

# National Productivity Investment Fund for the Local Road Network Application Form



Department  
for Transport

The level of information provided should be proportionate to the size and complexity of the project proposed. As a guide, for a small project we would suggest around 10 -15 pages including annexes would be appropriate.

One application form should be completed per project and will constitute a bid.

## **Applicant Information**

**Local authority name(s)\*:** Somerset County Council

*\*If the bid is for a joint project, please enter the names of all participating local authorities and specify the lead authority.*

**Bid Manager Name and position:** Sunita Mills, Service Commissioning Manager Transport Policy

*Name and position of officer with day to day responsibility for delivering the proposed project.*

**Contact telephone number:** 07977412526 **Email address:** smills@somerset.gov.uk

**Postal address:** County Hall  
Taunton  
Somerset  
TA1 4DY

## **Combined Authorities**

*If the bid is from an authority within a Combined Authority, please specify the contact, ensure that the Combined Authority has provided a note ranking multiple applications, and append a copy to this bid.*

**Name and position of Combined Authority Bid Co-ordinator:** N/A

**Contact telephone number:** **Email address:**

**Postal address:**

When authorities submit a bid for funding to the Department, as part of the Government's commitment to greater openness in the public sector under the Freedom of Information Act 2000 and the Environmental Information Regulations 2004, they must also publish a version excluding any commercially sensitive information on their own website within two working days of submitting the final bid to the Department. The Department reserves the right to deem the business case as non-compliant if this is not adhered to.

**Please specify the weblink where this bid will be published:**

<http://www.somerset.gov.uk/policies-and-plans/schemes-and-initiatives/>

## **SECTION A - Project description and funding profile**

**A1. Project name:** Nexus25 Cycle and footbridge.

**A2 :** Please enter a brief description of the proposed project (no more than 50 words)  
**To provide a walking and cycling connection from Taunton's existing and evolving Garden Town Network into a new 25ha employment site, Nexus25. The project will create a new route by providing a new bridge directly across the M5 into the employment site, reducing the severance caused by the M5 motorway**

**A3 :** Please provide a short description of area covered by the bid (no more than 50 words)  
**Nexus25 is located at the southeast of M5J25, adjacent to Taunton Gateway P&R, around 2 miles from Taunton town centre and railway station. All emerging residential developments in Taunton area are within 5 miles (8km). Nexus25 will provide a major employment opportunity for Taunton, accommodating Local Plan growth requirements**

OS Grid Reference: **ST 25599 24610**

Postcode: **TA3 5LU**

Please append a map showing the location (and route) of the project, existing transport infrastructure and other points of particular relevance to the bid, e.g. housing and other development sites, employment areas, air quality management areas, constraints etc.

**A4.** How much funding are you bidding for? (please tick the relevant box):

**Small project bids** (requiring DfT funding of between £2m and £5m)

**Large project bids** (requiring DfT funding of between £5m and £10m)

**A5.** Has any Equality Analysis been undertaken in line with the Equality Duty?

Yes  No

**A6.** If you are planning to work with partnership bodies on this project (such as Development Corporations, National Parks Authorities, private sector bodies and transport operators) please include a short description below of how they will be involved.

**The development of Nexus25 requires working in partnership with Heart of the South West (HotSW) LEP, Taunton Deane Borough Council (TDBC), Somerset County Council (SCC), Highways England (HE), Environment Agency (EA) and Summerfield Developments, all of these organisations are signed up to a Memorandum of Understanding for this purpose.**

**Delivering the sustainable transport link require approvals from HE (M5) and EA (watercourses), TDBC (planning) and SCC (local highways). Improvement at M5 J25 is promoted by HE and HotSW LEP. Summerfield Developments own the Nexus25 site and Blackbrook Business Park.**

**A7. Combined Authority (CA) Involvement**

Have you appended a letter from the Combined Authority supporting this bid?  Yes  No

**A8. Local Enterprise Partnership (LEP) Involvement and support for housing delivery**

Have you appended a letter from the LEP supporting this bid?  Yes  No

For proposed projects which encourage the delivery of housing, have you appended supporting evidence from the housebuilder/developer?

Yes  No

## **SECTION B – The Business Case**

### **B1: Project Summary**

Please select what the project is trying to achieve (select all categories that apply)

#### **Essential**

- Ease urban congestion
- Unlock economic growth and job creation opportunities
- Enable the delivery of housing development

#### **Desirable**

- Improve Air Quality and /or Reduce CO2 emissions
- Incentivising skills and apprentices

Other(s), Please specify –

- **Create a visually striking landmark feature to signify the gateway to Taunton, Somerset.**
- **Improve health and wellbeing of the work force in the town through improving walking and cycling connections and so that commuting by these modes becomes a desirable option.**

**B2** : Please provide evidence on the following questions (max 100 words for each question):

a) What is the problem that is being addressed?

**The M5 presents a barrier to movement by non-motorised modes. Taunton Garden Town is to the west of the motorway and Nexus25 is planned to start construction in 2019 to the east of the motorway. Recent engagement exercises with local communities and interest groups have indicated that any route via junction 25 would present a very unattractive option and they are unlikely to use it. Planned growth across the area means that the Nexus25 will likely need a high proportion of trips to be made by non-motorised modes; the existing infrastructure, even with some improvement, does not support this.**

b) What options have been considered and why have alternatives been rejected?

**Upgrading the facilities at junction 25. Some cycle facilities are included within planned capacity enhancements but the limitations of the junction mean that it is not possible to achieve high quality provision. This would also represent a significant detour for many journeys.**

**Subway under M5 – this has been discounted as it would be approximately 50m long and would not be a desirable route, the perception of an unsafe environment would discourage use.**

**No additional provision – this was discounted as the existing and planned facilities will not be adequate to encourage the level of desired use.**

c) What are the expected benefits/outcomes? For example, could include easing urban congestion, job creation, enabling a number of new dwellings, facilitating increased GVA.

**The bridge is a key element of Taunton's Garden Town plans and supports up to 3000 jobs at Nexus25 and housing growth across Taunton by reducing congestion at M5 Junction 25; the site's primary access from the strategic and local road networks. Nexus25 is designed to attract high profile tenants, raising desirability to relocate to Taunton. This will lead to more job creation and increase the demand in housing.**

**For residents of Ruishton, Thornfalcon and Henlade villages the facilities will provide new opportunities to access sites to the west of the motorway and Taunton town centre around 2 miles away by modes other than private car**

- d) Are there any related activities that the success of this project relies upon? For example, land acquisition, other transport interventions requiring separate funding or consents?

**Planning permission will be required however the aspiration for the bridge is set out in the emerging Nexus25 Local Development Order. The LDO is planned to be adopted in October 2017.**

**The project is supported by Highways England but will be subject to their processes as they intend to take ownership after construction.**

**The land on either side of the motorway is in the control of either Summerfield Developments or Taunton Deane Borough Council, both organisations have confirmed their support for the scheme and willingness for the land to be used for the purpose of providing this bridge.**

- e) What will happen if funding for this project is not secured - would an alternative (lower cost) solution be implemented (if yes, please describe this alternative and how it differs from the proposed project)?

**The partners in the project would continue to seek alternative funding sources; there is limited scope for a lower cost option.**

**Highways England are working through a value management process prior to seeking a substantial contribution to the project from their designated walking and cycling funds.**

- f) What is the impact of the project – and any associated mitigation works – on any statutory environmental constraints? For example, Local Air Quality Management Zones.

**The landings for the bridge ramps fall within flood zones. The Environment Agency is a partner on the Nexus25 project and appropriate mitigation measures are being developed for the development site. This project will be required to determine whether any additional mitigation is required.**

**An AQMA exists in Henlade village (to the north) for NOx caused by congestion on the approach to Junction 25. Measures which encourage and enable non-motorised travel and therefore reduce this congestion are likely to have a beneficial impact on the local air quality.**

**B3 : Please complete the following table. Figures should be entered in £000s**  
(i.e. £10,000 = 10).

**Table A: Funding profile (Nominal terms)**

£000s	2018-19	2019-20	Total
DfT funding sought	1,418	3,396	4,813
Local Authority contribution	218	522	741
Third Party contribution	545	1,306	1,851
<b>TOTAL</b>	<b>2,181</b>	<b>5,224</b>	<b>7,405</b>

Notes:

- 1) Department for Transport funding must not go beyond 2019-20 financial year.
- 2) Bidders are asked to consider making a local contribution to the total cost. It is indicated that this might be around 30%, although this is not mandatory.

**B4 : Local Contribution & Third Party Funding** : Please provide information on the following questions (max 100 words on items a and b):

- a) Provide an outline of all non-DfT funding contributions to the project costs, the level of commitment, and when the contributions will become available.

<b>Taunton Deane Borough Council</b>	<b>£375k</b>	<b>plus access to the land plans to allocate funds within capital programme</b>
<b>Somerset County Council</b>	<b>£366k</b>	
<b>Developer Funding</b>	<b>£200k</b>	<b>contribution to be determined based on site viability Plus access to the land and suitable connections through the site</b>
<b>Highways England</b>	<b>£50k plus £1651k</b>	<b>£50,000 allocated and additional funding being sought.</b>

- b) List any other funding applications you have made for this project or variants thereof and the outcome of these applications, including any reasons for rejection.  
**No other applications have been made.**

**B5 Economic Case**

This section should set out the range of impacts – both beneficial and adverse – of the project. The scope of information requested (and in the supporting annexes) will vary, including according to whether the application is for a small or large project.

**A) Requirements for small project bids (i.e. DfT contribution of less than £5m)**

- a) Please provide a description of your assessment of the impact of the project to include:
- Significant positive and negative impacts (quantified where possible) including in relation to air quality and CO<sub>2</sub> emissions.
  - A description of the key risks and uncertainties;

- If any modelling has been used to forecast the impact of the project please set out the methods used to determine that it is fit for purpose

**The economic case is based on the guidance set out in TAG Units A5.1 Active Mode Appraisal and A5.4 Marginal External Costs. It is acknowledged that a foot/cycle link, across the M5 connecting the employment site and the built up fringe of Taunton, will raise the profile of sustainable travel. However, the attractiveness to switch mode will only influence the residents within Taunton town and perhaps as far as Monkton Heathfield. A landmark structure will raise the profile of Taunton as a gateway to Somerset.**

**By implementing this scheme, workers will have a choice about which mode to use to travel to work and will no longer rely upon commuting by car across the motorway junction, which is already operating under pressure at peak times. Reducing car based demand at M5J25 will be a positive impact to the operation of the motorway junction, improve resilience to M5, reduce accidents, and reduce greenhouse gas. Journey time will become more reliable and support Highways England's A358 Taunton to Southfields Improvement Scheme. Movements on the sustainable route will benefit from better air quality, noise, quality to journey and health in general.**

**Delivering this project requires partnership between government bodies, local authorities and developer. All parties need to work towards the sustainable objectives. A RIBA design competition will be undertaken requiring designers to create a cost-effective but distinctive and attractive landmark structure. Prestige is difficult to measure and monetised. The landmark bridge will act as a catalyst to simulate more vibrant economic growth in Taunton, attract international and national investments.**

**The economic appraisal is developed from a first principles approach; essentially identifying the commuting time from driving verses cycling/walking. The assessment demonstrated that, within Taunton, driving to Nexus25 is often further and takes longer than cycling on a more direct/faster route. However, the attractiveness of cycling and walking diminish with longer distance; which limits the potential of switching mode in the wider area.**

**The economic assessment only considers cycling between Taunton town area and Nexus25. It is anticipated that cycling to Nexus25 will achieve government target and sustain this share throughout the 30 years evaluation period.**

**The Economic Appraisal is described in an annex to this report. The appraisal is based on WebTag Unit A5.4 – Calculation of Marginal External Costs and Unit A5.1 – Active Mode Appraisal. Since driving is often slower and further than using sustainable modes to travel from Taunton, there is an element of “commuting saving” included in the economic case. The evaluation, for a sustainable scheme, is limited to 30 years.**

**The Cost Estimates are based on the report produced by PBA (38488-1501-REP-001-P01) discussing the three pedestrian bridge options with the addition of elements for materials, design and supervision, third party costs, QRA and contingency as these were not included within the PBA assessment.**

**The Economic Appraisal calculated -  
Present Value Benefit = £23.9m.  
Present Value Cost = £11.053m.  
Net Present Value= £12.846m  
BCR = 2.16.**

b) Small project bidders should provide the following in annexes as supporting material:

Has a **Project Impacts Pro Forma** been appended?  Yes  No  N/A

Has a description of data sources / forecasts been appended?  Yes  No  N/A

Has an **Appraisal Summary Table** been appended?  Yes  No  N/A

Other material supporting your assessment of the project described in this section should be appended to the bid.

*\* This list is not necessarily exhaustive and it is the responsibility of bidders to provide sufficient information to demonstrate the analysis supporting the economic case is fit-for-purpose.*

**B) Additional requirements for large project bids (i.e. DfT contribution of more than £5m)**

c) Please provide a short description (max 500 words) of your assessment of the value for money of the project including your estimate of the Benefit Cost Ratio (BCR) to include:

- Significant monetised and non-monetised costs and benefits
- Description of the key risks and uncertainties and the impact these have on the BCR;
- Key assumptions including: appraisal period, forecast years, optimism bias applied; and
- Description of the modelling approach used to forecast the impact of the project and the checks that have been undertaken to determine that it is fit-for-purpose.

N/A

d) Additionally detailed evidence supporting your assessment, including the completed [Appraisal Summary Table](#), should be attached as annexes to this bid. **A checklist of material to be submitted in support of large project bids has been provided.**

Has an Appraisal Summary Table been appended?  Yes  No  N/A

- Please append any additional supporting information (as set out in the Checklist).

*\*It is the responsibility of bidders to provide sufficient information for DfT to undertake a full review of the analysis. N/A*



**B6 Economic Case:** For all bids the following questions relating to **desirable criteria** should be answered.

Please describe the air quality situation in the area where the project will be implemented by answering the three questions below.

i) Has Defra's national air quality assessment, as reported to the EU Commission, identified and/or projected an exceedance in the area where the project will be implemented?

Yes  No

ii) Is there one or more Air Quality Management Areas (AQMAs) in the area where the project will be implemented? AQMAs must have been declared on or before the 31 March 2017

Yes  No

iii) What is the project's impact on local air quality?

Positive  Neutral  Negative

- Please supply further details:

**The scheme should reduce future levels of car traffic at M5 Junction 25 by enabling mode switch to walking and cycling. This will have a positive impact on the AQMA in Henlade village.**

iv) Does the project promoter incentivise skills development through its supply chain?

Yes  No  N/A

- Please supply further details:

**Somerset County Council's Social Value Policy Statement for procurement encourages added value for local communities. The recently procured highways maintenance and engineering contract includes incentives for ensuring the use of the local supply chain and requiring that supply chain to include apprentice opportunities to be made available to local people.**

### **B7. Management Case - Delivery (Essential)**

Deliverability is one of the essential criteria for this Fund and as such any bid should set out, with a limit of 100 words for each of a) to b), any necessary statutory procedures that are needed before it can be constructed.

a) A project plan (typically summarised in Gantt chart form) with milestones should be included, covering the period from submission of the bid to project completion.

Has a project plan been appended to your bid?  Yes  No

b) If delivery of the project is dependent on land acquisition, please include a letter from the respective land owner(s) to demonstrate that arrangements are in place to secure the land to enable the authority to meet its construction milestones.

Has a letter relating to land acquisition been appended?  Yes  No  N/A

c) Please provide in Table C summary details of your construction milestones (at least one but no more than 6) between start and completion of works:

**Table C: Construction milestones**

	Estimated Date
LDO Adoption	October 2017
RIBA design competition	September 2017 – February 2018
Design complete	September 2018
Start of works	February 2019
Completion	January 2020
Opening date	February 2020
Completion of works (if different)	

d) Please list any major transport projects costing over £5m in the last 5 years which the authority has delivered, including details of whether these were completed to time and budget (and if not, whether there were any mitigating circumstances).

- Taunton Third Way – completed on time and on budget

**B8. Management Case – Statutory Powers and Consents (Essential)**

a) Please list if applicable, each power / consent etc. already obtained, details of date acquired, challenge period (if applicable), date of expiry of powers and conditions attached to them. Any key dates should be referenced in your project plan.

**No consents have been obtained.**

b) Please list if applicable any outstanding statutory powers / consents etc. including the timetable for obtaining them.

**Adoption of the LDO - October 2017**

**Planning permission – August 2018**

**B9. Management Case – Governance (Essential)**

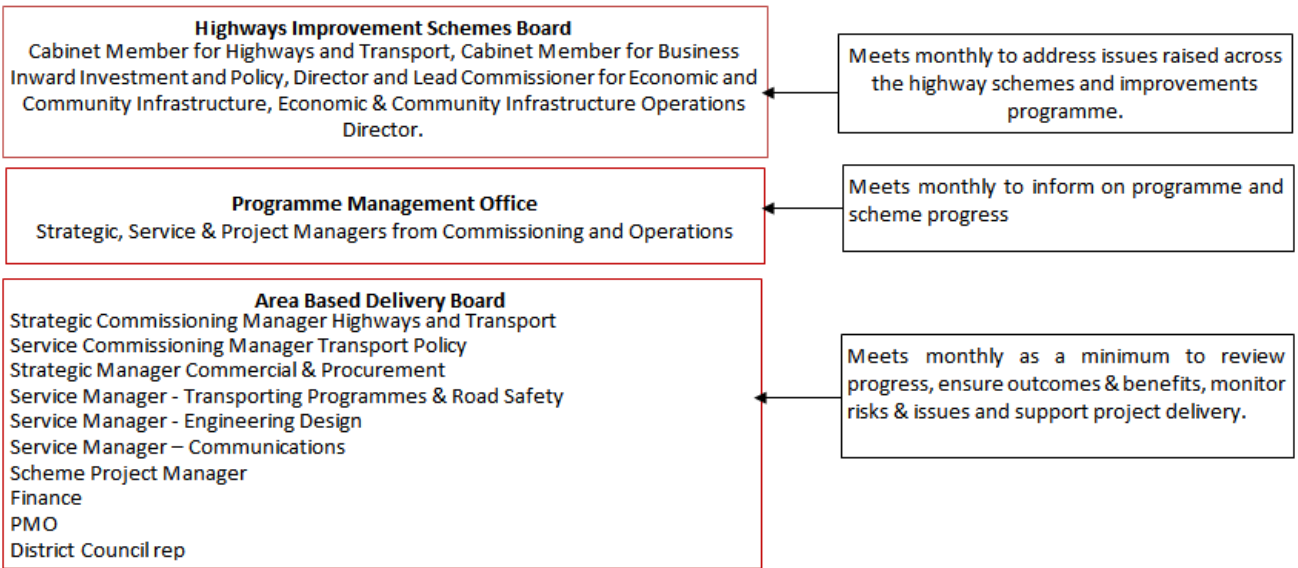
Please name those who will be responsible for delivering the project, their roles (Project Manager, SRO etc.) and responsibilities, and how key decisions are/will be made. An organogram may be useful here.

**Somerset County Council has robust project management process in place that follows Prince2 principles.**

**For this project it is envisaged that the following will be the roles and responsibilities –**

<b>Senior Responsible Owner</b>	<b>Director for Economic &amp; Community Infrastructure Commissioning (Michele Cusack)</b>
<b>Project Manager</b>	<b>Service Commissioning Manager Transport</b>

**The governance structure is as follows -**



### B10. Management Case - Risk Management (Essential)

All projects will be expected to undertake a Quantified Risk Assessment (QRA) and a risk register should be included. Both should be proportionate to the nature and complexity of the project. A Risk Management Strategy should be developed that outlines how risks will be managed.

*Please ensure that in the risk / QRA cost that you have not included any risks associated with ongoing operational costs and have used the P50 value.*

Has a QRA been appended to your bid?  Yes  No

Has a Risk Management Strategy been appended to your bid?  Yes  No

Please provide evidence on the following points (where applicable) with a limit of 50 words for each:

a) What risk allowance has been applied to the project cost?

**A risk allowance of £605k has been included within the project cost on the basis of the QRA**

b) How will cost overruns be dealt with?

**Whilst not anticipated due to a contingency of 20% being included within the costs any cost over-runs will be managed through the partnership. The design of the scheme will focus early work on exploring the more risky elements (e.g. ground conditions) to understand the implications of these on cost.**

c) What are the main risks to project timescales and what impact this will have on cost?

**The main risks to the project timescales with mitigated cost are –**

**Ground conditions - £27,500**

**EA approvals £9,000**

**Buildability and site access - £10,000**

### B11. Management Case - Stakeholder Management (Essential)

The bid should demonstrate that the key stakeholders and their interests have been identified and considered as appropriate. These could include other local authorities, the Highways England, statutory consultees, landowners, transport operators, local residents, utilities companies etc. This is particularly important in respect of any bids related to structures that may require support of Network Rail and, possibly, train operating company(ies).

a) Please provide a summary in no more than 100 words of your strategy for managing stakeholders, with details of the key stakeholders together with a brief analysis of their influences and interests.

**The strategy for management of stakeholders is an open partnership approach that has community engagement at its heart. The key stakeholders and their influences / interests are considered to be –**

Highways England	Lead partner – financial investment Managing the safety and flow of traffic on the SRN
Taunton Deane Borough Council	Lead partner – financial investment Scheme promoter Planning authority
Environment Agency	Water management interests - how this scheme dovetails with the Nexus25 site

<b>Local communities and parish councils</b>	<b>Scheme impact on individuals; access to Nexus25 and the leisure opportunities that would be opened up</b>
<b>Taunton Area Cycling Campaign</b>	<b>Enabling more options for cycling</b>
<b>Blackbrook Business Park landowners</b>	<b>Impact of structure on businesses and increased cycling traffic through the park.</b>

b) Can the project be considered as controversial in any way?  Yes  No  
 If yes, please provide a brief summary in no more than 100 words

c) Have there been any external campaigns either supporting or opposing the project?  
 Yes  No

If yes, please provide a brief summary (in no more than 100 words)

**Taunton Area Cycling Campaign, local parishes and other residents have strongly expressed the need for this link to be completed in order for Nexus25 to be a success. The need to focus on access by foot and cycle stems from the need to manage congestion at junction 25 and reduce pollution through Henlade village.**

d) For large projects only please also provide a Stakeholder Analysis and append this to your application.

Has a Stakeholder Analysis been appended?  Yes  No  N/A

e) For large projects only please provide a Communications Plan with details of the level of engagement required (depending on their interests and influence), and a description of how and by what means they will be engaged with.

Has a Communications Plan been appended?  Yes  No  N/A

### **B12. Management Case – Local MP support (Desirable)**

e) Does this proposal have the support of the local MP(s); Due to the general election there has been a delay approaching the local MP; they have been approached and we are awaiting a response.

Name of MP(s) and Constituency

1 **Rebecca Pow, Taunton Deane**  Yes  No

### **B13. Management Case - Assurance (Essential)**

We will require Section 151 Officer confirmation (Section D) that adequate assurance systems are in place.

Additionally, for large projects please provide evidence of an integrated assurance and approval plan. This should include details of planned health checks or gateway reviews.

**N/A**

## **SECTION C – Monitoring, Evaluation and Benefits Realisation**

**C2.** Please set out, in no more than 100 words, how you plan to measure and report on the benefits of this project, alongside any other outcomes and impacts of the project.

**The benefits of the project are defined in terms of the number of additional walking and cycling trips across the M5. An automatic cycle counter is in place at the junction 25 crossing point and new automatic monitoring will be included within the new bridge. Reporting of success will be via annual reports to the partnership group.**

**The Nexus25 site will be required to produce a travel plan and report annually via iOn Travel tool; this information will be used to understand the mode choices of staff and visitors to the site.**

*A fuller evaluation for large projects may also be required depending on their size and type.*

## **SECTION D: Declarations**

### **D1. Senior Responsible Owner Declaration**

As Senior Responsible Owner for Nexus25 Cycle and footbridge I hereby submit this request for approval to DfT on behalf of Somerset County Council and confirm that I have the necessary authority to do so.

I confirm that Somerset County Council will have all the necessary statutory powers in place to ensure the planned timescales in the application can be realised.

Name:  
Mike O'Dowd Jones

Position:  
Strategic Commissioning Manager Highways and Transport

Signed:

### **D2. Section 151 Officer Declaration**

As Section 151 Officer for Somerset County Council I declare that the project cost estimates quoted in this bid are accurate to the best of my knowledge and that Somerset County Council

- has allocated sufficient budget to deliver this project on the basis of its proposed funding contribution
- accepts responsibility for meeting any costs over and above the DfT contribution requested, including potential cost overruns and the underwriting of any funding contributions expected from third parties
- accepts responsibility for meeting any ongoing revenue requirements in relation to the project
- accepts that no further increase in DfT funding will be considered beyond the maximum contribution requested and that no DfT funding will be provided for this bid in 2020/21.
- confirms that the authority has the necessary governance / assurance arrangements in place and, for smaller project bids, the authority can provide, if required, evidence of a stakeholder analysis and communications plan in place
- confirms that if required a procurement strategy for the project is in place, is legally compliant and is likely to achieve the best value for money outcome

Name:  
Kevin Nacey

Signed:

### **HAVE YOU INCLUDED THE FOLLOWING WITH YOUR BID?**

Combined Authority multiple bid ranking note (if applicable)	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input checked="" type="checkbox"/> N/A
Map showing location of the project and its wider context	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A
Combined Authority support letter (if applicable)	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input checked="" type="checkbox"/> N/A
LEP support letter (if applicable)	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A
Housebuilder / developer evidence letter (if applicable)	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input checked="" type="checkbox"/> N/A
Land acquisition letter (if applicable)	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A
Projects impact pro forma (must be a separate MS Excel)	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A
Appraisal summary table	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A
Project plan/Gantt chart	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A