

Pipeline snapshot

March 2024

The National Infrastructure Pipeline

The **National Infrastructure Pipeline** (Pipeline) is New Zealand's national dataset of infrastructure project information. It provides an evidence base for how New Zealand maintains, renews, and improves the infrastructure we all rely on. The forward view of infrastructure project activity in the Pipeline is used to inform planning and decision-making by infrastructure providers across sectors and regions. It is also used by the construction sector to understand the workforce capability and capacity that will be needed to deliver infrastructure projects.

The Pipeline reflects information we receive from our contributors across the infrastructure system including, central government, local government, and the private sector. Our aim is to keep this information regularly updated with the support of contributors.

This snapshot report reflects the Pipeline at March 2024 which included active and planned projects totalling \$121.2 billion in value.

The Commission is developing a National Infrastructure Plan (Plan) for New Zealand that will draw on the Pipeline. The Plan will provide a current and forward view of asset renewal and maintenance, as well as new infrastructure projects, across sectors and regions. Over the next few quarters, we aim to move rapidly to gather contributions to the Pipeline from all organisations and expand the depth of investment intentions included in the Pipeline. This work will align well with the finalisation and publication of long-term plans by local government infrastructure providers.

To inform good decision-making across the system, it's crucial that the information in the Pipeline represents a complete picture of activity, and that the information is accurate and up-to-date. Please reach out to contribute or update data, or if you have a question regarding the information in the Pipeline email: pipeline@tewaihanga.govt.nz.

Total value in the Pipeline increased by \$12.7 billion to \$121.2 billion

In March 2024 the total value of infrastructure projects in the Pipeline stood at \$121.2 billion. This total was up 11.7 per cent from \$108.5 billion in December 2023. Almost 70 per cent (\$81.4 billion) of the \$121.2 billion value comes from projects that are funded, part-funded or have a funding source confirmed. At the time of the update \$2.4 billion worth of projects were recorded as being ‘under review’ or ‘on hold’.

The main drivers of the change in value from December 2023 to March 2024 are outlined in the list below and Figure 1.

Increases in Pipeline value of active and planned projects.

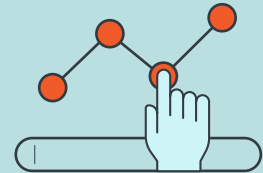
- \$0.3 billion added from new organisations providing project data
- \$11.4 billion added from additional projects from existing contributors (\$0.7 billion of these projects are in the planning stages and funding sources are still to be confirmed)
- \$5.3 billion added from an increase in the value of existing projects

Decreases in Pipeline value of active and planned projects.

- \$1.5 billion from projects completed during the quarter
- \$0.9 billion from projects cancelled during the quarter
- \$1.1 billion from a reduction in the value of existing projects

We are committed to working with Pipeline contributors to improve data quality. Data quality improvements resulted in a decrease of \$0.8 billion in Pipeline value during this quarter.

Interactive tool



What’s in the Pipeline? Project search

Download Pipeline data and search the project list by upcoming procurement opportunities, project timings, sectors, regions, and more on our insights platform.



Login or register for access at insights.tewaihanga.govt.nz

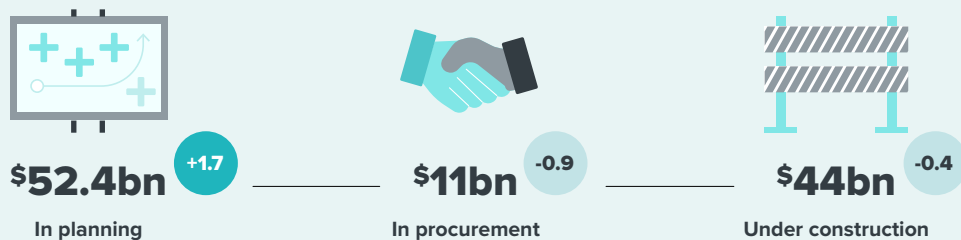
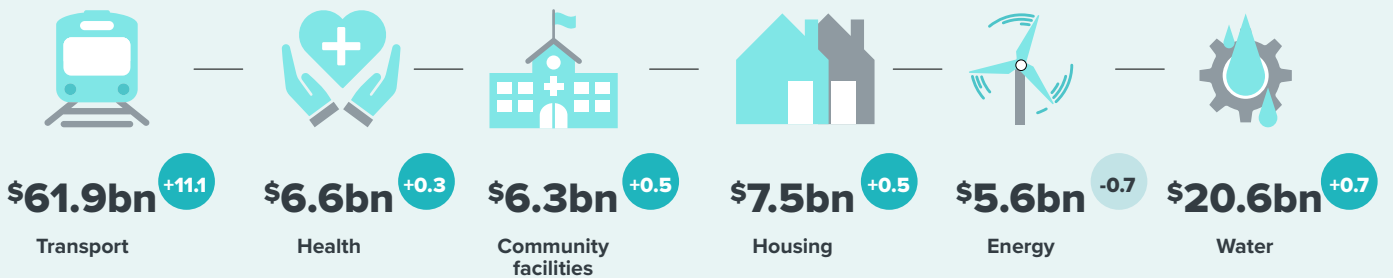
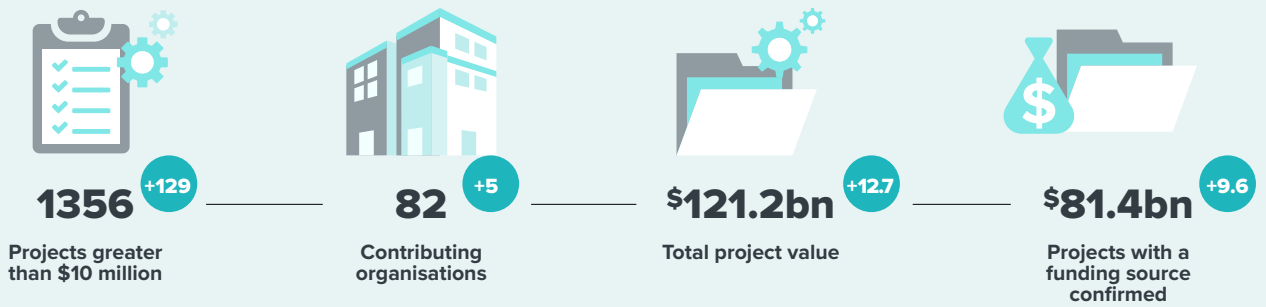
Figure 1:

Changes in total Pipeline value, December 2023 – March 2024



Eighty-two contributing organisations provided project information to the Pipeline on more than 5,300 planned and active projects for 128 infrastructure providers. We thank our partners for their efforts with 86 per cent of existing contributors providing project updates, making changes, or confirming their information in March 2024.

Welcome to **Environment Canterbury, Far North District Council, Hauraki District Council, Taranaki Regional Council, and Waimate District Council** who joined as new contributors during this quarter.



● ● Change from Q4 2023

Using the Pipeline

The Pipeline is used to inform prioritisation, coordination, and planning decisions amongst infrastructure providers. It is also used by the construction sector to support their planning and investment in capability and capacity to deliver projects. Additionally, regional economic and employment agencies utilise the Pipeline to understand when they need to draw skills to their region.

March 2024 submissions indicated that 577 active projects with a total value of \$11 billion were in procurement at the time of the update. A further 283 projects valued at \$4.9 billion (including \$2.3 billion of projects that are fully funded or have a funding source confirmed) are expected to enter procurement during the 12 months starting from 1 April 2024. These projects are projected to add around \$1 billion of spend per quarter through to 2026.



Where to learn more

Learn more on our **insights platform** where you can gain access to a growing range of Pipeline insights and tools:

- Pipeline project list searchable by project timings, sectors, regions and more
- Download the Pipeline project data in CSV format
- Interactive Pipeline workforce projection tool



Login or register for access at
insights.tewaihanga.govt.nz

Projected spend by sector

Each quarter we model the projected future spend to deliver projects in the Pipeline. Figure 2 highlights these spend projections across the infrastructure sectors.

Project certainty and demand naturally decreases over the planning horizon and this rate varies across infrastructure sectors. Factors such as the relative size of an individual project (to the size of the market), project scope and project complexity influence how far ahead projects are planned within each sector.

The March 2024 update to the Pipeline shows a total of \$12.1 billion in projected annual spend for 2024. The projected annual spend for 2025 is currently \$11.6 billion. Three quarters of all projected spend will occur within 3.5 years.

Spend in the transport, social (including, health, housing, justice, and corrections) and water sectors continues to dominate the Pipeline in the near term.

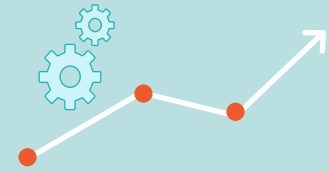
The transport sector accounts for \$4.9 billion or 40 per cent of total projected spend in 2024. Annual spend in the transport sector remains above \$1 billion through the years until eventually dropping to around \$0.7 billion in 2032.

The workforce needed to deliver the Pipeline

An early view of workforce demand supports planning, coordination, and scheduling of work. It also helps the training institutions, the construction sector, and regions to prepare, invest in and attract the workforce capability that will be needed.

Each quarter we model the workforce required to deliver projects in the Pipeline. Figure 3 illustrates the national workforce demand by occupation group.¹

The workforce numbers presented in the projections, include estimates of both workers needed on projects full-time and workers needed on projects part-time.² These workforce projections will continue to change, as new projects are planned across the horizon and this information is submitted to the Pipeline.



Pipeline workforce projections

Learn about the projected workforce demand for your area, sector, or industry on our insights platform.

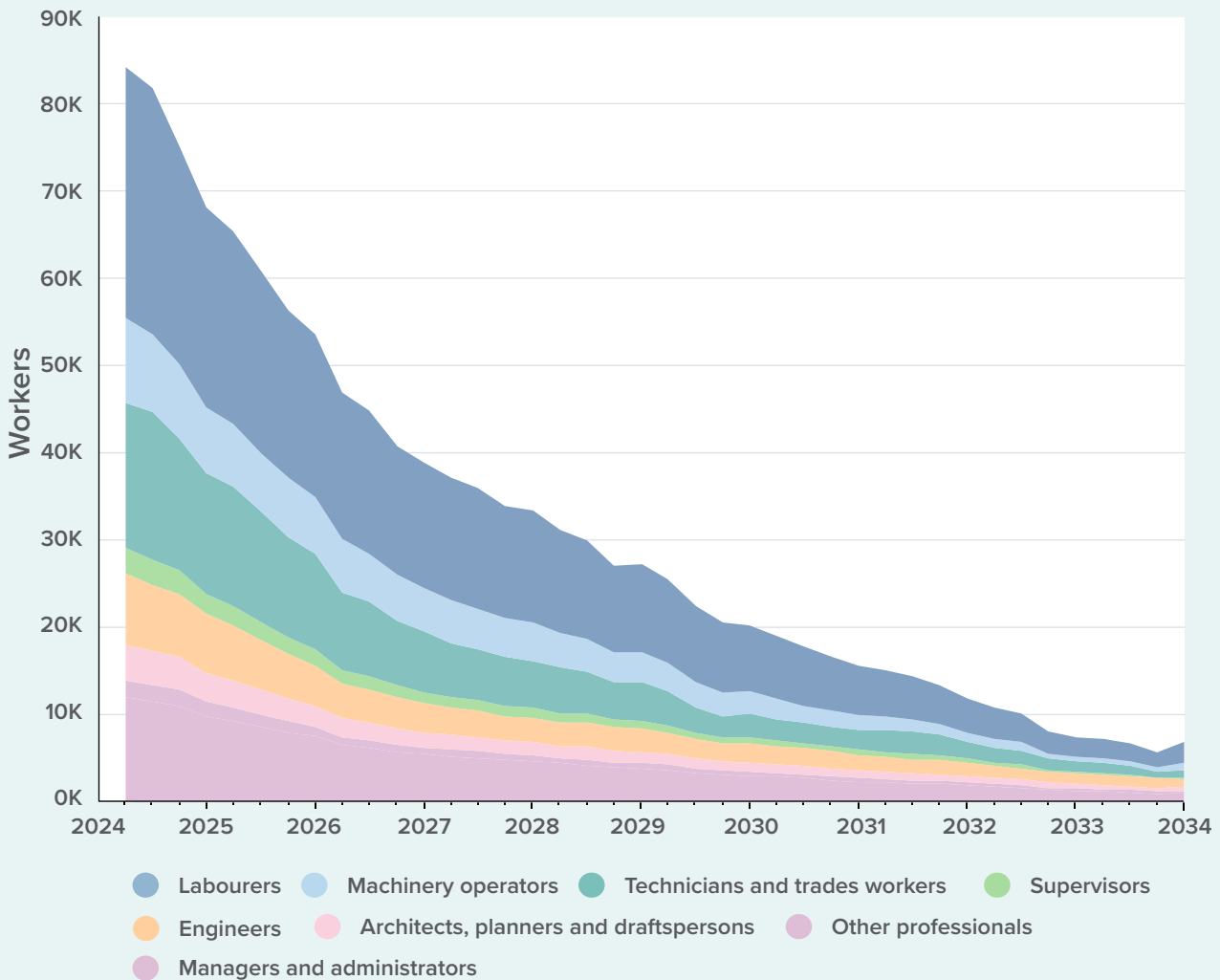


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Figure 3:

Projected workforce required to deliver Pipeline projects

Workers by occupation group, 2024 – 2034



¹ Our workforce modelling currently uses a different model to the spend modelling and some differences may arise because of this. Over time we will integrate these two models.

² Projections of the number of workers needed will generally be larger than the number of full-time equivalents needed due to the presence of workers that are only required for part of the time.

Progress towards a complete Pipeline of infrastructure projects

Te Waihanga first published the Pipeline in June of 2020 to support statutory functions required under the New Zealand Infrastructure Commission/Te Waihanga Act 2019.

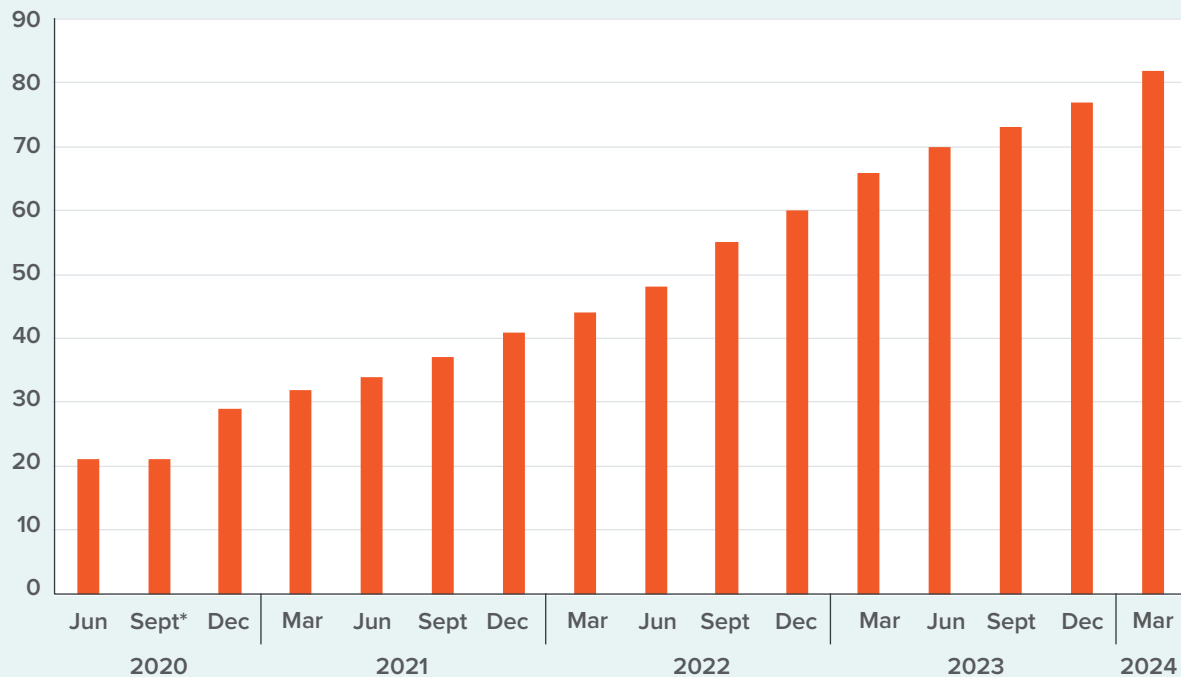
The Pipeline continues to build towards a trusted and complete view of planned and current infrastructure project activity in New Zealand

The March 2024 quarter saw our contributing partners reach 82, up 24 per cent on 12 months ago. These contributors include 37 councils, representing three quarters of all rates revenue collected.

Figure 4:

Pipeline contributors grew by five in March 2024

Pipeline contributors, June 2020 – March 2024



*Pipeline project information was not updated in the September quarter of 2020

Join the Pipeline

We invite infrastructure providers not yet represented in the Pipeline to submit their project information as we increase the breadth and depth of the Pipeline.

If your organisation has project information that is not included in the Pipeline, or you are a current contributor and need a refresher, contact the Pipeline team via pipeline@tewaihanga.govt.nz to register for our next quarterly onboarding webinar covering the Pipeline's role, value to your organisation, submission process, and data requirements.

We appreciate your support to build a complete picture of infrastructure investment and project intentions around New Zealand.