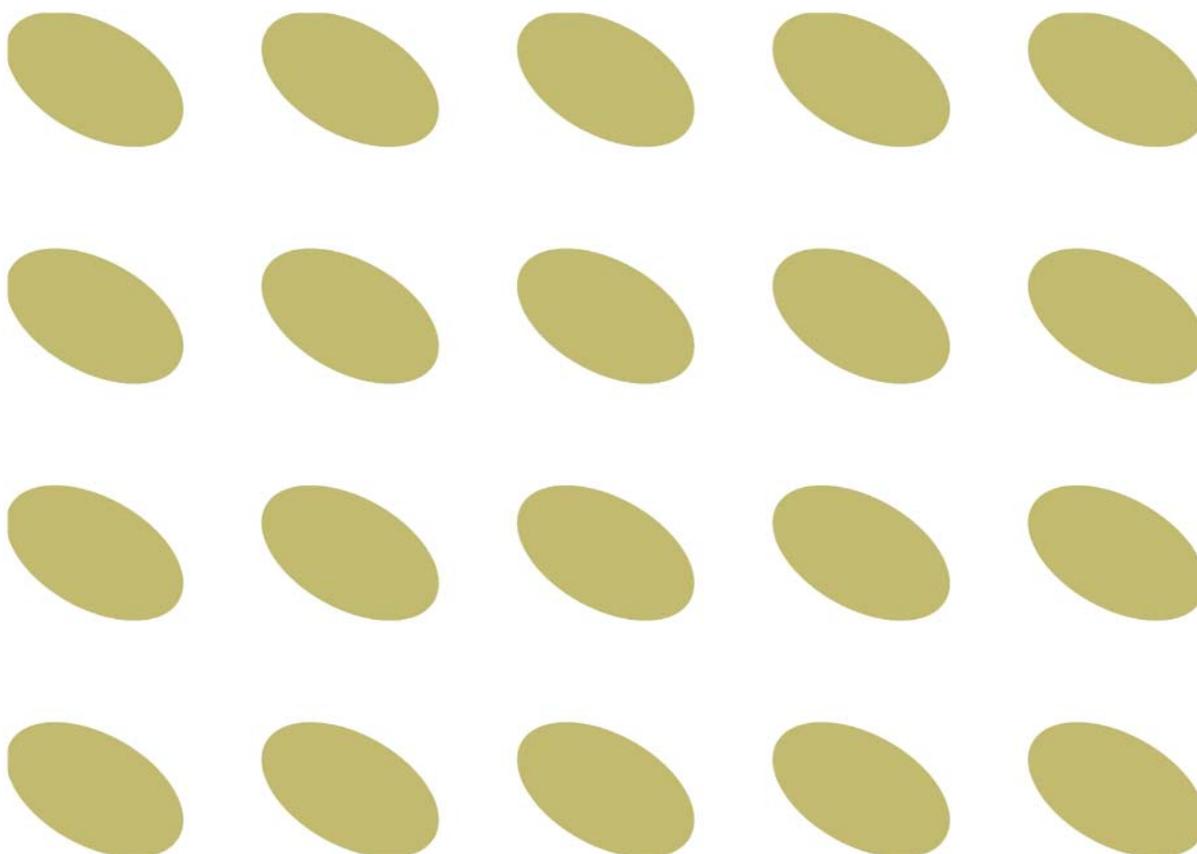


State of the Market Survey 2020

Local Authority Street Lighting Services



March 2021
21-16

State of the Market Survey 2020

Local Authority Street Lighting services

The state of the market survey was conducted by Rob Bailey, APSE Principal Advisor for Street Lighting.

The report was written and prepared by Garry Lee, Research and Coordination Officer.

For any enquires in relation to the survey, Rob may be contacted on:

Tel: 0161 772 1810

Email: rbailey@apse.org.uk

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.



GB 11409



GB 11132



GB 14074

Association for Public Service Excellence

3rd Floor Trafford House
Chester Road

Manchester M32 0RS

telephone: 0161 772 1810

fax: 0161 772 1811

web: www.apse.org.uk

Table of Contents

Results at a glance3

Section 1 - The Service5

- Where in the UK do you work?
- How are your street lighting services currently delivered?
- If the service is currently provided in-house, do you expect the service to remain in-house over the next 12 months?

Section 2 - Budget6

- How has the budget for the street lighting service changes from the last financial year?
- If your budget has decreased from last year, by how much has it decreased?
- To what extent will this year’s budget for street lighting meet the need for maintenance / investment?
- What has happened to your training budget over the past 12 months?

Section 3 – Staffing8

- Where have you had difficulty recruiting or retaining staff (over the past 12 months)?
- Do you personally feel staff absence levels are at an acceptable level?
- Do you run an apprenticeship scheme?
- What is the average age of your street lighting operational staff?

Section 4 – Service Delivery10

- What energy saving initiatives have you undertaken? What proportion of the lighting stock do you estimate is affected?
- Do you currently sell your services to organisations external to the council?
- What is your council’s approach to lamp replacement within your street lights?
- Do you have a CMS System?
- Does your council scout for failures?
- How does your council track energy usage (by half hourly metering, estimated annual consumption or other)?
- What is your council’s target time for restoring street lights to working order (in days)?
- Which energy supplier do you use?
- What is the length of your current energy contract?
- When does your current energy contract end?
- What non street-lighting tasks do you undertake?
- What additional measures have you taken in response to COVID-19?

Section 5 – Opinions15

- Where do you see growth areas for the street lighting service over the next 12 months?
- Where do you see areas where work may decrease over the next 12 months?

Results at a glance

Service

% of street lighting services currently delivered in house	54.54%
% of respondents who sell their services to organisations external to the council	51.85%
% who have a CMS System	51.72%
% of responding councils who scout for failures	60.71%
% of respondents whose approach to lamp replacement is burn to extinction	57.14%
% of respondents whose approach to lamp replacement is planned replacement	32.14%

Budgets

% whose budget has decreased from the last financial year	36.36%
% whose training budget has stayed the same over the past 12 months	93.33%

Staff

Average age of street lighting operational staff among respondents	46.2 years
% who feel staff absence levels are at an acceptable level	93.33%
% who run an apprenticeship scheme	40.00%
% with difficulty recruiting operatives	32.00%
% with difficulty retaining operatives	8.00%
% with difficulty recruiting technical/managerial staff	32.36%
% with difficulty retaining technical/managerial staff	6.45%

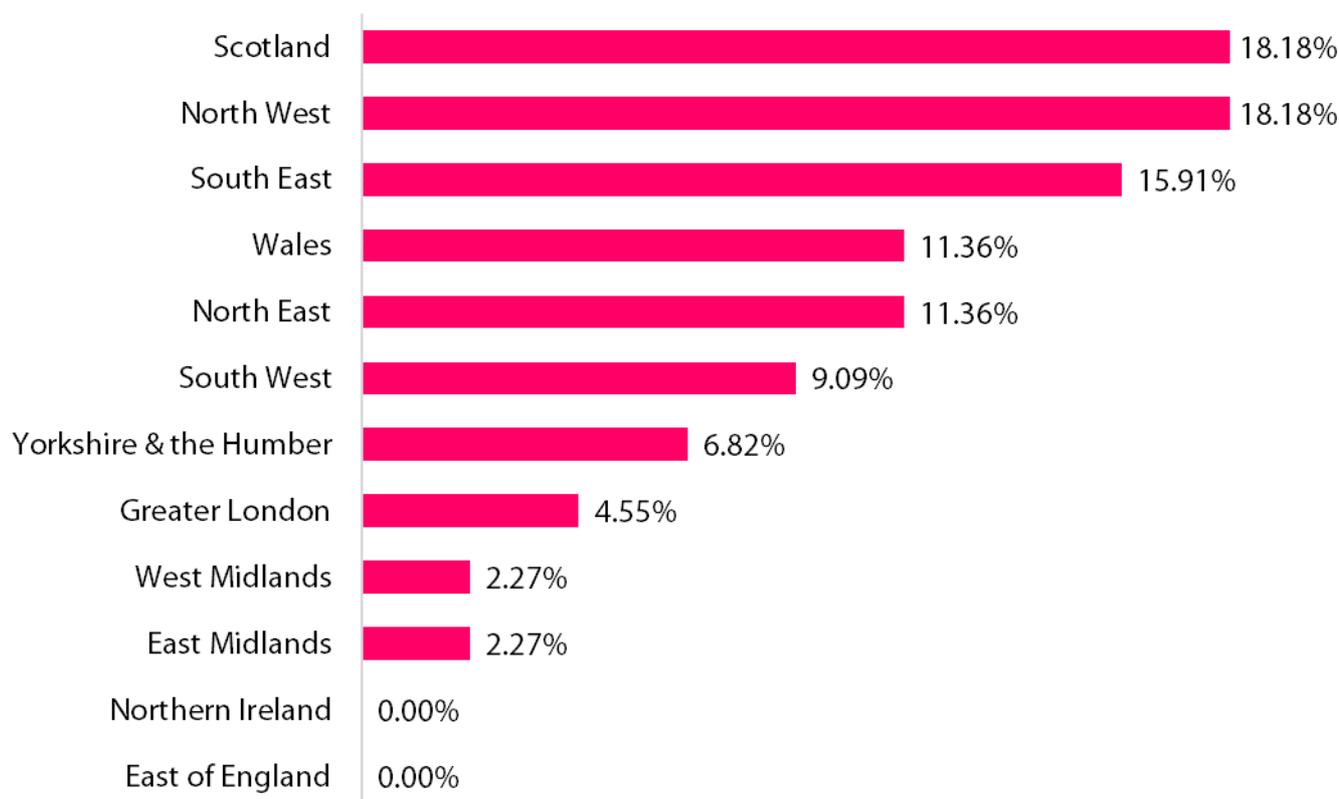
Introduction

APSE conducted an online survey during November and December 2020. 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 44 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 sports and leisure services rather than a thorough analysis of change over time.

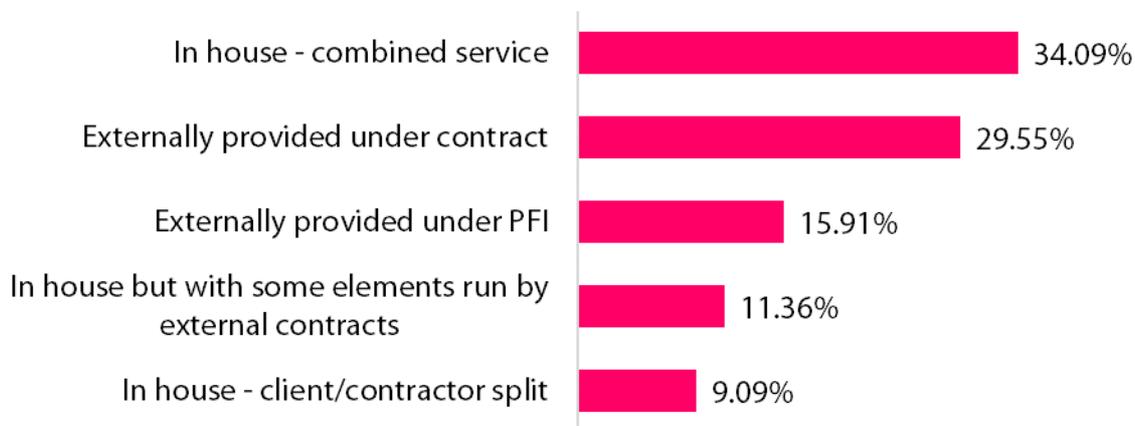
Where in the UK do you work?



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 (34.09%), 11.36% are delivered in-house but with some elements run by external contracts and 9.09% are delivered via an in-house client/contractor split. 29.55% are externally provided under contract and 15.91% are externally provided under PFI.

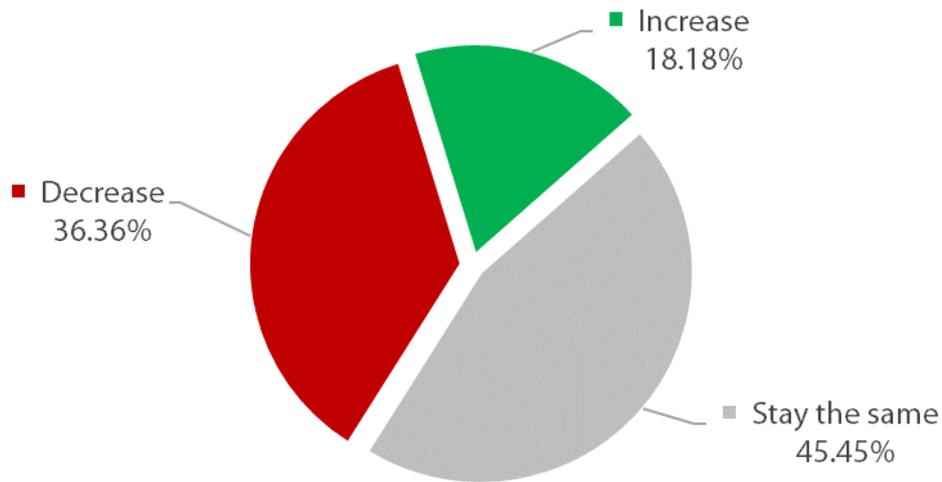
If the service is currently provided in-house, do you expect the service to remain in-house over the next 12 months?



96.77% of respondents with a service currently provided in house expect the service to remain this way over the next 12 months.

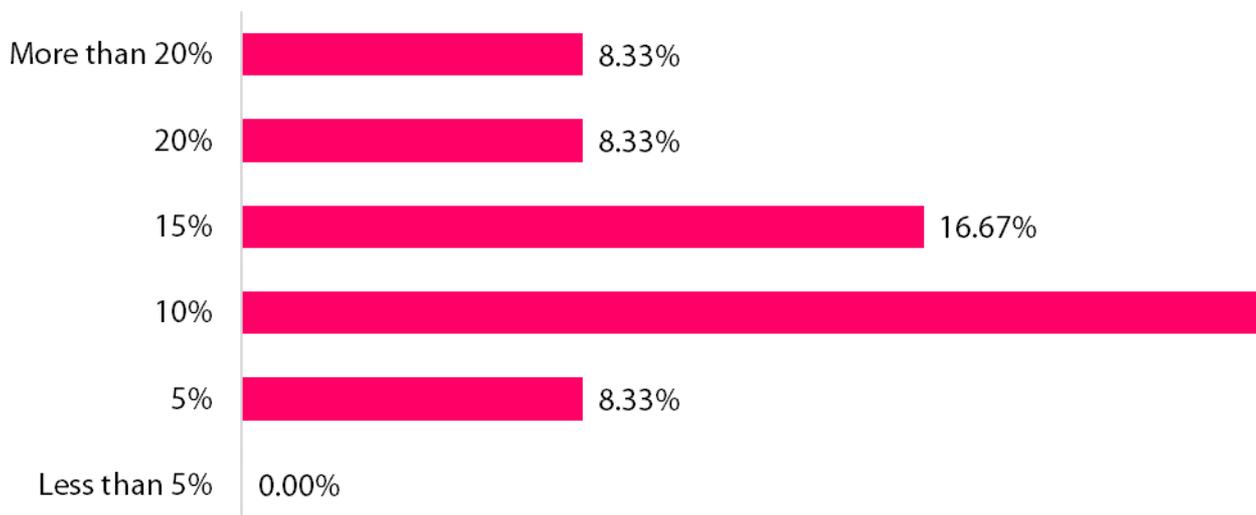
Section 2 – Budget

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 (45.45%), 36.36% experienced a decrease and 18.18% experienced an increase.

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



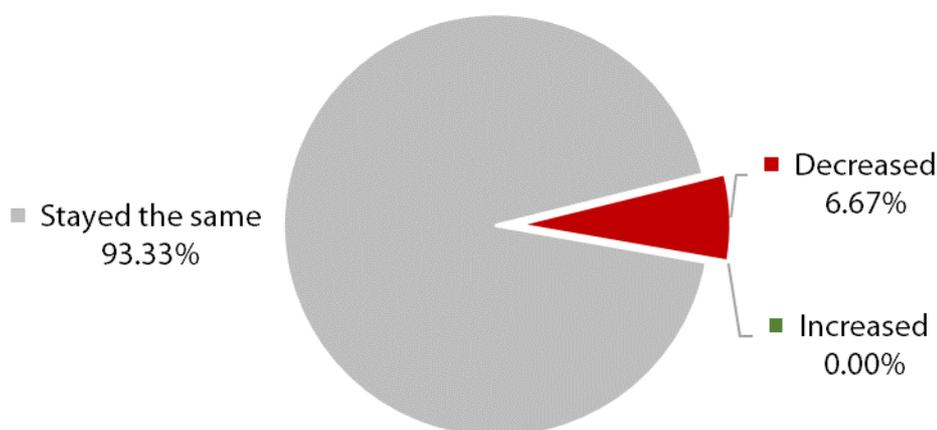
Responding councils have experienced a variety of different decreases in budgets from 5% (8.33%) with some experiencing decreases of more than 20% (8.33%).

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

0 – 25%	16.13%
25 – 50%	0.00%
50 – 75%	22.58%
75 – 100%	41.94%
100%	19.35%

61.29% 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, 16.13% 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?

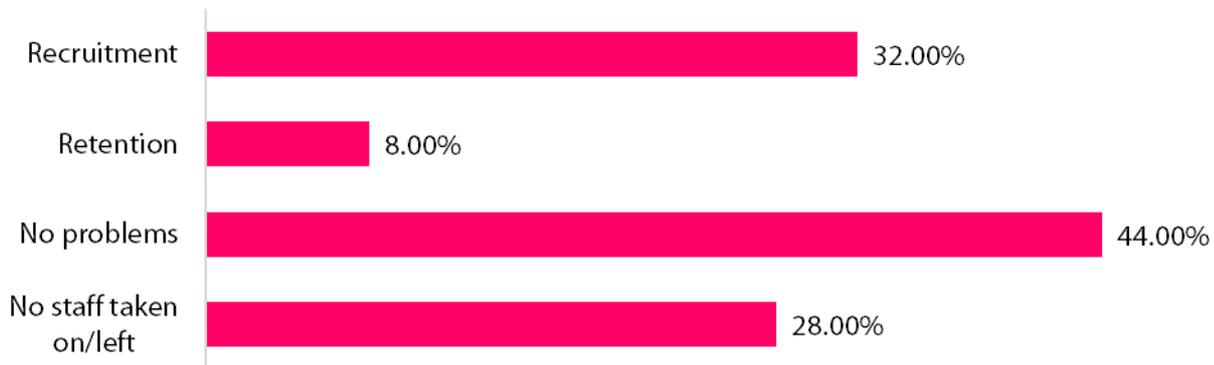


The majority of respondents’ (93.33%) training budgets have stayed the same over the past 12 months. 6.67% of them decreased, and none of them increased.

Section 3 – Staffing

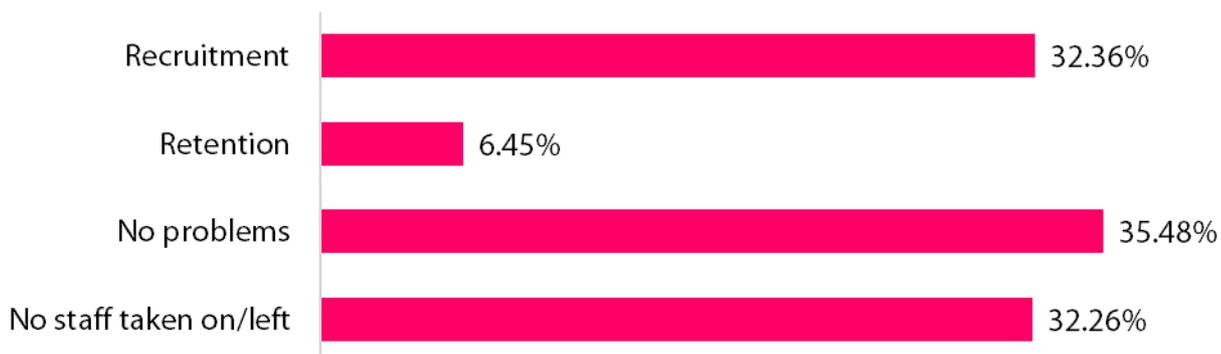
Where have you had difficulty recruiting or retaining staff (over the past 12 months)?

Operatives



32.00% of respondents had difficulty recruiting operatives, and 8.00% experienced issues retaining them. 44.00% reported as having no problems, and 28.00% said that no staff had been taken on or left.

Technical/Managerial staff



32.36% had issues recruiting technical/managerial staff, and 6.45% experienced issues retaining them. 35.48% said they had no problems, and 32.26% said that no staff had been taken on or left.

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



93.33% said that they did personally feel staff absence levels are at an acceptable level.

Do you run an apprenticeship scheme?



40.00% 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 46.2 years, with the lowest average age reported as 35 years and the oldest average age among respondents was 55 years.

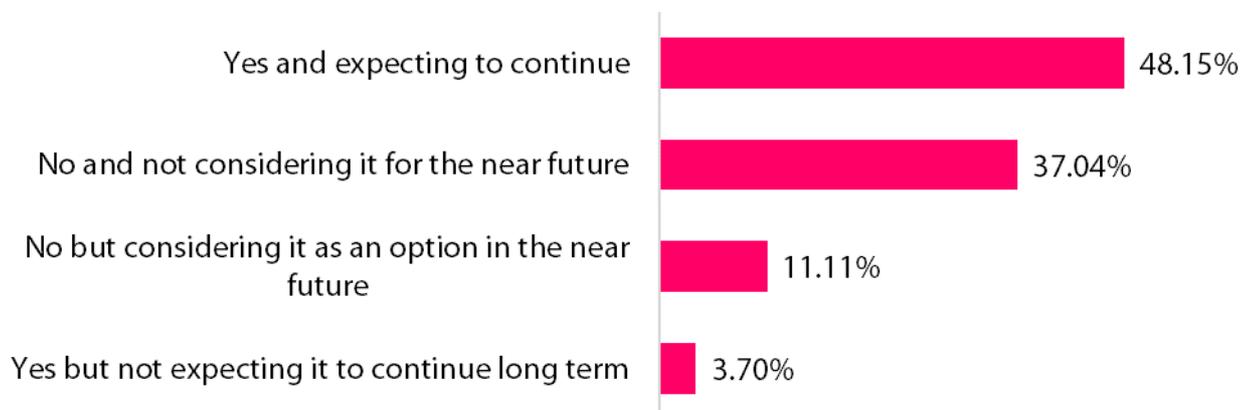
Section 4 – Service Delivery

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

	Zero	0-10%	10-20%	20-30%	30-40%	>40%
Lamp switch off (eg. 2am-5am)	69.23%	11.54%	3.85%	0.00%	0.00%	15.38%
LED Lighting	0.00%	3.45%	3.45%	0.00%	3.45%	89.66%
Lamp dimming	20.69%	3.45%	3.45%	6.90%	6.90%	58.62%
Reduced lighting hours	58.33%	0.00%	0.00%	0.00%	0.00%	41.67%

The table above shows the different approaches taken by local authorities with regards to different energy saving methods. Over 40% of lighting stock is now LED.

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 (48.15%), with 11.11% considering it as an option in the near future. A further 3.70% are currently selling their services but are not expecting it to continue long term. 37.04% 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 (57.14%) rather than planned replacement (32.14%).

Do you have a CMS System?



48.28% of respondents have a CMS System, whereas the majority of respondents do not (51.72%).

Does your council scout for failures?



60.71% of responding councils scout for failures.

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

Half Hourly Metering	15
Estimated Annual Consumption	4
CMS	3

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

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

3 days	4
5 days	12
7 days	3
10 days (or more)	6

The most common council target time among respondents for restoring street lights to working order was 5 days.

Which energy supplier do you use?

EDF	11
E-on	2
Kent County Council	1
Laser	1
NPower	6
SSE	2
Total Gas and Power	2
UKPN	1
West Mercia	1

Responding councils use a range of different energy suppliers, with the most common being EDF.

What is the length of your current energy contract?

1 year	4
2 years	2
3 years	3

4 years	1
5 years	1
More than 5 years	3
Unknown	5

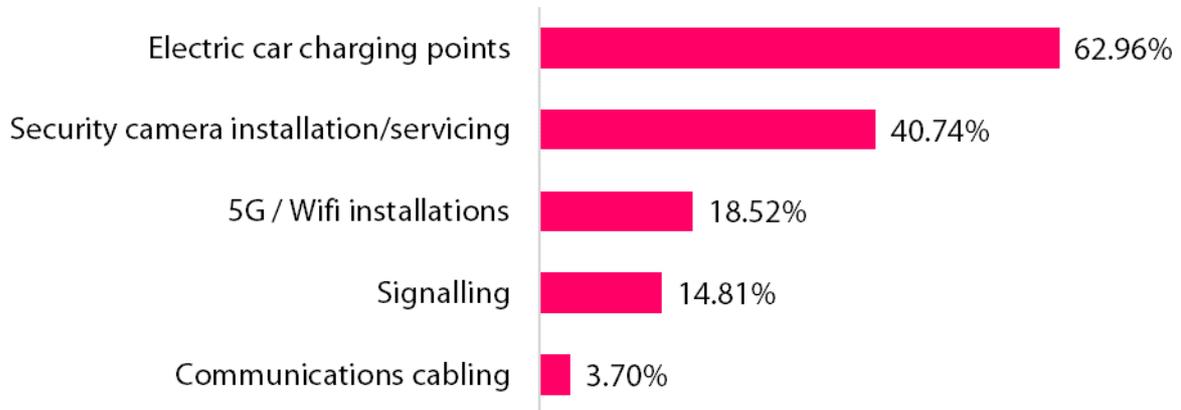
The lengths of current energy contracts are shown in the table above.

When does your current energy contract end?

2021	6
2022	2
2023	1
2024	2
Unknown	5

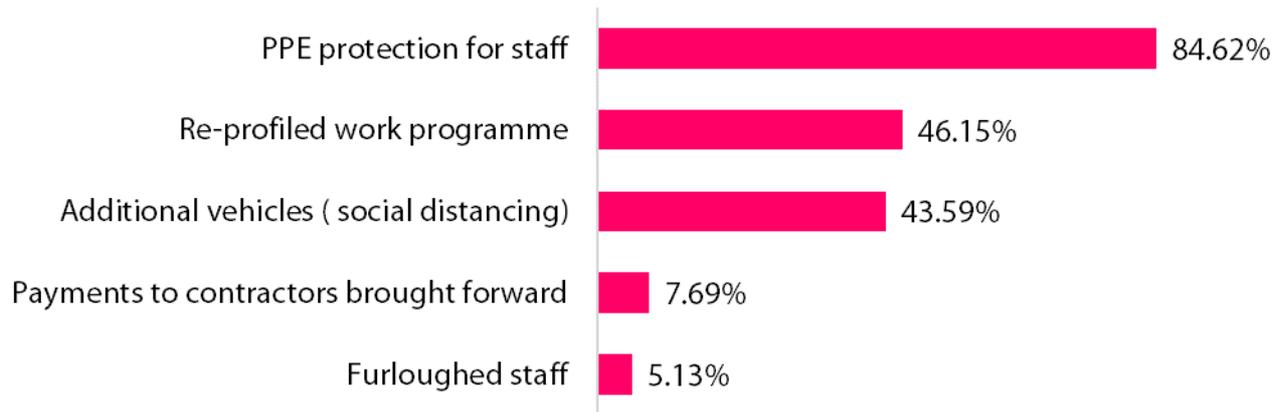
The table above shows the years when respondents current energy contracts end, with the most common response being 2021.

What non street-lighting tasks do you undertake?



The most common non street-lighting task undertaken by respondents is electric car charging points (62.96%).

What additional measures have you taken in response to COVID-19?



The most common additional measure taken in response to COVID-19 is PPE protection for staff (84.62%), followed by re-profiling the work programme (46.15%) and additional vehicles for social distancing (43.59%).

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:

- External works
- EV charging
- 5G / Smart city technology
- LED and Lighting Columns
- CCTV
- Central Management Systems
- Testing
- Commercial civil engineering services
- Maintenance of council department assets
- New development works

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

Potential areas of decrease are shown below:

- Scouting for failures
- Column replacements
- New build development sites
- Revenue budget decreases
- Lamp maintenance
- External works

Local Authority Street Lighting Services

State of the Market 2020

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. Due to Covid-19, these are held online, at present, approximately four times a year. 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