



State of the Market Survey 2017

Winter Maintenance



Briefing 17-40

November 2017



The state of the market survey was conducted by Rob Bailey, APSE Principal Advisor with assistance from Ian Scherr - Research and Coordination Officer

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Winter Maintenance Services

State of the Market 2017

APSE conducted an online survey during May and June 2017. A series of questions were asked covering a range of issues of interest to those officers and councillors responsible for Winter Maintenance services.

The surveys are an attempt to understand perceptions of the market amongst people directly involved in delivering services.

Methodology

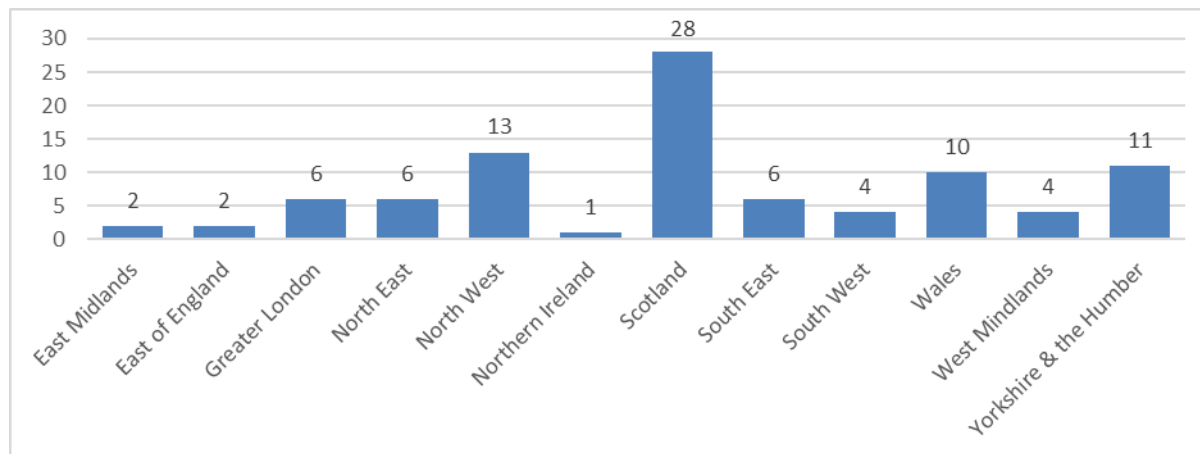
At the beginning of May, an email invitation was sent out to all APSE colleagues who deal with Winter Maintenance. This contained 26 questions on various different issues faced by those involved, 23 of which will be used for this report. Duplicate responses and almost wholly incomplete responses were eliminated from the sample, leaving a final sample of 86.

No questions were mandatory, so the total amount of responses differs from question to question. This report will state the total that answered each question in the results. Respondent's information has been kept confidential, with identifying information being limited to the general area of the U.K. the respondent is from.

The relatively small sample size makes it challenging to distinguish sample variance from actual trends across time. Whilst reference to previous years is made, this is purely for general information, and this report is best treated as a snapshot of the current opinions of those working in Winter Maintenance services, rather than a thorough analysis of change over time.

Results from the Survey

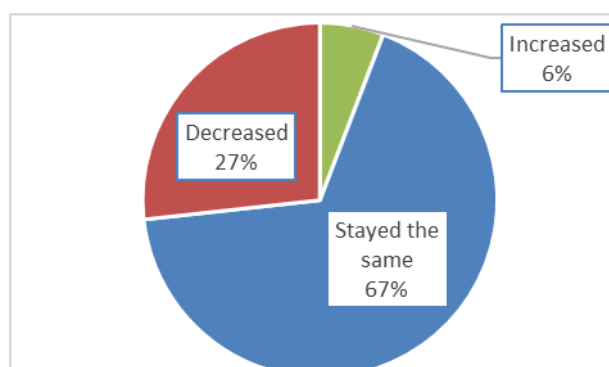
1. Where in the United Kingdom do you work?



Respondents represent variety from across the whole of the United Kingdom. England accounts for 54 of respondents, with 10 from Wales, 1 from Northern Ireland and 28 from Scotland. This gives a total sample of 86. Responsibility within Northern Ireland does not rest at the Local authority level.

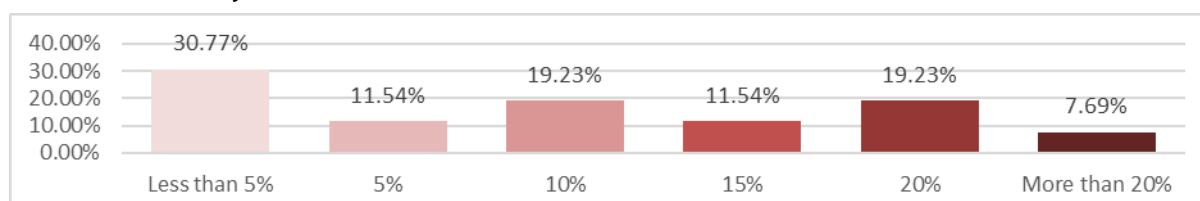
2. How has the budget for the winter maintenance service changed from 2016-17 to 2017-18?

Out of 86 people, 28 said there had been a change in their budget since 2017-17. Five of these said it was increased, with the rest identifying a decrease. For most people, their budget remained static for 2017-18.



There were less people saying there was a decrease in their budget than the previous year, where 39.5% said they had experienced a decrease in their budget

3. If your budget has decreased from 2016-17 to 2017-18, how much has it decreased by?



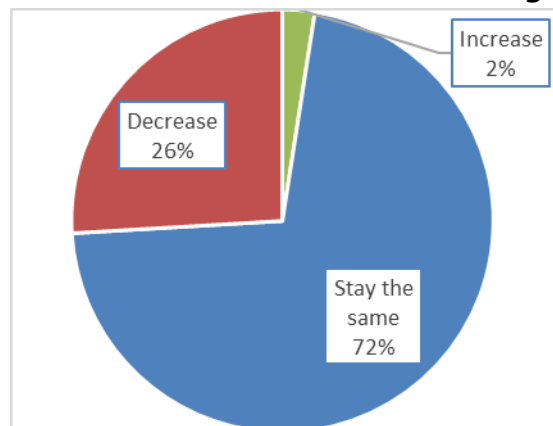
For those that said they had faced a decrease, more than half said their reduction was 10% or less. Only two people said their budget had been reduced by more than 20%.

Comments identified that mild winters have resulted in an under spend in the past few years so the budget has been cut as a result.

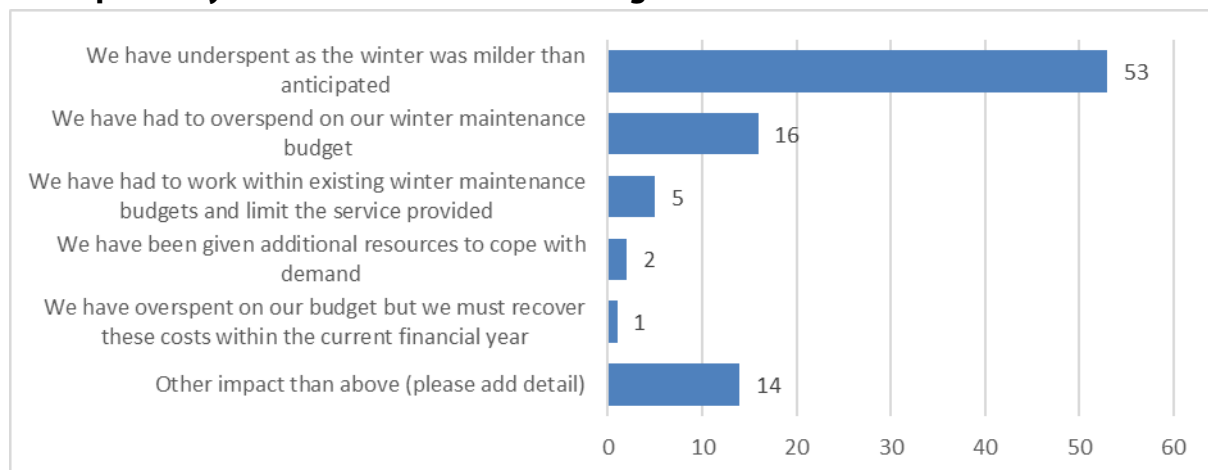
4. How do you expect the budget for the winter maintenance service to change when allocated in 2018-19?

Of the 81 responses to this question, 58 expected their budget to remain the same going into 2018-19.

This is the smallest share of people expecting an increase since 2009, though the percentage of people expecting a decrease has fallen since 2016.



5. With reference to the weather during the winter 2016-2017, what has been the impact on your winter maintenance budget?



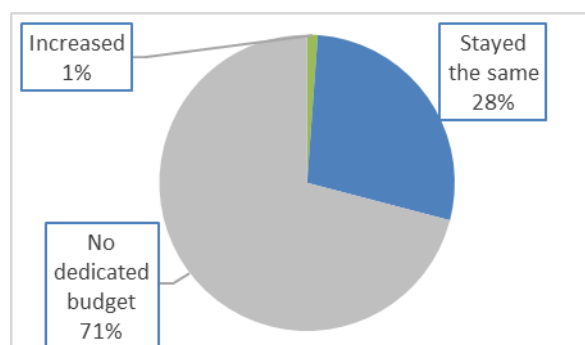
86 people gave at least one response to this question. Most people identified an under spend due to the mild winter; however there was a significant group that said they had to overspend. This is the second year where an under spend was the most popular option.

A few comments mentioned that the budget was always set too low, resulting in overspends as the service is delivered regardless.

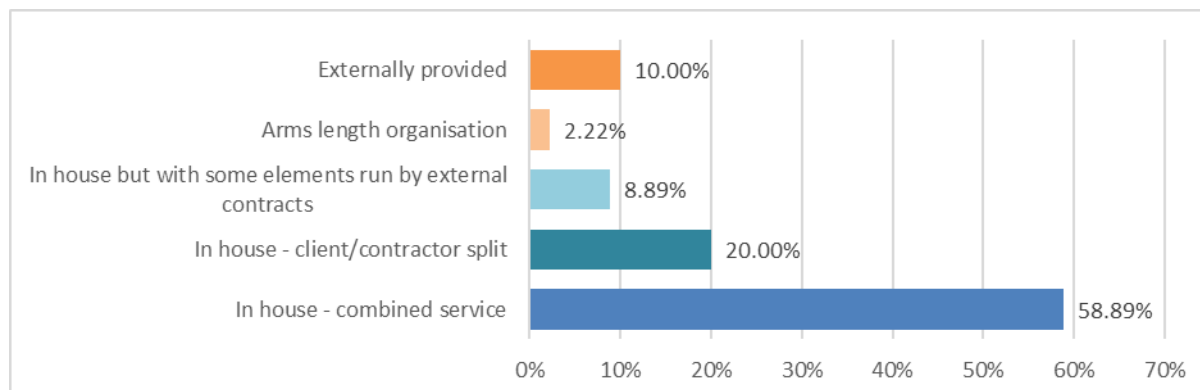
6. If you have a dedicated training budget for winter maintenance, what has happened to it over the past 12 months?

Most respondents said they did not have a dedicated training budget. Of those that did, 24 said that it had stayed the same over the past year.

Comments noted that training budgets are often handled centrally by the council.



7. How are your winter maintenance services currently delivered?

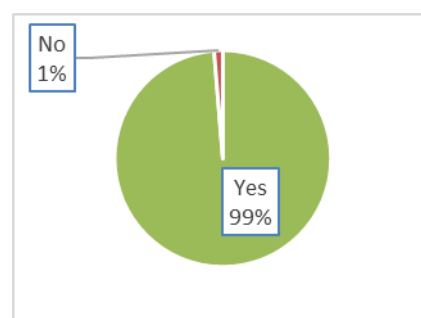


Of the 90 people who responded, 79 said that their services were delivered at least in part 'In-House'. 2 people said they used an arm's length organisation, and 9 said that their service was provided externally.

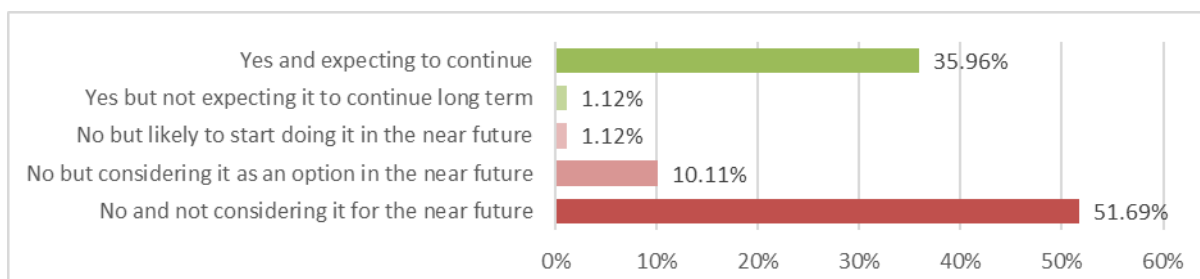
The proportion of people saying that services were delivered in somewhat 'in-house' remains the same as it had last year, though there has been a reasonable shift in the detail. Combined Service has fallen from 73.9% last year, and this is matched with a 9% increase in those with a client/contract split, and a 6% increase those running elements with external contracts.

8. If the service is currently provided in-house, do you expect the service to remain in-house over the next 12 months?

Only 1 person out of 77 thought that their service would stop being in-house over the next year.



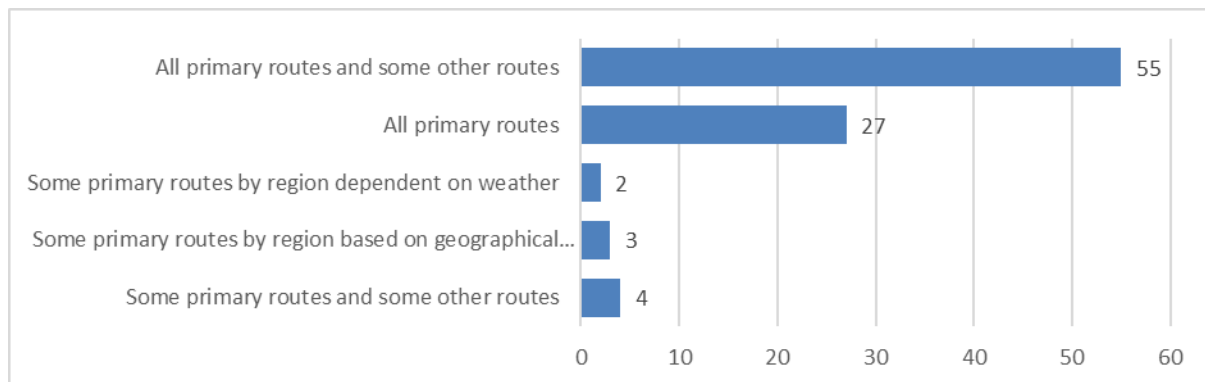
9. Do you currently sell your services to organisations external to the council?



The majority of people said they did not sell their services externally, nor were they considering it. 33 of 89 said that they did, though one of these people didn't expect it to continue in the long term.

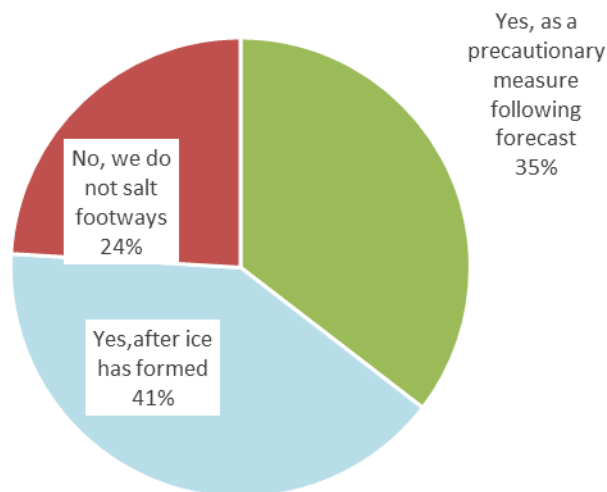
The comments show some areas covered externally, including work for hospitals, utility companies, and various transport companies.

10. With regard to your road network, which of the following are salted?



There were a total of 79 respondents to this question.

11. Do you salt footways?



Out of the 79 people that answered this question, only 19 said they did not salt footways. Most (32) said that they waited until after the ice has formed, with the rest (28) salting as a precautionary measure.

12. If you do salt footways, approximately what percentage of the footway network do you salt?



Responses indicated that it was often a small proportion of footways that were salted, with only one response over 50%, and most being 20% and below. Salting is most often focused on just the town centres. The graph above shows the areas targeted. Other areas identified included elderly homes and schools. Very few people said there had been extra resources allocated to salting footways.

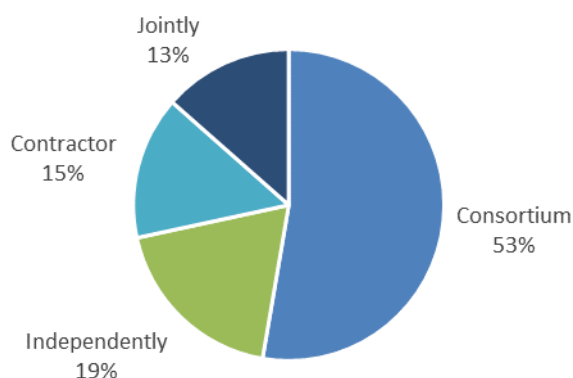
13. What changes have you made to service arrangements as a result of severe weather over recent years?

Responses to this indicated a number of changes that have been made by authorities. There has been an emphasis in many areas on optimising routes, with councils implementing a variety of technologies to achieve this, such as thermal mapping and vehicle changes. A number of services have increased their salt stocks and resilience. A few people also mentioned that they had recently reviewed their services and made changes based on these.

14. Have the orders you placed for salt to cover winter maintenance over 2015-16 been met by your suppliers?

All 78 of the responses to this question said their order had been met in full. Comments also suggested that some have had enough stock to not need to make salt orders in recent years.

15. How do you purchase salt supplies (jointly with other authorities, via Highways Agency, independently, via consortium such as YPO or other)?



There were 74 responses to this question, and using a consortium was the most popular method for purchasing salt, with 39 people indicating this is how their council purchases salt. 14 bought their salt independently, 11 used a contractor and 10 bought theirs jointly with other authorities.

16. Which company supplies your salt?

Company	Responses
Compass Minerals	27 (41%)
Cleveland Potash	12 (18%)
Salt Sales	11 (17%)
Salt Union	9 (14%)
ICL	6 (9%)
Boulby Potash	1 (2%)

17. Do you have any suggestions for how councils or suppliers can act to avoid salt shortages in times of very bad weather in future?

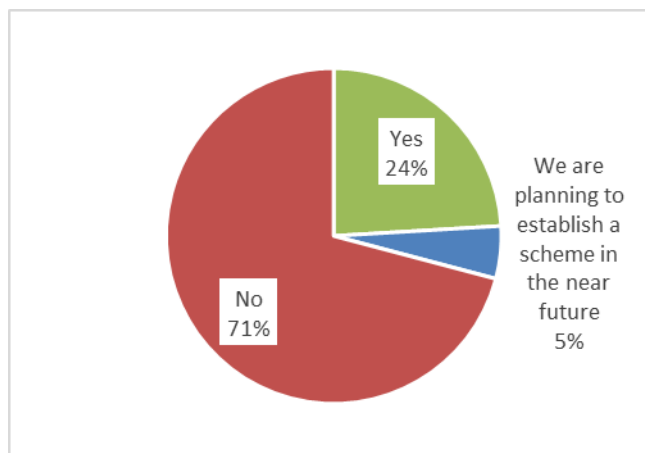
For this question, responses included

- Better stock management and coordination when bad weather is predicted
- Reducing secondary network usage as soon as possible.
- Increase storage capacity
- Build dry facilities.
- Work together with other local authorities.

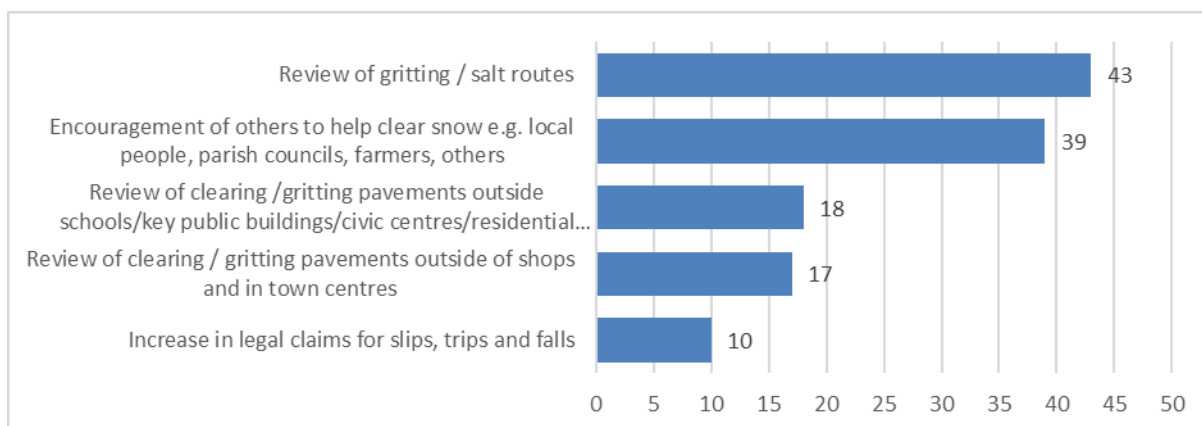
18. Do you have a snow warden (or similar) scheme in place?

Out of 79 responses, 19 said they had a snow warden or similar in place. These included Town/Parish Councils assisting with gritting voluntarily, or training existing community safety groups to also deal with snow.

One response noted that interest has waned due to the milder winters



19. Has the severe weather over the recent years led to any of the following (you may answer more than one)



59 people responded to this question. A number of councils are conducting reviews of their gritting/salt routes, and are using tools like thermal mapping to assist with this. Many noted that they have not experienced severe weather in a number of years in their area.

20. Where do you see growth areas for the service over the next 12 months?

A number of areas were identified as having potential for growth.

- Private Gritting/Salt services
- Route optimisation and thermal mapping.
- Automated Salting
- Collaboration with other local authorities.

21. Where do you see areas where work may decrease over the next 12 months?

Responses to this question included.

- Reduction in routes to be gritted
- Less Bin provision
- Snow Ploughing (due to traffic calming measures)
- Reduction in early morning operations.

APSE Comment

The National Winter Service Research Group (NWSRG) 'Practical Guide For Winter Service' is imminent. This will provide recommendations for various highways winter regimes. Combined with the evolving risk based approach to highways maintenance, the near future is likely to require some reorganisation of the winter maintenance service and councils should recognise this requirement within 2018/19 budgets

Local Authority Winter Maintenance Services

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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 authority's 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: -

- FM & Building Cleaning
- Catering (school meals)
- Cemeteries and Crematoria
- Environmental Health
- Highways and Street Lighting
- Housing Construction and Building Maintenance
- Local Authorities Commercialisation, Income and Trading Network
- Parks, Horticulture and Grounds Maintenance
- Renewables and Climate Change
- Sports and Leisure Management
- Vehicle Maintenance and Transport
- Waste Management, Refuse Collection and Street Cleansing