

# Pipeline snapshot

January – March 2023

## The National Infrastructure Pipeline

The [National Infrastructure Pipeline](#) (Pipeline) is an online tool that helps to coordinate projects and inform decisions within the infrastructure sector. It plays an important role in providing a forward view of planned infrastructure projects in New Zealand. Each quarter, updated project information comes directly from government agencies, councils, and private sector entities involved in providing infrastructure services that

support the way New Zealanders live, work, and play. Following the flooding events across the country in the first quarter of 2023, we expect to see continued changes in the Pipeline as agencies use it coordinate, plan, and reprioritise projects and resources.

## What changed?

In March 2023 the total value of infrastructure projects in the Pipeline stands at \$92.3 billion, an increase of 17% from December 2022.

### Increases in Pipeline value include:

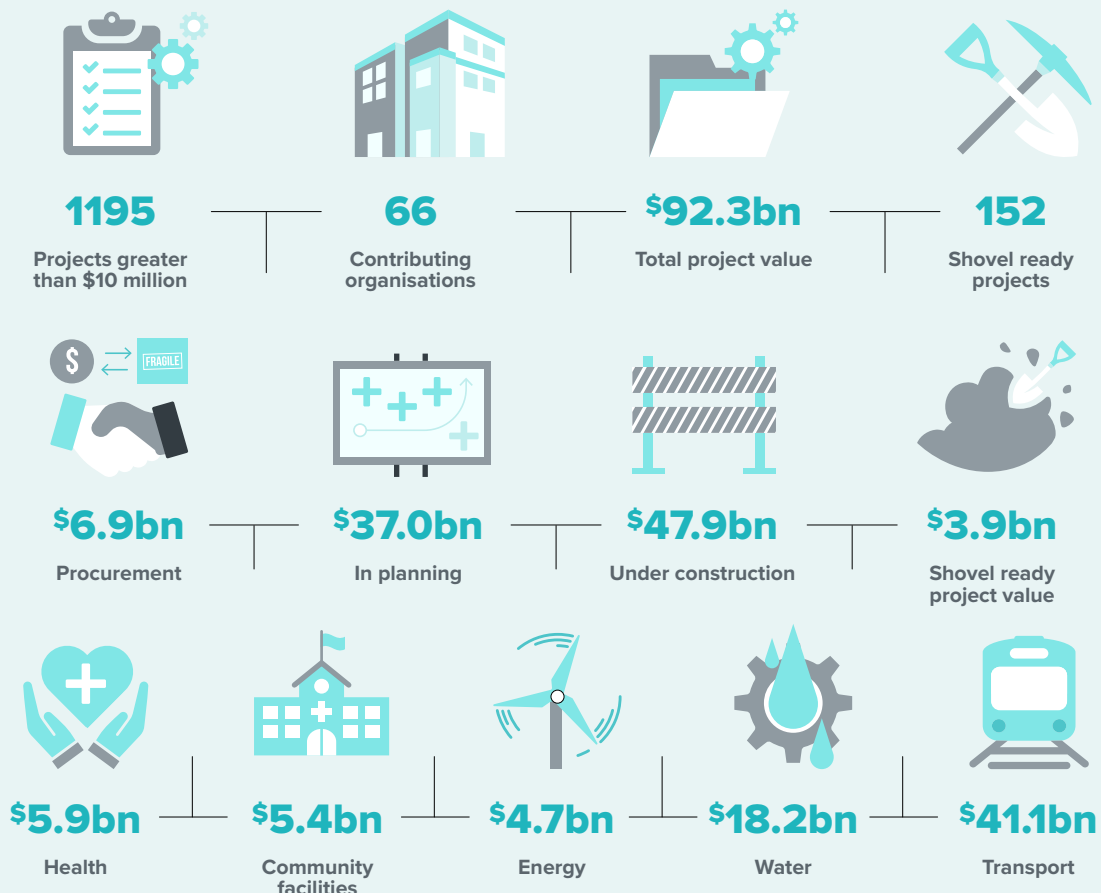
- \$0.59bn from new organisations providing project data
- \$7.22bn from new projects from existing contributors
- \$4.44bn due to an increase in the value of existing projects
- \$3.89bn net from projects added or replaced due improvements in data quality.

### Decreases in Pipeline value include:

- \$0.72bn of projects completed during the quarter
- \$0.02bn from projects cancelled during the quarter
- \$1.72bn due to a reduction in the value of existing projects.

Sixty-six contributing organisations provide project information to the Pipeline on more than 3000 planned and active projects for 150 infrastructure providers. A good response from contributing organisations was achieved, despite the weather-related disruption during the quarter, with 86% of contributors providing project updates.

Welcome to Kaikōura District Council, Waikato District Council, Waimakariri District Council, Waipa District Council, Te Puni Kōkiri – Ministry of Māori Development, and Lincoln University who joined as new contributors between January and March 2023. We appreciate your efforts and look forward to our continued partnership.



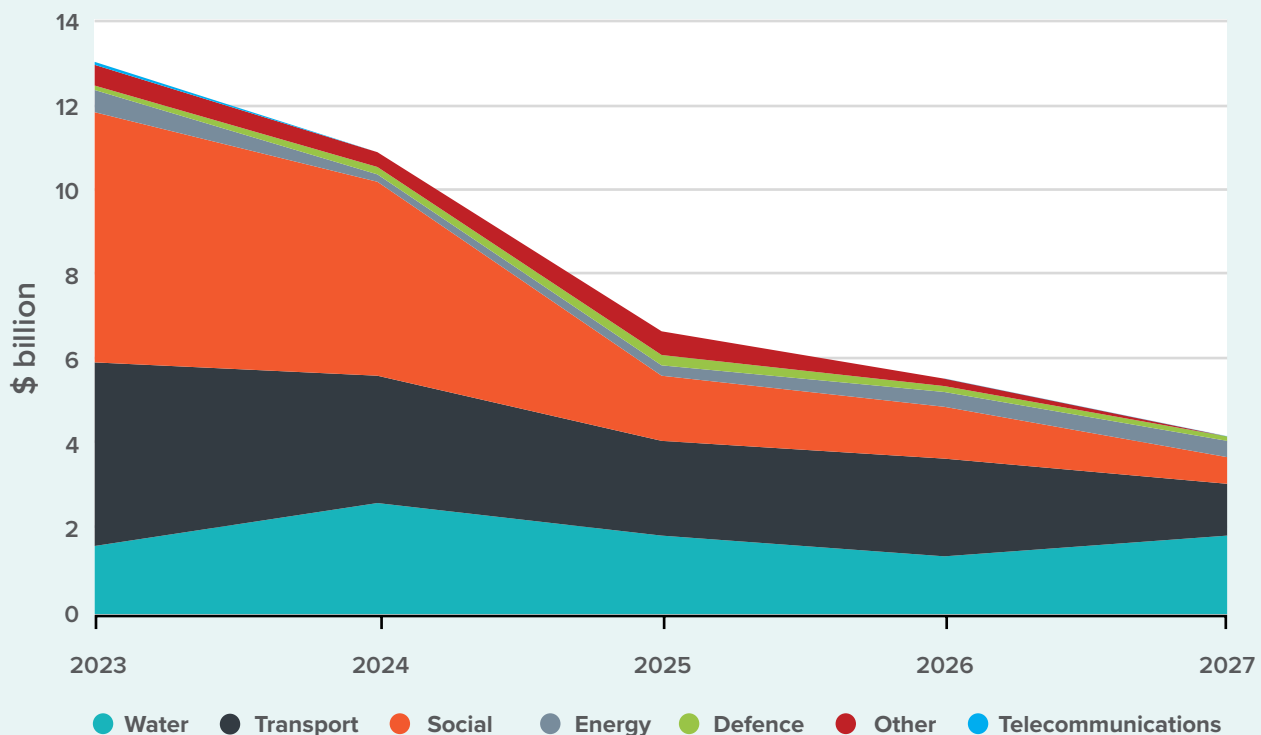
## Forecast spend by sector

The forecast annual spend by sector for the projects in the Pipeline has been modelled and is illustrated in Figure 1. These figures may be revised significantly in upcoming quarters, following the recent flooding events across the country in the first quarter of 2023.

Figure 1:

### Spending in transport, water, and social sectors dominates infrastructure spending over the next five years

Forecast project spend by sector 2023–2027



The March 2023 update to the Pipeline shows significant spend in the social sector is expected in the near term, accounting for \$5.9 billion or 43% of total forecast spend in 2023 (see Figure 1). These social infrastructure projects include 29% on health infrastructure, 25% on education facilities, 20% on community facilities and 17% on social housing.

The forecast value of transport project spend peaks in 2023 at \$4.3 billion, or 33% of the total annual infrastructure spend. This value reduces slightly in 2024 to \$3.0 billion and then stays

relatively constant through to 2026 where it equals \$2.3 billion. In 2027 the value drops to \$1.2 billion which represents 29% of the total spend value.

Annual spend on water projects is forecast to peak in 2024 at around \$2.6 billion – and then decreases steadily to around \$1.9 billion by 2027.

These forecasts will continue to evolve as new contributors come onboard and as new projects are planned and gain the certainty to be included in the Pipeline.

## Progress towards a complete Pipeline of infrastructure projects

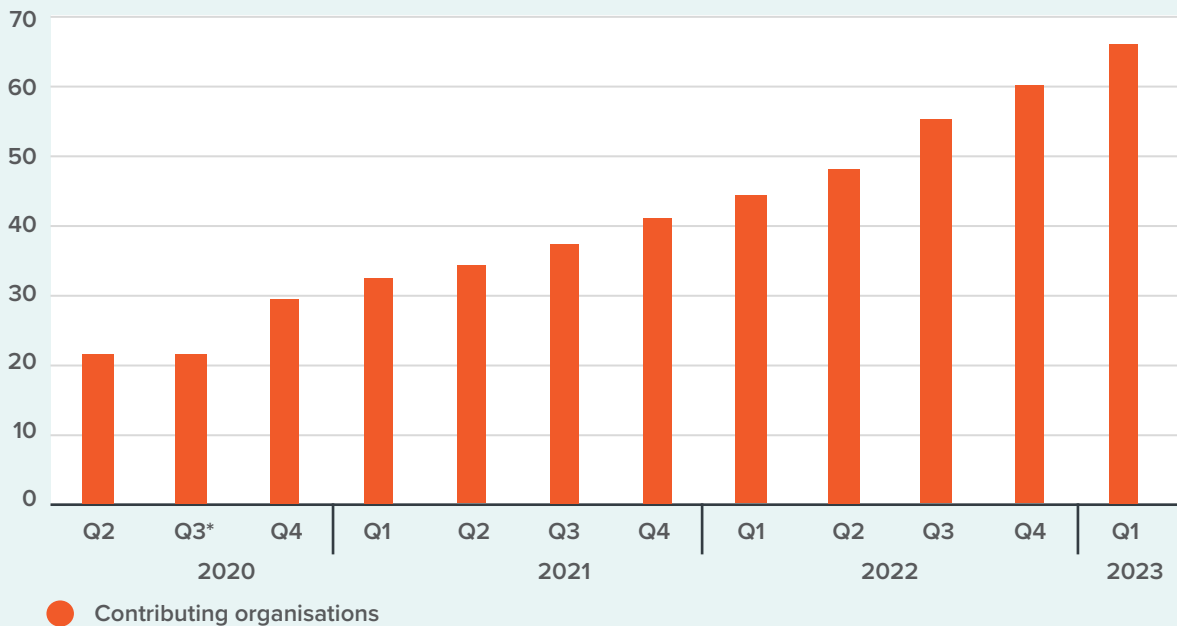
Te Waihanga first published the Pipeline in the second quarter of 2020 (with regular updates since the fourth quarter of 2020) to support statutory functions required under the New Zealand Infrastructure Commission/Te Waihanga Act 2019.

The Pipeline continues to build towards the Commission's goal of providing a trusted and complete view of planned infrastructure activity to the market. This continued development will facilitate improved planning, coordination, and delivery within New Zealand's broader infrastructure system.

We invite organisations not yet represented in the Pipeline to submit project data as we increase the breadth and depth of infrastructure projects in the Pipeline. The March 2023 quarter saw our contributing partners reach 66, up 6 on December 2022. **We thank our partners for their efforts with 86% providing updates.**

Figure 2:

### Quarterly count of Pipeline contributors, June 2020 to March 2023



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

### Are you aware of an infrastructure provider or project that we are missing?

Organisations do not need to be invited to submit their data; if your organisation has project information that is not included in the Pipeline, please contact the Pipeline team on [pipeline@tewaihanga.govt.nz](mailto:pipeline@tewaihanga.govt.nz). View the Pipeline at [www.tewaihanga.govt.nz/pipeline](http://www.tewaihanga.govt.nz/pipeline)