

The logo for apse, consisting of the lowercase letters 'apse' in white, set against a dark red, rounded rectangular background.

The Association for Public Service Excellence

State of the Market Survey 2019

Local Authority Street Lighting Services

NEW MUNICIPALISM

Delivering for local people and local economies

Briefing 19 - 47
December 2019

State of the Market Survey 2019

Local Authority Street Lighting services

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About APSE

The Association for Public Service Excellence (APSE) is a not-for-profit local government body working with over 300 councils throughout the UK. Promoting excellence in public services, APSE is the foremost specialist in local authority frontline services and operates one of the UK's largest research programmes in local government policy and frontline service delivery matters.



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Results at a glance

Service

% of street lighting services currently delivered in house	73.01%
% of respondents who sell their services to organisations external to the council	56.86%
% who have a CMS System	44.00%
% of responding councils who scout for failures	46.00%
% of respondents whose approach to lamp replacement is burn to extinction	64.00%
% of respondents whose approach to lamp replacement is planned replacement	26.00%

Budgets

% whose budget has decreased from the last financial year	34.48%
% whose training budget has stayed the same over the past 12 months	69.81%

Staff

Average age of street lighting operational staff among respondents	47.6 years
% who feel staff absence levels are at an acceptable level	71.15%
% who run an apprenticeship scheme	30.77%
% with difficulty recruiting operatives	38.46%
% with difficulty retaining operatives	23.08%
% with difficulty recruiting technical/managerial staff	40.35%
% with difficulty retaining technical/managerial staff	15.79%

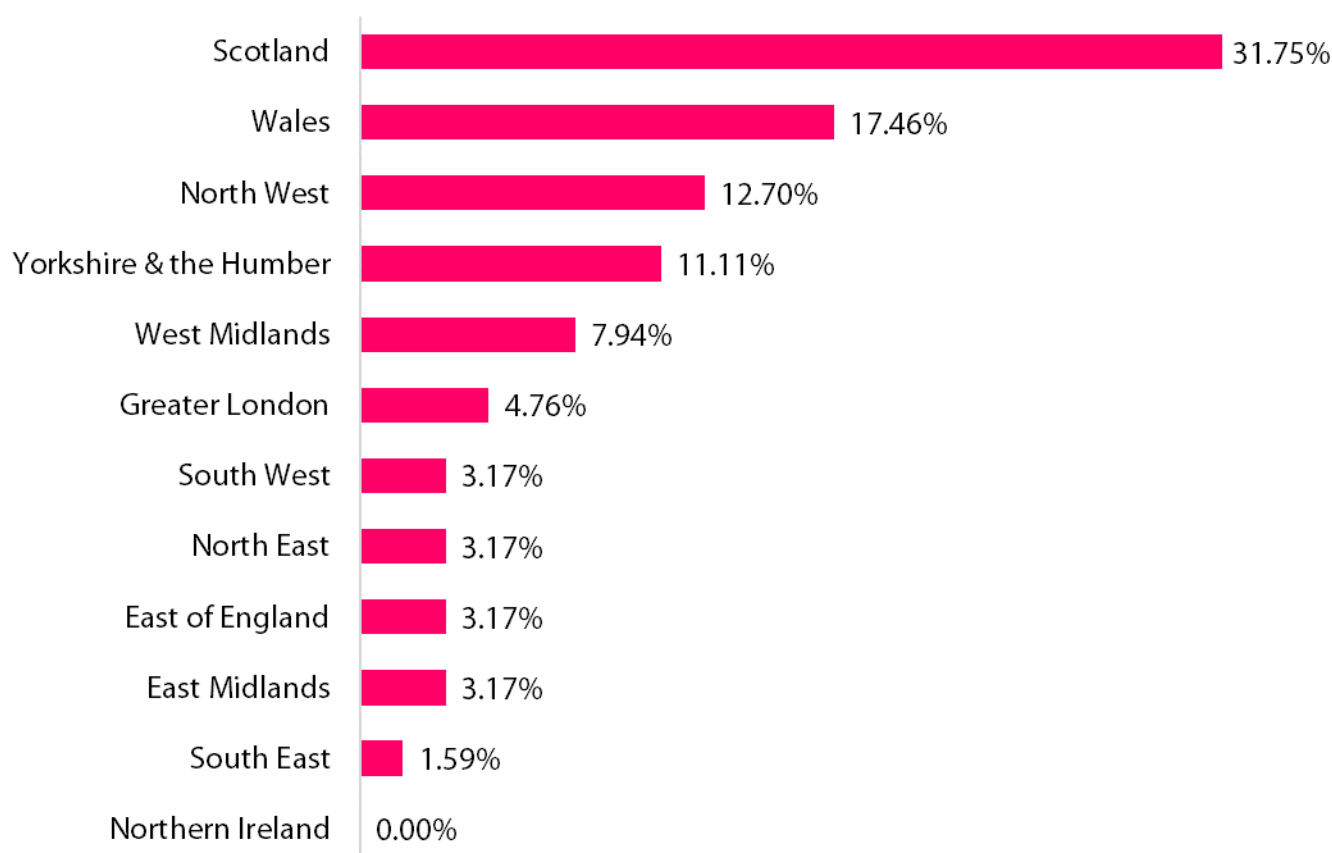
Introduction

APSE conducted an online survey during June 2019. A series of questions were asked covering a range of issues of interest to those officers, managers and councillors responsible for Street Lighting services.

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

There were 63 responses from local authorities to this survey. None of the questions were mandatory, so the total amount of responses differs from question to question. Individual details of respondents have been kept confidential. Results of the survey should be treated as a snapshot of current opinions of those working in street lighting services rather than a thorough analysis of change over time.

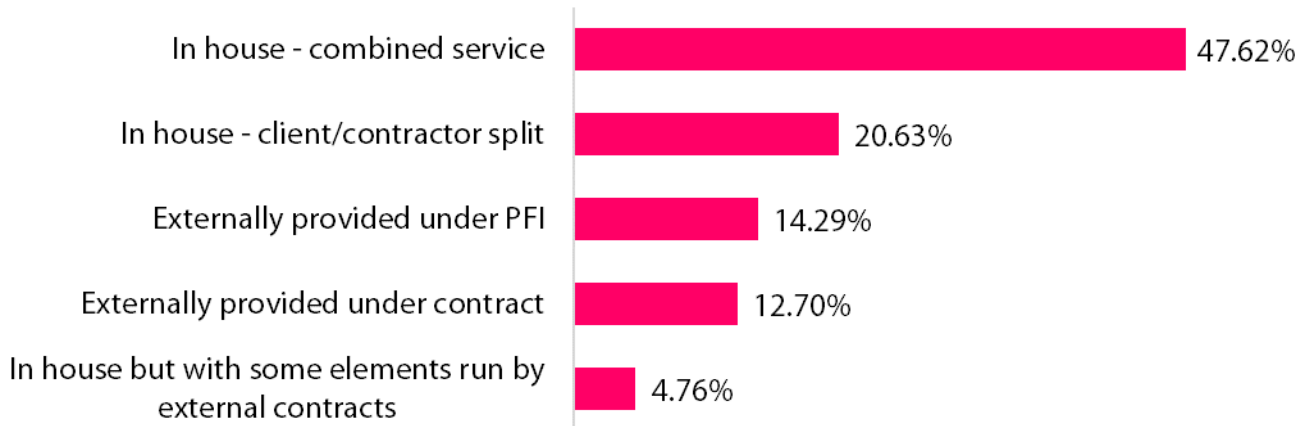
Where in the UK do you work?



The table above shows the breakdown of where the respondents to the survey are located in the UK.

Section 1 – The Service

How are your street lighting services currently delivered?



The majority of respondents' street lighting services are currently delivered via an in-house combined service (47.62%), 20.63% are delivered via an in-house client/contractor split and 4.76% are in-house but with some elements run by external contracts. 14.29% are externally provided under PFI and 12.70% are externally provided under contract.

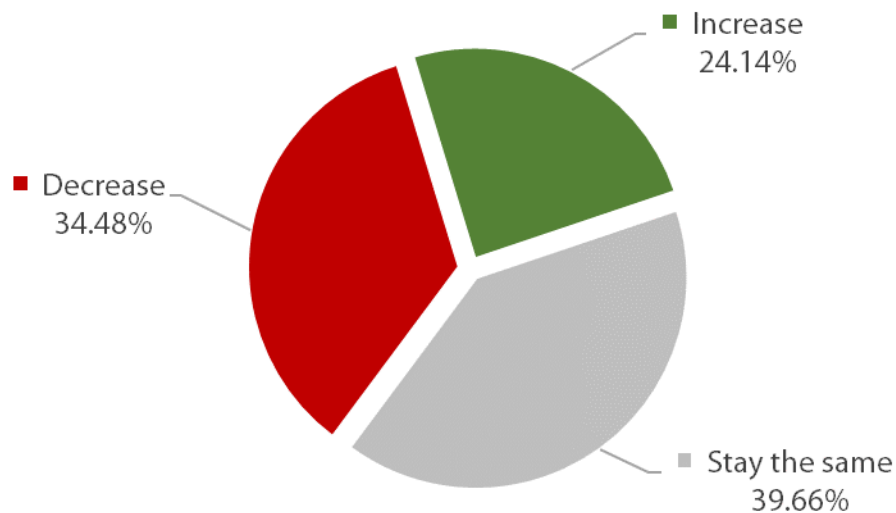
If the service is currently provided in-house, do you expect the service to remain in-house over the next 12 months?



89.58% of respondents with a service currently provided in house expect the service to remain this way over the next 12 months.

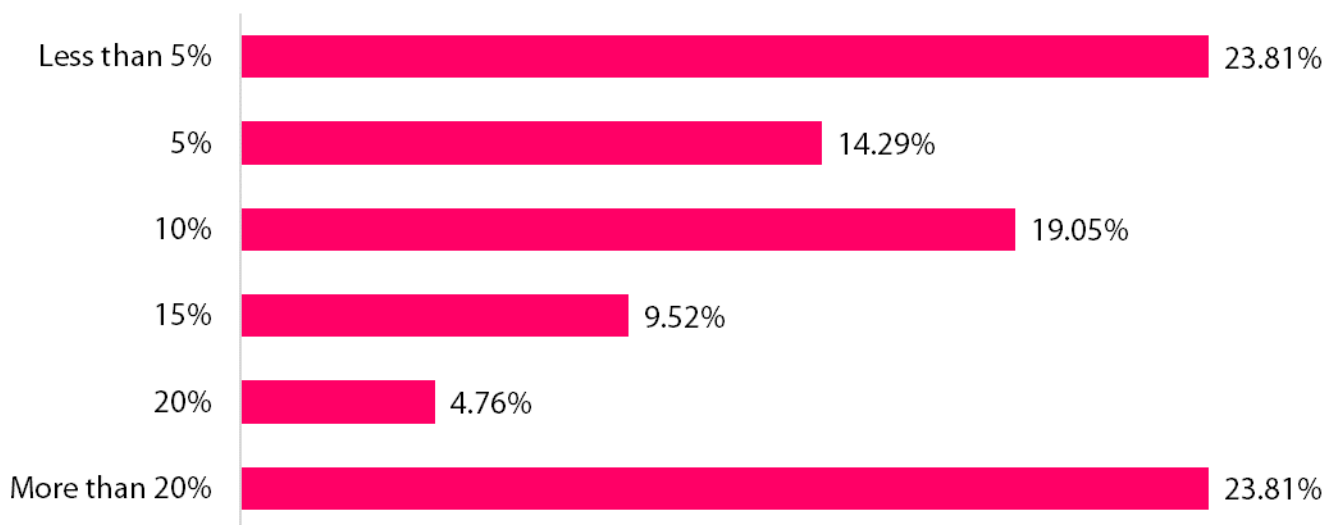
Section 2 – Budget

How has the budget for the street lighting service changed from the last financial year?



While most respondents' street lighting budgets have remained the same as the last financial year (39.66%), 34.48% experienced a decrease and 24.14% experienced an increase.

If your budget has decreased from last year, by how much has it decreased?



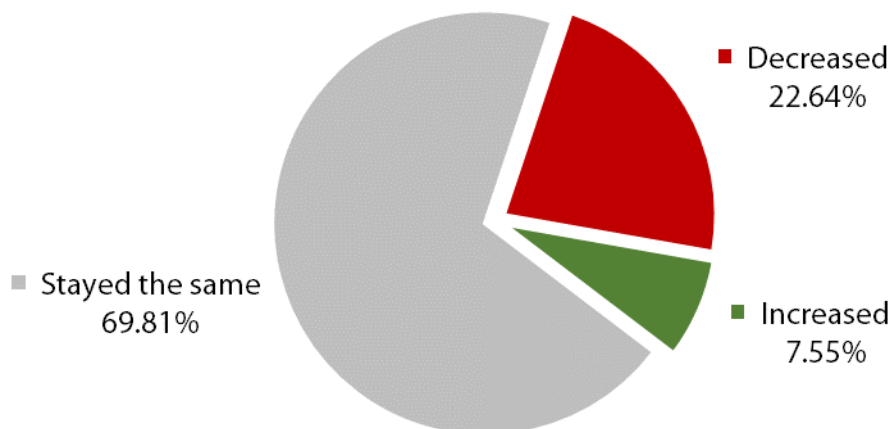
Responding councils have experienced a variety of different decreases in budgets from less than 5% (23.81%) with some experiencing decreases of more than 20% (23.81%).

To what extent will this year’s budget for street lighting meet the need for maintenance / investment?

0 – 25%	7.27%
25 – 50%	10.91%
50 – 75%	25.45%
75 – 100%	34.55%
100%	21.82%

56.37% of respondents believe that their budget for street lighting will meet between 75% and 100% of their need for maintenance / investment. On the other end of the scale, 7.27% of respondents felt that the budget would meet between 0% and 25% of their needs.

What has happened to your training budget over the past 12 months?

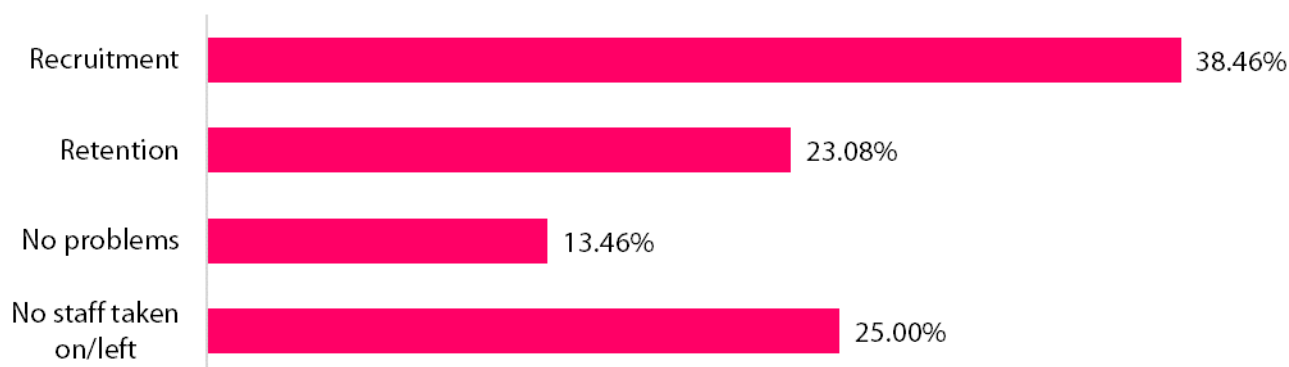


The majority of respondents’ (69.81%) training budgets have stayed the same over the past 12 months. 22.64% of them decreased, and 7.55% increased.

Section 3 – Staffing

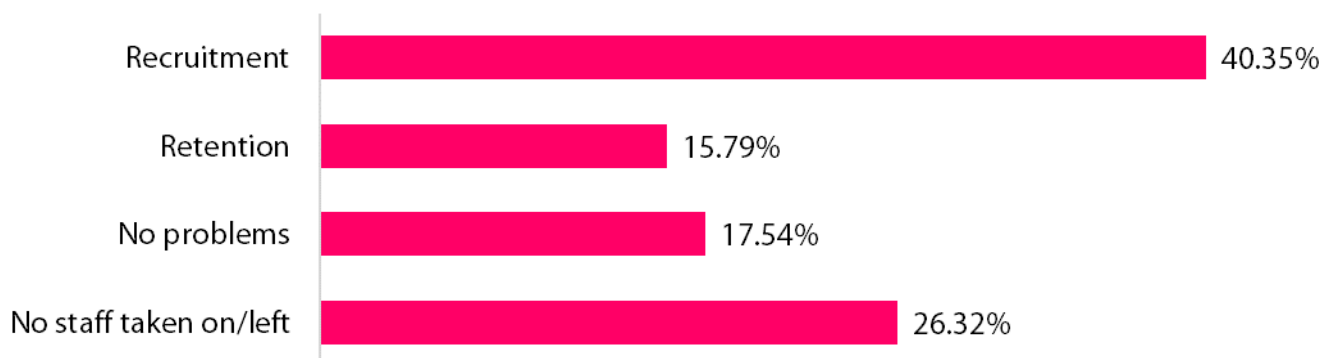
Where have you had difficulty recruiting or retaining staff (over the past 12 months)?

Operatives



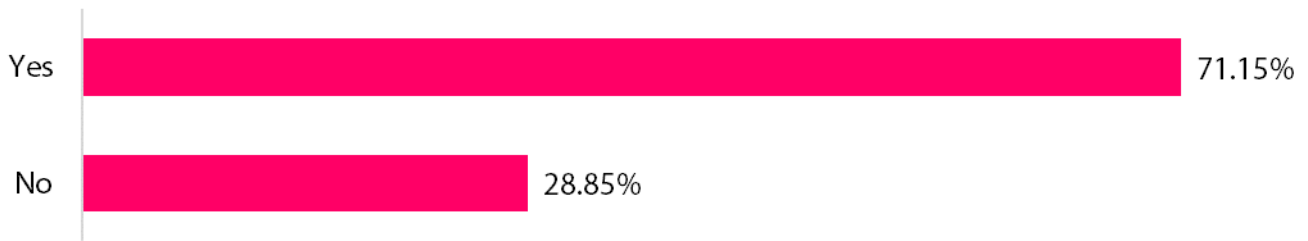
38.46% of respondents had difficulty recruiting operatives, and 23.08% experienced issues retaining them. 13.46% reported as having no problems, and 25.00% said that no staff had been taken on or left.

Technical/Managerial staff



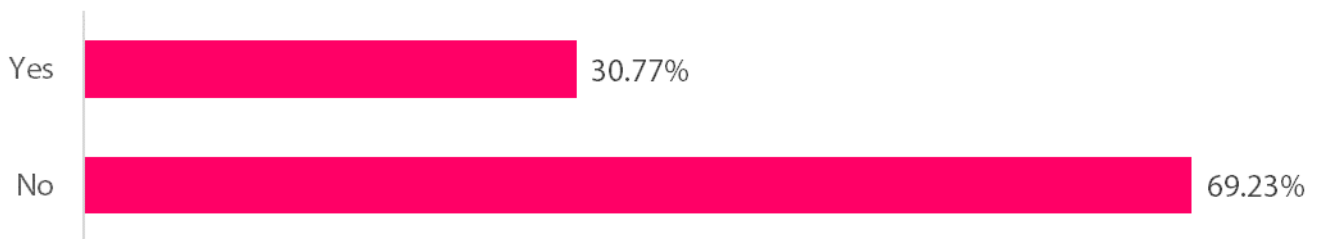
40.35% had issues recruiting technical/managerial staff, and 15.79% experienced issues retaining them. 17.54% said they had no problems, and 26.32% said that no staff had been taken on or left.

Do you personally feel staff absence levels are at an acceptable level?



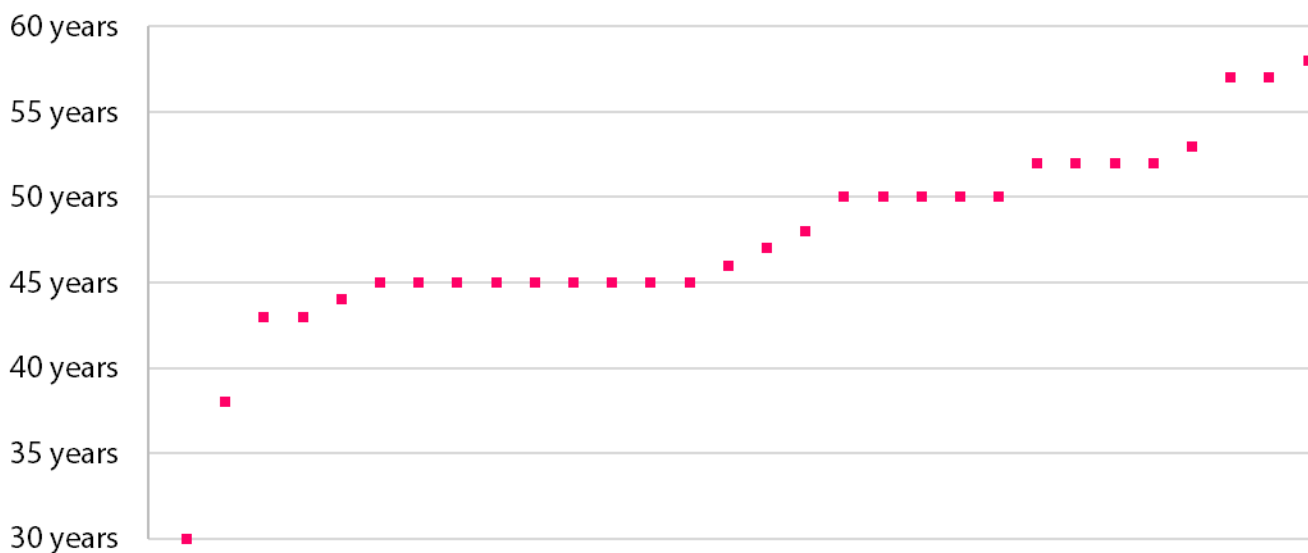
71.15% said that they did personally feel staff absence levels are at an acceptable level.

Do you run an apprenticeship scheme?



30.77% of respondents run an apprenticeship scheme.

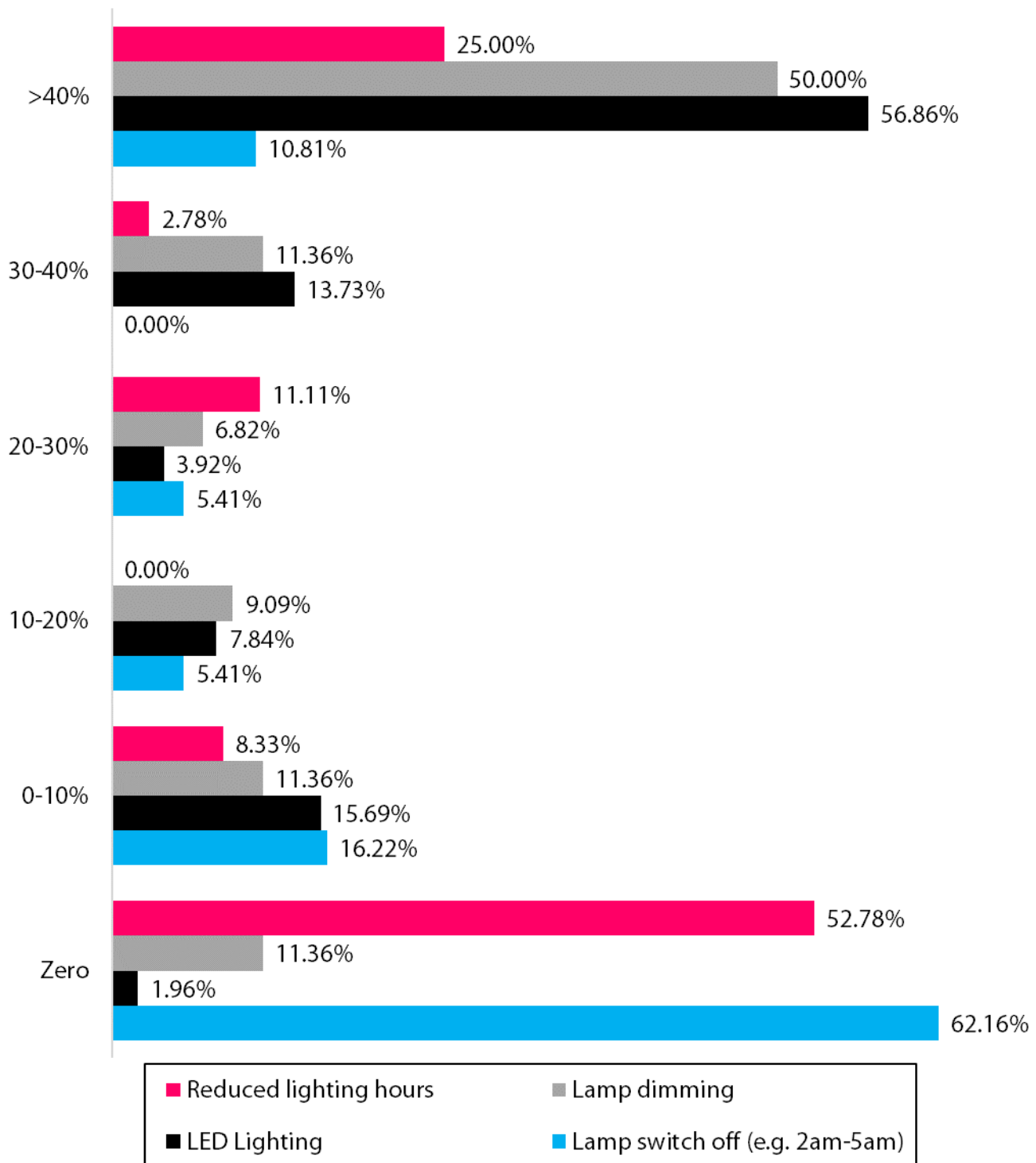
What is the average age of your street lighting operational staff?



The average age of street lighting operational staff was 47.6 years, with the lowest average age reported as 30 years and the oldest average age among respondents was 58 years.

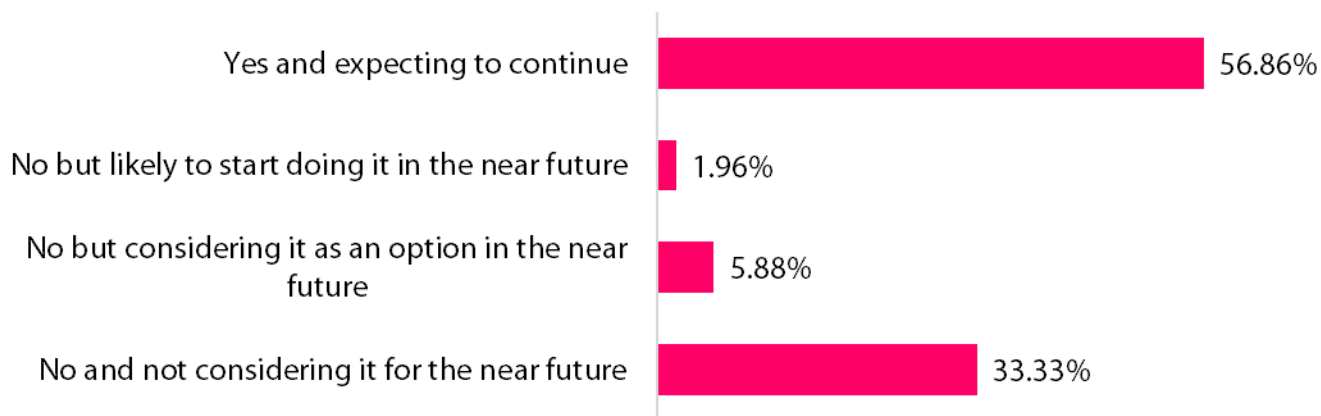
Section 4 – Service Delivery

What energy saving initiatives have you undertaken? What proportion of the lighting stock do you estimate is affected?



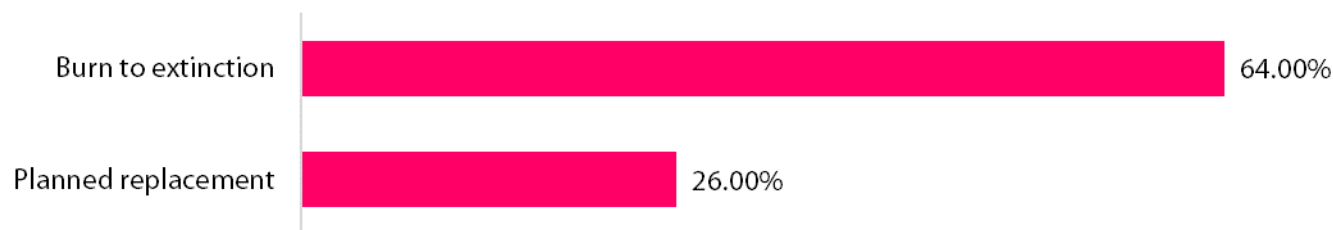
The table above shows the different approaches taken by local authorities with regards to different energy saving methods.

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



Most respondents are selling their services to organisations external to the council and expecting to continue this (56.86%), with 5.88% considering this as an option for the future and 1.96% likely to start doing this in the near future. 33.33% are not selling their services and are not considering this.

What is your council’s approach to lamp replacement within your street lights?



The majority of responding councils’ approach to lamp replacement is burn to extinction (64.00%) rather than planned replacement (26.00%).

Do you have a CMS System?



44.00% of respondents have a CMS System, whereas the majority of respondents do not (54.00%).

Does your council scout for failures?



46.00% of responding councils scout for failures. In other questions many have commented that this has reduced with the introduction of LED lighting in their authorities.

How does your council track energy usage (by half hourly metering, estimated annual consumption or other)?

Half Hourly Metering	75.61%
Estimated Annual Consumption	17.07%
CMS	7.32%

Among respondents, half hourly metering was the most common method of tracking energy usage (75.61%).

What is your council's target time for restoring street lights to working order (in days)?

3 days	2.13%
5 days	46.81%

7 days	40.43%
10 days	10.64%

The most common council target time among respondents for restoring street lights to working order was 5 days (46.81%) closely followed by 7 days (40.43%).

Which energy supplier do you use?

EDF	46.81%
Laser	4.26%
NPower	27.66%
Scottish Power	4.26%
SSE	8.51%
Total Gas and Power	4.26%
Western Power	2.13%
West Mercia	2.13%

Responding councils use a range of different energy suppliers, with the two most common being EDF (46.81%) and Npower (27.66%).

What is the length of your current energy contract?

1 year	18.92%
2 years	13.51%
3 years	13.51%
4 years	24.32%
5 years	10.81%
Unknown	18.92%

The lengths of current energy contracts are shown in the table above.

When does your current energy contract end?

2019	8.57%
2020	31.43%
2021	22.86%
2022	8.57%
2023	8.57%
2024	2.86%
Unknown	17.14%

The table above shows the years when respondents current energy contracts end, with the most common responses being 2020 (31.43%) and 2021 (22.86%).

Section 5 – Opinions

Where do you see growth areas for the street lighting service over the next 12 months?

While several respondents noted that they did not see any growth areas for the service over the next 12 months, responses from those who did include:

- LED lantern conversions
- Smart Cities work
- Electric Vehicle charger installations
- Replacing concrete lighting columns
- Implementing CMS
- External design and delivery work
- Maintenance of underground infrastructure
- Adoption of housing and business developments
- De-illumination of signs
- Wi-Fi
- S278 work
- External works
- Planned maintenance

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

Potential areas of decrease are shown below:

- Maintenance and lamp replacements following LED lantern changes
- Night scouting
- Revenue budgets
- Lighting on new residential developments

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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
- Climate Change and Renewable Energy Network
- Sports and Leisure Management
- Vehicle Maintenance and Transport
- Waste Management, Refuse Collection and Street Cleansing