GAS INFRASTRUCTURE

Advice to the Tertiary Education Commission for training investment in 2027

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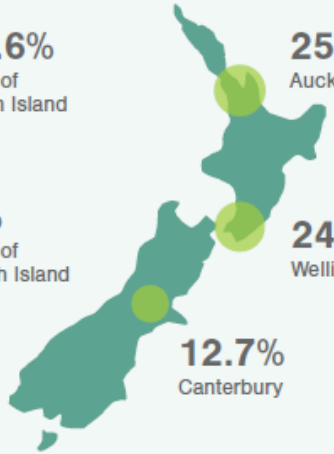
WAIHANGA ARA RAU
Construction and Infrastructure
Workforce Development Council

GAS INFRASTRUCTURE SECTOR

EMPLOYMENT BY REGION[1]

2023



GENDER[2]

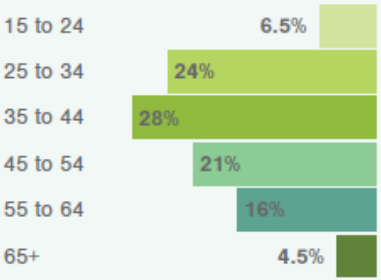
2023

65% Men

35% Women

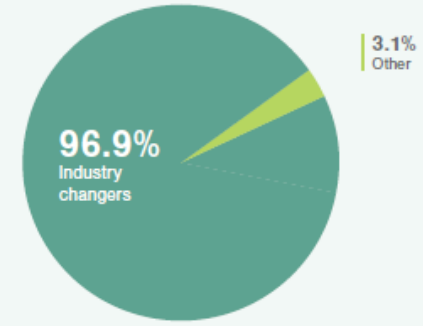
AGE[3]

2023



NEWCOMERS BY ORIGIN[4]

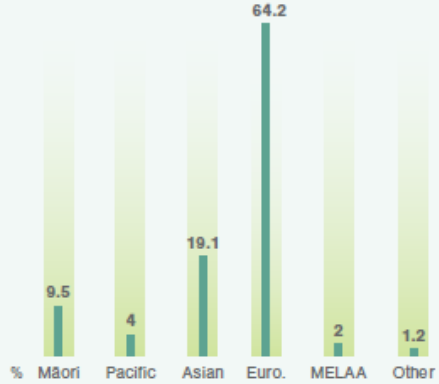
2023



31.2% of employees have been in the industry for less than a year.[6]

ETHNICITY[5]

2023



This data is extracted from StatsNZ IDI and IRD and displayed in the Workforce Information Platform. Figures are defined by those who work for or own a business with a relevant ANZSIC (industry) code. The infographic can be found at *workforce.nz*

GAS INFRASTRUCTURE NARRATIVE

Government policy shifts

The industry is **highly sensitive to shifts in government policy**, particularly those that signal long-term changes in the viability of natural gas as a fuel source. While the offshore oil and gas ban was a pivotal moment, the broader impact stems from the signal it sent about the sector's future investability. This uncertainty has been compounded by ongoing policy language that often conflates natural gas with renewable gas, further undermining investor confidence.

More recently, an emerging factor is that the Government is considering underwriting Liquefied Natural Gas (LNG) import facilities, which could reshape the gas supply landscape.

Flow-on impacts on the workforce

The resulting hesitation in development and investment affects all companies in the sector and has significant flow-on impacts for workers and learners. At the same time, the sector is experiencing layoffs and an ageing workforce, leading to a loss of experience. Together, **these factors are diminishing the prospects of a viable career in the gas industry and weakening the sector's ability to attract and retain staff**.

In light of these, skills mapping and career pathways into and across the transmission, distribution, and upstream sectors need to be undertaken to identify gaps and opportunities.

Training

Despite typically low levels of formal training, the **gas infrastructure industry is highly complex and high-risk**. The sector has limited qualifications, with recent developments including micro-credentials to support the voluntary Certificate of Competence (CoC) framework. However, these micro-credentials are competing with one another, and the industry must determine which future work-based delivery framework best supports its needs. The CoC framework is 'owned' by GasNZ on behalf of the sector and administered by a PTE.

Currently, the sector relies on a single main Work-Based Learning (WBL) provider for qualifications and micro-credentials aligned to its needs. Due to low training volumes, the industry has invested significantly in developing training and assessment resources, which have been gifted to the WBL provider. This has contributed to extended timeframes for bringing new programmes to market, with only one of the three main qualifications currently available.

INVESTMENT ADVICE

Overarching narrative

This document should be read alongside the overarching narrative document, which provides the introduction and overarching assumptions for Waihanga Ara Rau's 2025 investment advice to the Tertiary Education Commission (TEC), focused on training provision for 2027.

The sector versions outline our approach to qualifications relevant to each sector, regardless of whether they meet TEC's investment threshold. This ensures that all stakeholders, from policymakers to industry leaders, can engage with advice that aligns with their areas of influence.

2027 Investment advice baseline year

We're applying a similar approach to last year's. **The baseline year is 2024,** which provides the most recent full year of training data. All active learners across the 2024 calendar year set the minimum level of provision we expect in 2027, with any recommended growth, reduction, or no change based on that starting point.

Investment advice threshold (for 2027 delivery)

For qualifications within our scope, only those meeting the threshold are included in our formal submission to the Tertiary Education Commission (TEC). The 2027 threshold includes:

- growth or reduction of more than 20 learners compared to the 2024 baseline.
- not registered or not TEC-funded learners in 2024, but expected activity in 2027.
- fewer than 20 learners in 2024, with projected growth that more than doubles by 2027.

The threshold is designed to ensure our advice focuses on qualifications that could significantly impact current TEC funding. Qualifications that fall below this threshold typically sit within the margins of existing funding activity and therefore do not materially affect funding availability

This advice covers 6 qualifications and programmes within Waihanga Ara Rau's Gas Infrastructure sector. Together, these show a projected growth of 145 learners in 2027 based on the 2024 baseline. Of these, 5 qualifications meet the TEC advice threshold and are included in the formal advice document submitted to TEC. These account for 140 of the total projected learner growth.

Context: Investment advice table

The general growth in provision for qualifications in the **Gas Infrastructure sector is 23.8%,** which relates only to one qualification [3591]; however, this growth does not meet the threshold. In terms of other advice:

- **3593:** No activity in 2024, but consultation with industry employers indicates that there will be activity, possibly as early as 2026.
- **Current and planned micro-credentials:** The micro-credentials listed below had no activity in 2024, as they were only recently developed. **Our advice from last year still stands,** which is highlighted below. Ten further micro-credentials will be listed during the remainder of 2025.

Investment advice table

Code	NZQA Qualification Title	2027 Total Provision	Growth on 2024 base	Meets threshold
3591	New Zealand Certificate in Reticulated Gas Pipelines (Level 3)	25	5	No
3593	New Zealand Certificate in Reticulated Gas Pipelines (Level 4) with strands in Metering and Pressure Control, and Polyethylene Pipeline Construction	10	10	Yes
5063	Gas CoC Protocol: Foundation Skills for Working on Gas Infrastructure (Micro-Credential)	100	100	Yes
5134	Gas CoC Protocol: Excavation for Work on Gas Infrastructure (Micro-credential)	10	10	Yes
5135	Gas CoC Protocol: Low-capacity Gas Measurement Systems for Gas Infrastructure (Micro-credential)	10	10	Yes
5136	Gas CoC Protocol: Safe Practice for Working on Gas Infrastructure (Micro-credential)	10	10	Yes
	Total	165	145	

Products in development

Reference	Title	Type	Status	Likely Year
TBC	Gas CoC Protocol: Network Leakage Repair (Micro-credential)	Micro-credential	In Development	2026/27
TBC	Gas CoC Protocol: Construct PE Mains (Micro-credential)	Micro-credential	In Development	2026/27
TBC	Gas CoC Protocol: Construct PE Services (Micro-credential)	Micro-credential	In Development	2026/27
TBC	Gas CoC Protocol: Cathodic Protection Survey (Micro-credential)	Micro-credential	In Development	2026/27
TBC	Gas CoC Protocol: Disconnect or Reconnect a GMS <12m3/hr (Micro-Credential) (Micro-credential)	Micro-credential	In Development	2026/27
TBC	Gas CoC Protocol: Gas Fitter – Gas Leakage Response on GMS <25m3/hr (Micro-credential)	Micro-credential	Submitted to NZQA	2026/27
TBC	Gas CoC Protocol: Network Leakage Response (Micro-credential)	Micro-credential	In Development	2026/27
TBC	Gas CoC Protocol: Polyethylene (PE) pipelaying (Micro-Credential)	Micro-credential	Submitted to NZQA	2026/27
TBC	Gas CoC Protocol: Gas Fitter - Install or Replace GMS <25m3/hr (Micro-Credential)	Micro-credential	In Development	2026/27
TBC	Gas CoC Protocol: Standard Pressure Control (Micro-credential)	Micro-credential	Submitted to NZQA	2026/27