



**Planning Policy Branch,  
Planning Directorate,  
Welsh Government,  
Cathays Park,  
Cardiff,  
CF10 3NQ**

Dear Sir,

### **Call for Evidence and Projects National Development Framework**

Thank you for the opportunity to respond to the call for evidence

RICS in Wales is the principal body representing professionals employed in the land, property and construction sector and represents some 4000 members divided into 17 professional groups. As part of our Royal Charter we have a commitment to provide advice to the Government of the day and in doing so we have an obligation to bear in mind the public interest as well as the interest of our members

In response to the Consultation we would like to make the following proposal:

#### **Electrification of the North Wales train network**

Rationale:

With construction on HS2 set to begin there should be an assessment on how Wales can benefit from this infrastructure. An improvement in the train network in North Wales, through electrification, can result in improved connectivity to the HS routes across the UK. This will mean other geographical regions, Wales in this case, can reap the benefits of HS2.

There is widespread endorsement for the electrification of the train network in Wales with the cross border North Wales/North West England Group Growth 360 concluding that “electrification, track enhancements and improved signaling of key rail routes will reduce journey time allowing frequency enhancements whilst improving reliability and quality. This will

improve rail mode share and reduce the dependence on the private car for the 12m cross-border commutes per year (currently 85% by car).”

The group estimated that Electrification between Crewe and Holyhead would yield a total impact / contribution to the economy of £ 2.5bn. More information can be found at <http://www.growthtrack360.com/home/resources/>

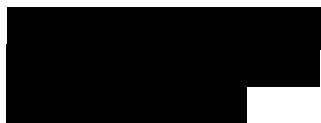
Finally we would also like to submit our Infrastructure Project proposals contained in our Manifesto for the 2016-2021 Assembly term which is attached to the email containing this letter.

We would be delighted to meet with you to discuss our proposals in more detail.

If you have any queries in respect of this response please do not hesitate to contact me.

Yours sincerely,

**David Morgan**  
**RICS Policy Manager in Wales**





# **Wales Manifesto 2016:**

## **Building 4 the Future**

Property in Politics

# **Maniffesto Cymru 2016:**

## **Adeiladu @ y Dyfodol**

Eiddo mewn Gwleidyddiaeth



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# Our role

**RICS is the world's leading professional body for professionals working in land, property and construction. RICS represents around 4,000 members across Wales and more than 100,000 worldwide. A royal charter body working in the public interest RICS provides impartial, expert advice to policymakers on sustainability, land, property markets, and the built environment. It is uniquely positioned to give an impartial insight into property matters in Wales.**

RICS property professionals are at the heart of delivering the housing, planning, construction and infrastructure projects that our cities, towns and communities need.

Property in Politics is a conversation between property professionals and political parties about building a vibrant property marketplace. As part of Property in Politics, RICS put forward this manifesto committed to enhancing public value and providing impartial expert advice to the all stakeholders both within and outside politics.



# Ein rôl ni

**Yr RICS yw'r prif gorff proffesiynol yn y byd i weithwyr proffesiynol sy'n gweithio ym myd y tir, eiddo ac adeiladu. Mae'r RICS yn cynrychioli tua 4,000 o aelodau ledled Cymru a mwy na 100,000 ledled y byd. Yn rhinwedd ei swydd fel corff sydd â siarter frenhinol ac sy'n gweithio er lles y cyhoedd, mae'r RICS yn rhoi cyngor arbenigol diduedd i'r rhai sy'n llunio polisïau, ynghylch cynaliadwyedd, tir, marchnadoedd eiddo a'r amgylchedd adeiledig. Mae mewn sefyllfa unigryw i gynnig golwg ddiuedd ar faterion eiddo yng Nghymru.**

Mae gweithwyr proffesiynol eiddo yr RICS wrthi yng nghalon y gwaith i gyflawni'r prosiectau tai, cynllunio, adeiladu a seilwaith y mae eu hangen ar ein dinasoedd, ein trefi a'n cymunedau.

Mae Eiddo mewn Gwleidyddiaeth yn sgwrs rhwng gweithwyr proffesiynol eiddo a phleidiau gwleidyddol ynghylch adeiladu marchnad eiddo fywiog. Fel rhan o Eiddo mewn Gwleidyddiaeth, mae'r RICS yn cynnig y manifesto hwn gan ymroi i wella gwerth cyhoeddus a rhoi cyngor arbenigol diduedd i'r holl randdeiliaid a hynny ym myd gwleidyddiaeth a'r tu allan iddo.



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# Property in politics

RICS' 'Building 4 the Future' manifesto, aims to support the Welsh Government and Welsh Assembly in creating an enabling environment for investment, growth and private sector enterprise across the key sectors of land, property, construction and infrastructure.

The recommendations put forward emerge from the views and insights of RICS members across Wales, sharing with us their professional insight into the biggest challenges currently facing Wales and what options might be available to policymakers.



# Eiddo mewn Gwleidyddiaeth

Nod manifesto'r RICS 'Adeiladu @ y Dyfodol' yw helpu Llywodraeth Cymru a'r Cynulliad Cenedlaethol wrth greu amgylchedd sy'n galluogi buddsoddiadau, twf a menter y sector preifat ar draws sectorau allweddol tir, eiddo, adeiladu a seilwaith.

Mae'r argymhellion a gynigir yn deillio o safbwyntiau a dirnadaeth aelodau'r RICS ledled Cymru, a fu'n rhannu eu dirnadaeth broffesiynol nhw o'r heriau mwyaf sy'n wynebu Cymru ar hyn o bryd a pha opsiynau a allai fod ar gael i'r gwneuthurwyr polisi.



# Our vision

**RICS in Wales calls on all parties to recognise the role property professionals can play in driving forward economic growth, addressing key long and short term Infrastructure needs and helping achieve social goals. It is important that all the key developments in devolution are brought together. This means co-ordinating city deals in Wales with those in England in particular to leverage the maximum benefit both from them and from electrification of the main line between London and Swansea. In addition improving transport linkages between South Wales and Bristol, and between North Wales and Manchester and Liverpool will we believe enable property led growth to be a driving force in the future prosperity of Wales.**

Growth in Wales must be supported by action across the following areas; infrastructure especially transport infrastructure, planning, housing and addressing the skills gap. With stamp duty land tax approved for devolution to Wales in 2018, and the announcement of the £500 million in borrowing power from the Wales Act 2015 we stand at a turning point for devolution in Wales. The right actions in the next few years have the potential to bring major gains for the long term prosperity of

Wales. The construction sector accounts for around 6.5% of the Welsh economy and other real estate activities account for a further 11% of GDP. Agriculture, fishing and forestry account for 0.7% of economic output. Historically, the infrastructure sector accounts for around 15% of Welsh construction output but it is likely to rise as a share of total construction over the course of the next five years.

Infrastructure and housing are priority issues that must be addressed by a strategic planning approach. Policymakers must prioritise accelerated delivery of transport infrastructure to facilitate growth, drive investment and enable private delivery. Co-ordination between the Wales Infrastructure Investment Plan, and the new commission chaired by Lord Adonis would facilitate informed and strategic decision making by aligning sector solutions and boosting the leverage of both to attract private sector investment to complement them. Support by both Government and institutional lenders is important. On average in 2015, 70% of Welsh respondents to the RICS Construction Market Survey reported financial constraints as an impediment to growth. To ensure that Mid and West Wales are given the buy into this new future that they deserve, we





# Ein gweledigaeth ni

**Mae'r RICS yng Nghymru'n galw ar bob plaid i gydnabod y rhan y gall gweithwyr proffesiynol eiddo ei chwarae i sbarduno twf yr economi, mynd i'r afael ag anghenion seilwaith yn y tymor hir a byr a helpu i gyrraedd nodau cymdeithasol. Mae'n bwysig bod holl ddatblygiadau allweddol datganoli'n cael eu dwyn at ei gilydd. Mae hynny'n golygu cydlynu bargeinion dinas yng Nghymru â'r rhai yn Lloegr, yn enwedig felly i sicrhau'r fantais fwyaf posibl o'r bargeinion hyn ac o drydaneiddio'r brif reilffordd rhwng Llundain ac Abertawe. Yn ychwanegol, credwn y bydd gwella'r cysylltiadau trafnidiaeth rhwng y De a Bryste, a rhwng y Gogledd a Manceinion a Lerpwl, yn fodd i dwf yn sgil eiddo fod yn rym a all sbarduno ffyniant yng Nghymru yn y dyfodol.**

Rhaid i dwf yng Nghymru gael ei ategu drwy weithredu ar draws y meysydd a ganlyn: seilwaith, yn arbennig seilwaith trafnidiaeth, cynllunio, tai a mynd i'r afael â'r bwlch sgiliau. Gan fod cymeradwyaeth wedi'i rhoi i ddatganoli treth dir y dreth stamp i Gymru yn 2018, a chan fod y £500 miliwn o rym benthyca yn Neddf Cymru 2015 wedi'i gyhoeddi, rydym yn sefyll ar drobwynt mewn datganoli yng Nghymru. Gallai'r camau cywir

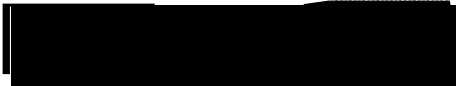
yn yr ychydig flynyddoedd nesaf sicrhau enillion o bwys ar gyfer ffyniant hirdymor Cymru. Mae'r sector adeiladu'n gyfrifol am ryw 6.5% o economi Cymru ac mae'r gweithgareddau eraill ynglŷn ag eiddo tirol yn gyfrifol am 11% arall o'r Cynnyrch Mewnwladol Crynswth (CMC). Mae amaethyddiaeth, pysgota a choedwigaeth yn cyfrannu 0.7% o allbwn yr economi. Yn hanesyddol, mae'r sector seilwaith yn gyfrifol am ryw 15% o allbwn adeiladu Cymru ond mae hyn yn debyg o godi fel cyfran o gyfanswm yr adeiladu yn ystod y pum mlynedd nesaf.

Mae seilwaith a thai'n flaenoriaethau y mae'n rhaid mynd i'r afael â nhw drwy gyfrwng ymagwedd strategol at gynllunio. Rhaid i'r gwneuthurwyr polisi roi blaenoriaeth i gyflymu'r gwaith i ddarparu seilwaith trafnidiaeth er mwyn hwyluso twf, sbarduno buddsoddiadau a chaniatáu gweithredu preifat. Byddai cydlynu rhwng Cynllun Buddsoddi yn Seilwaith Cymru, a'r comisiwn newydd o dan gadeiryddiaeth yr Arglwydd Adonis yn hwyluso penderfyniadau gwybodus a strategol drwy gysoni atebion y sectorau a hybu dylanwad y ddau er mwyn denu buddsoddiadau gan y sector preifat a'u cydategu. Mae cefnogaeth gan y Llywodraeth a benthyccwyr sefydliadol yn bwysig. Ar gyfartaledd yn 2015, dywedodd 70% o'r ymatebwyr yng Nghymru i Arolwg yr RICS o'r Farchnad Adeiladu fod cyfyngiadau ariannol



would like to see a focus on county deals with a specific focus on ensuring the best possible digital connections so rural Wales can benefit from the new digital economy.

RICS looks forward to working with the Welsh Government, and the next Welsh Assembly, to share the views and experiences of industry professionals in order to address some of the most significant challenges facing Wales.



**Ben Collins**  
Director Wales



**Helen Kane**  
Chair Wales



**David Morgan**  
Policy Manager Wales



yn rhwystro twf. I sicrhau bod y Canolbarth a'r Gorllewin yn cael cyfranogi yn y dyfodol newydd hwn yn unol â'u haeddiant, fe hoffem weld ffocws ar fargeinion Sir, gan ganolbwyntio'n arbennig ar sicrhau'r cysylltiadau digidol gorau posibl er mwyn i'r Gymru wledig fanteisio ar yr economi digidol newydd.

Mae'r RICS yn edrych ymlaen at gydweithio â Llywodraeth Cymru, a'r Cynulliad Cenedlaethol nesaf, i rannu safbwyntiau a phrofiadau gweithwyr proffesiynol y diwydiant er mwyn mynd i'r afael â rhai o'r heriau mwyaf arwyddocaol sy'n wynebu Cymru.



**Ben Collins**  
Cyfarwyddwr Cymru



**Helen Kane**  
Cadeirydd Cymru



**David Morgan**  
Rheolwr Polisi Cymru



# Taxation

The postponement of the business rates review in the current assembly was a missed opportunity. With many businesses continuing to labour under peak time valuations years out of date we urge all parties to state that next planned review must be carried out and implemented as scheduled. With the proposed devolution of income tax and the impending 2018 devolution of stamp duty land tax the area of property taxation is a seeing a major deepening of Welsh devolution.

## We have the following recommendations:

- A review of business rates every three years to follow the delayed revaluation planned for 2017 to better reflect economic changes and also to take it out of the political cycle.
- We urge all parties to commit to no return to the SLAB principle in the replacement of Stamp Duty Land Tax upon its devolution in 2018.
- We also recommend that HMRC continue to be the collecting agency for Stamp Duty Land Tax or its successor in Wales for at least the first few years after devolution of the tax to Wales.



# Trethi

Drwy ohirio'r adolygiad o ardrethi busnes yn y Cynulliad presennol, fe gollwyd cyfle. Gan fod llawer o fusnesau'n dal i rygnu o dan brisiau a bennwyd ar yr adeg ddrutaf flynyddoedd yn ôl, rydym yn annog pob plaid i ddweud bod rhaid i'r adolygiad arfaethedig nesaf gael ei gwblhau a'i roi ar waith yn unol â'r amserlen. Gan fod bwriad i ddatganoli treth incwm a chan fod treth tir y dreth stamp am gael ei datganoli yn 2018, mae datganoli yng Nghymru yn dyfnhau'n sylweddol ym maes trethu eiddo.

## Mae gennyn ni'r argymhellion a ganlyn:

- Adolygiad o ardrethi busnes bob tair blynedd yn sgil yr ailbrisiad gohiriedig sydd wedi'i gynllunio ar gyfer 2017 er mwyn adlewyrchu'n well y newidiadau yn yr economi a hefyd i'w godi allan o'r cylch gwleidyddol.
- Rydym yn annog pob plaid i ymrwymo i beidio â mynd yn ôl i egwyddor SLAB wrth ddisodli Treth Dir y Dreth Stamp pan gaiff ei datganoli yn 2018.
- Rydym yn argymhell hefyd y dylai CThEM, barhau'n asiantaeth gasglu ar gyfer Treth Dir y Dreth Stamp neu ei holnydd yng Nghymru am yr ychydig flynyddoedd cyntaf o leiaf ar ôl datganoli'r dreth i Gymru.



# A successful housing sector

Addressing housing supply is a vital part of addressing long term economic and social needs. However, we need to ensure that we build the right number of homes of the right type, in the right place, at the right time. Available investment such as Help to buy Cymru could be promoted as a tool to encourage more joint ventures between private developers and housing associations, boosting the house building sector and delivering mixed tenure developments. Welsh Government and Local Authorities could also develop integrated approach to social care encompassing not only assisted living, but also hospital care and planning to better adapt to the needs of an ageing population. That there is an ongoing shortage of homes across all classes in Wales including affordable homes is clear.

## We have the following recommendations:

- Schemes that produce significant large scale number of new homes should be recognised as being of national significance for Ministerial review, to produce a clear national picture of housing needs. To assist Welsh Government the Welsh Local Government Association should map all Local Development plans in Wales to produce clear national overview.
- Health Authorities should plan for intermediate care by entering into joint ventures with developers who will provide facilities if the Authority will provide the land. This will for the first time integrate planning for housing with social care Wales faces the challenges of an ageing population.
- Utility groups should set out and publish standards for response times to s104 requests. Too often at present slow responses are serving to greatly delay developments. If necessary consideration should be given to require the relevant industry regulators to include such standards as part of their overall responsibilities for regulating their particular sectors.
- The next Welsh Government in May 2016 should recommission a new Housing Taskforce to report to Ministers on the impact on housing provision after the changes in devolved powers and economic stance.
- While we welcome the implementation of the Rent Smart Wales scheme we feel it is important that the fee structure is proportionate and attuned to the “polluter pays” principle in terms of fines for breaches and fees for the vast majority of well behaved landlords and tenants.



# Sector tai llwyddiannus

Mae mynd i'r afael â'r cyflenwad tai yn rhan hanfodol o fynd i'r afael ag anghenion economaidd a chymdeithasol yn y tymor hir. Serch hynny, mae angen inni sicrhau ein bod yn codi'r nifer cywir o gartrefi o'r math cywir, yn y lle cywir, ar yr adeg gywir. Gallai'r buddsoddiadau sydd ar gael megis Cymorth i Brynu - Cymru gael eu hybu fel dull i hyrwyddo rhagor o fentrau ar y cyd rhwng datblygwyr preifat a chymdeithasau tai, gan roi hwb i'r sector adeiladu tai a sicrhau datblygiadau deiliadaeth gymysg. Gallai Llywodraeth Cymru a'r awdurdodau lleol fynd ati hefyd i ddatblygu ymagwedd integredig at ofal cymdeithasol gan gwmpasu nid yn unig lleoedd i fyw â chymorth, ond hefyd gofal ysbty a chynllunio i addasu'n well at anghenion poblogaeth sy'n heneiddio. Mae'n glir bod diffyg cartrefi ar draws pob dosbarth yng Nghymru, gan gynnwys cartrefi fforddiadwy.

## Mae gennyn ni'r argymhellion a ganlyn:

- Dylai cynlluniau sy'n cynhyrchu nifer o gartrefi newydd ar raddfa fawr arwyddocaol gael eu cydnabod fel cynlluniau sydd o bwysigrwydd cenedlaethol i'w hadolygu gan y Gweinidogion er mwyn creu darlun cenedlaethol clir o'r angen am gartrefi. I helpu Llywodraeth Cymru, dylai Cymdeithas Llywodraeth Leol Cymru fapio pob cynllun datblygu lleol yng Nghymru er mwyn creu trosolwg cenedlaethol clir.
- Dylai'r awdurdodau iechyd gynllunio ar gyfer gofal canolradd drwy ymuno â mentrau ar y cyd â datblygwyr a fydd yn darparu cyfleusterau os bydd yr awdurdod yn darparu tir. Bydd hyn am y tro cyntaf yn integreiddio cynllunio ar gyfer Tai â gofal cymdeithasol. Mae Cymru'n wynebu heriau poblogaeth sy'n heneiddio.
- Dylai grwpiau cyfleustodau nodi a chyhoeddi safonau ar gyfer amserau ymateb i geisiadau adran 104. Yn rhy aml ar hyn o bryd mae ymatebion araf yn gohirio datblygiadau'n ddifrifawr. Os oes angen hynny, dylid ystyried ei gwneud yn ofynnol i'r rheoleiddwyr diwydiannol perthnasol gynnwys safonau o'r fath yn rhan o'u cyfrifoldebau cyffredinol dros reoleiddio'u sectorau penodol.
- Dylai Llywodraeth nesaf Cymru ym mis Mai 2016 ailgomisiynu Tasglu Tai newydd i gyflwyno adroddiad i'r Gweinidogion ar yr effaith ar y ddarpariaeth tai ar ôl y newidiadau yn y pwerau datganoledig a'r safbwynt economaidd.
- Er ein bod yn croesawu cynllun Rhentu Doeth Cymru, teimlwn ei bod yn bwysig bod y strwythur ffioedd yn gymesur ac yn cyd-fynd â'r egwyddor mai'r "llygrwr sy'n talu" o ran dirwyon am dorri'r rheolau a ffioedd i'r mwyafrif llethol o landlordiaid a thenantiaid sy'n ymddwyn yn dda.



# An efficient and viable planning system

Developers need confidence to invest, policymakers and communities want confidence on which sites can be taken forward. All three must be supported by better capacity in the planning system and a holistic professional approach to local economic development. Local Authorities must be supported by the provision of a professional, and sufficiently resourced, planning and development skills base to ensure an efficient planning system. The Welsh Government must proceed with the City regions concept to strategically address the regeneration issues within our city and town centres. The passage of the Wales planning act must be regarded only as the start of a long term drive to give Wales the best possible system that balances sustainability with encouraging development. What is viable for developers will clearly fluctuate according to economic circumstances.

## We have the following recommendations:

- A national register of contaminated land sites both to encourage certainty and provide support for plans to decontaminate land. “Positive planning” namely flexibility in detail of environmental amelioration. Further we would like to see a Welsh fund for land remediation - utilising planning gain, fees and structural funds.
- An assumption of land development. This means there must be an assumption by planning officials that land is to be developed for housing as they begin their consideration of applications. It should be a shift to ask why land should not be developed for Housing rather than why it should.
- There should be a similar assumption to encourage change of excess retail to residential particularly in struggling town centers. However we are not suggesting an assumption of development in National Parks etc.
- A strategic planning zone approach to major projects or Infrastructure such as the A55 should be developed. This is essential to build transport connectivity into the planning system. To encourage a more strategic approach we urge regular secondment between planning departments to encourage sharing of best practices.





# System gynllunio effeithlon a hyfyw

Mae ar ddatblygwyr angen hyder er mwyn buddsoddi, mae ar wneuthurwyr polisi a chymunedau hyder o ran pa safleoedd a all gael eu cynnig. Rhaid i'r tri gael eu cefnogi drwy well capasiti yn y system gynllunio ac ymagwedd holistig ymysg gweithwyr proffesiynol at ddatblygu'r economi lleol. Rhaid i'r awdurdodau lleol gael eu cefnogi drwy ddarparu cronfa o sgiliau proffesiynol mewn datblygu a chynllunio, a digon o adnoddau, er mwyn sicrhau system gynllunio effeithlon. Rhaid i Lywodraeth Cymru fwrw ymlaen â chysyniad dinas-ranbarthau er mwyn mynd i'r afael yn strategol â materion adfywio yng nghanol ein dinasoedd a'n trefi. Rhaid edrych ar basio Deddf Cynllunio Cymru fel man cyhywyn yn unig mewn ymdrech hirdymor i sicrhau bod gan Gymru'r system orau posibl sy'n taro cydbwysedd rhwng cynaliadwyedd a hybu datblygu. Mae'n eglur y bydd yr hyn sy'n ymarferol i ddatblygwyr yn amrywio yn ôl yr amgylchiadau economaidd.

## Mae gennyn ni'r argymhellion a ganlyn:

- Cofrestr genedlaethol o safleoedd tir halogedig, er mwyn hybu sicrwydd ac er mwyn rhoi cymorth i gynlluniau i ddadhalogi tir. "Cynllunio cadarnhaol" sef hyblygrwydd o ran manylion gwelliannau amgylcheddol. Ar ben hynny fe hoffem weld cronfa Gymreig ar gyfer adfer tir – gan ddefnyddio enillion cynllunio, ffioedd a chronfeydd strwythurol.

- Rhagdybiaeth o blaid datblygu tir. Mae hynny'n golygu bod rhaid i swyddogion cynllunio ragdybio bod tir am gael ei ddatblygu ar gyfer tai wrth iddyn nhw ddechrau ystyried ceisiadau. Dylid symud i ofyn pam na ddylai tir gael ei ddatblygu ar gyfer tai yn hytrach na pham y dylai.
- Dylid cael rhagdybiaeth debyg i annog newid eiddo manwerthol gormodol yn eiddo preswyl, yn enwedig yng nghanol trefi sy'n ei chael yn anodd. Er hynny, nid ydym yn awgrymu y dylid rhagdybio y caiff Parciau Cenedlaethol etc eu datblygu.
- Dylid datblygu dull cynllunio ar sail parthau strategol ar gyfer prosiectau neu seilwaith o bwys, megis yr A55. Mae hyn yn hanfodol er mwyn cynnwys cysylltiadau trafnidiaeth yn y system gynllunio. Er mwyn hybu ymagwedd fwy strategol, rydym yn galw am secondiadau rheolaidd rhwng adrannau cynllunio er mwyn rhoi hwb i rannu'r arferion gorau.



# Delivering infrastructure for the long term

Infrastructure is the key to unlocking growth potential in economic centres. To be attract companies to invest and base themselves in Wales, Wales needs certainty in infrastructure delivery. We urge Welsh Government to therefore make full use of the £500 million in borrowing power from the Wales Act 2015. This should be advanced as a vehicle to leverage funding, with clarity provided on government project priorities. To utilise the full potential of the borrowing capacity a clear plan for partnership between the public and private sectors must be developed, working together with all appropriate stakeholders to ensure that suitable schemes are developed and implemented within specified timeframes.

Further financing might be possible from utilising returns from the rent to buy scheme in 2019 to invest in transport Infrastructure during the next five years. Longer term investment in both micro and large scale infrastructure particularly transport are vital for the long term health and sustainability of the Welsh economy.

## We would like to highlight the following key projects:

- The importance of electrification of the main line between London and Swansea can scarcely be overstated. We would like to see electrification carried out from the Swansea side at the same as time as from London.

- Electrification of the North Wales train network so maximum advantage for Wales can be leveraged by the proximity to HS2 at Crewe. To further this there should be direct HS2 connections to Crewe for North Wales.
- Metro plan for the Valleys so that real momentum is put behind the Cardiff Capital region concept and integration of both the Valleys and Cardiff is strengthened to the advantage of both. Tax Increment funding could be an option to progress this project.
- Swansea Bay Tidal Lagoon. This has the capacity to generate an entirely new industry in Wales as North sea oil did for oil services in Scotland. Everything possible should be done to progress this technology in the fight against climate change.
- The need for the M4 relief road remains a key priority for Wales. We urge all parties to commit unequivocally to supporting its commencement during the next Assembly term.
- Improvement of the A55 Expressway (widening and making into a Motorway in appropriate places, especially in North East Wales). Addressing road capacity in North Wales is key to unlocking its economic potential.



# Darparu seilwaith at y tymor hir

Seilwaith yw'r allwedd i ddatgloi'r potensial ar gyfer twf mewn canolfannau economaidd. Er mwyn denu cwmnïau i fuddsoddi ac ymsefydlu yng Nghymru, mae ar Gymru angen sicrwydd o ran darparu seilwaith. Gan hynny, rydym yn annog Llywodraeth Cymru i ddefnyddio'r pŵer benthyca o £500 miliwn yn Neddff Cymru 2015 i'r eithaf. Dylai hyn gael ei hybu fel cyfrwng i ysgogi cyllid, gan roi eglurder ynglŷn â'r prosiectau sy'n cael blaenoriaeth gan y Llywodraeth. Er mwyn defnyddio potensial y gallu i fenthycu i'r eithaf, rhaid datblygu cynllun clir ar gyfer partneriaeth rhwng y sectorau cyhoeddus a phreifat, gan gydweithio â phob rhanddeiliad priodol i sicrhau bod cynlluniau addas yn cael eu datblygu a'u rhoi ar waith mewn cyfnodau amser penodedig.

Gall fod modd cael hyd i ragor o gyllid drwy ddefnyddio'r enillion o'r cynllun rhentu i brynu yn 2019 i fuddsoddi mewn seilwaith trafnidiaeth yn ystod y pum mlynedd nesaf. Mae buddsoddi at y tymor hirach mewn seilwaith ar raddfa fach a mawr, yn enwedig trafnidiaeth, yn hanfodol ar gyfer iechyd a chynaliadwydd economi Cymru yn y tymor hir.

## Hoffem dynnu sylw at y prosiectau allweddol a ganlyn:

- Trydaneiddio rhwydwaith rheilffyrdd y Gogledd er mwyn sicrhau'r fantais fwyaf posibl i Gymru o fod yn agos i HS2 yn Crewe. I hybu hyn, dylid cael cysylltiadau HS2 uniongyrchol i Crewe o'r Gogledd.
- Cynllun metro i'r Cymoedd i sicrhau gwir fomentwm y tu cefn i gysyniad prifddinas-ranbarth Caerdydd a bod integreiddio'r Cymoedd a Chaerdydd yn cael ei gryfhau er lles y ddau. Gallai cyllid drwy Gynyddrannau Treth fod yn un opsiwn i symud y prosiect hwn yn ei flaen.
- Morlyn Llanw Bae Abertawe. Gallai hwn greu diwydiant cwbl newydd yng Nghymru, fel y gwnaeth olew Môr y Gogledd ar gyfer gwasanaethau olew yn yr Alban. Dylai popeth posibl gael ei wneud i symud y dechnoleg hon yn ei blaen wrth inni ymladd yn erbyn newid yn yr hinsawdd.
- Mae'r angen am ffordd liniaru i'r M4 yn dal yn flaenoriaeth allweddol i Gymru. Anogwn bob plaid i ymrwymo'n ddigamsyniol i gefnogi dechrau'r ffordd yn ystod tymor y Cynulliad nesaf.
- Gwella Gwibffordd yr A55 (ei lledu a'i thro'i'n draffordd mewn mannau priodol, yn arbennig yn y Gogledd-ddwyrain). Mae mynd i'r afael â chapasiti ffyrdd y Gogledd yn allweddol er mwyn datgloi ei botensial economaidd.
- Prin fod modd gor-ddweud pwysigrwydd trydaneiddio'r brif reilffordd rhwng Llundain ac Abertawe. Hoffem weld y trydaneiddio'n digwydd o gyfeiriad Abertawe yr un pryd ag o Lundain.



# Constructing the future for Wales

There are currently 99,000 people employed in the Welsh construction industry and the CITB estimate that around 27,000 jobs will be created in the sector over the next five years. There is a further 20,000 people employed in other real estate fields. The construction industry needs to be able to plan for the longer term through economic cycles, to recover from adverse economic periods faster and to build for the future. The industry focus should be a stronger, more efficient, more confident and more competitive sector for the benefit of all. The skills gap in the construction industry requires both long term planning and immediate action to address capacity constraints. Confidence in project pipeline and simplified procurement structures would boost the growth of a dynamic marketplace.

## We have the following recommendations:

- That policymakers support non traditional forms of construction by supporting better education of lenders on valuation methods. This is to address speed of construction and cover skills gaps in the Welsh economy.
- That support for apprenticeship schemes is linked to major infrastructure projects like electrification of the main line so that Wales not only benefits from the short term impact on the economy of the Construction Multiplier, and the benefits of the projects themselves, but also in the longer term of addressing the skills gap in the Industry by supporting new skilled apprentices at the start of their careers.
- We call for the next Welsh government to co-ordinate its plans with the UK construction 2025 strategy, recognising the significant cross border links and the opportunities for firms to be more efficient, train more staff, and cut cost and carbon.
- Providing better training in the processes/ procedures and enabling formation of consortia or co-ops to give smaller firms a better chance. RICS stands ready to support this with existing research.



# Adeiladu dyfodol Cymru

Ar hyn o bryd mae 99,000 o bobl yn cael eu cyflogi yn y diwydiant adeiladu yng Nghymru ac mae'r CITB yn amcangyfrif y caiff rhyw 27,000 o swyddi eu creu yn y sector dros y pum mlynedd nesaf. Mae 20,000 arall o bobl yn cael eu cyflogi mewn meysydd eraill mewn eiddo tirol. Mae angen i'r diwydiant adeiladu allu cynllunio ar gyfer y tymor hirach drwy gylchoedd economaidd, ymadfer yn gynt ar ôl cyfnodau economaidd gwael ac adeiladu at y dyfodol. Dylai'r diwydiant hoelio sylw ar sector cryfach, mwy effeithlon, mwy hyderus a mwy cystadleuol er lles pawb. Mae'r bwlch sgiliau yn y diwydiant adeiladu'n gofyn cynlluniau hirdymor a chamau ar unwaith i fynd i'r afael â chyfyngiadau ar gapasiti. Byddai hyder mewn prosiectau arfaethedig a dulliau caffael symlach yn hybu cynnydd marchnad ddeinamig.

## Mae gennyn ni'r argymhellion a ganlyn:

- Y dylai cefnogaeth i gynlluniau prentisiaethau gael ei chyplysu â phrosiectau seilwaith mawr fel trydaneiddio'r brif reilffordd er mwyn i Gymru nid yn unig fanteisio o'r effaith fyrdymor ar yr economi yn sgil y Lluosydd Adeiladu, a manteision y prosiectau eu hunain, ond hefyd yn y tymor hirach o ran mynd i'r afael â'r bwlch sgiliau yn y diwydiant drwy gefnogi prentisiaid medrus newydd ar ddechrau eu gyrfaeodd.
- Rydym yn galw ar i Lywodraeth nesaf Cymru gydlyn ei chynlluniau â strategaeth adeiladu'r Deyrnas Unedig ar gyfer 2025, gan gydnabod y cysylltiadau arwyddocaol ar draws y ffin a'r cyfleoedd i gwmnïau fod yn fwy effeithlon, hyfforddi mwy o staff, a thorri costau a charbon.
- Cynnig gwell hyfforddiant mewn prosesau/ gweithdrefnau a hwyluso ffurfio consortia neu fentrau cydweithredol i roi gwell cyfle i gwmnïau bach. Mae'r RICS yn barod i ategu hyn â gwaith ymchwil sydd eisoes ar gael.

- Y dylai gwneuthurwyr polisi gefnogi mathau anraddodiadol o adeiladu drwy gefnogi gwell addysg i fenthycwyr ynglŷn â dulliau priso, a hynny er mwyn cyfitymu gwaith adeiladu ac ymdrin â bylchau mewn sgiliau yn economi Cymru.



# Revitalising our town centres

Many town centres have declined in recent decades due to economic and technological changes. We welcomed the investment in town centres by Welsh Government which play a key role in the life of local communities and offer the path to a strategic approach to regeneration. However it is vital that such investment is accompanied by complementary policy measures, such as utilising the opportunities afforded by the ongoing work on the planning system. In particular we believe embedding greater flexibility on change of use where appropriate in the approach taken by planning officials, particularly in the case of conversion of excess retail to residential also has significant potential to aid economic development and community regeneration.

## We have the following recommendations:

- Special task groups encompassing government all levels as well as the private sector to create and oversee recovery plans for designated town centres, to address the gap between Local Authorities and Welsh Government. As part of this the city regions concept should include an approach to centres outside the big cities as a core part of its strategy. As part of this there should be promotion of business improvement districts for Welsh towns.
- The last point could be done working with the association of town centre managers.
- Greater use by Local Authorities of their ability to borrow from public works loans board to fund in partnership with the private sector town centre regeneration schemes.
- Councils should develop websites that are formulated to advertise opportunities in town centres across all sectors with specific commitments of support to encourage regeneration.



# Adfywio canol ein trefi

Mae llawer canol tref wedi dirywio yn y degawdau diwethaf yn sgil newid yn yr economi ac mewn technoleg. Rhoesom groeso i fuddsoddiad Llywodraeth Cymru yng nghanol trefi sy'n chwarae rhan allweddol ym mywyd y cymunedau lleol ac sy'n cynnig llwybr tuag at ymagwedd strategol at adfywio. Serch hynny, mae'n hanfodol bod buddsoddi o'r fath yn cyd-fynd â mesurau polisi cydategol, megis defnyddio'r cyfleoedd sy'n dod yn sgil y gwaith presennol ar y system gynllunio. Yn benodol, rydym yn credu y gallai mwy o hyblygrwydd yn agwedd swyddogion cynllunio ynglŷn â newid defnydd pan fo'n briodol, yn enwedig wrth droi eiddo manwerthol gormodol yn eiddo preswyl, wneud cryn dipyn i helpu i ddatblygu'r economi ac i adfywio'r gymuned.

## Mae gennyn ni'r argymhellion a ganlyn:

- Gallai'r pwynt olaf gael ei gyflawni drwy weithio gyda chymdeithas rheolwyr canol trefi.
- Yr awdurdodau lleol i ddefnyddio mwy ar eu gallu i fenthycu gan y Bwrdd Benthyciadau Gwaith Cyhoeddus er mwyn ariannu cynlluniau i adfywio canol trefi mewn partneriaeth â'r sector preifat.
- Dylai cynghorau ddatblygu gwefannau sydd wedi'u llunio i hysbysebu cyfleoedd yng nghanol trefi ar draws pob sector gan ymrwymo cymorth penodol i hybu adfywio.
- Tasgluoedd arbennig yn cynnwys pob lefel o lywodraeth yn ogystal â'r sector preifat i greu a goruchwyllo cynlluniau adfer i ganol trefi dynodedig, er mwyn mynd i'r afael â'r bwlch rhwng yr awdurdodau lleol a Llywodraeth Cymru. Fel rhan o hyn, dylai cysyniad y ddinas-ranbarth gynnwys ymagwedd at ganolfannau y tu allan i'r dinasoedd mawr yn rhan graidd o'r strategaeth. Dylai hyn gynnwys hybu ardaloedd gwella busnes i drefi Cymru.



# Rural economy

Wales is uniquely placed to build on a high quality reputation for agricultural production, and forestry and these are areas that need to be central in the approach to rural policy. In the wider rural economic context transport is absolutely key, along with the roll out of broadband to support the productivity of non-farming SMEs and micro-businesses. A stronger focus on animal health issues, along with greater clarity on the basic payment scheme is also needed.

## We have the following recommendations:

- Welsh Government, working with Natural Resources Wales, should explore the appropriateness of a new Agricultural Land Classification system in Wales, given opportunity for this assessment through the new agency's over-arching role.
- An emphasis on speeding up roll out of faster broadband to rural areas.
- Future forestry policy should capture how Welsh woodland can play a more significant role in climate change mitigation, with a focus on hardwood, in the form of natural hydraulic braking.
- Rural payment programmes to be re-examined to incentivise technology and encourage long term planning.
- "County" deals for rural areas in particular to focus on and improve transport connectivity in rural Wales by better attuning it to the needs of the rural economy.
- With parking such a key issue for market towns in attracting visitors and custom a parking strategy as part of an overall parking strategy for Wales is needed.
- In energy production there needs to be a focus on better grid connections. Incentives need to be developed to connect off mains sites.





# Yr economi gwledig

Mae Cymru mewn sefyllfa unigryw i adeiladu ar enw da o ran cynhyrchu mewn amaethyddiaeth a choedwigaeth, a dyma feysydd y mae angen iddyn nhw fod yn ganolog yn yr ymagwedd at bolisi gwledig. Yn y cyd-destun economaidd gwledig ehangach, mae trafnidiaeth yn gwbl allweddol, ynghyd â dod â band eang i helpu cynhyrchedd busnesau bach a chanolig a microfusnesau y tu allan i ffermio. Mae angen canolbwyntio'n gryfach hefyd ar faterion iechyd anifeiliaid, ynghyd â mwy o eglurder ar y cynllun taliadau sylfaenol.

## Mae gennyn ni'r argymhellion a ganlyn:

- Dylai Llywodraeth Cymru, gan gydweithio â Chyfoeth Naturiol Cymru, ystyried priodoldeb system newydd o ddosbarthu tir amaethyddol yng Nghymru, gan fod yna gyfle ar gyfer asesiad o'r fath yn sgil rôl gyffredinol yr asiantaeth newydd.
- Pwyslais ar gyflymu'r broses o ddod â band eang cyflymach i gefn gwlad.
- Dylai'r polisi coedwigaeth yn y dyfodol ddisgrifio sut y gall coetir Cymru chwarae rhan fwy arwyddocaol i leddfu newid yn yr hinsawdd, gan hoelio sylw ar goed caled, a allai weithredu fel rhwystr naturiol.
- Rhaglenni taliadau gwledig i gael eu hailystyried er mwyn rhoi cymhellion ar gyfer technoleg a hybu cynlluniau hirdymor.
- Bargeinion "Sir" i ardaloedd gwledig, yn enwedig er mwyn canolbwyntio ar gysylltiadau trafnidiaeth yn y Gymru wledig a'u gwella drwy eu cydlynu'n well ag anghenion yr economi gwledig.
- Gan fod parcio'n gymaint o bwnc llosg mewn trefi marchnad o ran denu ymwelwyr a chwsmeriaid, mae angen strategaeth barcio fel rhan o strategaeth barcio gyffredinol i Gymru.
- O ran cynhyrchu ynni, mae angen hoelio sylw ar well cysylltiadau â'r grid. Mae angen datblygu cymhellion i gysylltu safleoedd nad oes ganddyn nhw gysylltiad â'r prif gyflenwad.





## Confidence through professional standards

RICS promotes and enforces the highest professional qualifications and standards in the development and management of land, real estate, construction and infrastructure. Our name promises the consistent delivery of standards – bringing confidence to the markets we serve.

We accredit 118,000 professionals and any individual or firm registered with RICS is subject to our quality assurance. Their expertise covers property, asset valuation and real estate management; the costing and leadership of construction projects; the development of infrastructure; and the management of natural resources, such as mining, farms and woodland. From environmental assessments and building controls to negotiating land rights in an emerging economy; if our members are involved the same professional standards and ethics apply.

We believe that standards underpin effective markets. With up to seventy per cent of the world's wealth bound up in land and real estate, our sector is vital to economic development, helping to support stable, sustainable investment and growth around the globe.

With offices covering the major political and financial centres of the world, our market presence means we are ideally placed to influence policy and embed professional standards. We work at a cross-governmental level, delivering international standards that will support a safe and vibrant marketplace in land, real estate, construction and infrastructure, for the benefit of all.

We are proud of our reputation and we guard it fiercely, so clients who work with an RICS professional can have confidence in the quality and ethics of the services they receive.

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