

# Pipeline snapshot

December 2024

## The Pipeline at a glance

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. It includes projects from central government, local government, and private sector infrastructure providers.

The December 2024 Pipeline update <sup>1</sup> included \$107.9 billion of projects underway and in planning which were reported as funded, part funded, or with a funding source confirmed. This project value represents an increase of \$8.1 billion relative to the September 2024 Pipeline update, which included \$99.8 billion of projects with the same funding status.

The Pipeline also includes projects that are earlier in the planning cycle and do not yet have a funding source confirmed. In the December 2024 Pipeline update, the combined value of all projects, regardless of funding status, is \$204 billion. This project value represents an increase of \$60.4 billion relative to the September 2024 Pipeline update, which included a combined total of \$143.6 billion of funded and unfunded projects.

We are working with Pipeline contributors to improve the visibility of lower-certainty unfunded projects. As the quality of information in the Pipeline improves, our reporting on the funding and planning status of infrastructure projects will continue to evolve.

## The Pipeline will play an important part in the National Infrastructure Plan

The Government has requested that the Commission develop a **National Infrastructure Plan** (Plan) for New Zealand. The Plan will consider long-term infrastructure needs and compare these to current investment intentions. It will address what should be prioritised and how to deliver on longer-term requirements.

To inform the Plan and decision-making across the system, it's crucial that the information in the Pipeline represents a complete picture of regional and sectoral infrastructure investment activity, across the project lifecycle. The Minister for Infrastructure has sent **letters to public sector infrastructure providers** requesting they regularly update the Pipeline with their investment intentions. Information from private sector providers is equally important.

Over the last two quarters we have seen a substantial increase in the number of organisations contributing project information to the Pipeline. Local government contributors have increased 51% since June 2024. Only 19 councils have not yet contributed information for their regions. It's important that these organisations contribute to the Pipeline to ensure their needs and resource requirements are represented.

Please reach out to contribute, update data, or if you have a question regarding the information in the Pipeline at: [pipeline@tewaihanga.govt.nz](mailto:pipeline@tewaihanga.govt.nz).

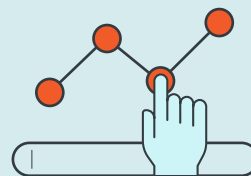
<sup>1</sup> Project information received through the December update, was published through our online facilitation tools on 20 December 2024.

## Total value of Pipeline projects with funding or funding source confirmed is \$107.9 billion

The Pipeline includes projects and initiatives at various stages of planning and commitment. In December 2024, the Pipeline included information on over 7,600 infrastructure projects underway and in planning for 147 infrastructure providers. The value of projects reported as funded, part funded or with a confirmed funding source was \$107.9 billion, up \$8.1 billion in December 2024. The value of unfunded projects with a funding source yet to be confirmed was \$96 billion. The combined value of all projects was \$204 billion, this includes \$4.8 billion of projects reported as 'on hold' or 'under review'.

1,558 projects are currently under construction totalling \$48.6 billion in expected cost (45% of projects with funding source confirmed). Improvements in the information submitted for projects earlier in the planning cycle that are lower-certainty have contributed to the 42% (\$60.4 billion) increase in total Pipeline value from \$143.6 billion in September 2024 <sup>2</sup>. Figure 1 highlights the funding status for projects in the Pipeline by value and project count.

### Interactive tool



#### What's in the Pipeline? Project search

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

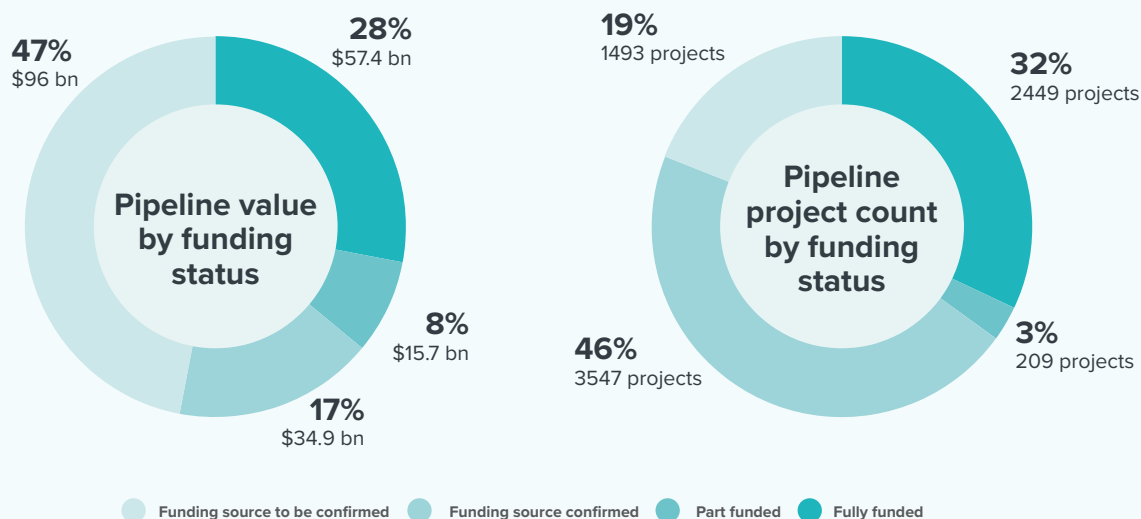


Login or register for access at  
[insights.tewaihang.govt.nz](https://insights.tewaihang.govt.nz)

Figure 1:

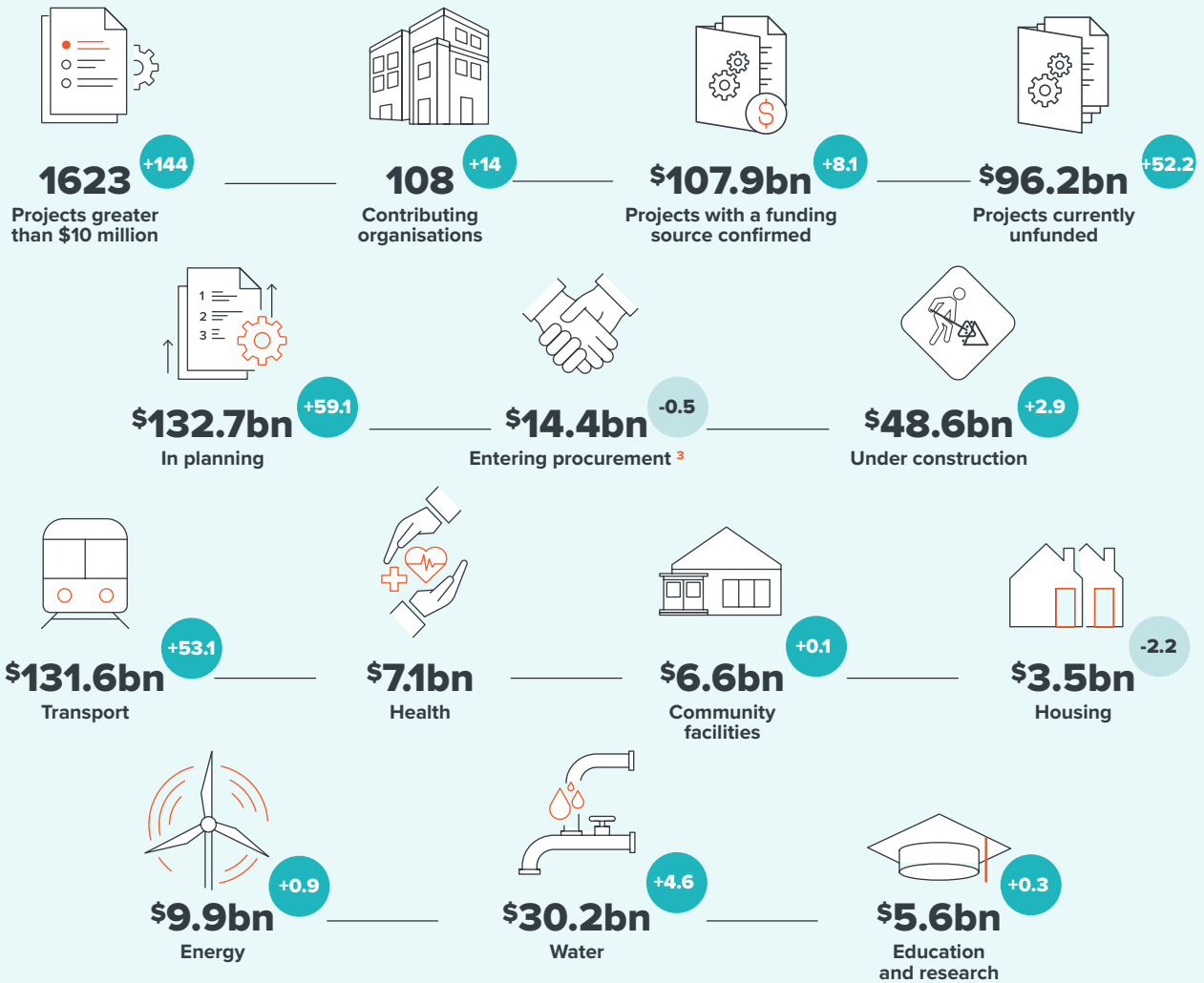
### \$107.9 billion of Pipeline projects are funded or have a funding source confirmed

Pipeline value and project count by project funding status, December 2024



<sup>2</sup> The Pipeline is a live system that is updated regularly. Our Snapshot reports are based on best known information at the time of publication. This may cause differences in reported values over time and between publications.

## The Pipeline at a glance



Change from September 2024

Note: Dollar amounts are rounded.

## New Pipeline contributors

A total of 108 organisations now contribute project information to the Pipeline. We thank our partners for their efforts and another strong response towards improving the national coverage of the Pipeline. This quarter, 82% of existing contributors provided project updates, made changes, or confirmed their information.

With increased interest and recognition that contributing to the Pipeline ensures representation in the National Infrastructure Plan, we welcomed 14 new contributors in December (a 15% increase in Pipeline contributors in one quarter).

Carterton District Council

Central Economic Development Agency

Central Otago District Council

Chorus

Clutha District Council

Gore District Council

New Plymouth District Council

New Zealand Police

Ōtorohanga District Council

South Taranaki District Council

Stratford District Council

Waitomo District Council

Western Bay of Plenty District Council

Whanganui District Council

<sup>3</sup> Projects submitted with a project status of 'In procurement' and projects reported to enter procurement within 12 months of 21 December 2024.

## Using the Pipeline

The Pipeline provides an important evidence base to help inform Government demand-side decisions (e.g. increasing or curtailing demand through funding and other settings), and supply-side decisions (e.g. economic, education, and employment initiatives and settings). Infrastructure providers use the forward view of infrastructure activity the Pipeline provides to inform prioritisation, coordination, planning, and decision making across sectors and regions. Our stakeholders within the construction market use the Pipeline to understand upcoming business opportunities, and the workforce capability and capacity that will be needed to deliver infrastructure projects. Regional economic and employment agencies use the Pipeline to understand when they need to draw skills to their region.

## Projects entering procurement

The December 2024 Pipeline update indicates that 512 active projects valued at \$8.2 billion were in procurement at the time of the update. A further 478 projects valued at \$6.2 billion (including \$2.6 billion of projects that are fully funded or have a funding source confirmed) are expected to enter procurement during the 12 months from 21 December 2024. Projects that are in procurement or expected to enter procurement in the next 12 months are projected to add between \$100 to \$400 million spend per quarter through to 2029.

The Pipeline includes a further \$126.4 billion of projects that are expected to enter procurement after 20 December 2025 (or currently have no expected procurement dates scheduled, or procurement dates have not been updated). These projects are projected to add \$1 to \$2 billion spend per quarter through to 2031 and then a further \$1.5 to \$4 billion through to 2035.



## Where to learn more

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

- Pipeline project list searchable by project timings, sectors, regions and more
- download the Pipeline project data
- interactive Pipeline workforce projection tool



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

## Drivers of change in value between quarters

The main drivers of the change in the total expected costs of projects and initiatives in the Pipeline from September (totalling \$143.6 billion) to December 2024 (totalling \$204 billion) are outlined in the list below and **Figures 2 to 4**.

<b>Increases in total Pipeline value of projects underway and in planning.</b>	<b>Decreases in total Pipeline value of projects underway and in planning.</b>
<ul style="list-style-type: none"><li>• \$7.1 billion from new organisations providing project information.</li><li>• \$21.6 billion from existing contributors providing additional projects.</li><li>• \$44.2 billion from adjustments in the reported value of existing projects (as described below).</li></ul>	<ul style="list-style-type: none"><li>• \$6.1 billion from projects completed during the quarter.</li><li>• \$100 million from projects cancelled during the quarter.</li><li>• \$5.4 billion from adjustments in the reported value of existing projects.</li></ul>

We are committed to working with Pipeline contributors to improve information quality. Quality adjustments resulted in a decrease of \$1 billion in Pipeline value.

Together, contributors added \$28.7 billion of new projects to the Pipeline in December. Adjustments to previously reported projects added a further \$38.8 billion in value. Figure 2 illustrates the total change in Pipeline value in December inclusive of projects that are funded or have confirmed funding sources, as well as unfunded lower-certainty projects that are earlier in the planning cycle.

Transparent reporting of funding status enables the Commission to build a clearer view of the ‘funded Pipeline’. Figure 3 shows the value of projects in the Pipeline that are funded or have confirmed funding sources increased by \$8.1 billion in December 2024. Of this increase, 60% came from new contributors' first submissions which included \$4.9 billion of projects with confirmed funding sources.

Tracking changes and drawing insights as the Pipeline improves in coverage and new organisations are added can be challenging. A closer look at contributors from September 2024, shows their changes lead to a modest net increase of \$3.3 billion in Pipeline value across projects that are funded or have confirmed funding sources. Figure 4 shows that this increase was the net effect of project additions and project closures, and project adjustments between September and December.

Figure 2: Changes in total Pipeline value including unfunded projects, Sept – Dec 2024

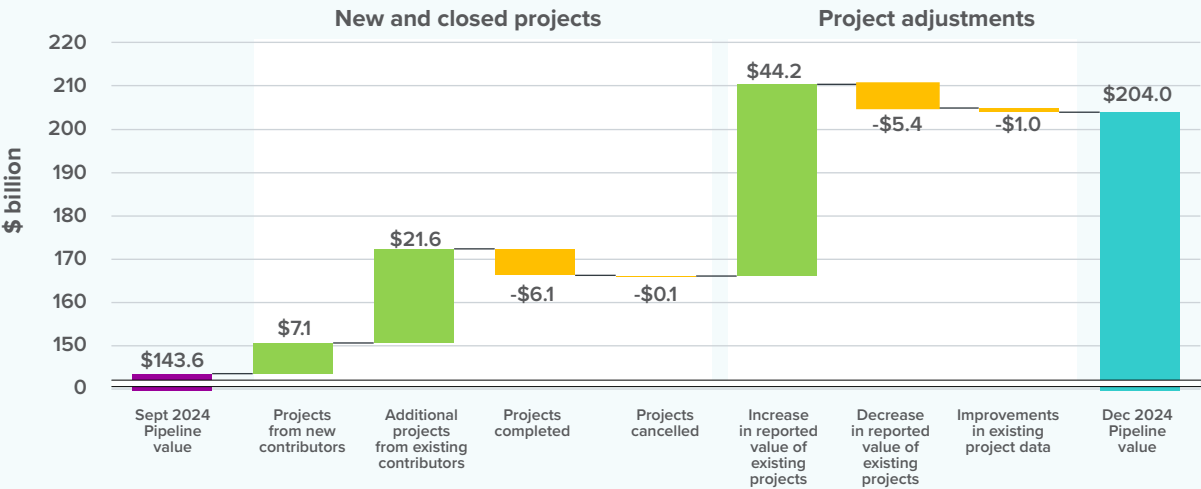


Figure 3: Changes in Pipeline value for projects with confirmed funding sources, Sept – Dec 2024

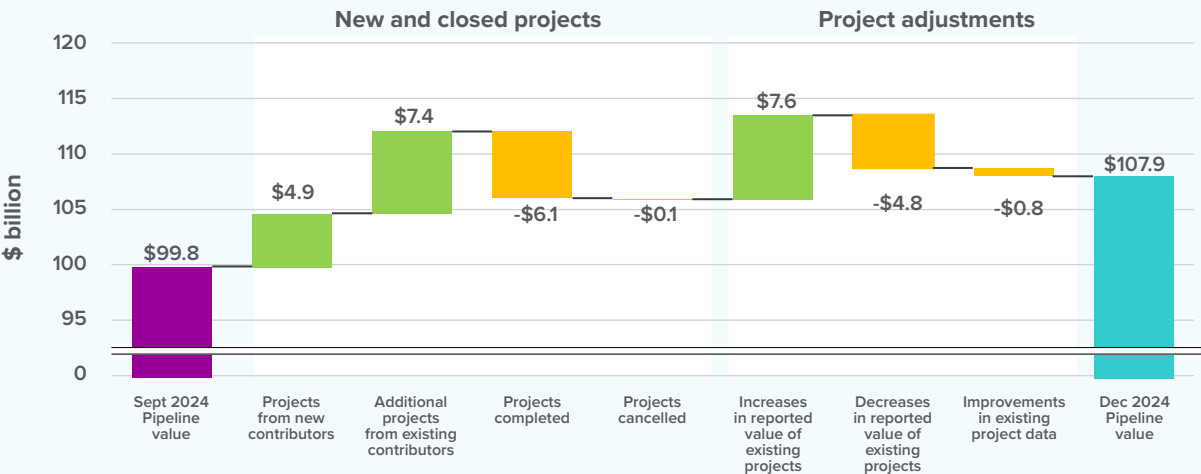


Figure 4: Changes in Pipeline value for projects with confirmed funding sources (excluding new contributor projects) Sept – Dec 2024



## Increasing transparency of megaprojects in early planning

In December 2024, there were 25 projects in the Pipeline with a value over \$1 billion, an increase of eight projects from September. Three of the eight projects were new additions. The other five were submitted previously in some form and have increased in reported value to better reflect potential costs for the full projects.

Of the Pipeline's \$96 billion of projects recorded with a funding source yet to be confirmed, 72% of this value comes from ten of these projects.

However, for the \$107.9 billion of projects recorded as funded or having a funding source confirmed, 28% of this value comes from these large projects, while 47% comes from 6,127 smaller initiatives with an individual value of \$200 million or below.

## Project adjustments

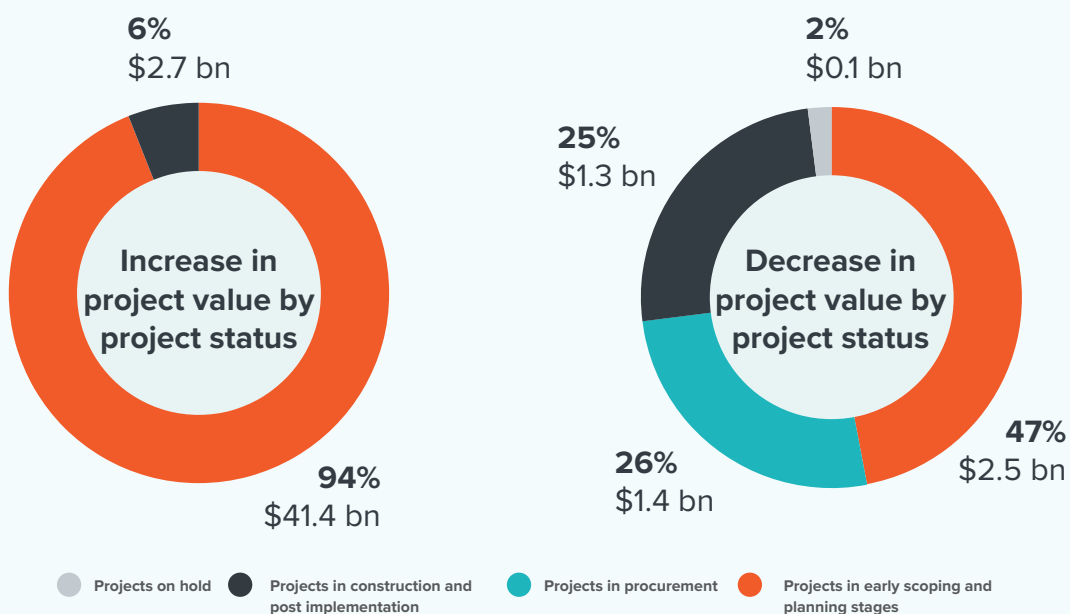
Cost estimates in early planning stages are typically lower-confidence. However, it is also the easiest time to accommodate change. Through the Pipeline, we observe that projects in the early scoping and planning phases accounted for 94% of the \$44.2 billion increase in the reported value of existing projects, with construction and post-implementation projects accounting for the remaining 6%.

Similarly, projects in early scoping and planning stages accounted for 47% of the \$5.4 billion decrease in the value from existing projects, while 26% came from projects in procurement, 25% from projects in construction and post implementation and 2% from projects reported as on hold.

In most instances, increases in project value were driven by a change in approach to reporting by selected contributors to better reflect potential costs for full projects, rather than by a change in project scope. We continue to work with contributors to standardise and align their reporting processes.

### Most adjustments in project value occur in early planning stages

Project status for pre-existing Pipeline projects that have increased or decreased in value, Sept – Dec 2024



## Projected spend by sector

Each quarter we model the projected spend to deliver projects in the Pipeline. The projections reflect how project certainty and demand naturally decrease over the planning horizon and how 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 December 2024 update shows a total of \$15.1 billion in projected spend for 2025 excluding projects reported as 'under review' and 'on hold'. This spend equates to around 3.6% of GDP and highlights the level of infrastructure activity in the Pipeline in the near term. The projected annual spend for 2026 is currently \$14.3 billion. For Pipeline projects with confirmed funding sources, three quarters of projected spend will occur within five and a half years.

Figure 6 illustrates projected spend by infrastructure sector. Spend in the transport sector (including road, rail, ports, and airports) dominates the Pipeline over the next 10 years. In 2025 transport spend accounts for \$7.7 billion or 51% of total projected spend. Yearly spend in this sector remains above \$4 billion across the 10-year spend period. Over the next 10 years the total projected transport spend is \$70.9 billion or 62% of spend across all sectors.

The water sector accounts for \$3.2 billion or 21% of projected spend in 2025. Projected annual spend in the water sector fluctuates between \$1 billion and \$3.4 billion between 2025 and 2032 and drops to \$0.4 billion in 2033. Local councils are currently developing their water services delivery plans. The Pipeline provides a way to iterate their delivery programmes and coordinate their approach with neighbouring entities. While water service delivery plans have a funding requirement, there is no such constraint to submit project detail to the Pipeline.

## Building the forward view

A more complete Pipeline with a transparent longer-term view of expected activity becomes a powerful tool to support scheduling and assessment of project deliverability as well as policy decisions to support the supply of resources and workforce. We have been working with our contributors to improve the visibility of lower-certainty projects that are earlier in the planning cycle and are currently unfunded. In December, this has enabled us to project and reveal more spend information, especially for the years 2030 to 2035.

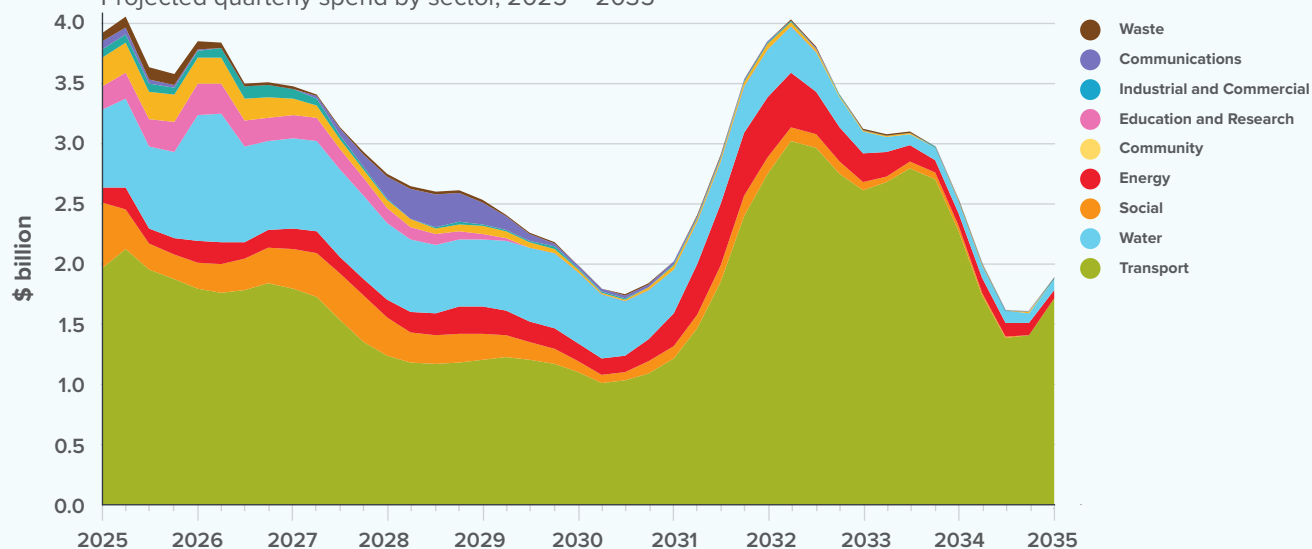
The improvements in visibility are shown more clearly in Figures 7 and 8, where in 2030 the balance of projected spend shifts from spend for initiatives that are largely in delivery and planning with confirmed funding sources, to spend for initiatives that are in early planning stages without confirmed funding sources.

The spend projections will continue to evolve as projects are adjusted, scheduled, and completed, new projects are planned and added to the Pipeline, and as new contributors provide project information.



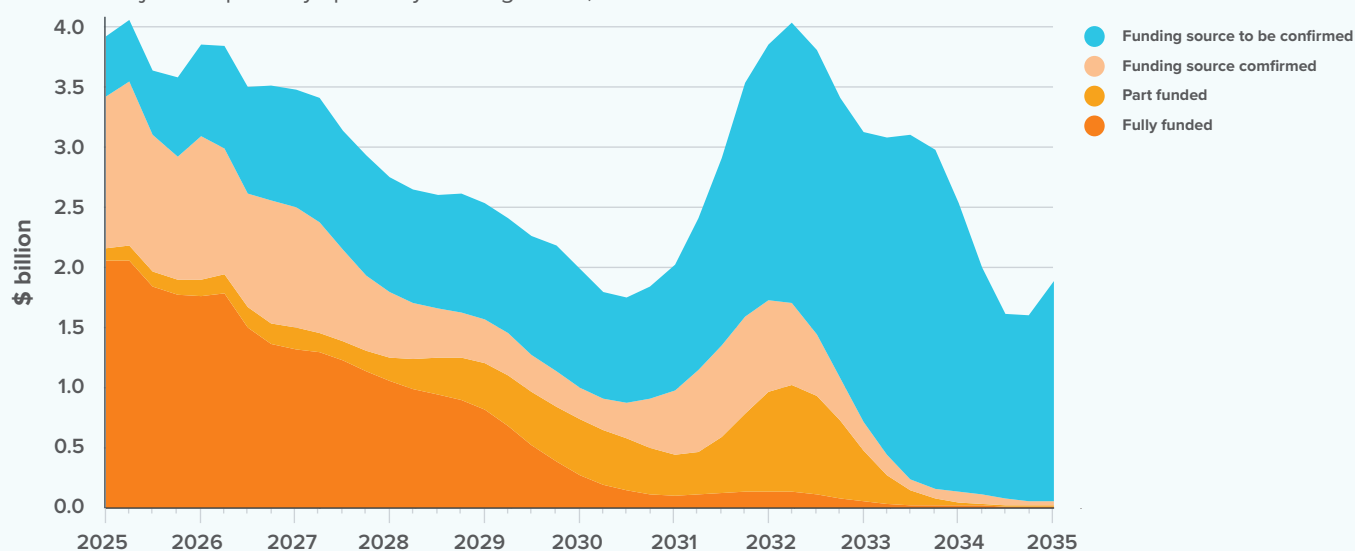
## Transport sector spend is projected to dominate infrastructure investment over the next ten years

Projected quarterly spend by sector, 2025 – 2035



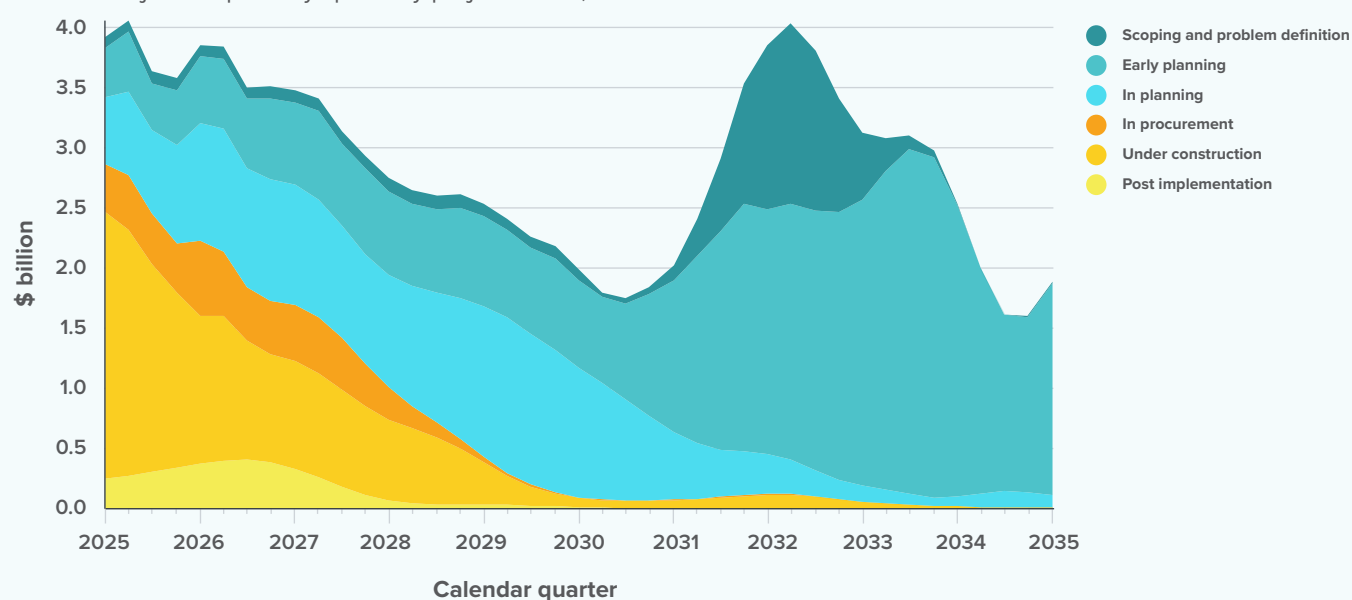
## Almost half of projected spend is funded or has a confirmed funding source

Projected quarterly spend by funding status, 2025 – 2035



## The bulk of unfunded projected spend comes from projects in early planning stages

Projected quarterly spend by project status, 2025 – 2035



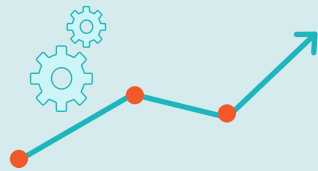
# The workforce needed to deliver the Pipeline

Even when faced with challenging market conditions, an early view of workforce demand and measures of certainty is important for planning, coordination, and scheduling of work. It also helps training institutions, the construction sector, and regions to make more informed and careful decisions on workforce and capability investments and in attracting the workforce that will be needed.

Each quarter we model the workforce required to deliver projects in the Pipeline. Figure 9 illustrates the national workforce demand by occupation group.<sup>4</sup>


The workforce numbers presented in the projections, include estimates of both full-time and part time workers needed on projects.<sup>5</sup> These workforce projections will continue to change, as new projects are planned across the horizon and this information is submitted to the Pipeline.

## Interactive tool



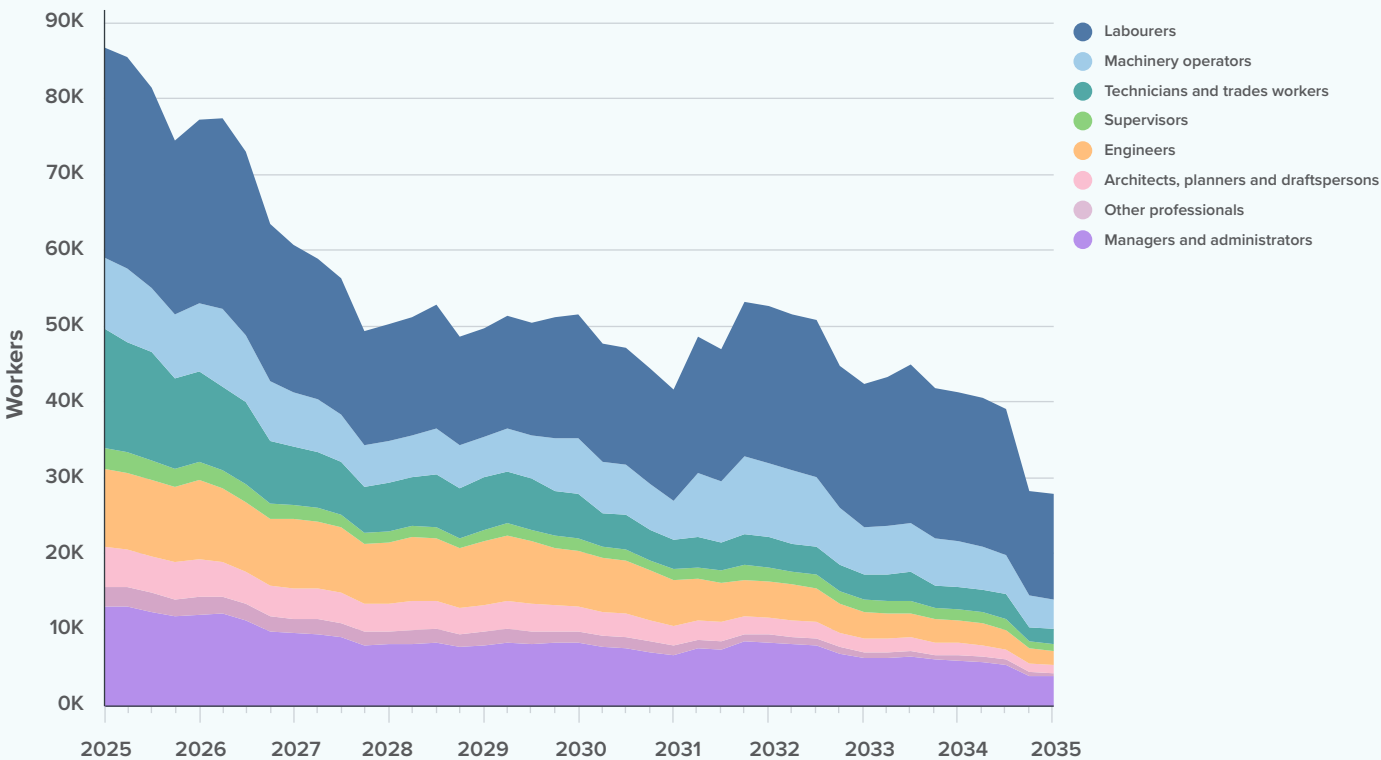
### Pipeline workforce projections

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

 Login or register for access at [insights.tewaihanga.govt.nz](https://insights.tewaihanga.govt.nz)

## Projected workforce required to deliver Pipeline projects

Workers each quarter by occupation group, 2025 – 2035



<sup>4</sup> 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.

<sup>5</sup> 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 whose specialist skills only required for part of the time.

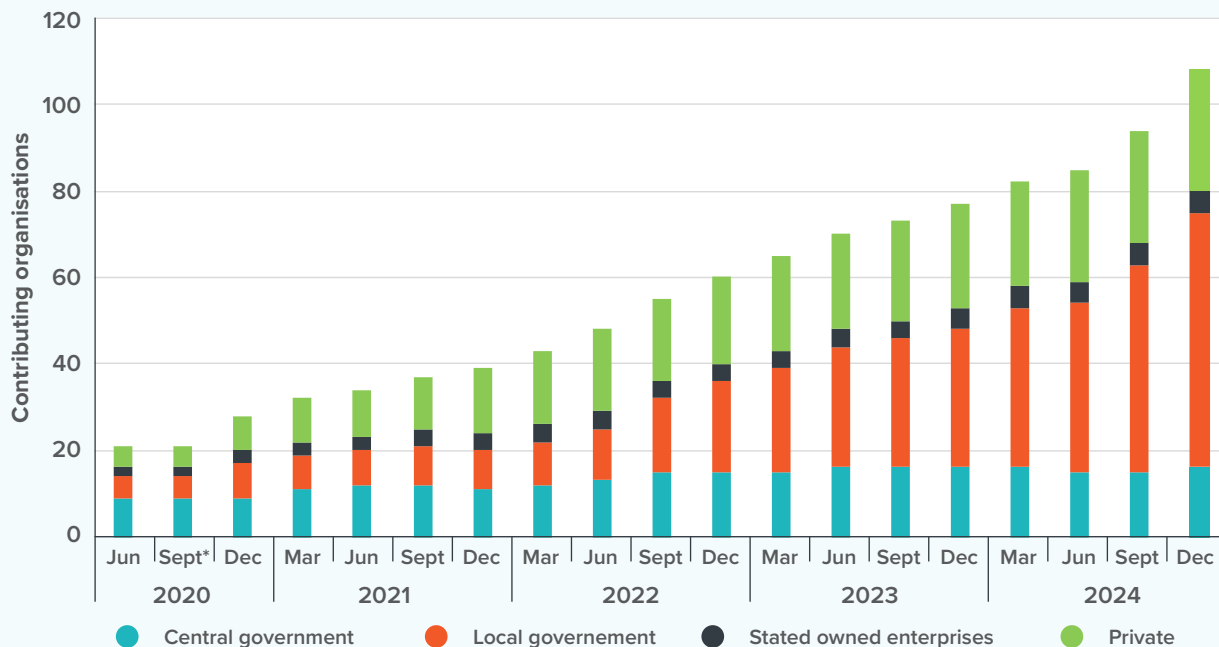
## Towards a complete Pipeline of infrastructure projects

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

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

### Pipeline contributors grew by 40% in the last 12 months

Pipeline contributors, June 2020 – December 2024 <sup>6</sup>



<sup>6</sup> Pipeline project information was not updated in the September quarter of 2020

The December 2024 quarter lifted our contributors to 108 organisations, up 40% on 12 months ago. Pipeline contributors include 16 central government organisations, 5 State owned enterprises, 4 electrical lines companies covering 54% of the installation control points (ICPs) <sup>7</sup>, and 59 councils (76% of councils across New Zealand).

Local government organisations are responsible for providing many important infrastructure services at a local and regional level. Our council contributors represent almost 90% of all rates revenue collected and are illustrated in Figure 11.

<sup>6</sup> In Figure 6 central government includes Crown entities; State-owned enterprises include mixed-ownership models; private organisations includes council-controlled organisations and universities.

<sup>7</sup> An ICP is an installation control point or the point of connection to an electricity network where an electricity retailer is deemed to supply electricity to a consumer.

Figure 11:

### Local government Pipeline contributor status

December 2024

Illustrated by territorial and regional boundaries

Metropolitan



Provincial



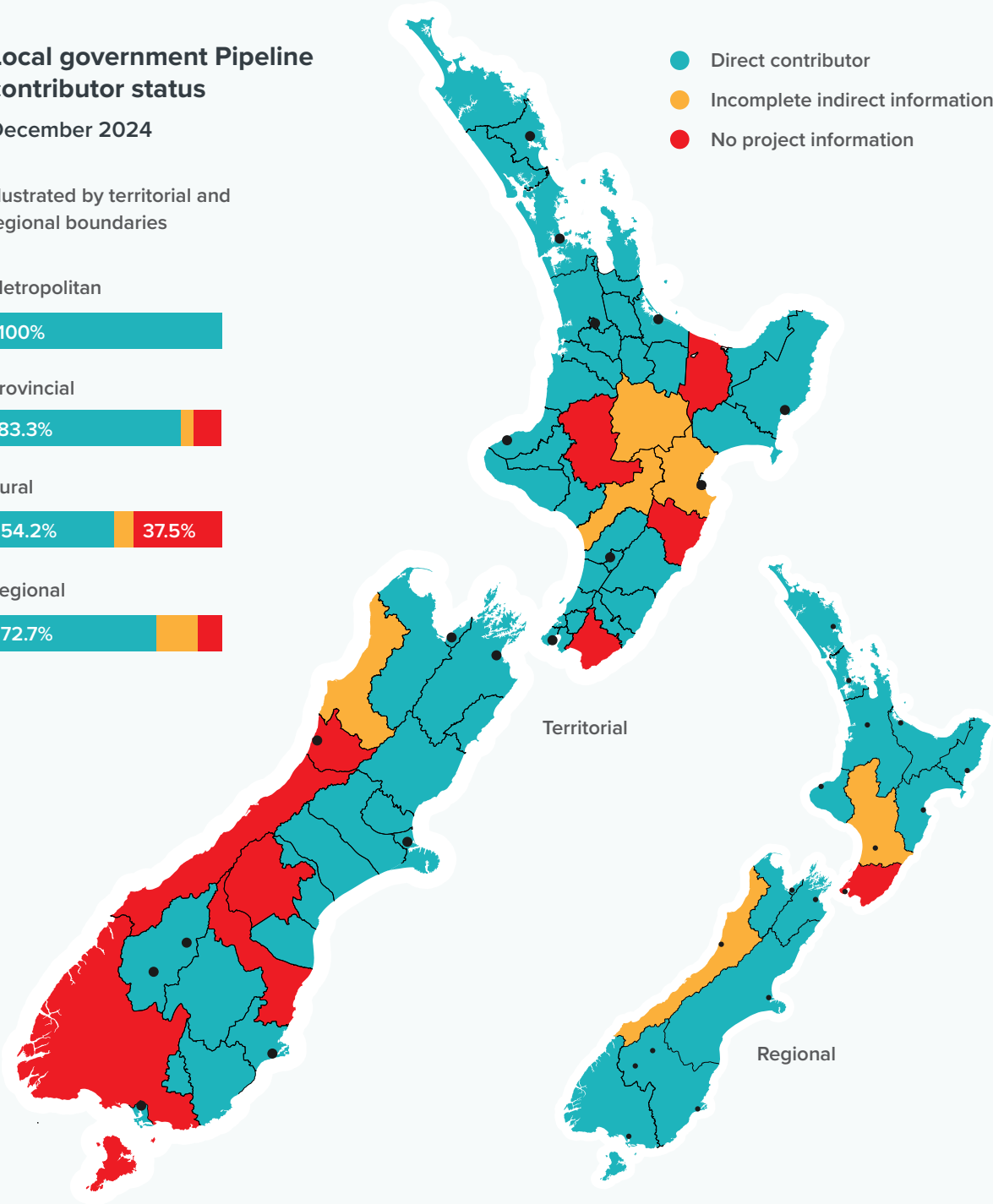
Rural



Regional



- Direct contributor
- Incomplete indirect information
- No project information



### Join the Pipeline

If your organisation has project information that is not included in the Pipeline, or you are new in your organisation and want to know more, contact the Pipeline team via [pipeline@tewaihang.govt.nz](mailto:pipeline@tewaihang.govt.nz)

Watch our [introduction to the Pipeline webinar](#) and find out more about the role of the Pipeline, value to your organisation, submission process, and data requirements.

We appreciate your support as we continue to build a complete picture of infrastructure investment and project intentions from across New Zealand.