

NISTA Infrastructure Pipeline: Supporting strategic planning in industry – ICE roundtable summary

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Background

Over the past year, the UK has taken meaningful steps toward a more coordinated national approach to infrastructure. With NISTA now shaping the long-term view, there is a clearer picture of how different parts of the system fit together and where the real pinch points and opportunities lie.

In March, NISTA [updated its infrastructure pipeline](#), providing refreshed insight and improved data. The latest iteration includes a workforce analysis tool, offering greater visibility on future demand. This additional data is designed to add clarity and support more informed decisions on investment, capability building, and addressing skills gaps.

By its nature, the pipeline defines the what not the how. Determining how the system will sequence projects, build workforce readiness, and secure funding stability is a shared responsibility across government, industry, and the wider sector.

The ICE hosted this roundtable for leaders from construction and consulting firms to share feedback on the latest pipeline iteration and provide suggestions for how it and future iterations can better support planning across the built environment sector, particularly in helping the industry deliver the government's 10-Year Infrastructure Strategy. The discussion was chaired by ICE Director of Policy and External Affairs Sam Gould and joined by Jon Loveday, Director of Infrastructure, Enterprise and Growth at NISTA.

Key discussion points:

- Perceptions of the pipeline as a good step forward and a useful tool for supply chain companies and investors.
- The required level of commitment for projects to enter the pipeline to ensure credible and consistent data over the long term to provide industry confidence that projects on the Pipeline will be delivered.
- Opportunities to enhance future iterations with additional workforce categories and materials data.
- How civil servants are using the pipeline and further opportunities for it to support capacity building.
- The benefits of ensuring the pipeline is coherent with other government strategies, including for meeting legally binding climate targets and encouraging innovation and investment in new technologies.
- Continued risks in the investment environment for pipeline delivery and how the user interface and communications around the pipeline could better engage investors.
- Wider reforms needed to strengthen the supply chain – including procurement reform to drive long-term relationships.

Ensuring quality data to guide decision-making

The supply chain and investors need absolute confidence in the quality and accuracy of the data in the pipeline for it to guide their decision-making. The high bar projects must pass to enter the pipeline is intended to provide that confidence.

Projects must have reached a certain level of maturity and have a clear strategic need identified. The pipeline is not a wish list of projects. Instead, the pipeline is intended to work in tandem with the 10-year infrastructure strategy, which indicates the government's ambitions beyond what has been approved.

The criteria for inclusion and the visibility of the Pipeline could have wider impacts beyond its core purpose of supporting the supply chain and investors. In demonstrating the projects that have been committed to by government, it could impact how future government decisions about major projects are taken.

Data accuracy and presentation

The core data for some of the departmental projects on the Pipeline is the same as some aspects of government major project reporting. This ensures a consistent view of major government projects. There are multiple levels of agreement within government to clear data for inclusion in the pipeline. In the regulated utilities and wider private sector, NISTA is aware of some gaps – for example, in certain parts of the energy sector and telecoms – and is working on solutions for future iterations. Some of those gaps highlight where there is uncertainty about projects being developed within those sectors.

The pipeline also indicates the lifecycle stage of the project, which indicates the accuracy of the data – i.e. projects closer to the business case stage should have more robust data.

NISTA is committed to updating the pipeline every six months because it recognises that projects evolve and data must be regularly updated to keep the pipeline relevant.

There is only so much NISTA can do to ensure data accuracy at a project level and there will always be limitations. At a sectoral level, the pipeline provides useful clarity on the levels of investment different sectors will receive, and thus where companies should prioritise.

Many users tend to download the data to explore it offline, but this means NISTA is missing out on collecting information on how users are using the data to inform future developments.

Workforce and resource planning

The workforce data is welcome, but it could be enhanced. More information on project delivery skills that are needed earlier in the project timeline, such as for designers, and for other critical professions, such as town planners, would be useful. Participants also suggested having an indication of projects and roles that would require security clearance would also be helpful.

To date, NISTA has deliberately focused on construction skills requirements and bringing the different industry bodies together to identify regional needs and build up supply chain resilience across those trades.

The pipeline now has skills and investment heat maps to highlight regional demand. This will be useful in areas like the East of England, which are expecting a big spike in investment and workforce demand that risks fuelling

inflation. The heat maps are helping bring clients and other bodies, such as educational partners, together to develop solutions.

Materials

More granular data on materials requirements would help manufacturers in the supply chain. NISTA is working on getting individual sectors to develop long-term plans that sit below the 10YIS. A potential future iteration for the pipeline could look at commodities.

Capacity building and accountability within government

Participants noted the shrinking of the Government Major Projects Portfolio (GMPP) suggests departments are being given more accountability for those projects and the pipeline could be an opportunity to build capability. Participants suggested the pipeline could be used to provide feedback to clients on their performance, but recognised that developing feedback loops takes time. In the meantime, the pipeline can highlight problem areas over subsequent iterations.

There are encouraging signs of civil servants using the pipeline information to understand their projects in the context of wider regional activity rather than in isolation. There is still more potential for how NISTA can use the insight from the pipeline to inform and support civil servants at all levels – for example, about delivery risks. Sharing insight with data providers on delivery risks across the Pipeline could be a powerful way for NISTA to incentivise better quality data sharing. More granular data on delivery stages – indicating for example why a project has been stuck – would also help strengthen accountability.

Benefits and impact

Projects are a means to an end. Participants suggested that tracking the intended benefits and outcomes of projects in the pipeline would provide useful data. Similarly, the implications of changes to projects, including the economic impact and consequences for supply chain jobs, could be inferred. Skills data could be a proxy for those.

The spatial planning tool, which has been developed by NISTA in parallel to the pipeline, is now being widely used to look at joined-up planning across sectors and disciplines, for example, to help select the new town locations. Business cases are being looked at through a regional lens and being joined up across departments.

Cross-government alignment

Participants suggested that the pipeline should be coherent and aligned with other government strategies – such as the Seventh Carbon Budget and [30by30 plan for biodiversity](#). For example, the government has legally binding targets to reduce carbon emissions, but it is unknown if the pipeline will be delivered within those targets.

It should also be coherent around known and expected future climate-related shocks. Those changes should be built into the pipeline. Responsibility for this lies outside NISTA, but one option would be for the government to develop a national transition plan for climate change. A first step could be developing consistent measurements on carbon footprint and biodiversity to assess departments' performance.

Another benefit of government-mandated coherence with its other ambitions could be to provide the certainty companies need to drive innovation and investment in scaling up technologies like low-carbon cement.

Investor opportunities and engagement

There has been much positive feedback from investors on the pipeline. However, there are still limited opportunities showing on the Pipeline for private finance outside of the energy sector.

Participants also noted wider investor sentiment, which could impact the deliverability of projects in the pipeline. For example, investor concerns about high construction and energy costs in the UK could influence their decisions about where to invest globally.

Investors also want clarity on which investment models the government wants to use. These are policy questions which sit outside the scope of the pipeline, which will only include what is certain. The pipeline will illustrate models once they are decided by the government. In the meantime, NISTA has included more metrics and measures around the investment market, such as investment opportunities. These are very new and NISTA is aiming to improve the quality of data it can provide, recognising that there is still a mismatch in data available on the supply chain side versus the investment side of the pipeline.

There is more potential for the user interface, communications and marketing around the pipeline to pull out key messages for investors. Delivering the pipeline should also generate good export potential for UK plc, for example, through new intellectual property rights.

Strengthening the supply chain

The greater clarity from the pipeline alone will not break many of the challenges causing uncertainty in the supply chain. Many things need to happen in parallel – such as procurement reform – to end the current system that often encourages a race to the bottom.

A key aim is to start driving longer-term supply chain relationships because the 10-year infrastructure strategy and pipeline will be of limited use if departments still work on a project-by-project basis. Organisations need a sustained pipeline of projects to invest in capacity building. NISTA is trying to drive that policy. On the flipside, it will be looking for those organisations to train and invest in skills and technology. The future ideal would see Tier 1 organisations start to employ their own skilled trades again.

Parallel reforms

Some of those uncertainties and barriers that affect projects' progress and supply chain resilience sit outside NISTA's remit or the scope of the pipeline (such as the speed of consenting) – but they can still affect investment decisions, so that data is useful. There is an opportunity for NISTA to explore how the infrastructure pipeline and procurement pipelines could be joined up.

Other opportunities for the government to boost confidence in the deliverability of the pipeline include passing secondary legislation under the Planning and Infrastructure Act, new guidance for planning authorities and regulators, and new powers around the scope of judicial reviews of NSIPs. One of the key lessons from HS2 was around the need for additional resourcing – both people and technologies like AI – for statutory consultees like the Environment Agency.