

Chair
Economy, Energy and Connectivity Committee
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8th September 2026

Dear Chair,

Priorities for the Economy, Energy and Connectivity Committee during the Seventh Senedd

The National Infrastructure Commission for Wales (NICW) welcomes the opportunity to contribute to the Committee's consultation on its priorities for the Seventh Senedd.

NICW's remit is to provide independent, long-term advice on Wales' strategic economic and environmental infrastructure needs over a 5 to 80-year period. The Committee's portfolio is therefore central to the questions with which NICW is most concerned: how Wales delivers the infrastructure needed for decarbonisation, economic resilience, energy security, connectivity, productivity and long-term wellbeing.

NICW recommends that the Committee consider three priority inquiries.

1. An inquiry into delivery of Wales' renewable energy transition and the infrastructure required to support it

[NICW's renewable energy report](#) was published in October 2023. Energy was also one of the infrastructure sectors explored through the [Wales Infrastructure Assessment](#).

The Committee should consider an inquiry into whether Wales is moving quickly enough from renewable energy policy to energy infrastructure delivery. Such an inquiry could examine:

- progress against Welsh Government responses to NICW's renewable energy recommendations;
- grid capacity and the interaction between devolved and reserved responsibilities;
- the planning and consenting arrangements needed for renewable energy infrastructure;
- community benefits and Welsh economic value from renewable energy development;
- supply chain readiness and infrastructure workforce capacity;
- port, transport and grid infrastructure needed to support future energy deployment; and
- the role of Crown Estate arrangements in determining Welsh benefit from offshore and marine energy.

We suggest the Committee consider whether Wales has a sufficiently clear national energy infrastructure vision and whether infrastructure planning, consenting, grid investment and economic development policy are aligned behind it.

2. An inquiry into infrastructure delivery capability in Wales

[NICW's Welsh Infrastructure Delivery research](#), found that Wales has progressive legislation and policies, but continues to face persistent challenges in delivering major infrastructure. The report identified key barriers including slow, inconsistent and under-resourced consenting processes, political and economic uncertainty, skills shortages, short-term funding, unpredictable engagement and poor integration between transport, energy and digital systems.

The Committee should consider an inquiry into whether Wales has the delivery system needed for major infrastructure. This should not be limited to individual project delays. It should examine the system as a whole, including:

- long-term political and financial stability;
- planning and consenting capacity;
- public sector technical expertise;
- infrastructure workforce and skills pipelines;
- data sharing and integrated digital platforms;
- the quality and transparency of project pipelines;
- procurement and delivery models; and
- whether lessons from major infrastructure projects are systematically captured and applied.

NICW's delivery research identified eight priority actions: longer-term policy certainty; maximising the opportunities of planning reform; investing in skills and institutional capability; encouraging collaboration around future demand; enabling early and meaningful engagement; improving data sharing and coordination; facilitating longer-term funding; and supporting sustainable procurement and delivery models.

3. An inquiry into major project lessons and the infrastructure pipeline

NICW's infrastructure delivery research used real-world Welsh case studies to test systemic barriers and enablers.

The A465 Heads of the Valleys Road Upgrade was completed in May 2025 and used different delivery approaches across sections, including the Mutual Investment Model, a public-private partnership approach and Early Contractor Involvement. The Stephenson Street Flood Scheme was completed in spring 2025 and was designed to protect over 2,000 homes and businesses. Pen-y-Cymoedd Wind Farm involved complex peatland restoration and a recognised community benefit model, while South East Wales Rail Electrification represented a £1 billion-plus modernisation of ageing rail infrastructure.

We suggest that the Committee should use these case studies as the basis for a practical inquiry into major project learning. This inquiry could ask:

- why some projects progress and others stall;
- how political announcements affect cost, certainty and delivery confidence;
- how funding and procurement choices affect outcomes;
- how major infrastructure programmes manage interdependencies between transport, energy, flood risk and digital systems;
- whether Wales has enough technical capacity to act as an effective client;
- whether project learning is shared across Welsh Government, local government, regulators and delivery bodies; and
- whether the Wales Infrastructure Investment Strategy project pipeline provides sufficient transparency for the supply chain, skills providers and the public.

Conclusion

The Committee's programme should focus not only on what infrastructure Wales wants, but on whether Wales is organised to deliver it. That means scrutinising the delivery system, not only specific announcements or projects.

Yours sincerely,

A handwritten signature in black ink, appearing to read 'JBaxter'.

Dr Jenifer Baxter
Cadeirydd Dros Dro / Interim Chair