



membership resources

State of the Market Survey 2011

Local Authority Refuse Services



Briefing 11/26

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The state of the market survey was conducted by Debbie Johns, APSE Principal Advisor for Environmental services

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Local Authority Refuse Services

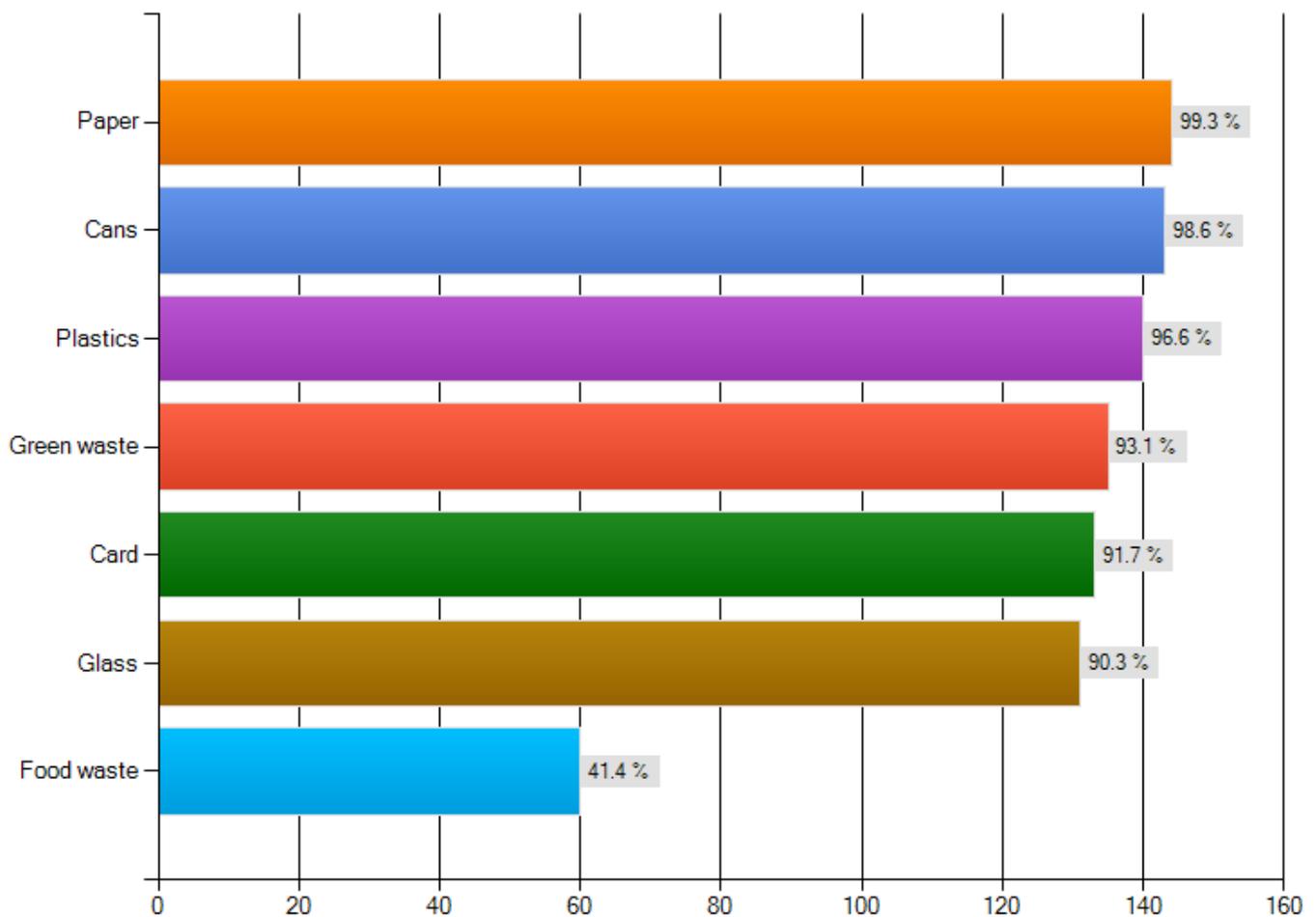
State of the Market 2011

APSE conducted an on-line survey during February and March 2011. This follows on from the 2008 Refuse Collection State of the Market survey where similar questions were asked to allow for trend comparisons. The 2008 results can be accessed by [clicking here](#). 149 responses were received from local authorities throughout the UK. This report identifies the key findings of the survey.

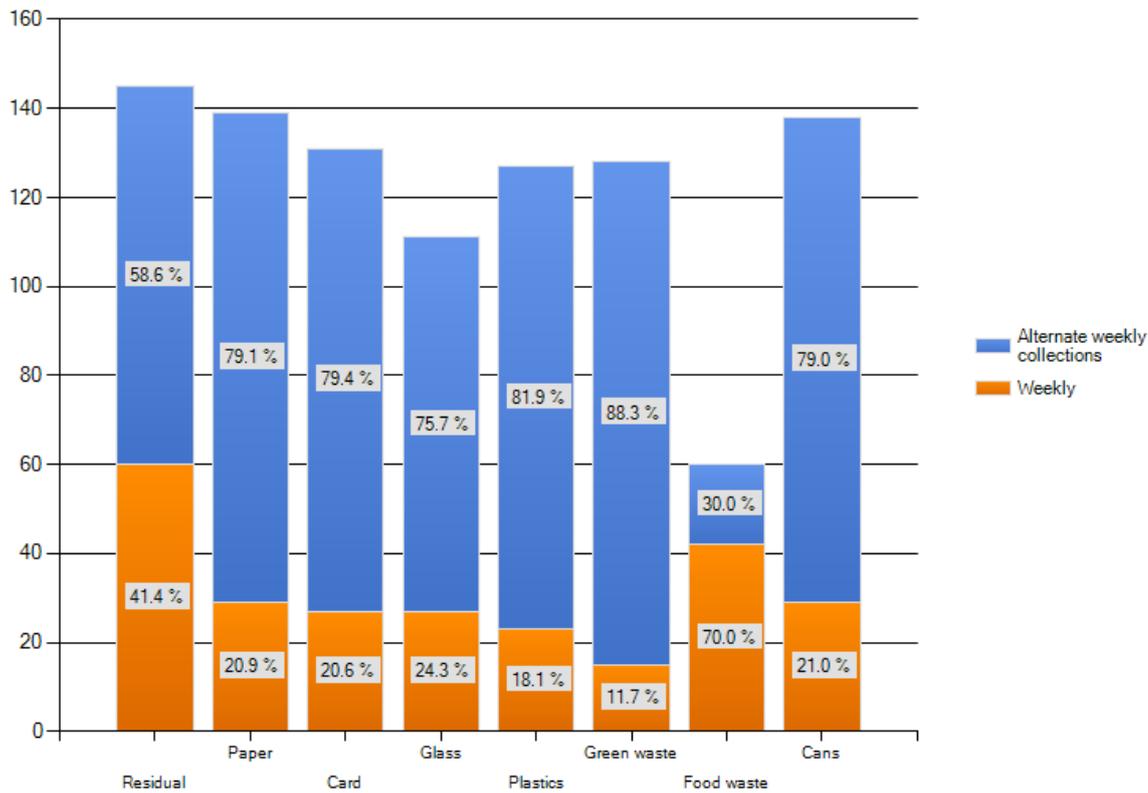
Results from the survey

a) Recycling activities

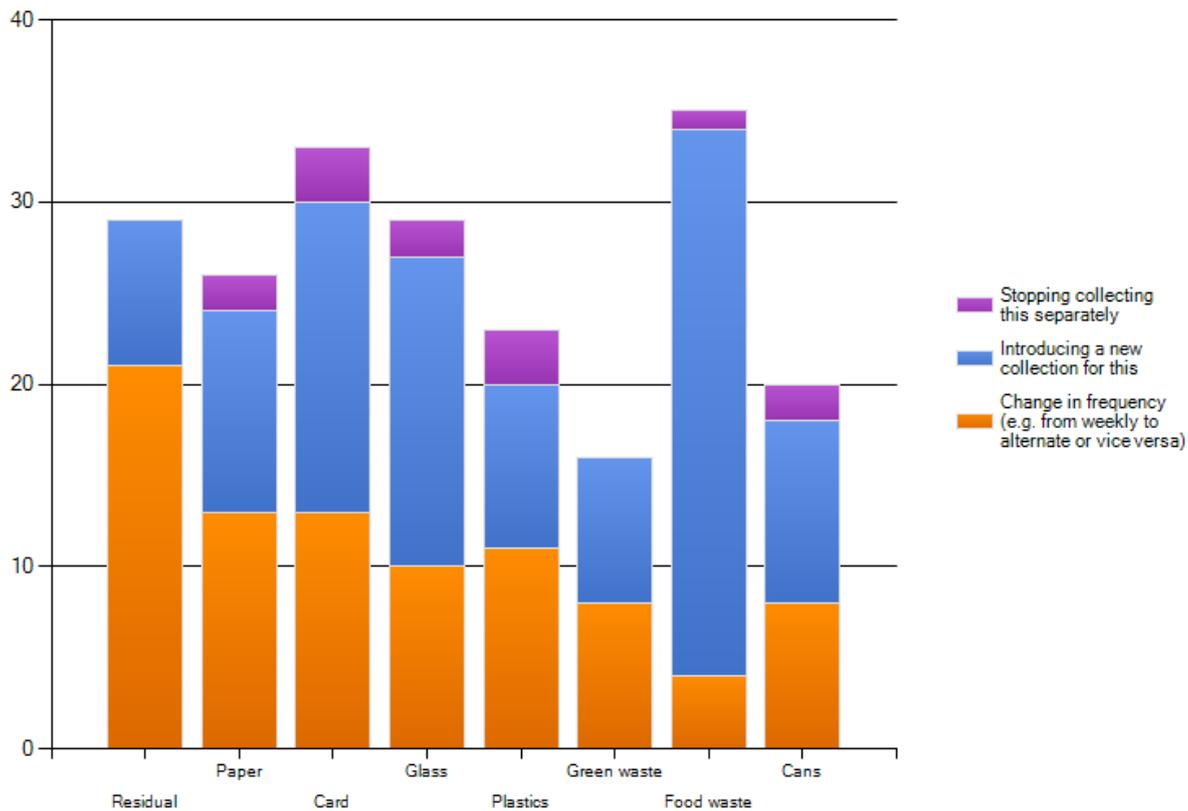
In terms of what recycling activities are currently carried out, the results were as follows:



In relation to the frequency of collections (weekly or alternate collections), the number of responses for each of the different types of collections (and the percentage breakdown between weekly and alternate collections) were as follows:

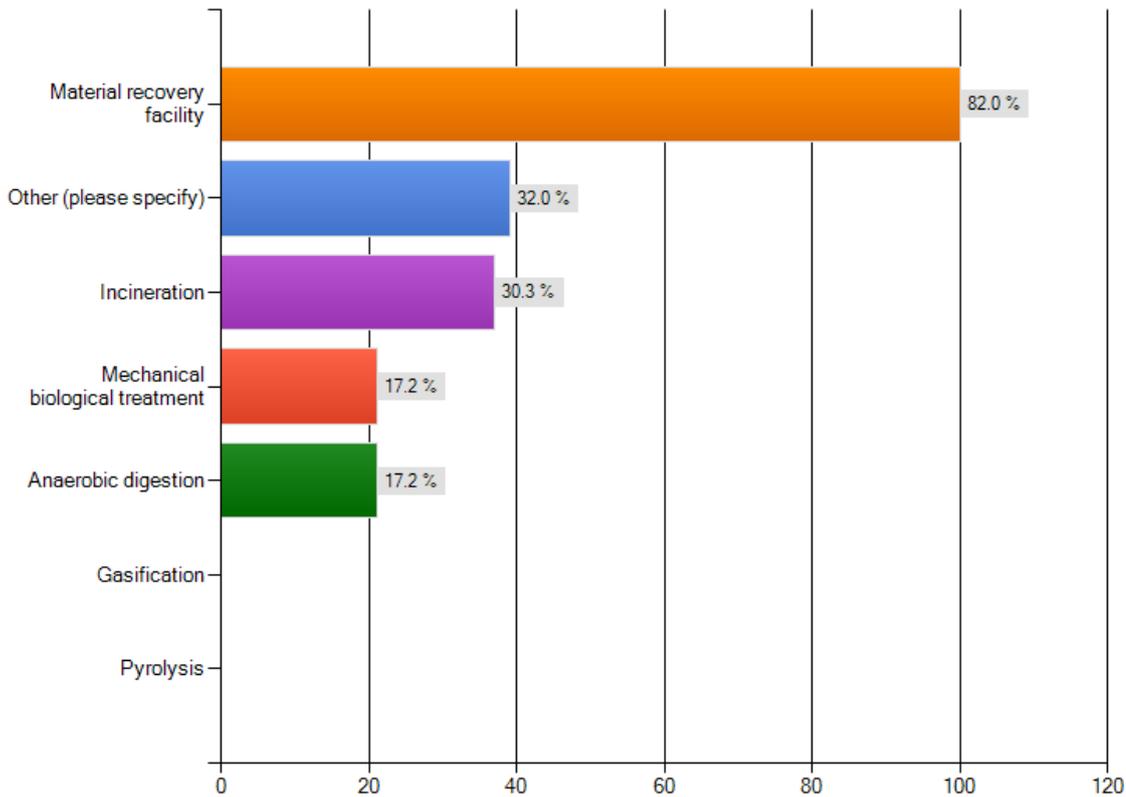


Members were asked whether there were going to be any changes to their residual and recycling collections in the next 2 years. 69 councils (46%) indicated that there were going to be some changes and these are broken down as follows:



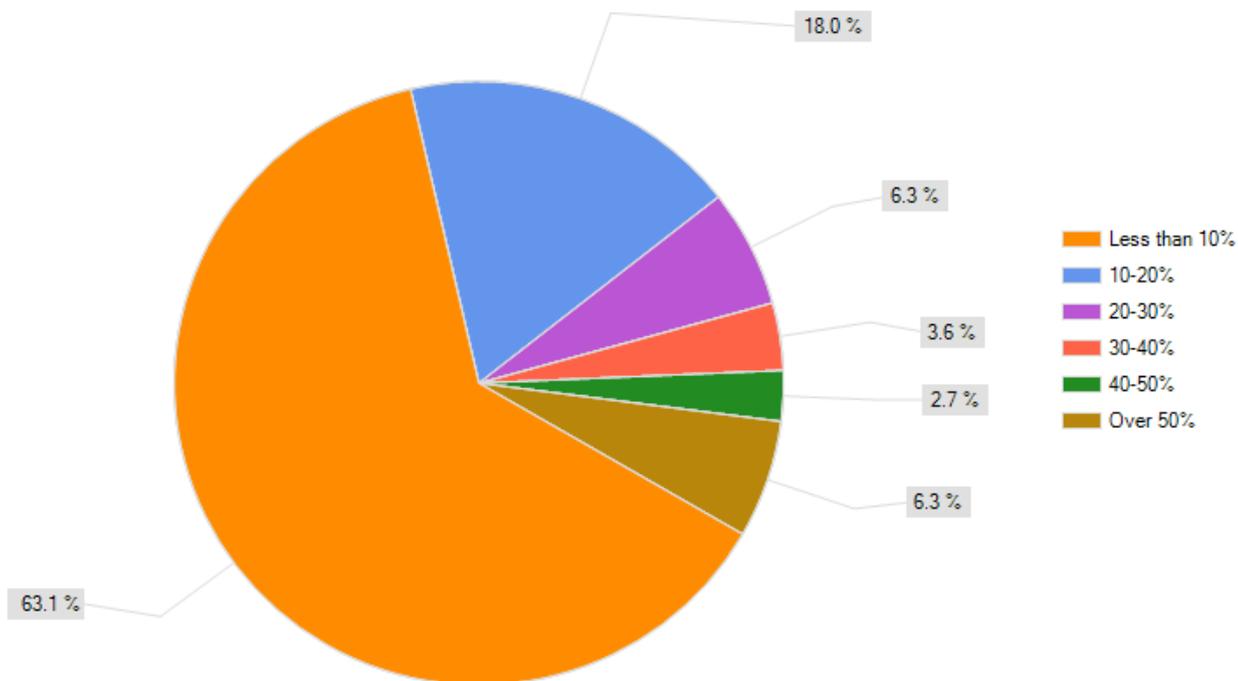
b) Collections and disposal methods

60% of respondents indicated that they operate a task and finish system for refuse collection and 60.5% have zonal working (collecting all waste from one zone on the same day). 73% operate co-mingled collections, compared with 56% when the survey was conducted in 2008. Treatment and sorting facilities include:

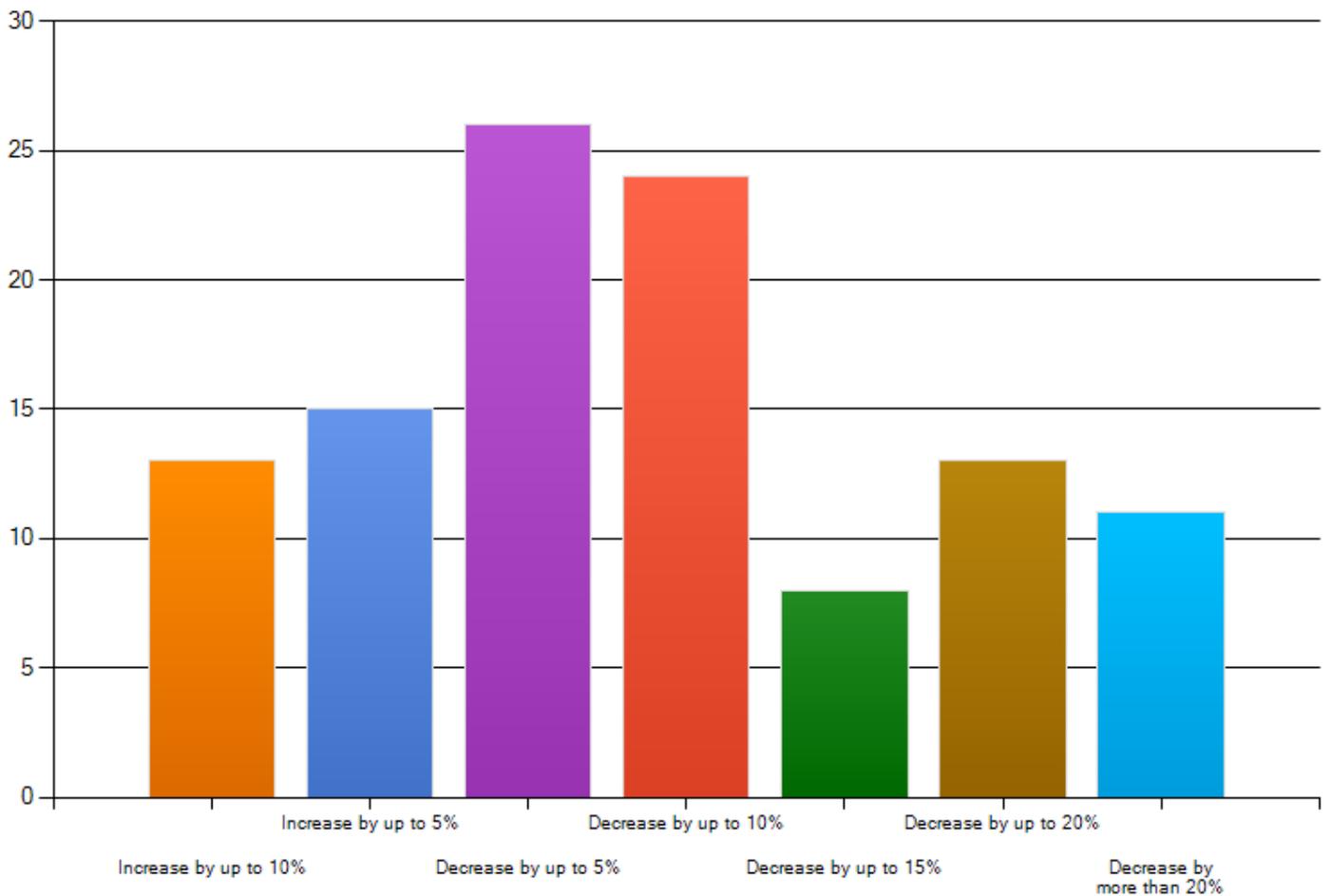


c) Investment in and managing the service

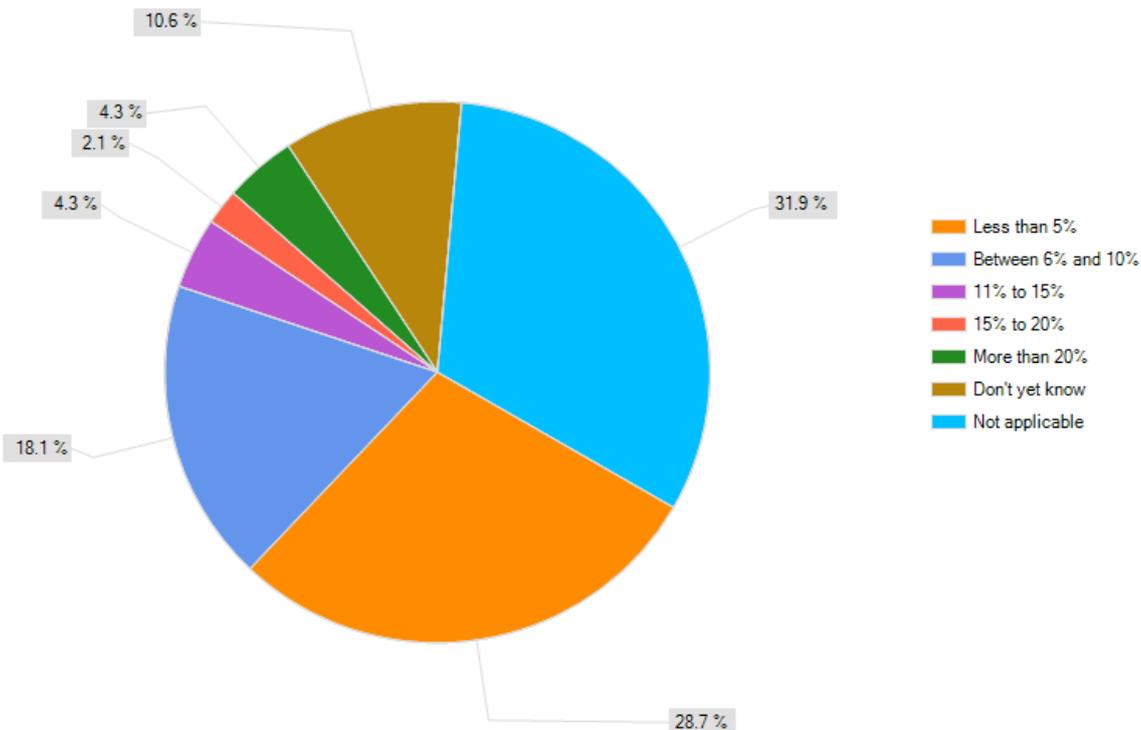
When asked what additional capital investment has been required in the past 2 years, the responses were as follows:



When this survey was conducted in 2008, 90% of respondents expected their refuse budget to stay the same, increase or increase significantly for the next year. However, this 2011 survey found a completely different expectation on budgets with 58.5% expect their refuse budget to either 'decrease' or 'decrease substantially' next year and 24.3% expect this to stay the same. When this is analysed further in terms of what their expectation of the level of funding in their service budget is in the coming five years, the majority of the respondents who expect a decrease, expect this to be a decrease of up to 5% or 10%:



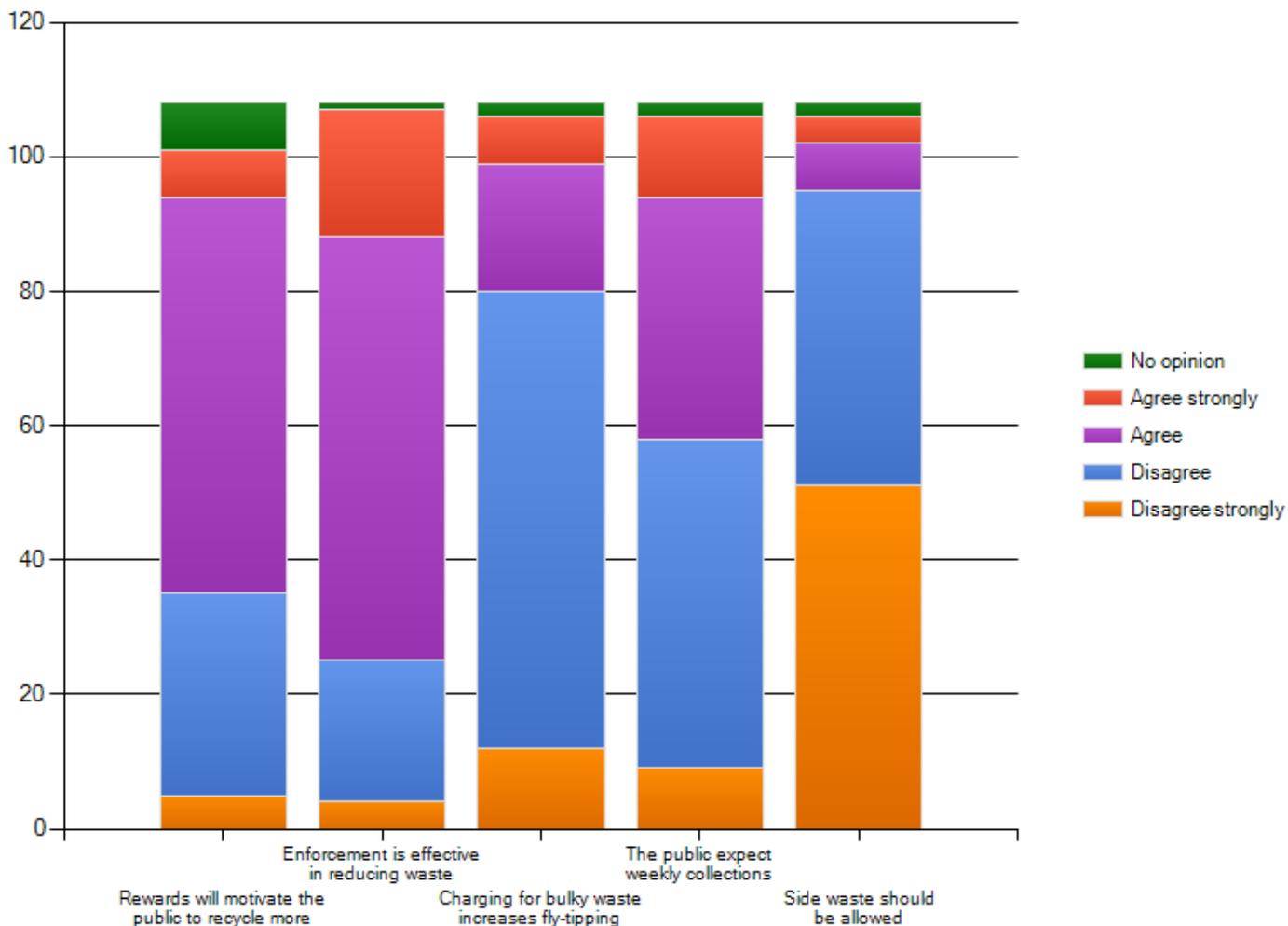
On employment related matters within the next 12 months, 55% expect to implement a recruitment freeze, 49% voluntary redundancy and 25.5% compulsory redundancy. 23% of authorities have indicated that they intend to implement none of these. Of those services who expect to be subject to redundancy measures, they expect to lose the following percentage of staff from the service:



65.8% expect their service to be managed in-house within the next 2-3 years (compared with 69% in 2008), 7.2% expect this to be managed by Joint waste authorities and 15.3% stated external management.

d) Your opinions

The chart below shows the breakdown of respondents who agree/disagree with the statements.



e) Charging for services

When asked which services respondents charged for, the results were as follows:

	Yes	No but will do within the next 1-2 years	No	Not applicable
Supply of bins	33.3%	18.1%	43.8%	4.8%
Bulky waste collections	72.4%	6.7%	21.0%	0%
Clinical waste collections	3.9%	1.0%	61.2%	34%
Trade waste collections to schools and hospitals	71.6%	6.9%	8.8%	12.7%
Green waste collections	8.7%	3.8%	79.8%	7.7%

f) Job evaluation

- 82.4% have completed job evaluation (compared with 61% in 2008) and 59% stated that this has involved the removal of a bonus scheme.
- When asked how this has affected wage costs, the majority of respondents either answered 'increased slightly' (26%), 'about the same' (31%) or 'decreased slightly' (11%).

g) Staffing

Members were asked whether they thought that staff absence levels are at an acceptable level. The responses are shown in the chart below:

Answer Options	Response Percent
Too high	23.4%
Slightly above average	23.4%
About average	33.6%
Slightly below average	13.1%
Very low	6.5%

These results have improved since 2008 when 36% answered that they were too high and only 1% answered that they were very low.

Only 6.8% envisaged an increase in the training budget over the next 12 months, with 52% stating that this will decrease and 41% stating that this will stay the same.

h) Future areas of work and service reviews

Respondents were asked where they see growth for the service over the next 12 months and responses included:

- Increases in recycling of other materials e.g. green, textile, paper
- Increase in frequency of collections e.g. from fortnightly to weekly
- Multi-material recycling and co-mingled collections
- Commercial/trade waste
- Food waste collections including trade food waste
- Enforcement and education
- Investment in waste treatment plants
- Private work, work for other councils and joint working/shared services
- Increased utilisation of vehicles
- Health and safety compliance

Respondents were they asked where they see future decreases in work for the service and these included:

- Collection frequency e.g. a move to alternate weekly collections
- Removal of collections on bank holidays
- Decrease in tonnages of residual waste collected and reductions in landfill use
- Reduction in the collection of material types (e.g. green waste) as charging becomes the norm
- Removal of kerbside glass collections and revert back to Bank collections
- Round rationalisation
- Fewer vehicles and staff
- As recycling is increased, a reduction in the number of residual RCV's
- Trade waste customers due to rising disposal costs, landfill tax and fuel bills
- Clinical waste, bulky waste and special collections

- Quality of service
- Education and training
- PR, communication and customer care

When asked if respondents had undertaken a service review recently, 32% stated that they have completed this, 45% stated that they have a review which is underway and 19% stated that they will be doing so in the next 1-2 years. Only 4% said 'no' and they won't be undertaking a review in the next 1-2 years.

Respondents stated that the reviews involved the following:

Utilisation of machinery/transport	83%
Service re-design	76%
Review of working time/rota's	71%
Review of productivity/work study	66%
Use of technology (e.g. handheld)	47%
Using systems thinking techniques	28%

The Association for Public Service Excellence

APSE member authorities have access to a range of membership resources to assist in delivering council services. This includes our regular advisory groups, specifically designed to bring together elected members, directors, managers and heads of service, together with trade union representatives to discuss service specific issues, innovation and new ways of delivering continuous improvement. The advisory groups are an excellent forum for sharing ideas and discussing topical service issues with colleagues from other councils throughout the UK.

Advisory groups are a free service included as part of your authorities membership of APSE and all end with an informal lunch to facilitate networking with peers in other councils. If you do not currently receive details about APSE advisory group meetings and would like to be added to our list of contacts for your service area please email enquiries@apse.org.uk.

Our national advisory groups include:-

- Building cleaning
- Catering
- Citizen engagement
- Community safety and security
- Efficiencies, procurement and service transformation
- Housing, construction and building maintenance
- Leisure management and community venues
- Local authority, police and fire and rescue partnerships group
- Parks, horticultural and ground maintenance
- Roads, highways and street lighting
- Social Care
- Vehicle maintenance and transport operations
- Waste management, refuse collection and street cleansing
- Workforce strategy and employee relations