



CONSTRUCTION & INFRASTRUCTURE SERVICES

Advice to the Tertiary Education Commission
for training investment in 2026

November 2024



WAIHANGA ARA RAU

Construction and
Infrastructure

Workforce Development Council

KEY INFORMATION - 2026 TEC INVESTMENT ADVICE

This information is part of a suite of documents relating to the Waihanga Ara Rau advice to the Tertiary Education Commission (TEC) for investment in training for 2026 it should be read in conjunction with the following:

- ▶ **Introduction to the Waihanga Ara Rau advice to TEC for investment in training for 2026.**

This document includes the methodology behind the learner forecasts and industry narrative, including context and themes related to the advice.

- ▶ **The sector-specific advice summaries for the other 11 strategic industry sectors.**

These documents include sector data snapshot, industry-specific context information, learner number profiles, and 2024 Learner and Provider snapshot.

- ▶ **The complete Waihanga Ara Rau advice to TEC for investment in training for 2026.**

INDUSTRY SNAPSHOT

48,075

workforce

100k+ (if Civil Infrastructure #s included)
2022

12,643

businesses

2022

5,070

learners

2023

15%

workforce
aged under 25

30%

workforce
<1 year in industry

CONSTRUCTION & INFRASTRUCTURE (C&I) SERVICES NARRATIVE

Construction & Infrastructure Services sits in a unique place within the construction and infrastructure sectors, disciplines within the strategic reference groups scope and associated qualifications span the gambit of professional services. There are also a wide range of qualifications and programmes at degree, and above which are relevant to career and vocational pathways but outside the scope of this advice.

As a result of the industry scope, segments of the sector's workforce are impacted by different project drivers, which is why both construction and infrastructure forecasts have been included as context to this advice.

In general, construction-specific activity is quiet in the fourth quarter of 2024, but with OCR and mortgage rate changes, there is an awakening of the market, which has retained much of the intention to build (Project Pipeline Value) but has been impacted by decisions on when to build. With promising signs of activity, we are forecasting construction activity and associated workforce and training demand to come back to 2023 levels during the 2026 calendar year and have forecasted training volumes in line with this.

Infrastructure demand has also dipped post-election, primarily due to a lack of decision-making regarding project prioritisation and activation. However, there is a strong pipeline of work supported by large infrastructure projects (including roads of national significance) and regional infrastructure funding. The forecast is for a 12% increase in infrastructure project activity between 2023 and 2026. In light of this, we are forecasting infrastructure activity and associated workforce and training demand to come back to 2023 levels during the 2026 calendar year.

We, alongside the sector and other organisations (ConCove), have been exploring the concept of diploma-level apprentices (also commonly referred to as degree-level apprentices). At the core, this is looking at how to address the workforce shortages within the sector which an important aspect, is the ability to 'speed up delivery' of qualifications, to deliver the workforce without compromising on the quality.

TEC INVESTMENT ADVICE

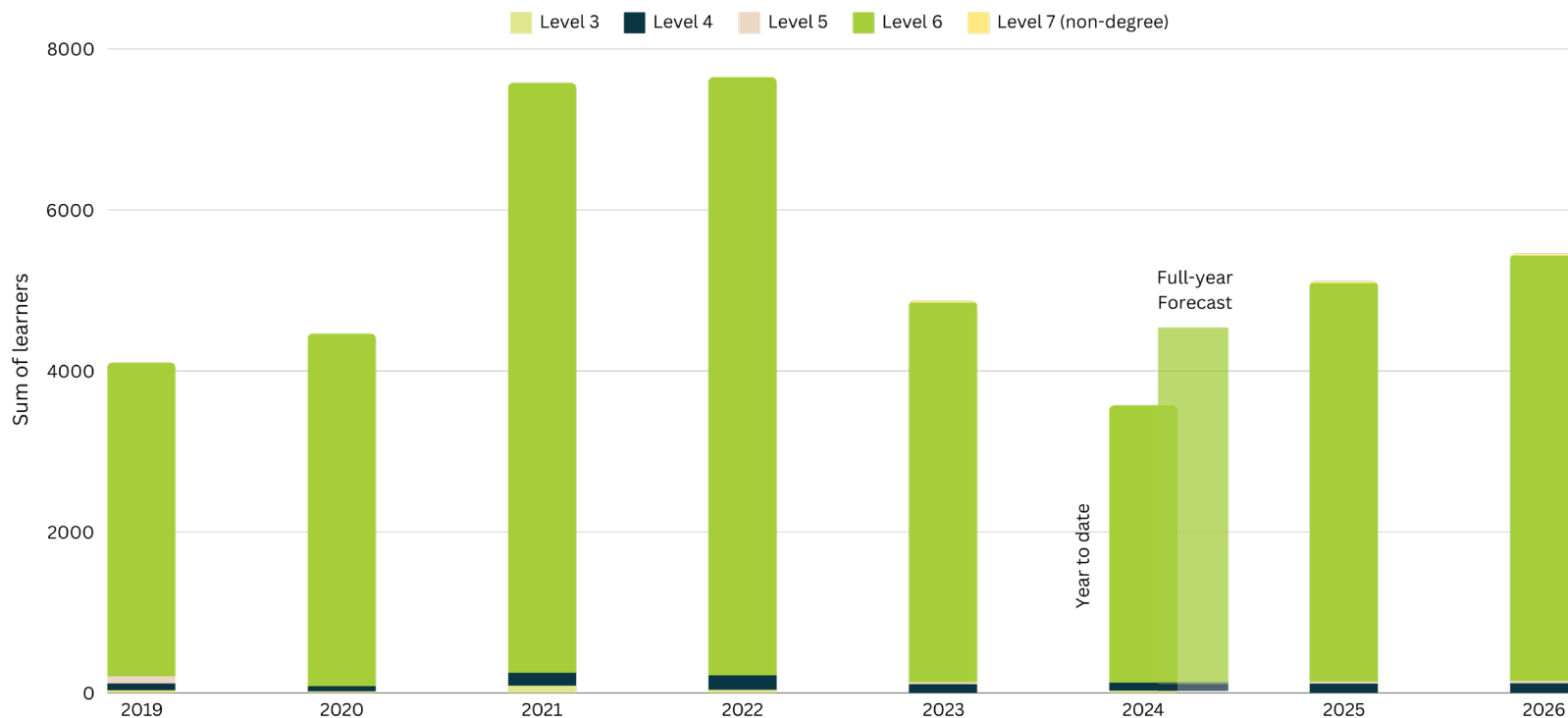
What is our baseline year and the training narrative/forecast?

We are using **2023 learner numbers as our baseline**, as this is the latest full-year training data.

While training interventions such as apprentice boost and fees free were still influencing learner numbers, the five-year pipeline of work was only just coming off its all-time high of approx. \$300B total \$251B construction specific in December 2022 learner numbers were starting to fall during 2023. Learner numbers in most industry sectors have continued to fall in 2024, but we anticipate government investment indicators and a falling Official Cash Rate (OCR) will see 2024 as the bottom of the training volume trough in both the civil infrastructure and construction sectors with enrolments building in 2025.

The 2026 projected learners numbers for construction reflect an expectation that 2024 will see the bottom of the trough in learner numbers which will start to rebound in 2025 and be back to 2023 levels in 2026, as highlighted above in the Construction five-year rolling Project Pipeline value nationally (2020 – 2026). Please note that the Qualification codes and corresponding qualifications are shown in the *Investment Advice table* below.

Actual and forecast learner numbers to September 2024 year to date and three-year forecast training numbers based on workforce indicators.



Investment Advice Table

Code	Qualification or credential name (programme title where NZQA title cannot be identified)	Mode	Region	2023 Learners	2026 Advice Provision
2416	New Zealand Diploma in Architectural Technology (Level 6)	Mixed mode	All	1,205	1,350
2420	New Zealand Diploma in Construction (Level 6) with strands in Construction Management, and Quantity Surveying			2,525	2,778
2612 ¹	New Zealand Diploma in Engineering (Level 6) with strands in Civil Engineering, Electrical Engineering, Electronics Engineering, Mechanical Engineering, and Fire Engineering			495	554
2957	New Zealand Certificate in Surveying (Level 4)			50	56
2958	New Zealand Certificate in Hydrographic Surveying (Level 4)			0	0
2959	New Zealand Diploma in Surveying (Level 6)			105	118
3029	New Zealand Certificate in Building Regulatory Environment (Level 4)			60	67
3030	New Zealand Diploma in Building Surveying (Level 6)			220	246
3179	New Zealand Certificate in Infrastructure Procurement Procedures (Level 6)			195	218
3180	New Zealand Diploma in Infrastructure Asset Management (Level 6)			15	17
-	<i>Programme: Construction Site Management Training Programme</i>			45	50
4515	NEW: New Zealand Diploma in Detailing (Structural) (Level 5) with strands in Light Steel Frame, Steel Reinforcing, Structural Steel, and Precast Concrete			NEW	26
Total				4,870	5,454

Shaded cells in 2026 column represent changes to qualification provision which we reflected in our formal advice to TEC (see "Advice to TEC for construction and infrastructure training investment 2025").

¹ Please refer to Introduction document - thematic section relating to "[Sustainability](#)" for more information around workforce need.

2024 Learner Snapshot

Age		Region		Gender	
Under 25	32%	Extramural	30%	Female	25%
25 – 39	48%	Auckland	25%	Male	75%
40 plus	20%	Canterbury	9%		
		Taranaki	8%		

NEW QUALIFICATIONS AND CREDENTIALS

Area of provision and/or qualification/ credential name (if known)	Level	Mode (if specific)	Qualification or micro-credential	Estimated date it will be available	Description
Introduction to detailing	5	TBD	Micro-credentials	2026	Stackable into the NZDip Detailing (Structural) L5 [Ref: 4515].
Detailing practice	5	TBD	Micro-credentials	2026	Stackable into the NZDip Detailing (Structural) L5 [Ref: 4515].