

ACE Wales Manifesto:

Delivering Infrastructure 2050



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ACE CEO Foreword



Milda Manomaityte, Chief Executive Officer, ACE and EIC

Infrastructure is the bedrock on which our economy is built and our communities flourish. The choices we make today will shape the Wales of the decades to come and how well we can share the opportunities of a better life across every corner of our country.

Delivering Infrastructure 2050 is a clear and confident statement of ambition for Wales. It is founded on a simple but radical proposition: that infrastructure should be regarded not as a cost to be managed, but as a long-term investment in productivity, prosperity, and shared success. When we get infrastructure right, we can unlock growth, improve living standards, and create places that people want to live and work in.

The challenge ahead is significant, but it also brings real opportunities. While public finances are under pressure, assets are ageing, and procurement and skills shortages create complexity, these issues provide a clear mandate for positive change. Wales is exceptionally well placed to meet this moment. We have a thriving consultancy sector, outstanding engineering and technical expertise, resilient local supply chains, and a policy framework that champions long term thinking and future generations.

This provides us with the tools needed to deliver meaningful progress for our built environment.

Wales must now collaborate earlier, procure better, and plan over the long term for places, not just projects, that will bring better outcomes for taxpayers and citizens alike. By valuing consultancy expertise as a strategic partner to government, rather than a nice-to-have extra, Wales can accelerate delivery, stimulate innovation, and make sure that every pound spent delivers the maximum possible return in social, economic, and environmental value.

This manifesto is a call to action. It encourages government, industry, and citizens to work together with clarity, confidence, and purpose – to deliver the infrastructure that Wales needs, and deserves, not just over the next Senedd term but in the years and decades to come.



Chair's Foreword



Gary Davies, *Chair, ACE Wales / Cymru*

Wales is at a moment of real change.

We have a strong industrial and engineering heritage, but far too much of the infrastructure that underpins our day-to-day lives is old, limited, or simply no longer fit for the purpose we require of it. Whether it is connectivity and transport links, flood resilience, digital infrastructure, social infrastructure or energy, the need is evident. Yet at the same time, the system is under pressure: slow decision-making, risk-averse procurement, increasing costs, and a lack of skills are all making it harder than it need be to deliver.

Yet there is also a massive opportunity. Wales is already showing what can be achieved when ambition is matched by delivery. Whether it is the South Wales Metro, coastal flood defence schemes in places like Fairbourne and the Severn Estuary, or the rapid expansion of renewable energy and grid upgrades, infrastructure can and is being used to drive economic growth, decarbonisation, and improved wellbeing. Our member ACE companies are at the forefront of this effort; developing new transport planning, nature-based flood protection, water and wastewater modernisation, and digital design solutions that cut costs and carbon from day one. The proposed Wylfa Newydd nuclear power station on Anglesey is expected to represent the largest single private investment in Wales' history, potentially worth over £20 billion, creating thousands of jobs during construction and operation while also playing a significant role in powering the UK with low carbon electricity.

As Chair of ACE Wales, I witness every day the level of expertise that exists within our consultancy sector, from

international companies to highly skilled Welsh SMEs embedded within local communities. Yet all too often, that expertise is called upon too late, asked to optimise schemes that are already limited by process. We need to turn this on its head. By engaging earlier, providing clearer pipelines of work, and procurement systems that prioritise quality and outcomes, we can release better outcomes and allow the Welsh business community to flourish and invest in skills.

Delivering Infrastructure 2050 is not about another strategy plan gathering dust on a shelf. It is about doing things differently: trusting professional expertise earlier, supporting SMEs, and aligning infrastructure investment with Wales' climate goals, economic ambitions, and the Well-being of Future Generations Act. This manifesto represents what our members are already delivering on the ground and what they could deliver with the right framework in place. Wales needs infrastructure that delivers, delivered at speed, and built to last.

How ACE Wales Shaped the Manifesto

This manifesto has been shaped through extensive engagement across the Welsh infrastructure ecosystem, including:

- **ACE Wales roundtables** with consultancy leaders, SMEs and the political parties in Wales
- **Direct consultations** with members working across transport, energy, housing, water and digital infrastructure
- **Evidence-led analysis** drawing on industry research, delivery experience and Welsh policy frameworks

This collaborative approach ensures the manifesto reflects both strategic ambition and on-the-ground delivery realities.

Key Asks



Economic Growth: Lobby the UK Government to devolve rail infrastructure powers and funding to Wales and use that devolution to accelerate investment in the whole public transport system (rail, bus services, active travel), so that people can reliably and affordably get to jobs, education and services within Wales and across the Wales–England border.



Driving Delivery: Embed early supply-chain engagement, strengthen public-sector client capability, and invest in skills and education to support effective, collaborative delivery.



Environment: Put nature and climate at the heart of planning and investment through a national retrofit strategy, stronger environmental protections, and alignment of infrastructure with biodiversity, resilience, and green jobs.





Infrastructure as a Driver of Economic Growth

Welsh Public Transport: A Whole System Approach

The rail network in Wales has been a visible illustration of what chronic underinvestment looks like: higher cancellation rates, constrained capacity, and reliability challenges. Independent analysis of Office of Rail and Road (ORR) data reported by multiple outlets shows that between 18 August 2024 and 16 August 2025 Wales recorded the highest rate of cancelled scheduled stops in Great Britain (3.9%), compared with 3.5% in England and 2% in Scotland; six of the ten busiest stations in Wales had cancellation rates above the UK average, while none of Scotland's ten busiest stations did¹.

However, in March 2026, Transport for Wales (TfW) posted recent improvements²: punctuality up six percentage points quarter-on-quarter (82% → 88%), cancellations improved by 3.6 percentage points, overall passenger satisfaction at 91%, and 'most improved operator' in the UK for the third consecutive period on ORR metrics (to 11th out of 24 overall). These gains reflect TfW's £800 million investment into new trains for the Wales and Borders network and the

near-completion of the £1bn South Wales Metro. These improvements should be consolidated and built upon to make it easier and more reliable for people to get to where they want to go.

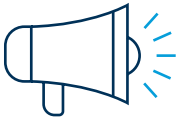
Why Wales Needs a Whole-Network Strategy

Low-income households, rural communities and young people rely more on frequent, affordable local transport, especially buses than on long-distance rail. Evidence consistently shows that bus networks deliver disproportionate social and economic benefits to lower-income groups, while rail enhancements often channel benefits toward higher-income commuters. In the UK, research also indicates that rail subsidies are captured more by higher-income households than lower-income ones, underscoring the need to balance rail with local public transport investment.

Wales should, therefore, pursue a whole-public-transport strategy, using rail devolution to unlock and co-fund better buses and local services rather than a rail-only approach.

¹The Independent, Major UK train stations with most cancellations revealed, 23 September 2025, [Major UK train stations with most cancellations revealed | The Independent](#)

²Transport for Wales, Customer and Rail performance improvements for Transport for Wales, 6 March 2026, [Customer and Rail performance improvements for Transport for Wales](#)



What Devolution Would Enable:

Devolution would enable Wales to:

- Align transport programmes with economic assets, such as:
 - Network North Wales (Metro) - a long-term vision with service increases, new links to Liverpool, station upgrades and PAYG (Pay as You Go) - should be supported and accelerated where feasible.
 - Anglesey Freeport and Wylfa SMR programme - ensure rail and bus connectivity supports workforce access and supply chains as these investments scale.
 - Wrexham–Flintshire Investment Zone - use transport devolution to target reliable, frequent public transport to advanced manufacturing sites, improving labour market access and productivity.
- Integrate rail with buses, active travel and land-use planning
 - Use devolution to co-fund priority bus corridors, hubs and integrated ticketing with TfW - delivering faster, cheaper end-to-end journeys.
- Prioritise reliability, resilience and the passenger experience
 - Lock in TfW’s recent improvements by targeting assets, operations and timetable resilience where performance risk is highest,

including cross-border routes where many cancellations originate off the Welsh network.

- Shift to long-term, place-based investment
 - Replace piecemeal funding with multi-year packages tied to Regional Transport Delivery Plans, secured through the Regional Transport Fund and coordinated with UK programmes and Network Rail.

Planning the Places: A Welsh TOD Policy

To maximise the Metro legacy and lock in growth around stations, Wales should adopt an explicit Transit-Oriented Development (TOD) policy, mirroring the UK Government’s draft NPPF reforms that propose a “default yes” for higher-density development near well-connected stations (subject to safeguards e.g. such as design codes). A Welsh TOD policy would:

- Fast-track housing and employment within walking distance of stations, with minimum densities and design quality standards.
- Secure station-area funding (via developer contributions) for accessibility, interchange, and bus priority.
- Prevent displacement/gentrification through affordability, mixed-use requirements and good bus links. This is key given evidence that rail-led schemes can otherwise tilt benefits up the income scale.



Regional Delivery: CJs, RTPs and the Regional Transport Fund

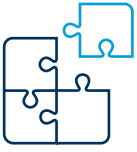
The Welsh Government has approved all four Regional Transport Plans and will consolidate grants into a single Regional Transport Fund from April 2026. This is a major step that

aligns funding with local priorities and reduces admin burden. Devolution of rail powers should plug directly into this framework, enabling regionalised pipelines that combine local bus improvements, rail enhancements, interchanges and active travel in one programme.

Policy Recommendations:

- **Adopt a whole-network public transport strategy**, ensuring any new rail powers support integrated investment in buses, demand-responsive transport, active travel and affordable local mobility for low-income and rural communities.
- **Align transport investment with major economic programmes** (North Wales Metro, Anglesey Freeport, Wylfa SMR, Wrexham–Flintshire Investment Zone) to improve workforce access, productivity and supply-chain connectivity.
- **Shift to long-term, place-based funding** via multi-year investment packages tied to Regional Transport Plans and delivered through the Regional Transport Fund.
- **Introduce a Welsh Transit-Oriented Development (TOD) policy** to fast-track higher-density, mixed-use development around well-connected stations, secure developer contributions and prevent displacement through affordability safeguards.
- **Embed rail devolution within regional delivery structures (CJs)** so that rail, bus, active travel and land-use projects are combined into coherent regional pipelines rather than separate, siloed programmes.





Procurement Reform

Infrastructure is one of the most influential investments available to government as a means of unlocking economic growth. In Wales, however, procurement systems are often working against this goal.

Currently, public procurement in Wales is not delivering the best possible outcomes for communities, the public finances, or the construction industry. The tendering process is often complicated and time-consuming, with a bias towards scale rather than specialist knowledge, and with too much emphasis on bidding and complexity. Unrealistic cost and timescale assumptions increase unnecessary delivery risk, while too much bureaucracy and bidding act as a deterrent. Consequently,

many qualified SMEs are being locked out of public procurement, even though 99% of construction firms in Wales are SMEs and the vast majority have fewer than 13 employees.³

However, procurement also presents a huge opportunity. When done properly, it can be a highly effective tool for economic growth, innovation, skills, and local value. A move towards outcome-based procurement, with greater use of early market engagement and proportionate procurement, would open the door to greater participation from Welsh businesses. By changing procurement policy, the public sector can improve delivery outcomes and enhance local supply chains and construction industry capacity in the longer term.

Policy Recommendations:

- **Change public procurement** to focus on whole-life value and long-term outcomes, rather than lowest price
- **Simplify the tendering process** and adopt proportionate procurement for low-risk, repeat, and smaller contracts
- **Embed realistic cost and timescale assumptions** into procurement from the start to minimize delivery risk and improve outcomes
- **Encourage further efficiency and consistency** with procurement reform by regional corporate joint committees
- **Improve mechanisms** for local SMEs to take part, including regional procurement frameworks, suitable lotting approaches, and better access to opportunities

³CIOB, The SME Construction Landscape in Wales, October 2024, <https://www.ciob.org/SME-risk-factors>

Accelerating Delivery – Embedding Early Expert Involvement

Many infrastructure projects in Wales are currently experiencing delay, cost overrun, and poor outcomes because of the late engagement of technical and professional expertise. Consultants are too often brought into projects too late, after key strategic decisions have already been made, and when their input is limited to having little influence on scope, cost, risk, and deliverability. This sequential approach to project development is increasingly putting pressure on under-resourced public sector bodies and leading to inefficiencies in planning and delivery.

Clearly, there is a role for improving performance by repositioning the input of consultancy expertise from a sequential service to a strategic input. Early engagement of consultants enables delivery considerations to inform investment decisions from the outset, leading to improved certainty, accelerated programs, and whole-life cost reductions. By integrating delivery expertise into planning and investment decisions, decision-making would be improved, risk management enhanced, and more collaborative and outcome-focused approaches to infrastructure delivery in Wales would be enabled.

Policy Recommendations:

- **Embed early consultant engagement** at pre-planning, option development, and investment-shaping stages
- **Reposition consultancy expertise** as a strategic partner to the Welsh Government and public sector bodies, rather than a transactional service provider
- **Increase the use** of early contractor and consultant engagement (ECI/ECE) approaches to inform design, cost, and delivery strategy
- **Improve public sector** client capability to enable informed commissioning and effective intelligent client practice
- **Foster collaborative delivery** approaches that facilitate shared risk, reward, and incentives

Energy Resilience and Nature Regeneration – Delivering Climate-Resilient Infrastructure

The Welsh Government has legally binding obligations to deliver net zero by 2050⁴, and how infrastructure, especially housing, is delivered and upgraded in the coming decades will be critical to meeting these commitments. Wales also has a profound structural challenge. It has one of the oldest and least energy-efficient housing stocks in Europe. A third of homes date from before 1919⁵ and the overwhelming majority of the homes that will be in Wales in 2050 are already in existence today. In addition, emissions from residential buildings account for a fifth (20%) of greenhouse gas emissions in the UK⁶. Without a comprehensive and coordinated strategy to upgrade existing homes, net zero will not be delivered.

This is also a profound opportunity. Large-scale, well-designed retrofit schemes can deliver emissions reductions while also supporting local employment, skills, and resilience in the long-term. High-quality standards such as PAS 2030 and PAS 2035 offer a critical foundation, but if delivered in a rigid way, they risk slowing down delivery and locking out SMEs, which are critical to scaling up retrofit activity in Wales. A skills-led and place-sensitive approach to retrofit, especially in heritage housing, can accelerate decarbonisation while also enhancing the skills and supply chain of the Welsh construction industry.

⁴Welsh Government, Just Transition Framework, December 2025, [Just Transition Framework: introduction \[HTML\] | GOV.WALES](#)

⁵Welsh Government, Homes of Today for Tomorrow, February 2024, [Retrofit in practice](#)

⁶Housing and Net Zero, House of Commons Library, 8 July 2024, [Housing and net zero - House of Commons Library](#)



Policy Recommendations:

- **Develop a long-term**, national domestic retrofit strategy that provides certainty, coordination, and scale
- **Introduce a proportionate and tiered quality framework** for private sector retrofit that maintains standards while enabling SME participation
- **Embed heritage** and traditional construction skills within retrofit programs, particularly for pre-1919 housing stock
- **Support the energy transition** in Wales through targeted upskilling and retraining initiatives across the construction sector
- **Establish retrofit training academies** linked to major green infrastructure and housing investment programs
- **Embed built environment education** within the new vocational curriculum
- **Increase the number of schools** and colleges offering built environment pathways
- **Continue and increase funding** for built and natural environment degree apprenticeships, aligned with provision in other UK nations
- **Align infrastructure investment** with wider objectives for nature regeneration, flood resilience, and biodiversity recovery



Regenerating Nature

Wales is one of the most nature-depleted countries in the world. Under State of Nature reporting⁷, one in six species in Wales is at risk of extinction, and the abundance of species has fallen sharply over the past decades. More than 90% of our protected habitats are in unfavourable condition, and NRW's assessments show that over half of our assessed marine species and habitats are in poor condition. Our rivers remain below ecological standards, and biodiversity loss is accelerating, with climate change adding to these pressures through flooding, drought, and rising sea temperatures. Nature is not a niche topic – it is the foundation for food production, clean water, climate change mitigation, and public health and crucially a critical driver for growth.

However, despite having robust environmental laws and international obligations, progress has been poor. Planning policy has too often favoured short-term development over long-term ecological sustainability. There has been a weakening of environmental monitoring and enforcement, and investment has failed to keep pace with the level of ambition set out in law. Without radical, systemic change – putting nature at the forefront of planning, energy policy, marine management, and economic policy – Wales is likely to miss its 2030 biodiversity goals and further degrade the natural assets that underpin our communities and future generations.

⁷State of Nature Partnership, State of Nature Wales Report, 2023, [TP26053-SoN-Wales-summary-report-v10.pdf](#)



Policy Recommendations:

Treat Nature as Infrastructure

- **Strengthen Building Regulations** and Planning Policy Wales to ensure all new development meets 10% BNG.
- **Develop and publish** statutory guidance on delivering biodiversity net benefit on site.
- **Provide a national policy statement** for renewable energy on land and at sea, with nature at the heart of site selection.
- **Ensure environmental** requirements are proportionate and not over-applied to impede delivery.

Protect and Restore Our Seas

- **Complete the Marine Protected Area** network in Wales, with 30% of our seas highly protected and 10% fully protected.
- **Designate Marine Conservation Zones** and work towards achieving Good Environmental Status.
- **Introduce byelaws** to control damaging activities such as bottom trawling and dredging in protected areas.
- **Publish a Marine Spatial Prioritisation Strategy** to protect habitats and mobile species.

Deliver Nature Recovery and Green Jobs

- **Develop and deliver** clear routes to achieve nature goals through a clear delivery plan that goes beyond 2030.
- **Increase tree cover** through planting and natural regeneration, particularly in the urban environment, while protecting high-value habitats

Conclusion

The infrastructure network in Wales is no longer enabling growth but is now actively limiting it. Underinvestment in rail has led to one of the least reliable rail networks in Great Britain, with reduced labour markets and lower productivity, and centralised decision-making and fragmented procurement practices driving delay, cost overrun, and poor value. Late expert involvement and issues faced by Welsh SMEs further limit delivery. Collectively, these issues mean that infrastructure is not living up to its potential to support economic development, climate action, and instead leaves Wales stuck in the quicksand of short-term solutions.

Infrastructure 2050 offers the chance to turn this trend around. By pledging to deliver full rail devolution,

outcome-based and proportionate procurement, early expert involvement, and a national, skills-led retrofit program, Wales can integrate transport, housing, energy, and nature recovery around a shared long-term vision. Placing nature at the heart of planning and infrastructure delivery would protect the ecosystems that support economic resilience, while large-scale retrofit would reduce emissions, address fuel poverty, and grow local supply chains.

With Infrastructure 2050 as a delivery vehicle rather than a statement of intent, infrastructure can become a force for green growth and regional renewal – rather than a continued brake on Wales' future.

This report was written by **Ben Brittain, Director of Public Affairs at ACE**.
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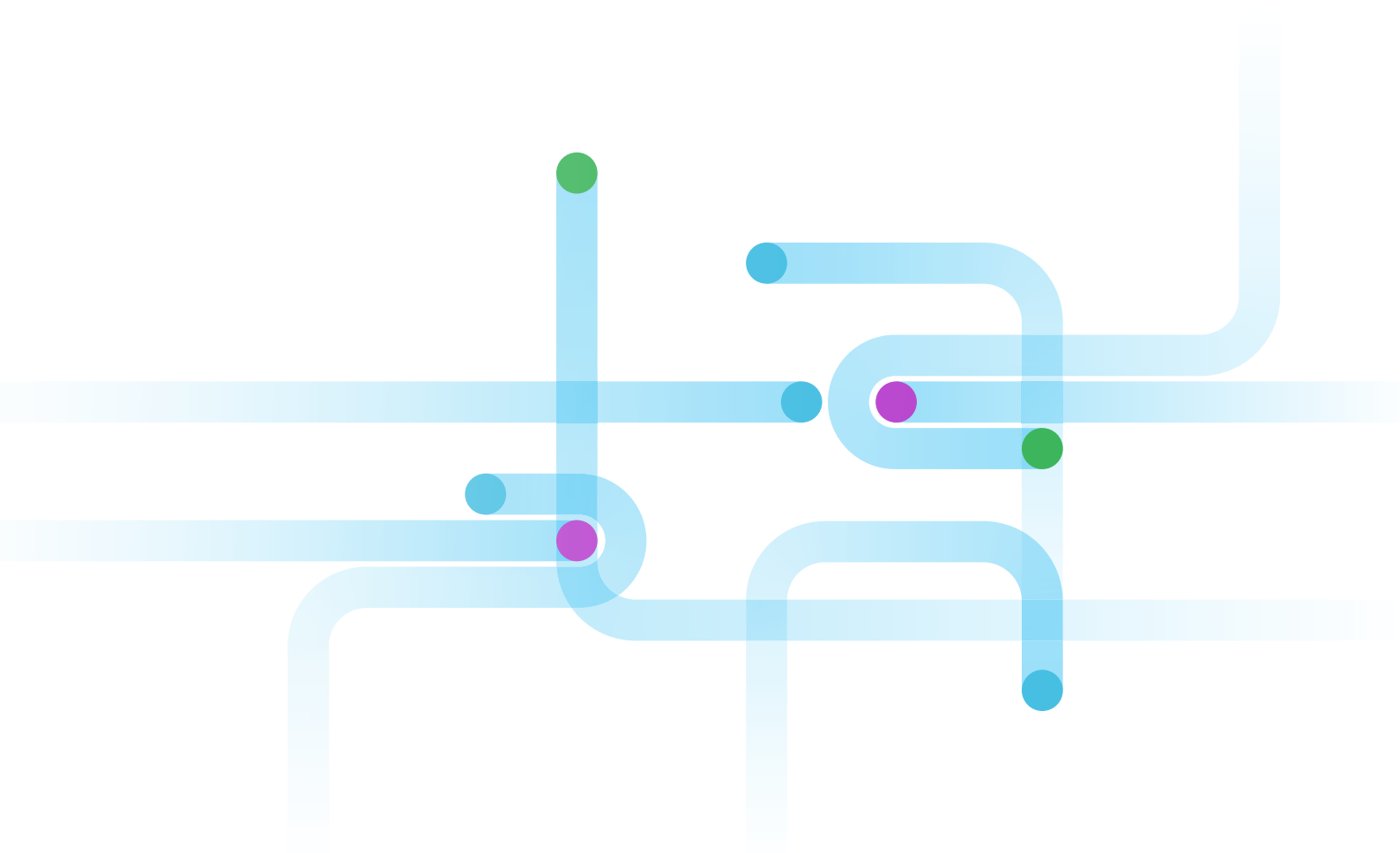


About Us

The Association for Consultancy and Engineering (ACE) is the business association for the UK's professional consultancy and engineering companies operating in the social and economic infrastructure sectors.

We represent around 400 member companies, large and small. As the leading voice for the sector, we foster collaboration to propel the industry to fulfil its ambitions.

The sector is highly skilled, productive, and forward-looking - employing over 470,000 people and contributing more than £39 billion to the UK economy. It competes on a global stage, exporting over £11 billion, providing solutions to the world's pressing issues and holds the key to a brighter future.





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