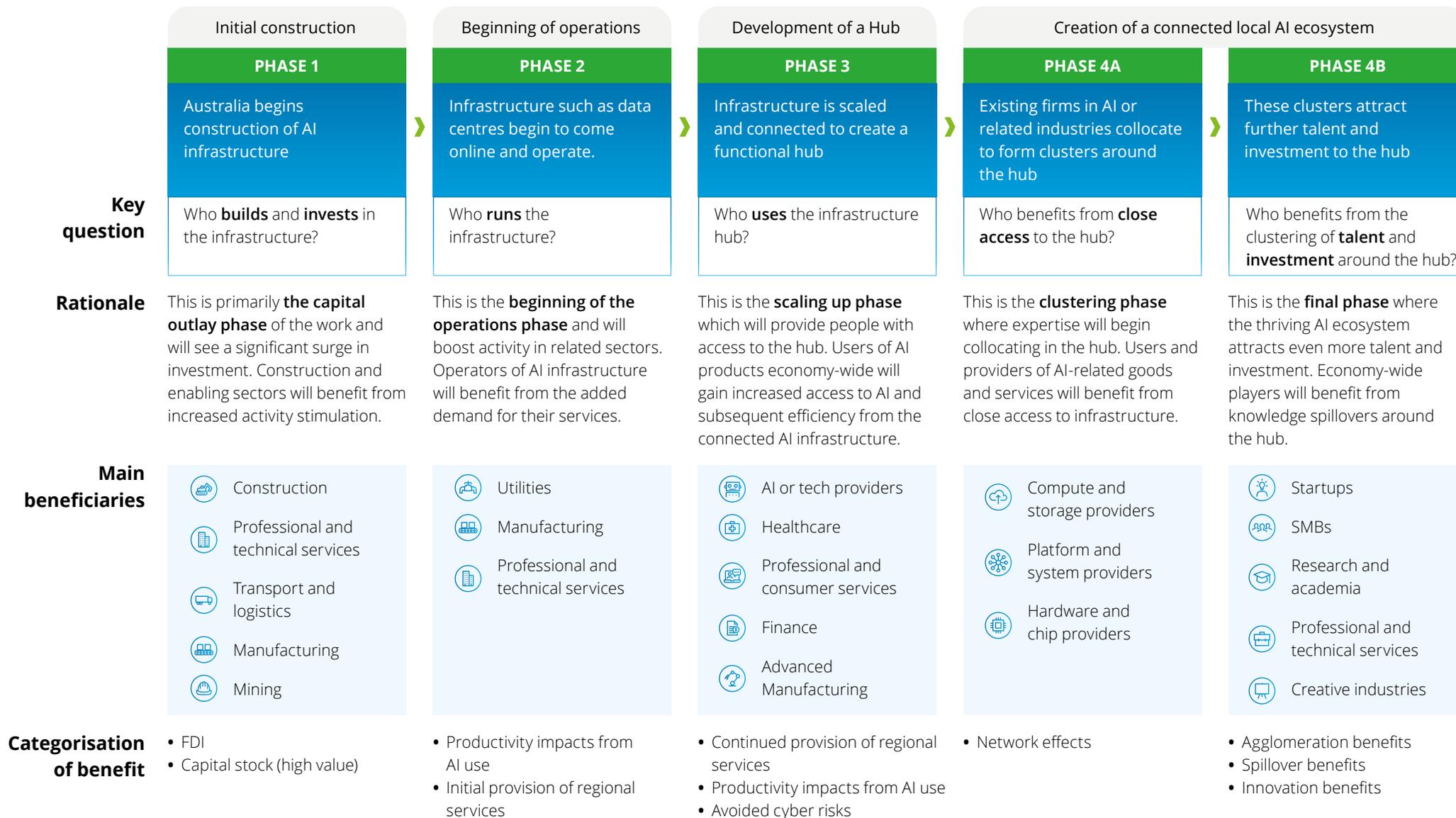


The economic impacts

- Investment in digital infrastructure will generate multiple economic impacts:
- **Upfront investment** in digital infrastructure, as well as the ongoing operation of digital infrastructure will generate lasting demand for goods and services and therefore stimulate economic activity.
 - Providing the region with digital services and compute capacity will contribute meaningfully to GDP.
 - Most significantly, increased AI use will generate an **uplift in productivity** across the economy and contribute to higher living standards.

The economic benefits of becoming a digital infrastructure hub will occur in phases

From initial construction to end-phase hub creation, a digital infrastructure will create economic benefits across different parts of the economy.



Sizing the impact of a digital infrastructure hub

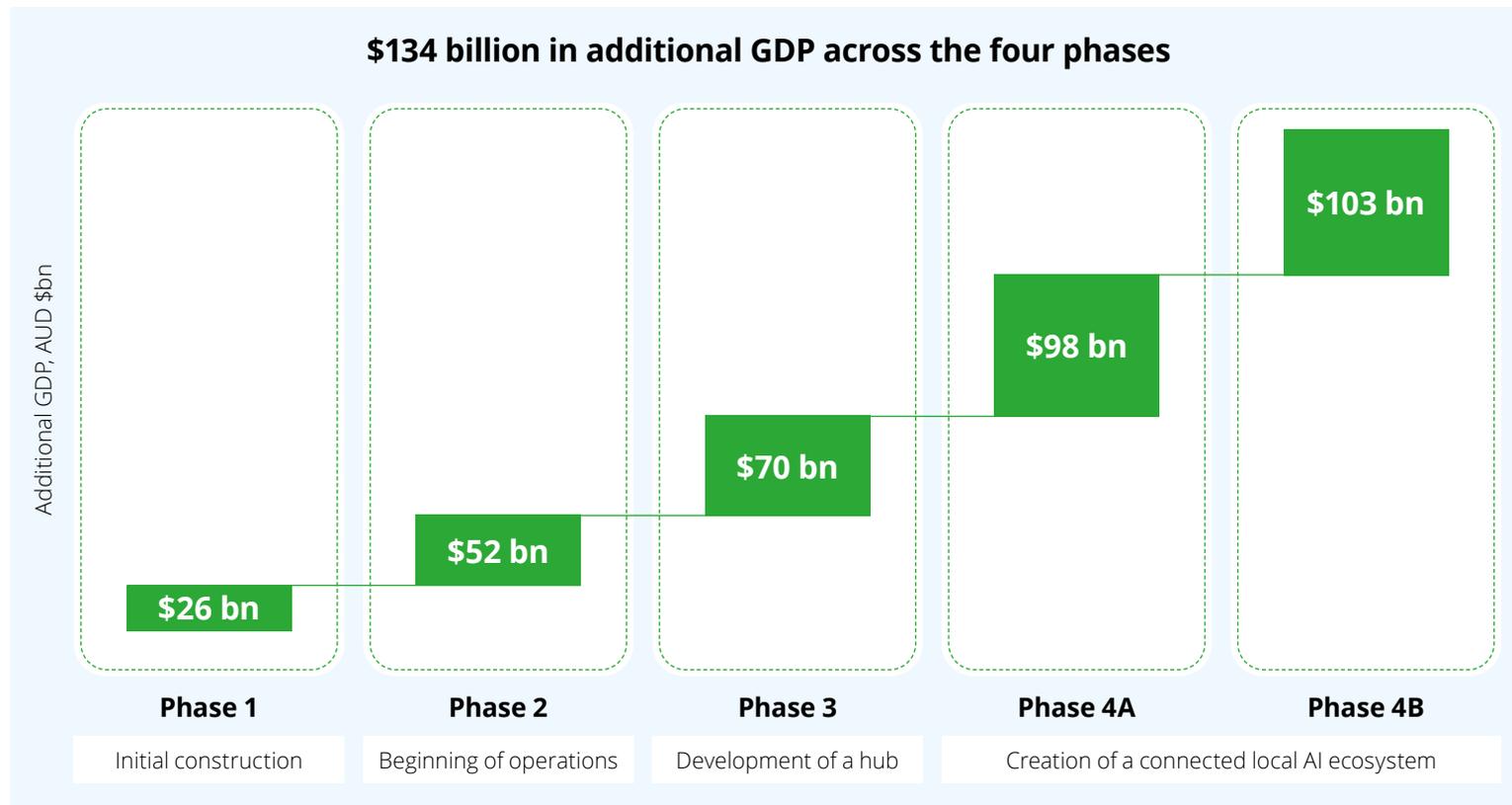
Becoming a digital infrastructure hub is a \$134 billion economic opportunity compared to organic growth.

An AI investment push could see Australia add an additional **\$133.6 billion in present value terms to its GDP by 2050** throughout the various phases of realising a digital infrastructure hub, compared to organic growth.

During the construction phase (Phase 1), it is expected that investment and upstream stimulation could contribute an additional \$25.9 billion to the economy. As compute capacity starts to come online, Phase 2 has the potential to unlock a further \$51.7 billion. Benefits will start to accumulate as co-location of infrastructure and capacity occurs, potentially contributing another \$69.4 billion more to GDP. Returns continue throughout Phases 4A and 4B as Australia attracts further talent, investment and downstream industries. Across the two phases, Australia has an opportunity to unlock an additional \$200.3 billion.

Alongside economic growth, a digital infrastructure hub could create an average additional 14,300 jobs across various industries and lift existing productivity growth.

Figure 8: Economic impact of becoming a digital infrastructure hub, by phase

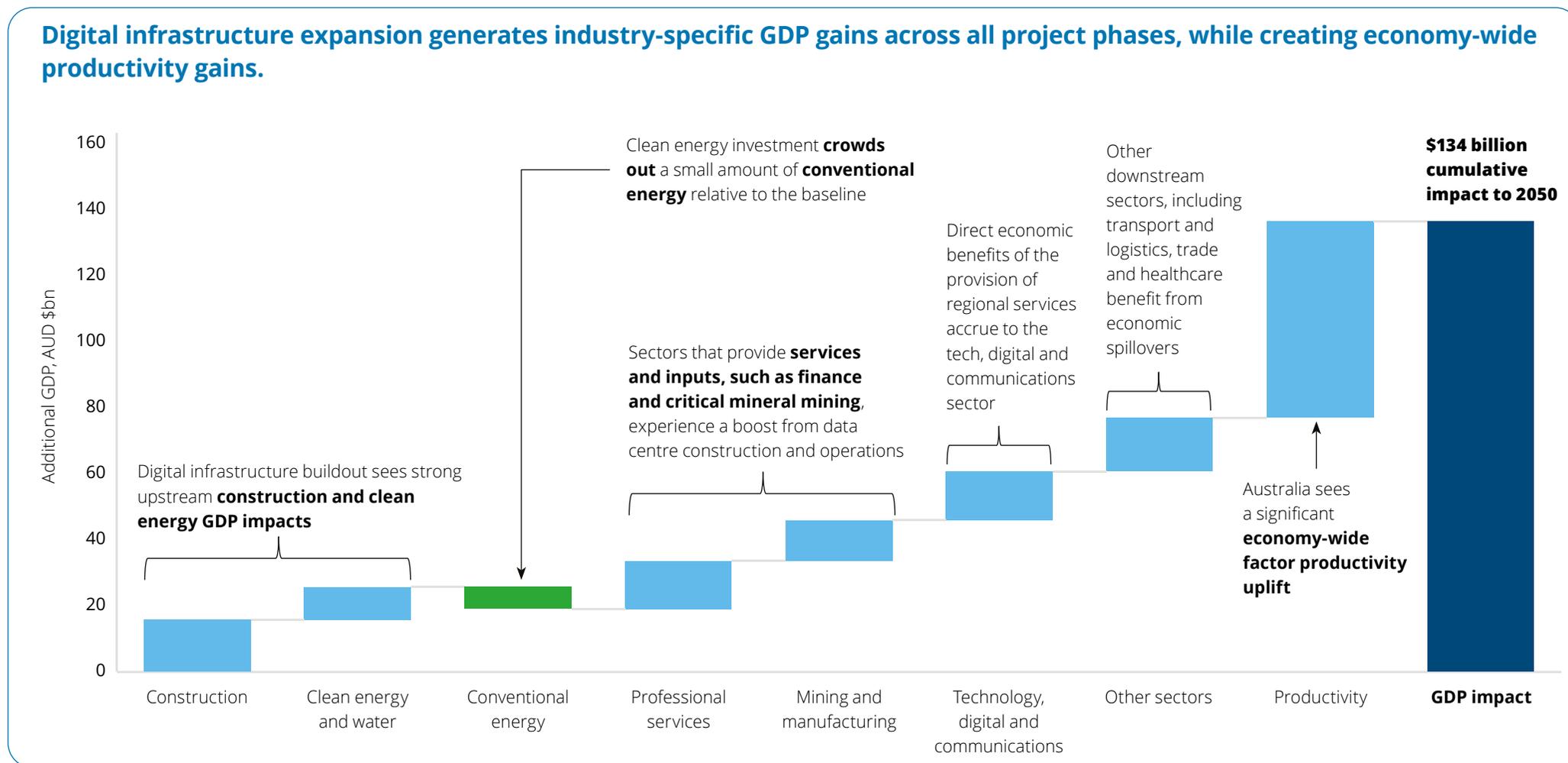


Note: Economic opportunity by phase does not sum to headline figure because the overall economic opportunity has been discounted by 7%.

Foundational industries stand to gain from a hub

A hub will unlock additional growth in Australia's pillar industries, as well as significant productivity gains across the economy.

Figure 9: Gross domestic product (GDP) impact breakdown by industry and total factor productivity uplift*



*Total factor productivity (TFP) is a measure of economic efficiency that reflects the amount of output that can be produced from a given amount of inputs, such as labour and capital. Technological progress, such as that enabled by investment in digital infrastructure, can generate an increase in TFP.

A hub can drive job growth across the economy

Becoming a digital infrastructure hub can drive the creation of 14,300 full-time equivalent (FTE) average additional jobs compared to organic growth, particularly within industries that align with Australia's strategic focus.

Bold digital infrastructure investment unlocks significant job growth above organic growth. Becoming a digital infrastructure hub could unlock an average additional 14,300 FTE jobs, reaching a peak of over 19,100 FTE jobs in 2030. These jobs would be created across a range of important and highly-skilled sectors in Australia, supporting sovereign goals and priorities.



Upskilling Australia

The strongest employment growth sits with high-skilled **professional service industries**, adding skilled labour to Australia's technology, finance and business sectors.



Building strategic capability

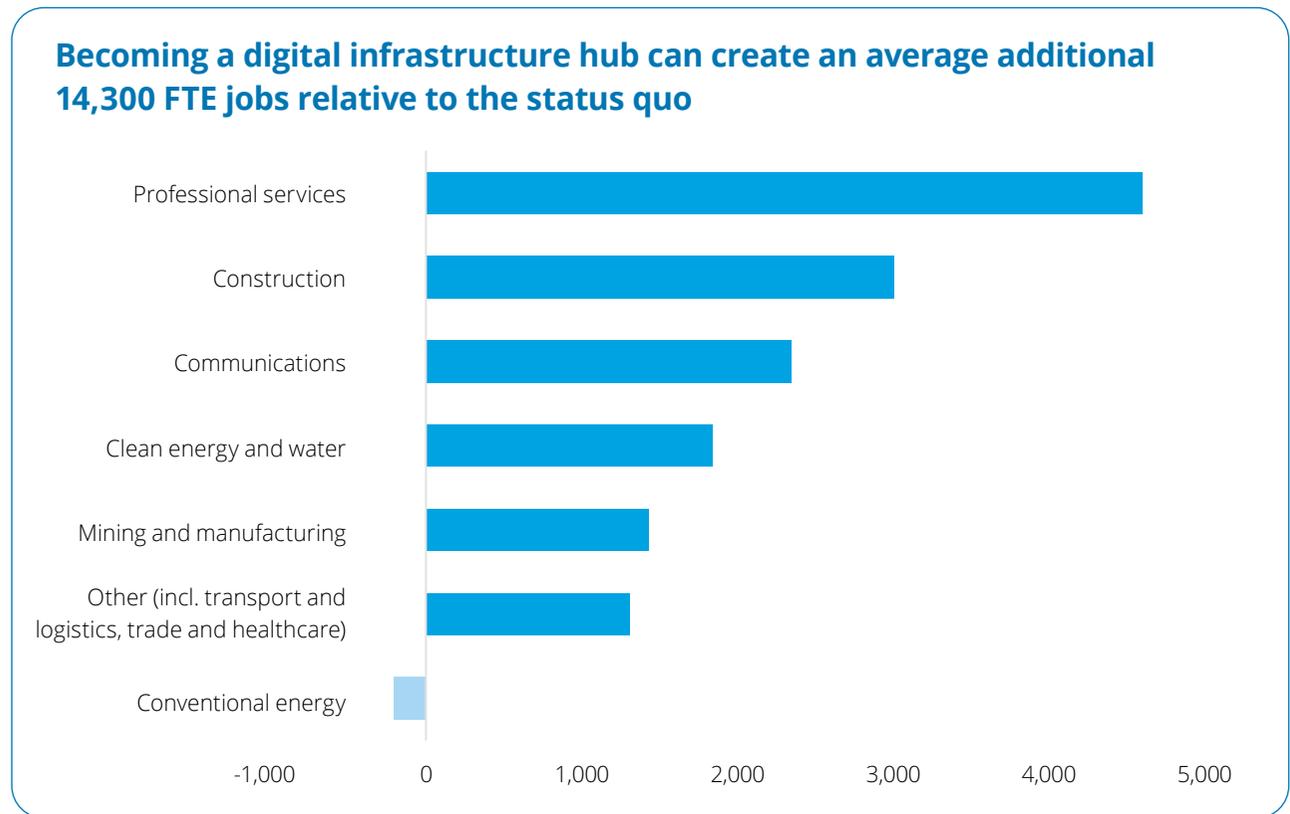
Strong employment growth is also expected in mining, manufacturing and construction sectors, **adding to Australia's foundation for onshore critical mineral production and advanced manufacturing.**



Advancing clean energy build-out

A digital infrastructure hub will provide critical demand certainty needed to **catalyse new investment in clean energy assets.** Most data centres are now developed in conjunction with wholesale power purchase agreements (PPAs).¹ These agreements underwrite clean energy projects that may otherwise might not be viable, as well as drive further build-out of clean transmission, generation and supporting infrastructure to modernise the energy grid.

Figure 10: Average additional FTE jobs



Note: The "additional jobs" represent additional employment under the Digital Infrastructure Hub scenario compared to the status quo, driven by the modelled increase in investment.

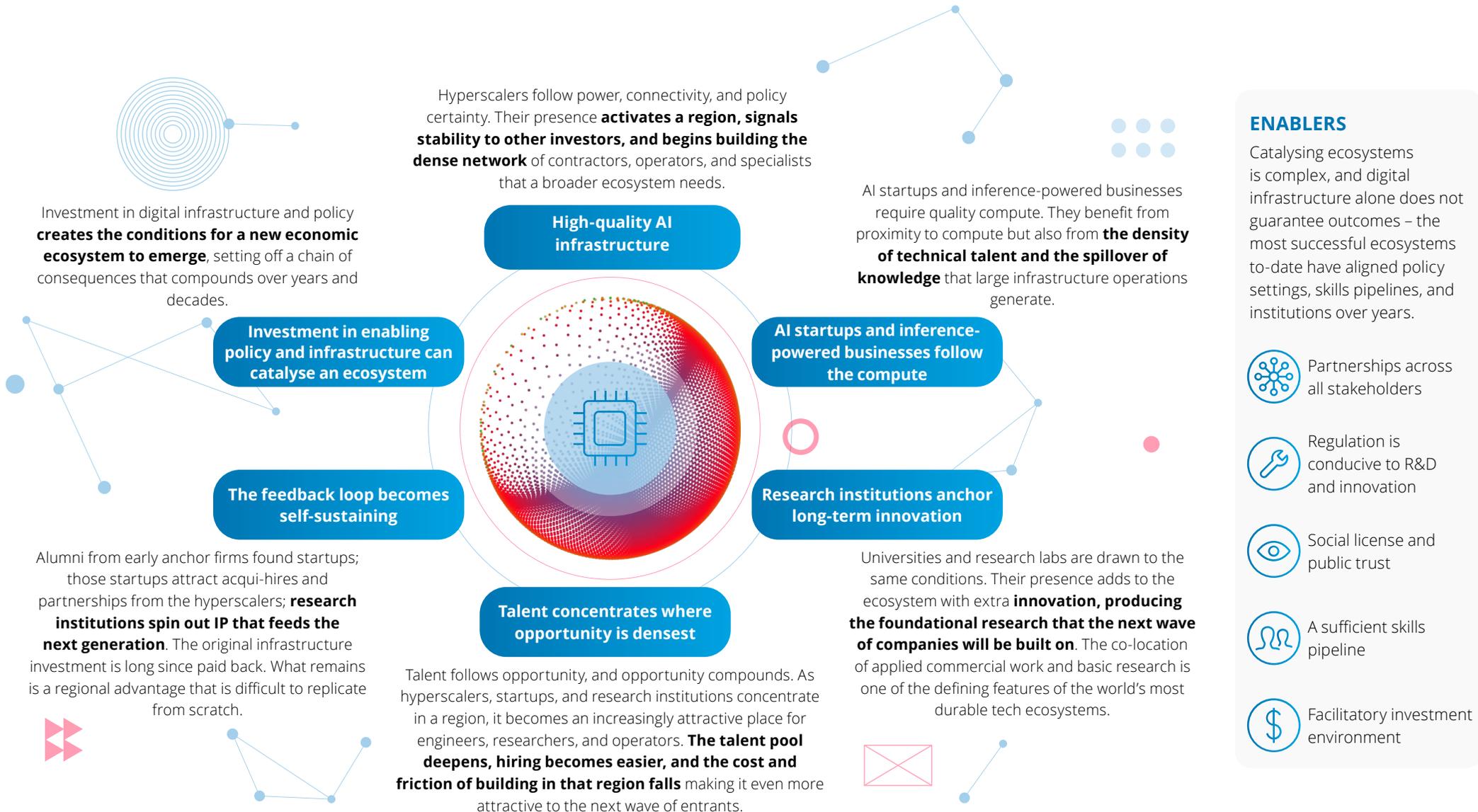
In the long run, investment leads to higher demand for labour, which in turn puts upward pressure on real wages. This increases labour force participation in Australia and lowers the unemployment rate.

A hub can anchor Australia's AI ecosystems

Economists have long recognised the importance of ecosystems and agglomeration effects for driving economic prosperity. From the seminal work of Alfred Marshall studying industrial districts to the Nobel prize-winning writing of Paul Krugman, there is a compelling reason to expect ecosystem to generate outcomes disproportionate to their initial inputs.^{1,2} These theories have been borne out in practice with studies finding evidence of innovation, knowledge and talent spillovers throughout industrial and technology hubs a like.^{3,4,5}



A hub can anchor Australia's AI ecosystems



Existing ecosystems

Self-sustaining ecosystems have developed around the world after a catalysing spark from industry or government



Source: Image Bank Sweden (2024)

Northern Virginia

In the 1990s, Northern Virginia became a choice location for early internet players like AOL and Equinix, establishing the foundations of what would become “Data Center Alley.” The region’s reputation solidified when one of the first large internet peering exchanges relocated there in 1998.¹ The presence of this growing infrastructure ecosystem attracted hyperscalers, who chose Northern Virginia as a primary cloud region, while other companies like VISA constructed their own digital infrastructure nearby to take advantage of proximity to existing players.² Today, the region hosts the highest concentration of data centres on earth; a position reinforced by continued infrastructure investment, a deep talent pipeline from regional universities, and federal cybersecurity contracts that make the ecosystem extraordinarily difficult to replicate.³

Singapore

The Singapore government’s IT2000 masterplan invested in a national broadband grid and undersea cable landing stations, positioning the country as APAC’s digital crossroads and achieving 100% fibre to the premises coverage by 2013.^{4,5} This infrastructure foundation attracted global technology firms — Google, Facebook, LinkedIn, Alibaba, and Grab all chose Singapore as their regional headquarters — and helped catalyse a startup ecosystem of more than 4,000 tech companies, 400 venture capital firms, and 200 incubators and accelerators.⁶ The compounding effects of that early investment are now clearly visible: the ecosystem has extended into fintech, biotech, and AI, and Singapore today captures almost 60% of venture capital funding across ASEAN, reinforcing its dominance with each successive cycle of investment.⁷

Stockholm

Sweden led the world in early mobile infrastructure deployment through Ericsson, achieving some of the highest broadband penetration rates globally by the early 2000s, underpinned by a government that treated digital connectivity as a public good and funded it in rural and urban areas alike.⁸ A digitally connected population turned the region into a live test market for new digital products; Spotify, King (Candy Crush), Klarna, and Mojang (Minecraft) all launched in Stockholm, drawing on an engaged, tech-literate user base that few other cities could offer.⁹ The ecosystem that emerged from those foundations has since become self-sustaining. Stockholm now produces more unicorns per capita than any region outside Silicon Valley, with Spotify alumni angel-investing in the next generation, Klarna alumni building fintech challengers, and KTH and Stockholm University providing a continuous pipeline of engineering talent.¹⁰

Security, resilience and strategic benefits of becoming a digital infrastructure hub

The benefits extend beyond financial returns and can create opportunities for Australia to strengthen its sovereign strategic position.

Investing in digital infrastructure delivers a suite of significant non-economic benefits that extend well beyond productivity and economic growth. The following six advancements ensure Australia can shape the future of AI in the Asia Pacific and remain both secure and influential in an increasingly digital world.

Strategic clout



Enhances national influence by positioning Australia as a key player shaping AI norms and collaboration. This includes helping neighbours in the Pacific to access AI capabilities.

Resilience



Strengthens national preparedness by leveraging trusted systems and ensuring continuity of critical AI capabilities during crisis or contingency.

Cyber



Improves cybersecurity by hosting more compute capacity onshore, reducing the risk of cyber-attacks, ransom and espionage.

Environment



Supports clean energy investment that helps to decarbonise digital infrastructure and energy use across the broader economy.

Reputation



Elevates Australia's global reputation as a knowledge economy and destination for forward-looking investment.

Policy sovereignty



Offers greater opportunities to make policies governing AI, through greater onshore expertise and information available to government.

Steps to become a digital infrastructure hub

Australia needs to act now, or it risks missing out on the opportunity to become a digital infrastructure hub for the Asia Pacific.



Set the vision

- Australia should collectively define its ambition to become a digital infrastructure hub and envision the economic benefits.
- This national vision should be clear, actionable and time-critical to ensure Australia can seize the opportunity without delay.



Get regulatory settings right

- Policymakers should put in place regulation that provides clarity for the development of AI infrastructure, and ultimately, the productivity-enhancing applications this unlocks.
- Fit-for-purpose regulation is needed covering areas such as:



Data



Energy



Planning

Invest with confidence

- Private investors and companies should seize the opportunity to make a generational investment in Australia's AI infrastructure, and ultimately, Australia's AI ecosystem.
- Investments are needed in several areas such as:



Capital: Hardware, construction and operational costs



Labour: Talent to design, build and maintain AI systems



Energy: Clean and reliable power sources to support AI systems



Appendices

Appendix A – Asia Pacific cross-country comparison

Overview of sources underpinning the analysis of Asia Pacific countries' relative strengths in developing digital infrastructure

	Australia	Singapore	Indonesia	Malaysia	New Zealand	India	Japan	Thailand
Land and geography	4 Leading land availability, low population density and moderate disaster risk; land expensive in capitals but more affordable in regions. ¹	1 Very limited suitable land; very high cost. ²	3 Significant land availability at a lower cost, but affected by geographical and infrastructure constraints, and high disaster risk. ³	4 Home to the Johor hub, ranked first in APAC for land availability, Moderate disaster risk. ⁴	3 Land available (especially in the South Island). Moderate disaster risk. ⁵	4 Significant land availability, some conflicts with urban land use given population and high disaster risks. ⁶	2 Low land availability, high costs and moderate disaster risks. ⁷	4 Land is subject to standard zoning requirements; no special permits required. Moderate disaster risk. ⁵⁷
Capital	5 Region-leading capital market competitiveness balanced by relatively strict foreign investment controls. ⁸	5 Highly sophisticated, world-leading capital market. ⁹	2 High growth environment, but a less developed financial system. ¹⁰	4 Moderately developed capital markets, with moderate size. ¹¹	4 Lower risk, relatively small capital market. ¹²	3 Very large capital market with high growth and moderate sophistication. ¹³	5 Highly sophisticated, large and world-leading capital markets. ¹⁴	3 Affordable capital requirements, but small exiting data centre market. Less developed capital markets than regional competitors. ⁵⁸
Electricity	3 Region-leading green energy resources; domestic gas; high current energy prices. ¹⁵	1 Very limited domestic energy production capabilities, and high energy costs. ¹⁶	3 Low costs; accelerating renewables rollout, but limited infrastructure. ¹⁷	3 Low power costs, but low renewable energy penetration. ¹⁸	3 High renewable concentration, but high power costs. ¹⁹	3 Lower cost, but lower renewable generation and faster-growing competition for alternative uses. ²⁰	2 High energy costs and limited domestic production capabilities. ²¹	3 Moderate power costs; low renewable energy penetration but high ambition and potential. ⁵⁹
Labour	4 High-quality talent and future skills readiness alleviates high costs. ²²	4 High-quality talent and future skills readiness alleviates high costs. ²³	3 Low-cost with moderate future skills readiness. ²⁴	3 Low-cost with moderate future skills readiness. ²⁵	3 High-cost and moderately high future skills readiness. ²⁶	5 Low cost and moderately high future skills readiness. ²⁷	4 Moderate cost and moderately high future skills readiness. ²⁸	3 Low-cost with moderate future skills readiness. ⁶⁰
Water	3 Water constraints, but robust markets and infrastructure. ²⁹	1 Water shortages driven by lack of availability. ³⁰	2 Water supply constraints and regulatory constraints on use and ownership. ³¹	3 Some water shortages in key hubs. ³²	4 Abundant water resources and relatively cooler climate, but constraints on infrastructure. ³³	1 Acute regional water shortages. ³⁴	4 Low water stress, aging infrastructure currently undergoing renewal. ³⁵	3 Thailand overall faces water shortages in some provinces, however data centres do not face water restrictions under regulatory frameworks. ⁶¹
Regulation	3 Stable environment, but foreign investment controls, and relatively fewer tax incentives and sectoral policies. ³⁶	5 Ranks first globally for growth-supportive regulation. ³⁷	2 Significant regulatory uncertainty mediated by streamlined permitting and land acquisition. ³⁸	4 Strong support in key hubs and reasonable relative stability. ³⁹	4 Ranks highly for regulatory stability but lags on approvals. ⁴⁰	2 Fragmented regulatory environment, subject to significant additional change. ⁴¹	4 Ranks 12th for growth-supportive regulation; material incentives for regional data centre proponents. ⁴²	4 Moderate regulatory stability and efficiency; zoning and tax incentives for data centre proponents; no additional sector-specific regulation. ⁶²
Demand	3 Four Top500 supercomputers and moderate IXP capacity; very good international connections. ⁴³	4 Five Top500 supercomputers and moderate IXP capacity; excellent international connections. ⁴⁴	2 No Top500 supercomputers and moderate IXP capacity; very good international connections. ⁴⁵	2 No Top500 supercomputers and low IXP capacity; very good international connections. ⁴⁶	2 No Top500 supercomputers and low IXP capacity; very good international connections. ⁴⁷	4 Six Top500 supercomputers and moderate IXP capacity; fair international connections. ⁴⁸	5 43 Top500 supercomputer and high IXP capacity; very good international connections. ⁴⁹	4 Two Top500 supercomputers and low IXP capacity; very good international connections. Bangkok in top 10 globally for cloud. ⁶³
Time	2 Approvals benefit from certainty but can be timely due to rigour. ⁵⁰	3 Long lead times due to tight land, power and water restrictions. ⁵¹	2 Streamlining for proponents, but highly variable procurement lead times. ⁵²	4 Streamlined lead times for data centres and associated utilities. ⁵³	2 Slower approvals, but generally favourable investment rules that simplify development. ⁵⁴	2 Regulatory and land use barriers exacerbate timeframes. ⁵⁵	2 Slow approvals timeframes, especially for power around major cities. ⁵⁶	3 Sustained cross-government efforts are reducing lead times through fast approvals. ⁶⁴
Total	27	24	19	27	25	24	28	27

Appendix B – Deloitte Access Economics' CGE modelling framework

Deloitte Access Economics' CGE model estimates of the impact of investment or policy shocks and how they flow through the economy

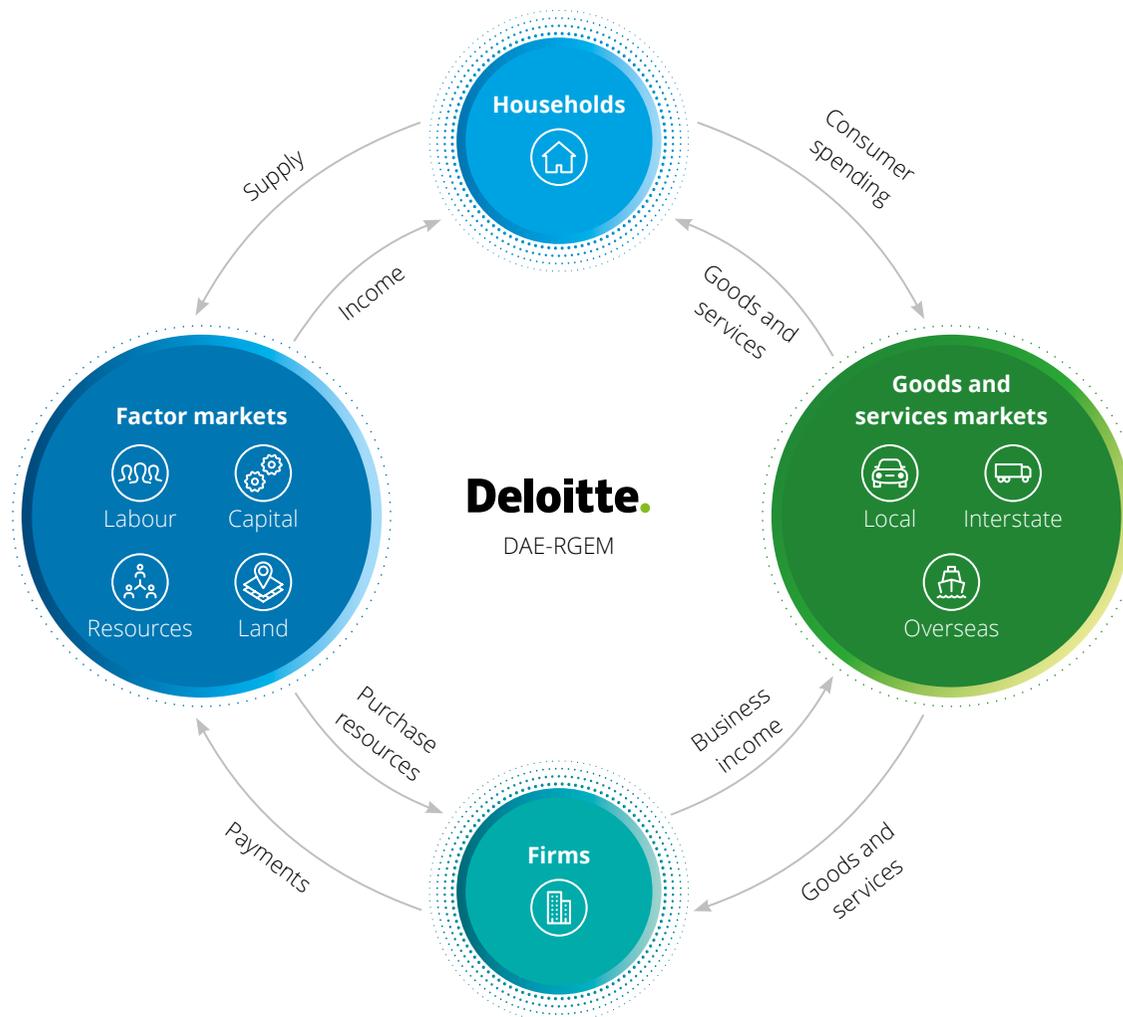
What is CGE modelling and how does it work?

Computable general equilibrium (CGE) modelling is a dynamic approach which shows how an economy might transition over time in response to a shock or policy change. This report used the Deloitte Access Economics Regional General Equilibrium Model (DAE-RGEM), which is a CGE model of Australia and the world economy. DAE-RGEM represents the interactions of households and firms with factor markets and goods markets over time.

CGE models, including DAE-RGEM, have the following features that make them uniquely suited to quantifying how the economy, as a whole, could react to potential changes in policy, technology or other external factors:

- **A general equilibrium framework** that is underpinned by a substantial body of accepted microeconomic theory. The CGE model recognises that there is a finite number of resources (such as labour) in the economy, and that a change in one part of the economy will have flow-on impacts on other sectors of the economy. Consequently, the model is appropriate for examining changes that affect the whole economy (such as policy changes, productivity improvement, and free trade agreements). In a CGE framework, model outputs therefore account for direct, indirect and induced economic activity.
- **Data driven and geographically customizable** as the CGE model is parameterised with real-world data on the structure of the economy, such as the population, labour force, and industry composition. This allows the insights to be tailored to the specific circumstances faced by a particular economy.
- **Potential synergies with other existing capabilities/models** as the CGE model is flexible enough to be 'shocked' with a range of inputs. This includes but is not limited to time savings (or other forms of productivity gain) from transport models, price changes from electricity and energy models, output changes in particular industries, and emissions and water restrictions.

Figure B.1: Structure of Deloitte Access Economics' whole-of-economy model.



Appendix B – Deloitte Access Economics' CGE modelling framework

Overview of modelling inputs

Base case

The base case scenario reflects a state of the world where Australia continues to experience strong growth in data centre capacity through to 2030. AI will be one driver of this growth with providers considered likely to fill existing capacity with AI hardware to meet requirements for domestic compute loads. Under this scenario installed data centre capacity is projected to grow by 1.8 GW through to 2030.

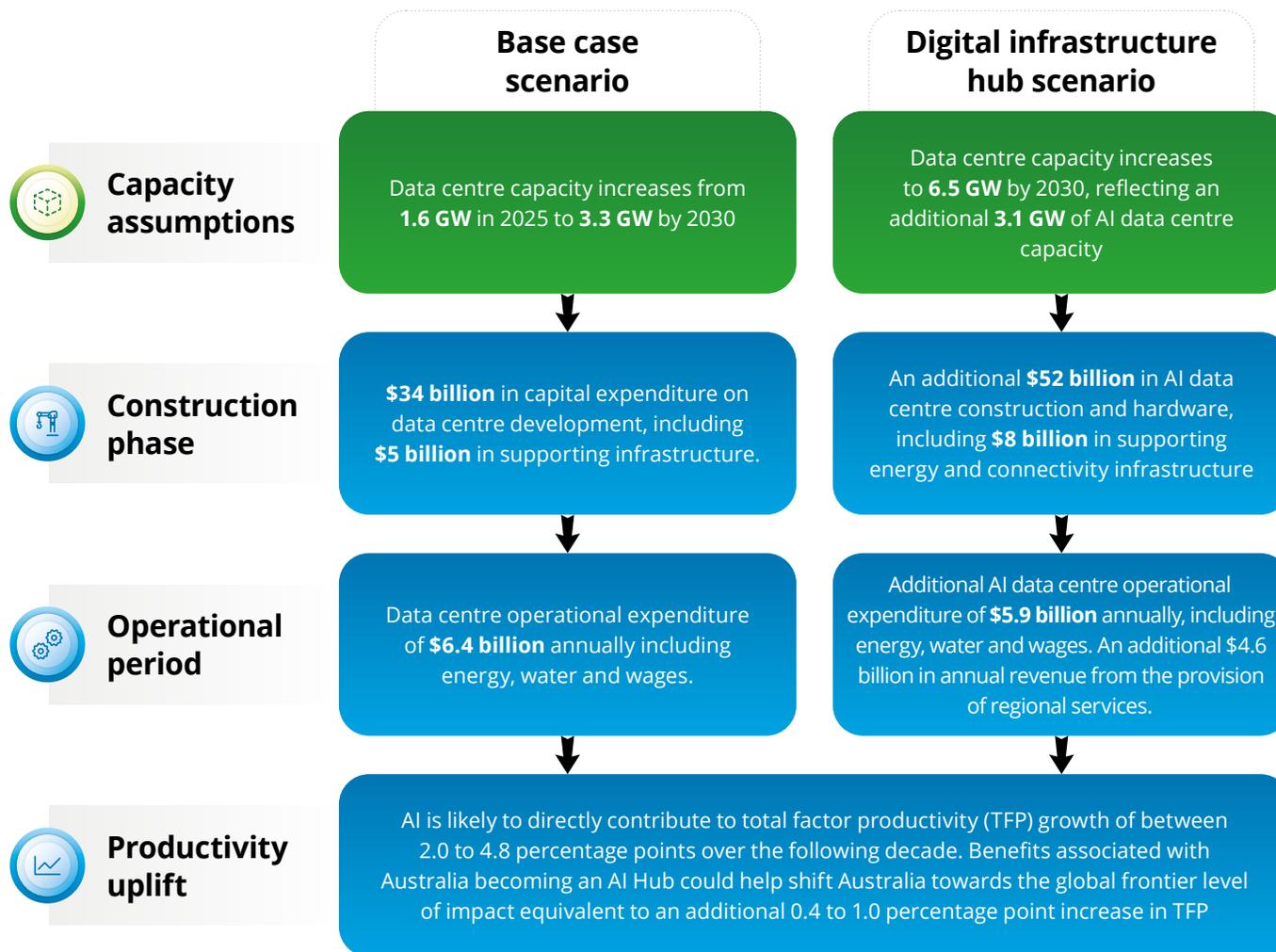
AI Hub scenario

The AI Hub scenario reflects a state of the world where additional AI-capable data centres are constructed in order to meet the compute requirements of neighbours in APAC. The additional capacity to enable this opportunity is conservatively estimated at 3.1 GW of AI-capable data centre capacity and other supporting infrastructure including energy generation and transmission, domestic connectivity and subsea-cable capacity.

Key limitations

There are a number of limitations to the modelling approach including:

- Uncertainty around the amount of data centre capacity that is likely to be committed under both the Base Case and AI Hub scenario. In particular, whether the 3.1 GW increase in AI infrastructure is sufficient to induce the productivity benefits of becoming a regional Hub is speculative.
- Rapidly evolving AI hardware development and the potential for improvements within data centres are likely to impact the efficiency with which they operate including the demand for key inputs such as electricity and water.
- A significant component of capital expenditure, such as almost all AI-hardware, will be sourced from overseas. As such, this investment will not stimulate Australian economic activity and is excluded from the modelling.



Note: The source of capital investment is foreign direct investment into Australia from the rest of the world. The investment is modelled as an increase in debt financing to finance additional capital stock. Returns on capital are treated as interest payment on debt.

Appendix B – Deloitte Access Economics' CGE modelling framework

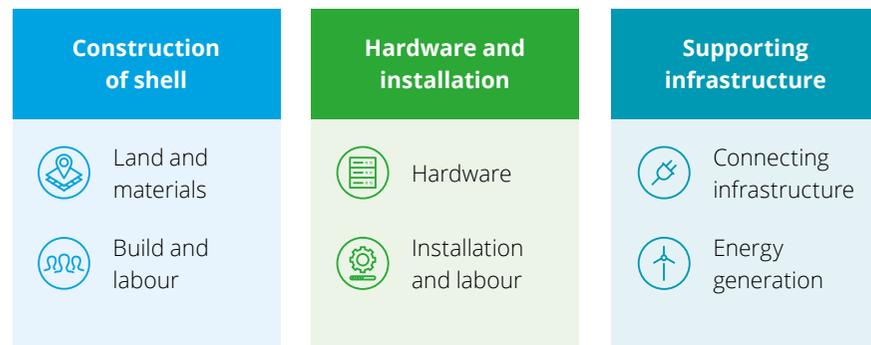
Construction phase

Construction phase

Components of capital expenditure

- The key components of capital expenditure sit within three pillars (Figure B.3).
- The magnitude of capital expenditure under each pillar is informed by government and industry benchmarks, and is expressed in \$/MW of capacity.

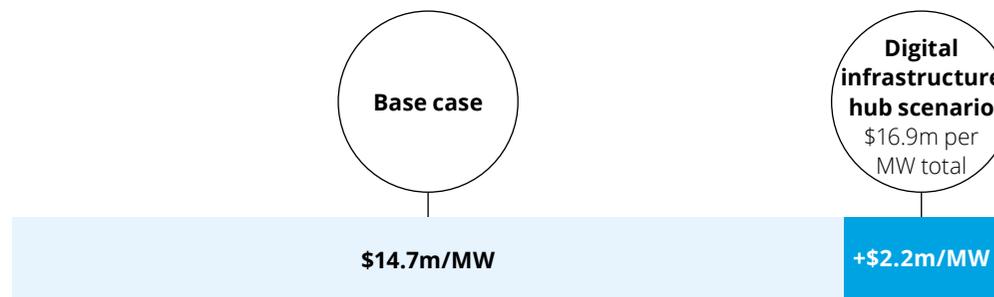
Figure B.2: Pillars of capital expenditure



Capital expenditure uplift

- Capital expenditure under the digital infrastructure hub scenario is estimated to be an additional 15% to the base case, totalling \$16.9 million per MW (Figure B.4). This excludes costs related to imports and AI hardware which total \$45.0 million per MW.
- 75% of capital equipment excluding computing hardware is assumed to be sourced domestically. 100% of computing hardware is assumed to be sourced from overseas.

Figure B.3: Capital expenditure under each scenario



Appendix B – Deloitte Access Economics' CGE modelling framework

Operational phase

Operational period

Operating expenditure

A bottom-up approach has been taken to estimate operating expenditure using industry and government benchmarks.

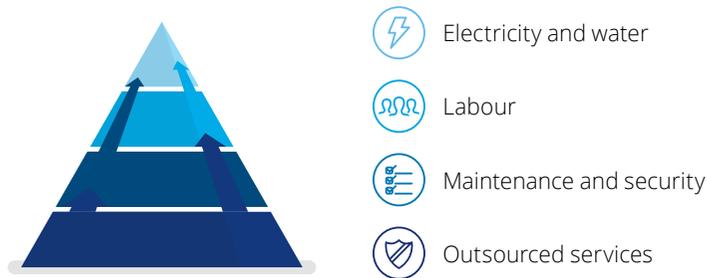


Figure B.4: Key operating expenditure input breakdown

	Base case	Digital infrastructure hub scenario
Electricity demand Average annual use	12.5 TWh	+ 12.7 TWh
Water demand Average annual use	25.5 GL	+ 22.7 GL
Labour demand Average additional FTE (including maintenance and security, and outsourced services)	18,100 FTE	+ 14,300 FTE

Note: Figures are average annual for 2026 - 2050.

Provision of regional services

A top-down approach based on industry benchmarks has been used to estimate the opportunity to provide regional services associated with becoming a digital infrastructure hub.

Key assumption and inputs include:

\$4.6 million

Revenue of \$4.6 million per MW of installed data centre capacity based on the average of industry benchmarks



75%

Assumed share for regional services starting at 75% and declining to 25% over time as the ecosystem develops.



Based these inputs, revenue from the provision of regional services associated with the digital infrastructure hub scenario averages \$4.6 billion per year across the operational period of the hub. There are no equivalent revenues assumed under the base case scenario.

Appendix B – Deloitte Access Economics' CGE modelling framework

Australia could move towards the frontier of estimated productivity impact from AI by becoming a digital infrastructure hub and realising the associated benefits

Productivity uplift

The macroeconomic impact of digital infrastructure

To measure the potential economic impact of additional investment in digital infrastructure, this report incorporates forward-looking estimates of impact of AI to derive a feasible range. These inputs are based on results from the OECD's paper *Miracle or Myth? Assessing the macroeconomic productivity gains from Artificial Intelligence*.

To generate the impact of AI on productivity, the OECD relies on the existing estimates from the literature of (1) the task-level impact of AI, (2) the composition of tasks within sectors and (3) the adoption of AI across firms. Based on these inputs, a sector-level estimate of the potential productivity uplift is calculated based on low and high adoption scenarios across all G7 markets.

Based on this process, the OECD suggests that AI will significantly contribute to annual Total Factor Productivity (TFP) growth in the US, increasing it by 0.25 – 0.60 percentage points. For Australia, these estimates are lower with Deloitte's report *AI for Business: APAC Trends in AI Platform Adoption* finding that AI is estimated to contribute to annual TFP growth of between 0.20 – 0.48 percentage points over a decade. These estimates are broadly consistent with other research such as the Productivity Commission who conservatively find that annual TFP gains of 0.23 percentage points are likely over a decade.

Digital infrastructure hub uplift

Becoming a digital infrastructure hub has the potential to amplify the productivity impacts of AI by creating concentrated networks of capability, infrastructure, and talent. At the core of productivity gains from AI adoption are the efficiencies it delivers in automating routine tasks, optimising processes, and enabling more sophisticated decision-making. However, the scale of these benefits depends on the diffusion of AI across the economy.

When a country or region positions itself as a digital infrastructure hub, it accelerates this diffusion by lowering barriers to access, building complementary skills, and embedding AI more deeply in production systems.

A digital infrastructure hub generates agglomeration effects similar to those observed in other high-tech clusters. The co-location of research institutions, firms, and skilled labour fosters faster knowledge spillovers, reduces the cost of innovation, and raises the likelihood that AI solutions are developed with direct relevance to local industries. This accelerates productivity growth by ensuring that firms adopt not only off-the-shelf tools, but also bespoke AI applications tailored to sectoral and local needs.

The existence of a digital infrastructure hub also deepens complementary investments, which are critical for realising productivity impacts. Infrastructure such as high-performance computing, data sharing frameworks, and cloud platforms is more readily available in hubs, while training programs and workforce development initiatives expand the pool of digitally skilled workers. These complementary inputs reduce the lag between AI adoption and measurable productivity improvements, allowing benefits to scale more quickly.

The size of the productivity impact from becoming a digital infrastructure hub is inherently difficult to measure. One way to proxy the potential scale of impact is to benchmark against global the estimated impact of leaders in AI adoption and productivity performance. As such, the potential uplift Australia could realise from becoming a digital infrastructure hub is stylistically estimated as the additional productivity Australia could realise from reaching the level of productivity anticipated to be experienced by the average of the leading economies of economies of the United States, United Kingdom and Germany: an additional 0.04 to 0.10 percentage points over a decade. As a central estimate, the average of these two points are modelled (0.07).



Endnotes

Endnotes

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