



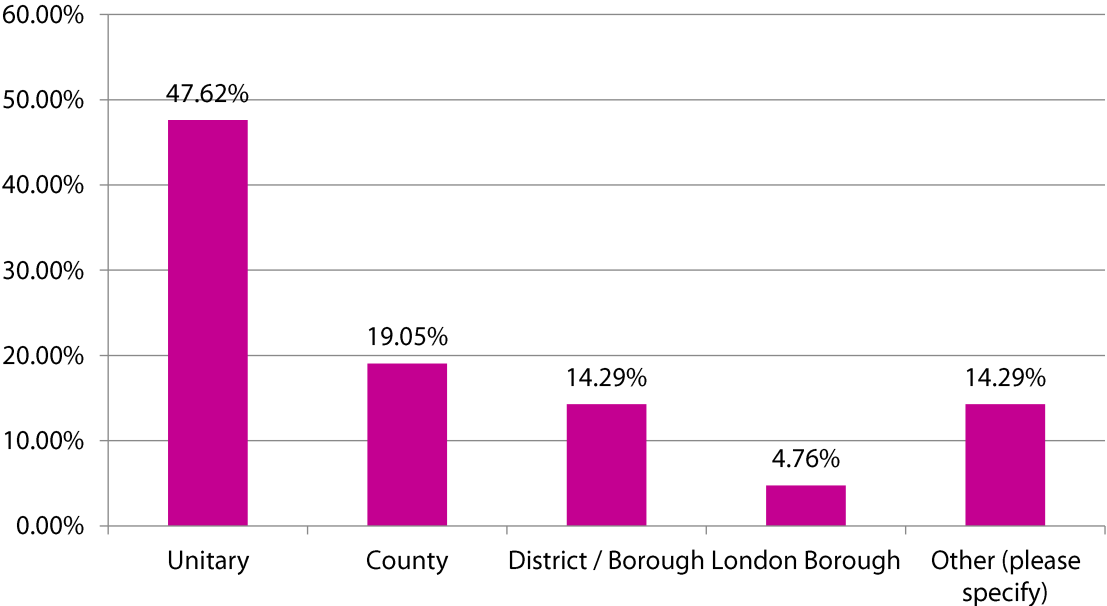
Association for Public Service Excellence

What today's picture tells us

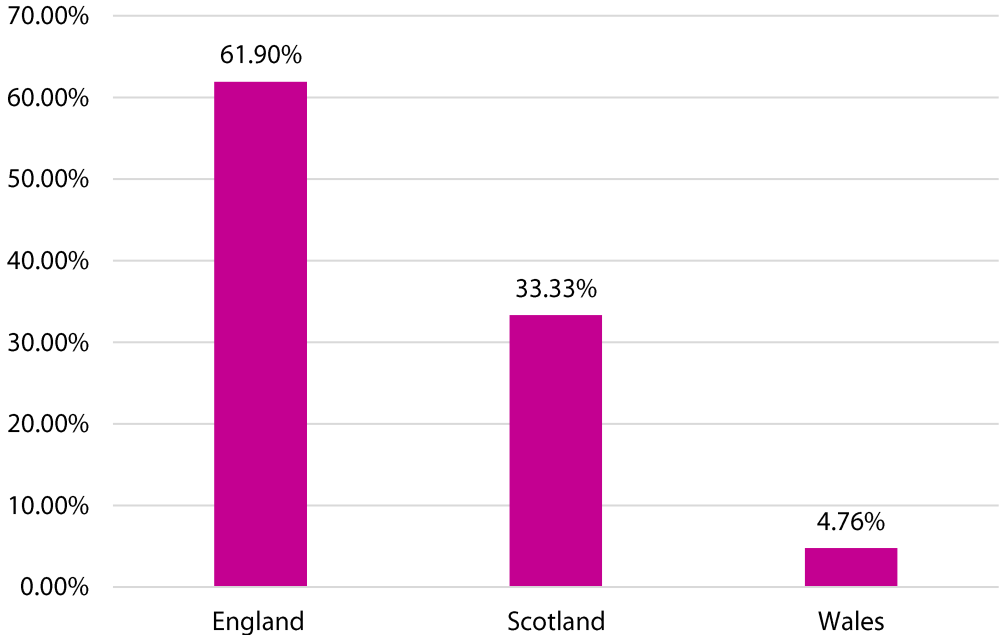
APSE State of the Market – Highways

Who responded to the survey

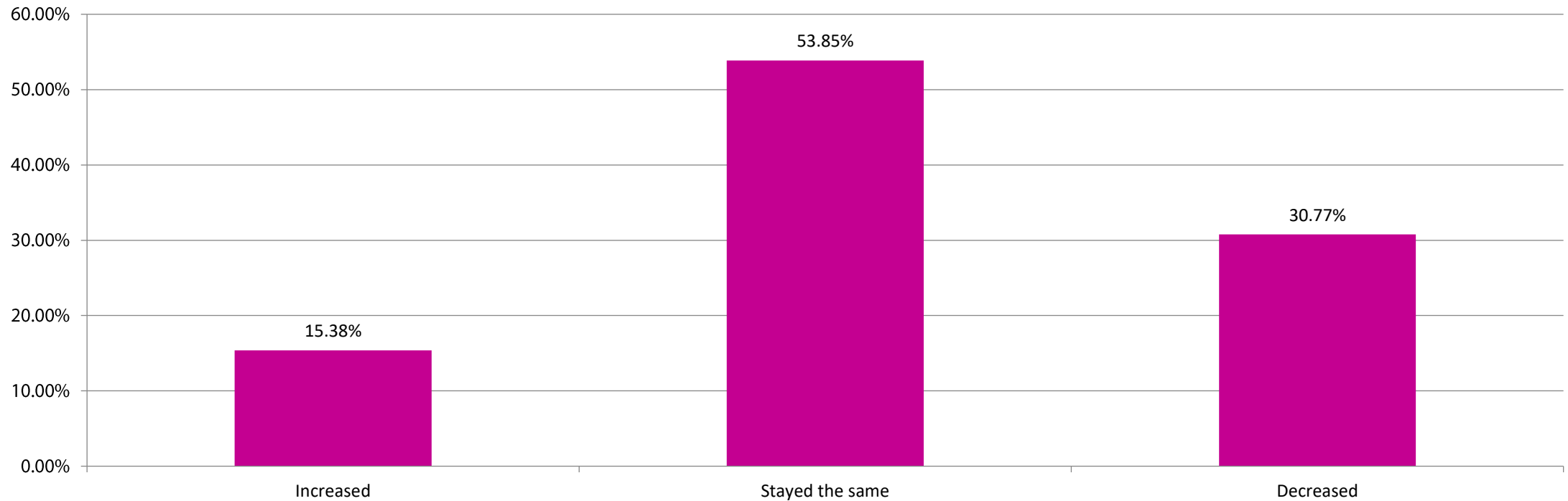
What type of authority is your main employer / client?



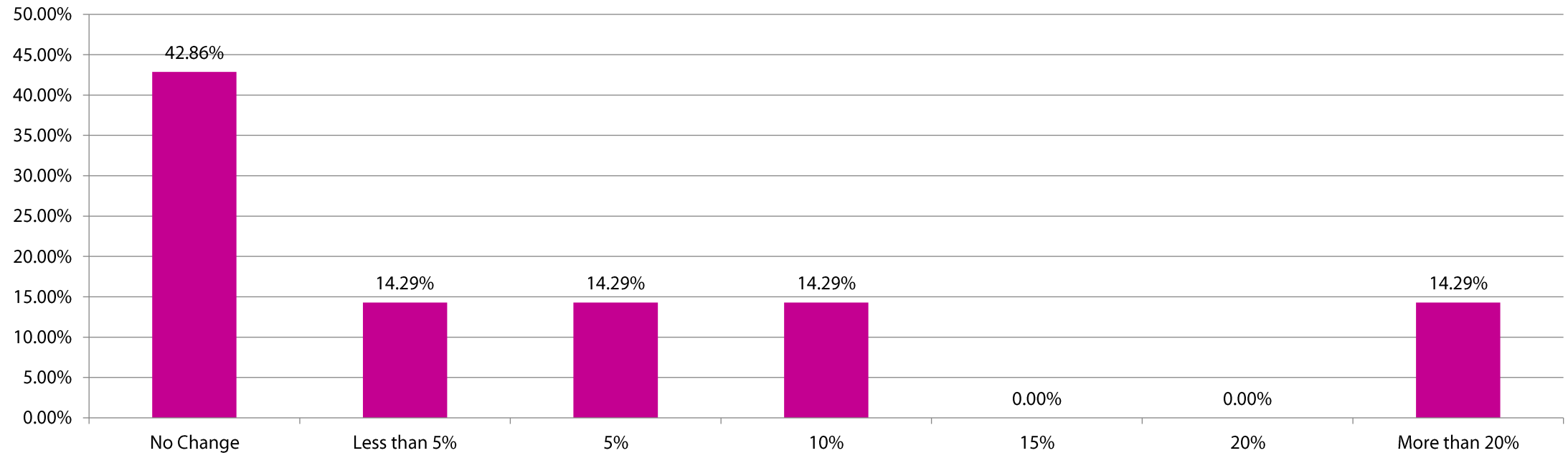
Where in the UK do you work?



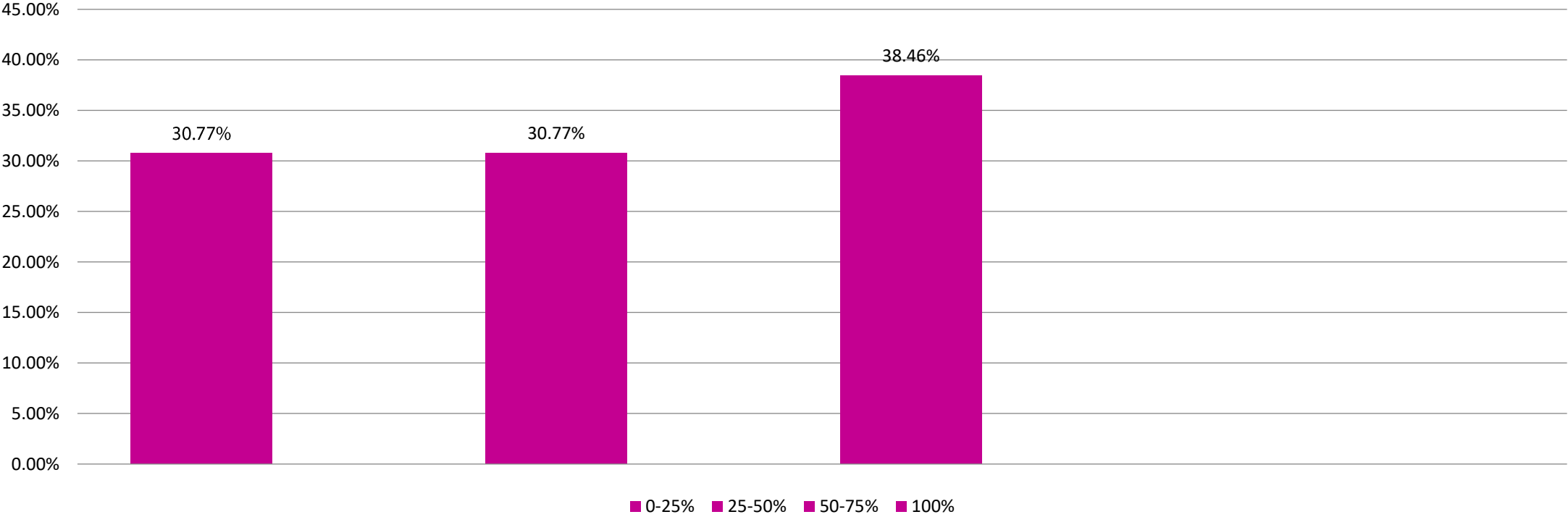
Most highways budgets have held, though nearly a third are down



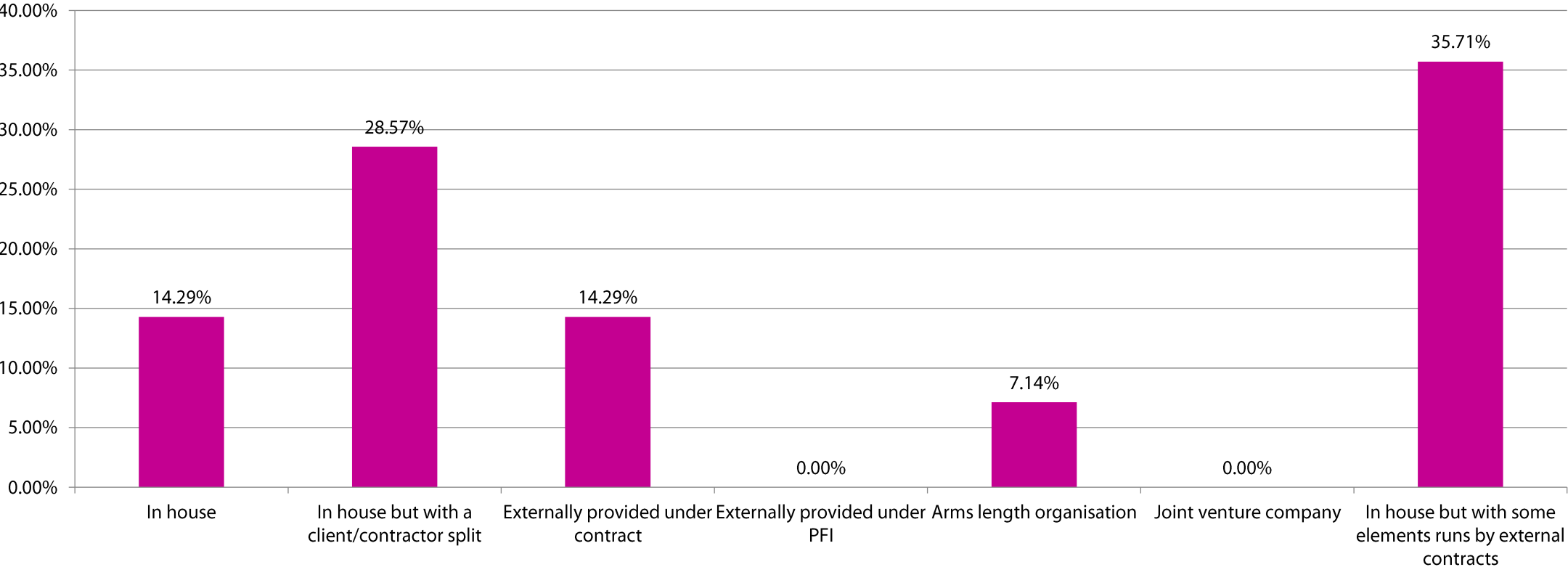
Where budgets fell, most reductions were modest



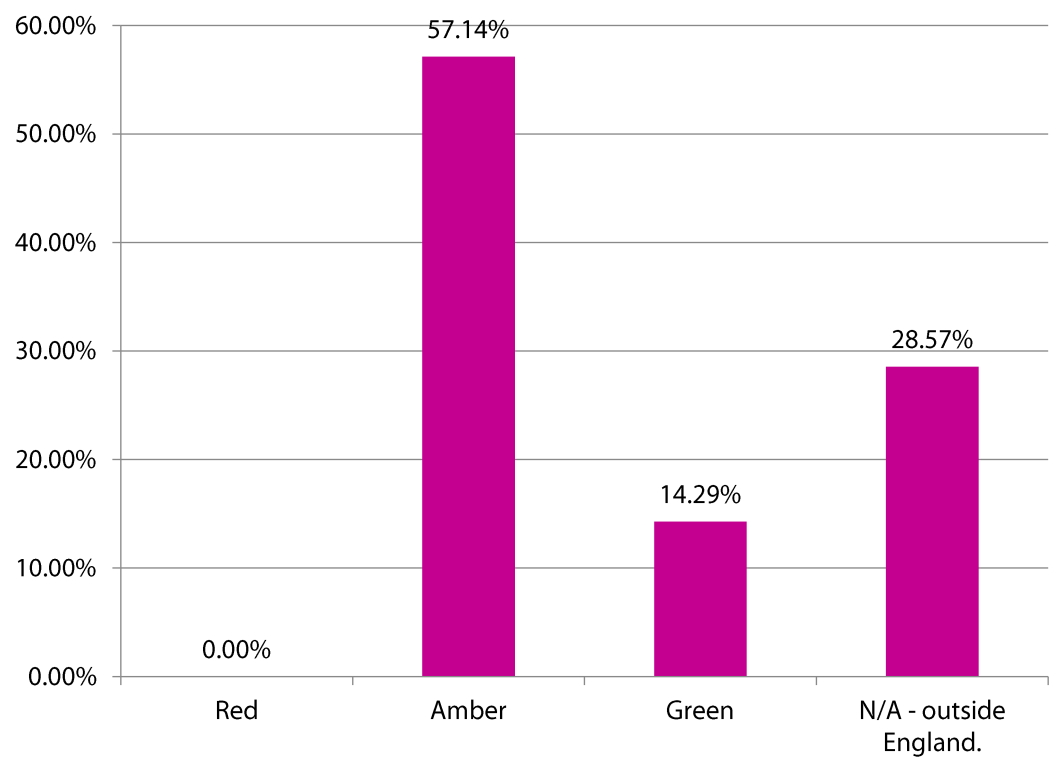
This year's budget will not fully cover pothole and resurfacing needs



Highways services are still delivered mostly in-house

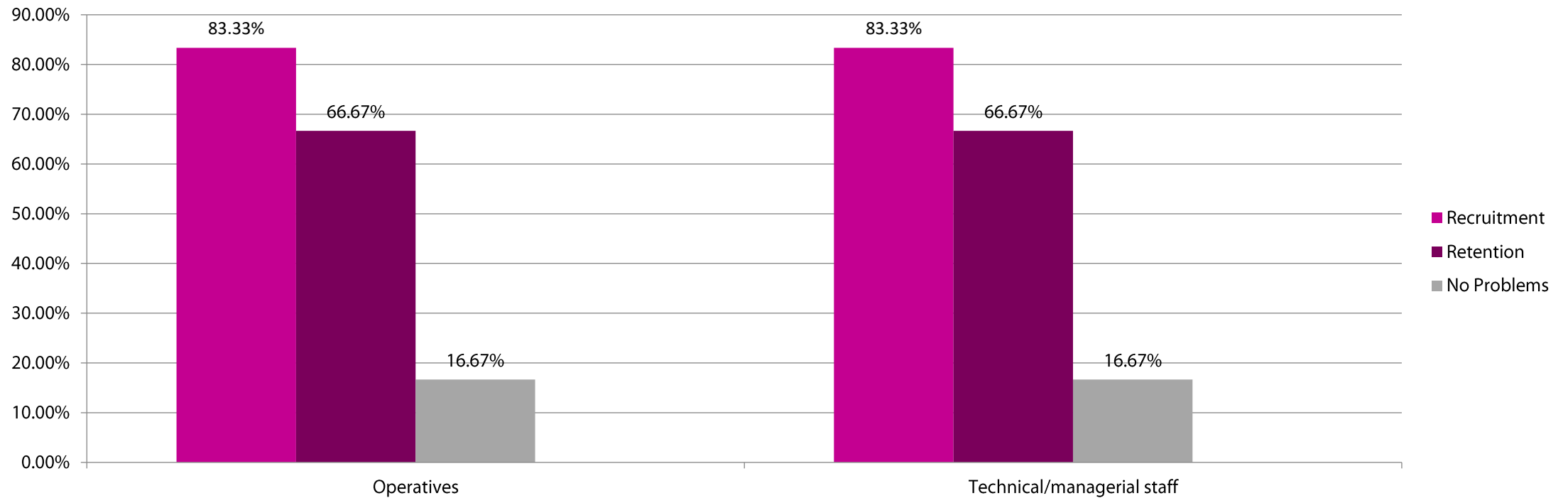


Most authorities are rated Amber on the DfT road maintenance map



- Further investigation is needed to validate the findings
- Some scoring appeared to contain calculation errors
- More clarity is needed on some definitions
- It was not clear how the scoring was carried out, or how a better rating could be achieved
- Publishing the tables in mid-summer, rather than at the January pothole peak, would avoid alarming residents
- Broadly supportive: Some best-practice metrics are of questionable value in assessing actual performance

Recruitment and retention remain difficult across all roles

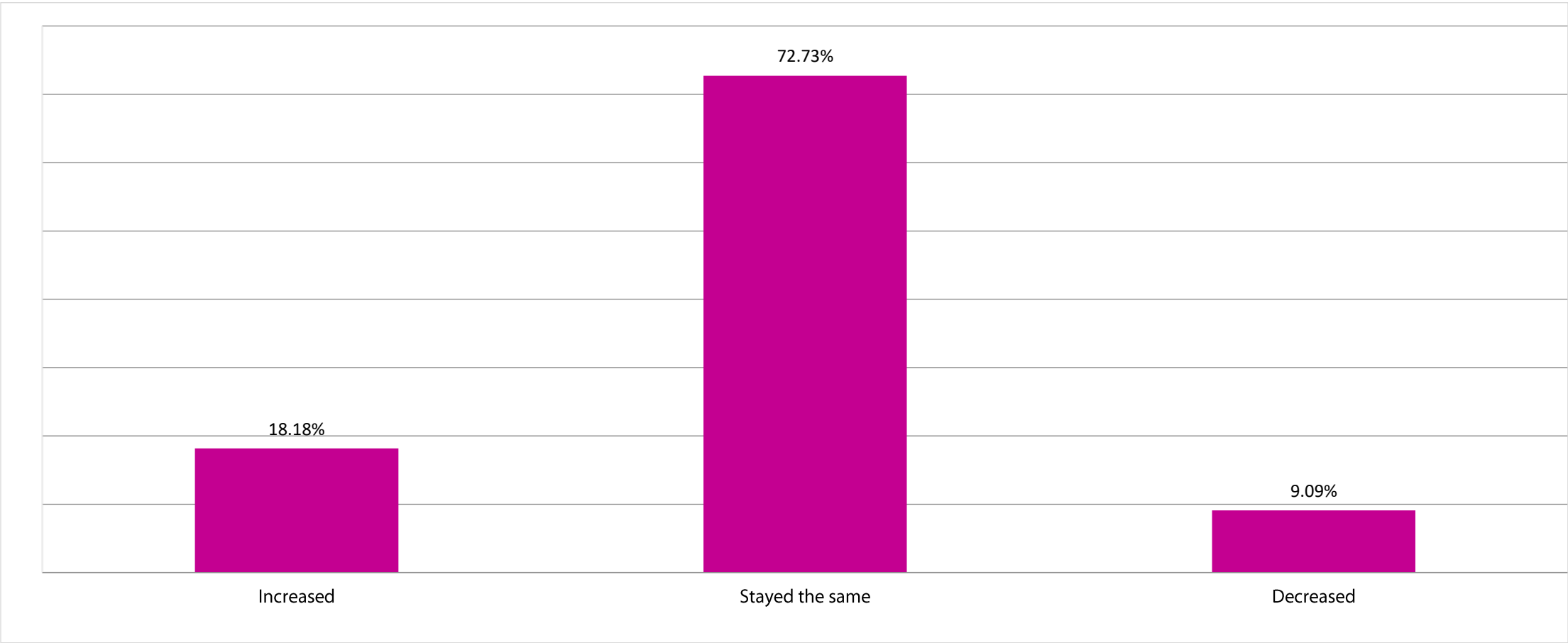




Three quarters of authorities run a highways apprenticeship



Training budgets have largely been protected



Sustainability in practice across the service

- AI-assisted inspections and scheme evaluation and integrated asset management systems
- Low-carbon and carbon-negative materials, including ACLA and rubber pellets.
- Electric vehicles in the fleet
- Digital tools
- Cold-lay surfacing materials
- Warm mixes, rejuvenators, preventative treatments and recycling
- Early intervention, batched delivery and local suppliers
- Trials of a range of new materials and ways of working

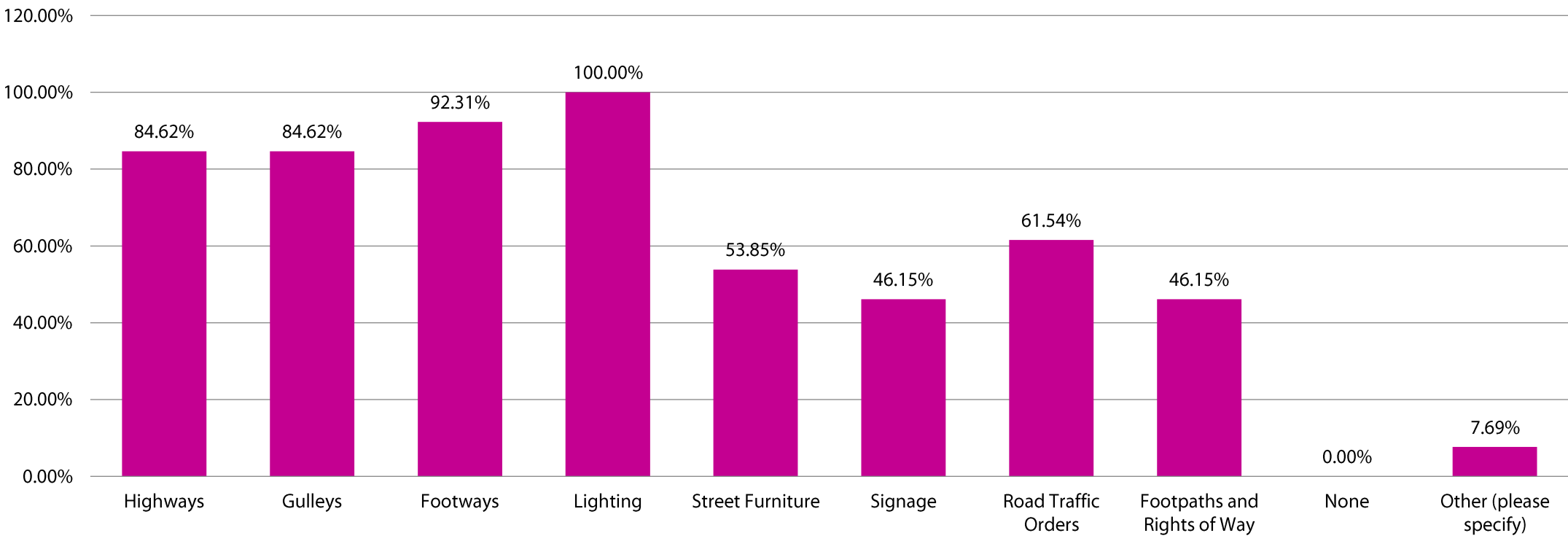
Where work may grow

- Preventative maintenance
- Greater use of sustainable materials
- Electric vehicles
- Traffic signals and highway maintenance
- Government-funded streetscape works
- Surface rejuvenators
- Routine works
- Traffic management

Where work may decrease

- Street lighting
- Uncertain
- External contracts
- Road maintenance, particularly resurfacing
- Structural works

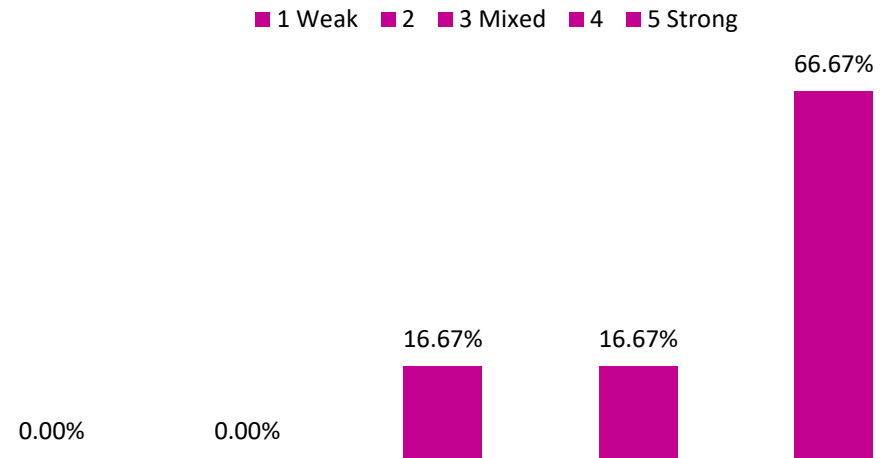
Core networks are well covered by asset management systems



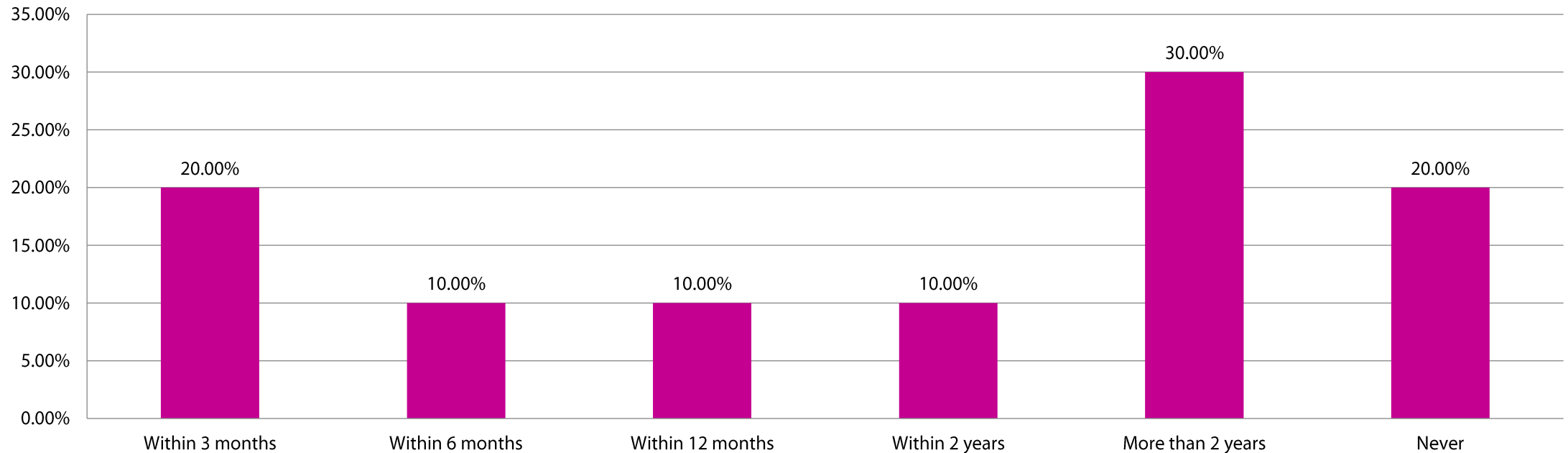
Authorities are confident in defending motorist claims

- All public liability claims are assessed against corporate policies
- More claims are being submitted
- Claim volumes have increased
- We are currently coping with the volume of claims
- Negligible
- Increasing
- Claims are robustly defended,
- Similar to previous years

How strongly do you rank your council's approach to defending claims? (from 1 weak to 5 strong)



For many authorities, an acceptable standard is still years away



The innovations officers' rate most highly

- Mastic asphalt used in preventative maintenance to reduce potential potholes.
- Gully cleaning
- Net-zero carriageway scheme
- Automated gritting
- Trialling SteelSurf ECO+, a carbon-negative resurfacing material from SteelPhalt. footprint.
- AI technology for inspections and record-keeping
- AI-based condition surveys

Conclusions

- Funding can't keep pace — potholes and resurfacing stay underfunded.
- For most, an acceptable network is still two years away.
- Recruiting and keeping skilled staff remains a real struggle.
- Apprenticeships are thriving and training budgets protected.
- Delivery stays largely in-house, blending client and contractor models.
- Asset management is firmly embedded.
- Low-carbon materials, prevention and AI inspection drive innovation.
- Claims are defended robustly, with volumes holding steady.



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