



Guiding the energy transition in NSW

Issued every two years, the IIO Report is the central planning document that guides NSW's energy transformation under the Electricity Infrastructure Roadmap (Roadmap). It sets out the least-cost 20-year pathway for meeting NSW's legislated targets for renewable energy infrastructure, alongside a 10-year plan for conducting tenders for long-term energy service agreements (LTESAs).

The 2023 IIO Report has been informed by stakeholder feedback on the Draft 2023 IIO Report. Changes have been made to reflect market developments, additional sensitivity testing and methodology improvements to account for lulls in variable renewable energy availability.

We have considered how factors such as deliverability risks and costs may influence the trajectory for procuring built infrastructure to meet NSW's future energy needs. We will apply a pragmatic and flexible approach towards tendering, given the rapid pace of change, to encourage investment and deliver value to consumers.

To date, our tenders for generation, storage and firming infrastructure have attracted over 10 GW of high-quality projects. The 2023 IIO Report serves as a call for further investment for NSW electricity customers to build on this success.

“Significant progress has been made towards delivering electricity infrastructure to support NSW's electricity system transition in the interest of consumers, but continued strong investment is required to meet 2030 targets.”



Infrastructure Investment Objectives



The 2023 IIO Report shows **over 46% of the minimum objective has been achieved** for generation (15,600 GWh / 5,790 MW added since November 2019), tracking well towards 2030. After multiple successful tenders, the delivery of long-duration storage is also aligned with the planned trajectory of construction towards the end of the decade to minimise costs to consumers, with almost 600 MW secured to date.

20-Year Development Pathway



The Development Pathway sets out AEMO Services view for achieving the Infrastructure Investment Objectives in the long-term financial interest of NSW electricity customers. It shows:

The need for consistent renewable generation construction:

The IIO Report shows a need for generation infrastructure investment in NSW across a range of technologies at or near record levels to 2030 and beyond to meet the infrastructure investment objectives.

Substantial investment in long-duration storage is required:

The build trajectory requires balancing projects' cost to consumers with their ability to deliver to the 2030 minimum objective.

Firming infrastructure will help ensure reliability:

Over 1 GW of firming infrastructure supported through a successful tender will help meet reliability needs as the power system evolves.

10-Year Tender Plan



The 10-Year Plan sets out the schedule of competitive tenders for delivering the Development Pathway. It shows consistently sized tenders for generation and storage to meet 2030 objectives.

Generation: opportunities for projects every 6 months.

Long-duration storage: annual tenders up to 2028 until the 2 GW and 16 GWh objective is met.

Firming: tender recently completed, directed by the Minister.

