

Addressing the needs of planners

Annual research among local authority planners responsible for mobile telecoms planning 2001 to 2005





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Introduction

This report presents the findings of research conducted by Market and Opinion Research International (MORI) on behalf of the Mobile Operators Association (MOA), regarding local authority planning officers' attitudes towards the development of mobile phone base stations. The views expressed in the report are MORI's, rather than those of the sponsor of the report, and represent our interpretation of the findings of the research.

The main objectives of the research are to:

- Better **understand planners' views** of base station planning;
- Assess whether planners perceive mobile phone operators to be:
 - Producing adequate levels of **information**;
 - **Co-operating** with their needs;
 - Effectively **addressing health issues**.

100 interviews are conducted with senior local authority planners involved in mobile phone base station planning every May. The research has been conducted annually since 2001.

A quota is set to ensure that the sample is representative of the different types of local councils across Great Britain. Since 2003 County Councils have not been included in the sample and some questions have been added in recent years.

Interviews are conducted by telephone.

Executive Summary

Most local authority planners who are involved in base station development have a generally positive view of the behaviour of the mobile phone operators. Specifically:

- Four in five agree that there has been an improvement in the quality of information and level of consultation, over a quarter 'strongly agree', four times as many as did so in 2001.
- Seven in eight feel operators co-operate positively with requests for more information about planning applications.
- Three-quarters agree the operators provide them with enough information about their plans for mobile phone base stations within their local authority area. This figure has steadily risen over the last four years; in 2001, just a quarter of planners thought this was the case.
- Four in five agree that the operators make themselves available for discussion with planners before submitting applications, and though rather fewer (57%) agree the operators also show willingness to consult local people directly; this has increased since 2001 when only 8% said the same.

Nevertheless, planners have some concerns. Just over a third agree that operators make sufficient effort to share existing base stations (though this figure has doubled over the last four years). The majority now agree that operators have provided evidence to show they have considered the possibility of site sharing, double the number that said so as recently as 2003.

Although mobile phone base stations seem to be important to most councils (three in five planners say they are a 'very important' issue within their local authority, and two-thirds have a mast register), not all approach it in the same way. Only three in ten have a dedicated Telecoms Officer in their planning department, while only just over a quarter have a formal policy on base station development which relates to possible health risks - and most of those that do say they are simply following ODPM policy. One in eight planners admit they do not try to make themselves available to discuss operators' plans before applications are submitted.

Planners feel they are well informed on the issue (four in five claim to know 'at least a fair amount' about the ODPM's Code of Best Practice), but are less confident about their colleagues - only a third feel the relevant officer in their authority is 'very knowledgeable' about telecoms. Furthermore, just 5% said that the same could be said about the responsible members or councillors. However both of these figures have improved in the last couple of years.

Main Findings

Telecoms knowledge

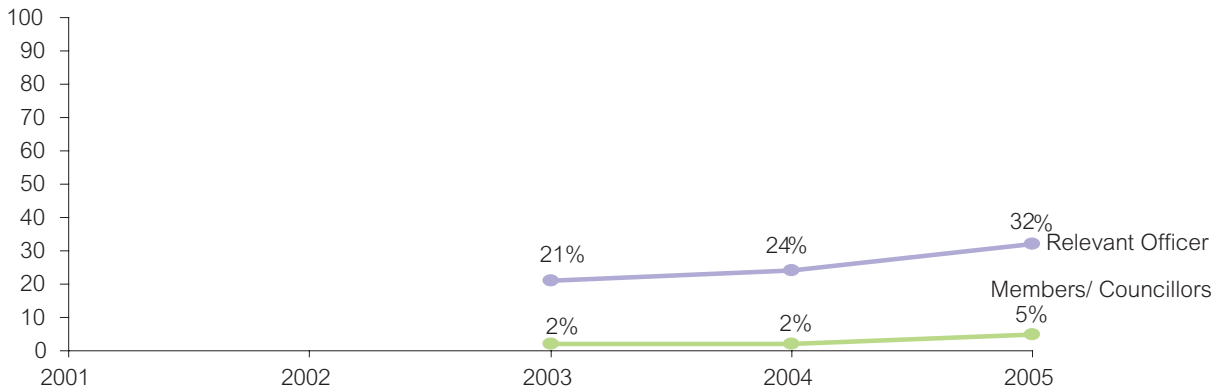
Knowledge about telecoms among relevant local authority officers appears to have increased over the last two years. A third of officers (32%) are now seen as being 'very knowledgeable' about telecoms, compared with one-fifth (21%) in 2003.

However, there is a perceived gap in knowledge about telecoms between the relevant officers and the local authority members/councillors responsible for telecoms. Planners say that only 5% of the responsible members/councillors in their local authority are very knowledgeable about telecoms. There seems to be no change in members'/councillors' level of knowledge since 2003.

Perhaps there is a genuine disparity in knowledge of telecoms between officers and members/councillors. However, it is also possible that planners see members/councillors as more removed from the day-to-day dealings of telecoms-related issues (as compared with themselves/officers) and having a much more general (less specific) role - and thus view members/councillors as less knowledgeable about telecoms.

- Q How knowledgeable, if at all, do you think the relevant officers in your authority are about telecom
- Q And how knowledgeable, if at all, do you think the responsible members/ councillors on your authority are about telecoms?

Very knowledgeable

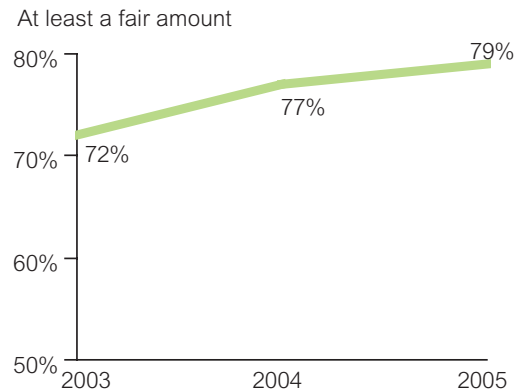
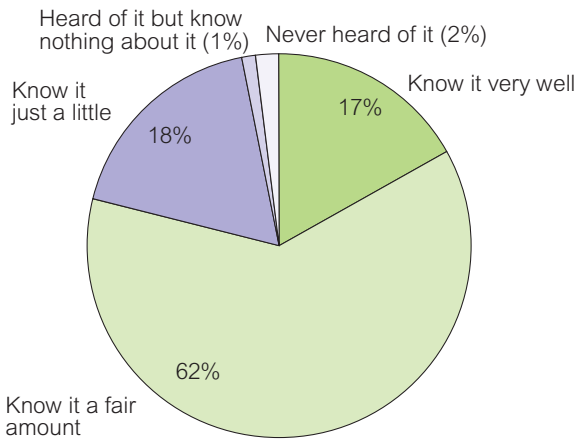


Base: Local authority planners involved in base station development: 100, May '03, '04 & '05

The ODPM Code of Best Practice on Mobile Phone Network Development was originally introduced in 1996 by the then Department of the Environment and the Welsh Office, together with representatives from the telecommunications industry and central and local government. November 2002 saw the introduction of the revised Code. This revision was made to better reflect the changing nature of telecommunications development and design and the need for greater local community involvement and consultation in the siting of base stations.

Planners' knowledge of the Code appears to have increased since 2003. Currently, four in five (79%) planners know 'at least a fair amount' about the code, and nearly a fifth (17%) of all planners 'know it very well'.

Q Could you please tell me how well you feel you know the ODPM's Code of Best Practice on Mobile Phone Network Development?



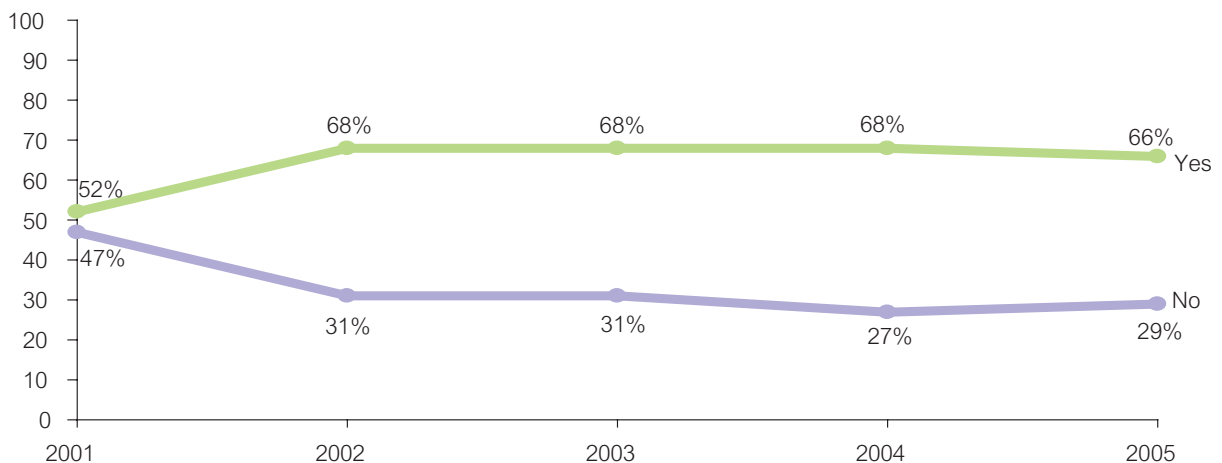
Base: Local authority planners involved in base station development: 100, May '03, '04 & '05

This increased level of knowledge suggests that planners are becoming more telecoms-savvy and more informed about the codes of best practice that apply to mobile phone network development. For the operators, having more knowledgeable and better-informed planners could prove advantageous.

Mast registers

Around two-thirds of local authorities have mast registers. This figure has peaked over the past four years, since the marked increase from 52% in 2001 to 68% in 2002.

Q Does your local authority have a mast register?



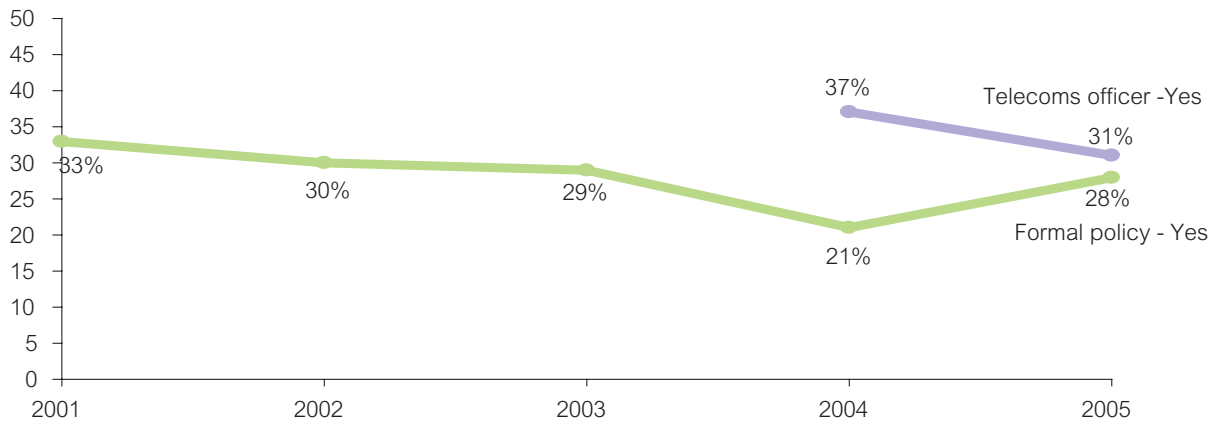
Base: Local authority planners involved in base station development: c.100, May '01, '02, '03, '04 & '05

Importance of base station issues

Three in ten councils (31%) have a dedicated telecoms officer in their planning department. A similar proportion has a formal policy on the development of mobile phone base stations which relate to possible health risks.

This year, among councils with such a policy, most say they are simply following government/ODPM policy. The research suggests that this is linked to planners' increased knowledge of telecoms and ODPM policy. Other top reasons for implementing such a policy are uncertainty about health risks/taking a precautionary approach, and increasing pressure from residents or members of council.

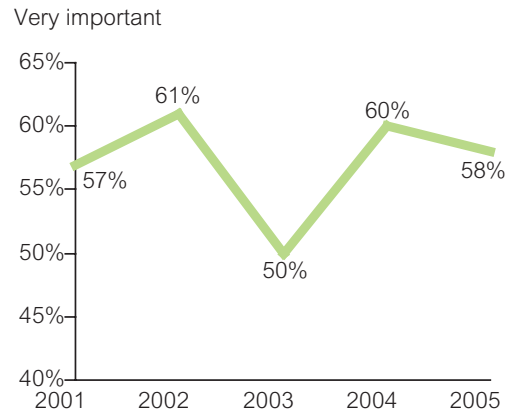
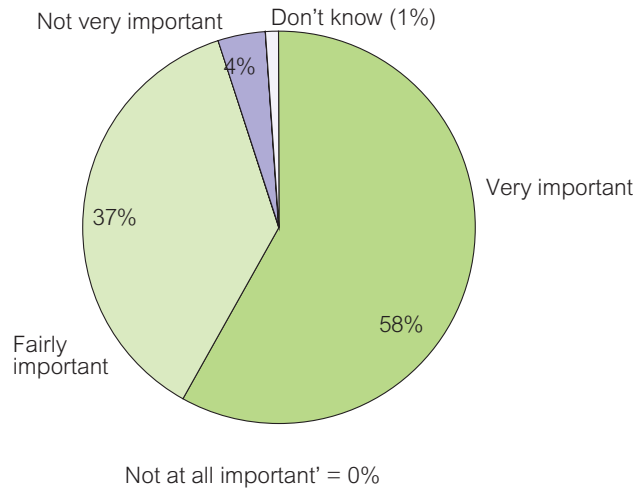
- Q Does your Authority have a dedicated Telecoms Officer in the planning department?
- Q Does your local authority have a formal policy on the development of mobile phone base stations which relates to possible health risks, for example the prevention of use of council property?



Base: Local authority planners involved in base station development: c.100, May '01, '02, '03, '04 & '05

Even if only three in ten councils have a dedicated telecoms officer and/or a formal policy on the development of mobile phone base stations, the base stations issue is a recurring 'top-of-mind' concern for at least half of all planners. Over the past five years, between 50% and 61% of planners have said the issue of mobile phone base stations as 'very important' within their local authority. On average, since 2001, 95% of planners rate it as being important (i.e. 'very' or 'fairly' important).

Q Within your local authority, how important is the issue of mobile phone base stations?



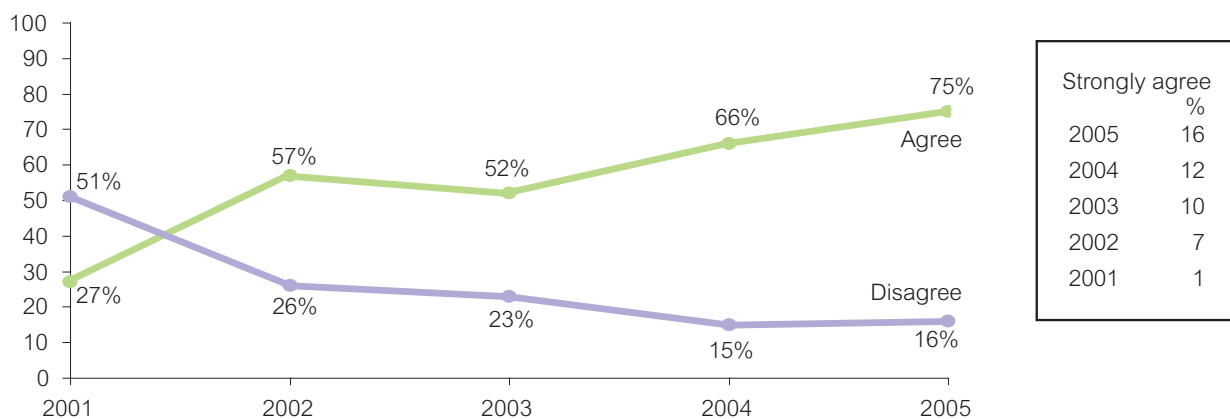
Base: Local authority planners involved in base station development: c.100, May '01, '02, '03, '04 & '05

Communicating with planners

Plans for base stations

Three-quarters of planners now agree that mobile phone operators provide sufficient information about plans for mobile phone base stations within the area covered by their local authority. In 2001, around a quarter of planners (27%) agreed. This positive development highlights the real progress made by mobile phone operators in trying to be more open and informative about their base station plans with local planners.

Q To what extent do you agree or disagree...the mobile phone operators provide me with enough information about their plans for mobile phone base stations within the area covered by this local authority?

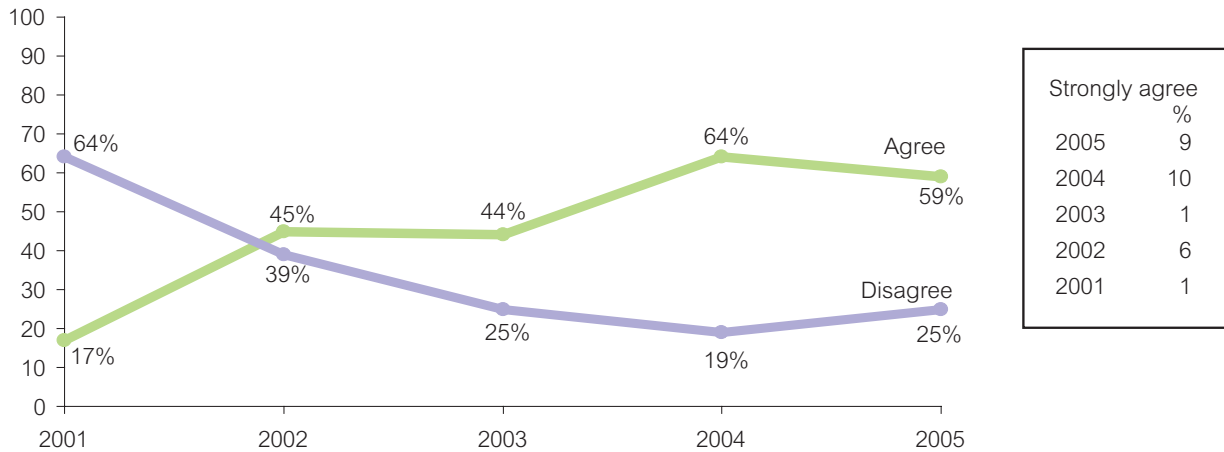


Base: Local authority planners involved in base station development: c.100, May '01, '02, '03, '04 & '05

Plans in specific local areas

Comparatively, mobile phone operators are seen as being less informative about their plans in specific local areas such as site options, justifications and technical information. Three in five (59%) planners now agree that they receive sufficient information in this respect. Nonetheless, mobile phone operators are also seen to have made progress in this area over the last five years (in 2001, only 17% of planners agreed).

Q To what extent do you agree or disagree...the mobile phone operators provide enough information about their plans in specific local areas such as site options, justifications and technical information, for example, radio wave emission levels and performance?

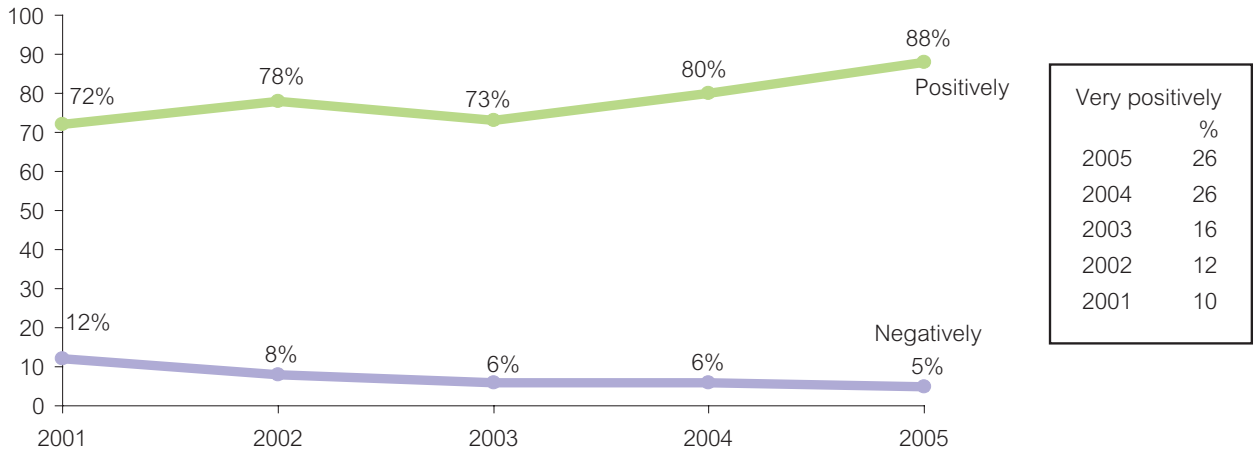


Base: Local authority planners involved in base station development: c.100, May '01, '02, '03, '04 & '05

Planning applications

As well as making improvements in the amount of information they provide, operators also now appear to be more willing to come up with additional information about their planning applications when requested by planners. In 2001, around seven in ten planners (72%) said their requests for more information were met positively. Now, nearly nine in ten planners (88%) agree, including a quarter who say their requests are met 'very positively'.

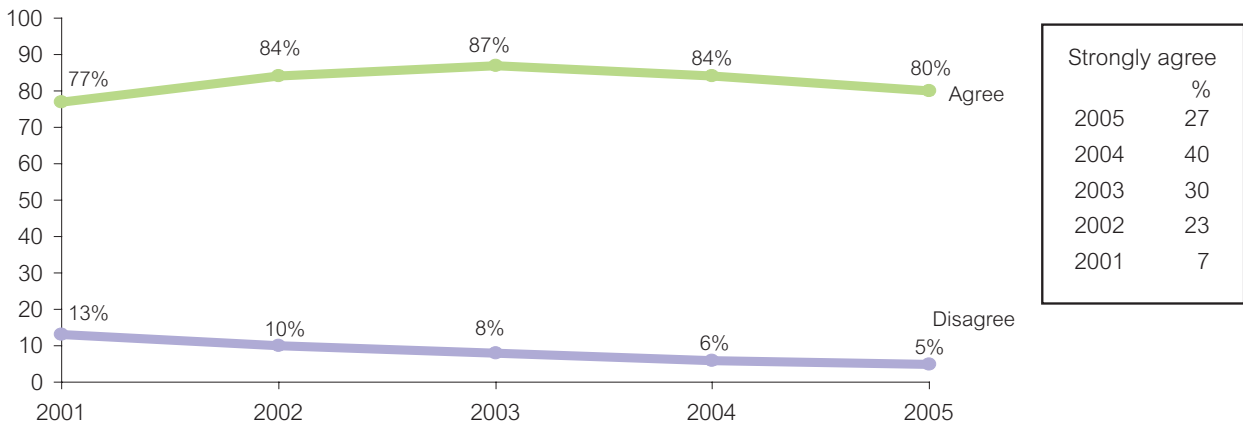
Q How positively or negatively do mobile phone operators co-operate with requests from you for more information about planning applications?



Base: Local authority planners involved in base station development: c.100, May '01, '02, '03, '04 & '05

The progress in the way mobile phone operators communicate with planners is further highlighted in the following chart. Every year, since 2001, around four in five planners agree that there has been a year on year increase in the quality of information and level of consultation by mobile phone operators when making planning applications for base stations. This indicates that mobile phone operators have not only achieved distinct improvements in the way they communicate with planners each year, they have also succeeded in maintaining and building upon the good work they have done from one year to the next.

Q To what extent do you agree or disagree...there has been an improvement in the quality of information and level of consultation by the mobile phone operators when making planning applications for base stations?



Base: Local authority planners involved in base station development: c.100, May '01, '02, '03, '04 & '05

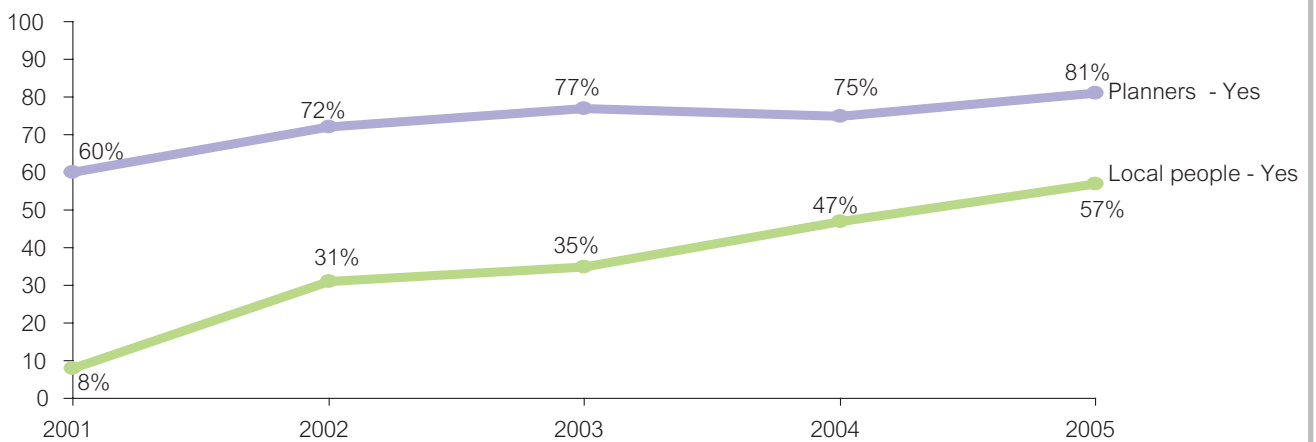
Consultation

Mobile phone operators are now seen to be more willing to consult with local people and with planners about possible mobile phone masts. Nearly three in five (57%) planners now agree that mobile phone operators show willingness to consult local people directly about possible site locations, compared with around 8% in 2001.

Likewise, there appears to be an increased willingness on the part of mobile phone operators to meet and discuss plans with local authority planners, prior to submitting planning applications.

Q Do mobile phone operators show willingness to consult local people directly about possible site locations?

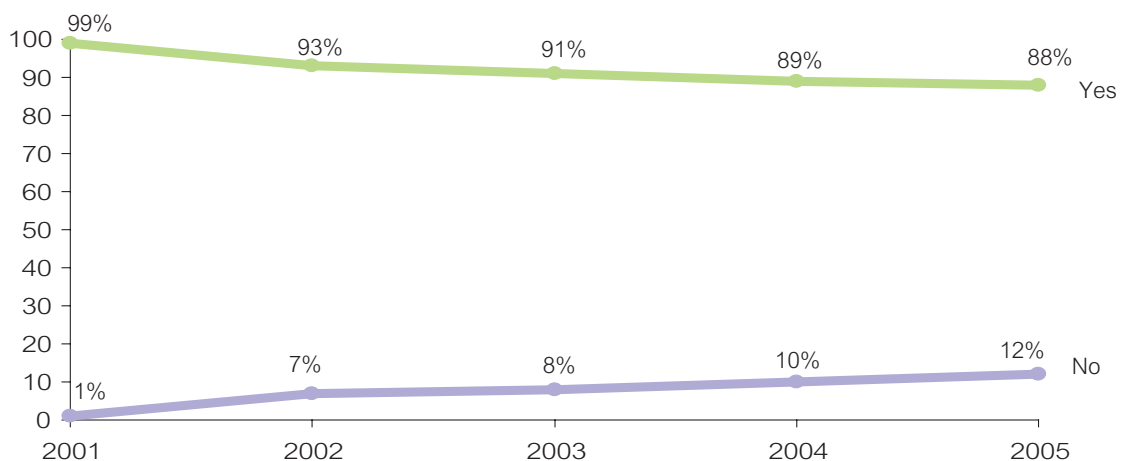
Q Do the mobile phone operators make themselves available to meet and discuss their plans with you prior to submitting planning applications?



Base: Local authority planners involved in base station development: c.100, May '01, '02, '03, '04 & '05

However, there is indication that planners may be becoming less likely to want to make themselves available to meet and discuss plans with mobile phone operators. This could be due to any number of reasons, but it has been suggested that perhaps planners are now often too busy with internal work commitments.

Q If mobile phone operators request to meet and discuss their plans with you prior to submitting planning applications, do you generally try to make yourselves available?



Base: Local authority planners involved in base station development: c.100, May '01, '02, '03, '04 & '05

Issues to address

Lack of information/knowledge about mobile phone base stations has ceased to be the main issue to be addressed. From 2001-2003, this was the main issue which planners felt mobile phone operators could be addressing more effectively, but its importance appears to have diminished, perhaps due to the attention that the issue has been given by the operators. There is indication that this change has been brought about by access to the internet - and so perhaps the challenge for mobile phone operators is not so much to address the lack of information, but to address the quality of information in terms of clarity and accuracy, in a transparent manner.

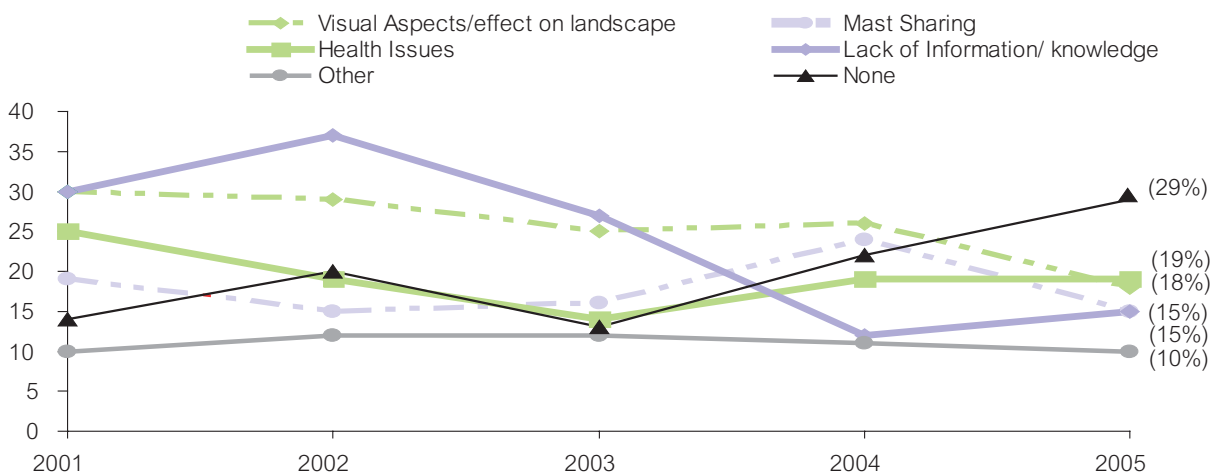
People have access to the internet and other sources of information, and they perhaps misinterpret them or don't understand them. So there needs to be a clearer line from both the operators and the Government about the issue.

Local authority planner

Likewise, concerns about the visual aspects of mobile phone base stations and their effect on the landscape have become less of an issue for planners. The results suggest this could be because of the increase in the number of phone masts, and the fact that people may now be more accustomed to seeing them than they were five years ago.

Most noticeable however is the increase in the proportion of planners who say there are no areas for mobile phone operators to address more effectively (29% in 2005, up from 14% in 2001). Issues relating to health and mast sharing have fluctuated over the years and it is worth noting that having been a key issue in 2004, the issue of mast sharing has seen a decline in importance in 2005. This suggests the operators have addressed some of the issues raised in 2004.

Q Are there any issues relating to mobile phone base stations which you feel mobile phone operators could be addressing more effectively?

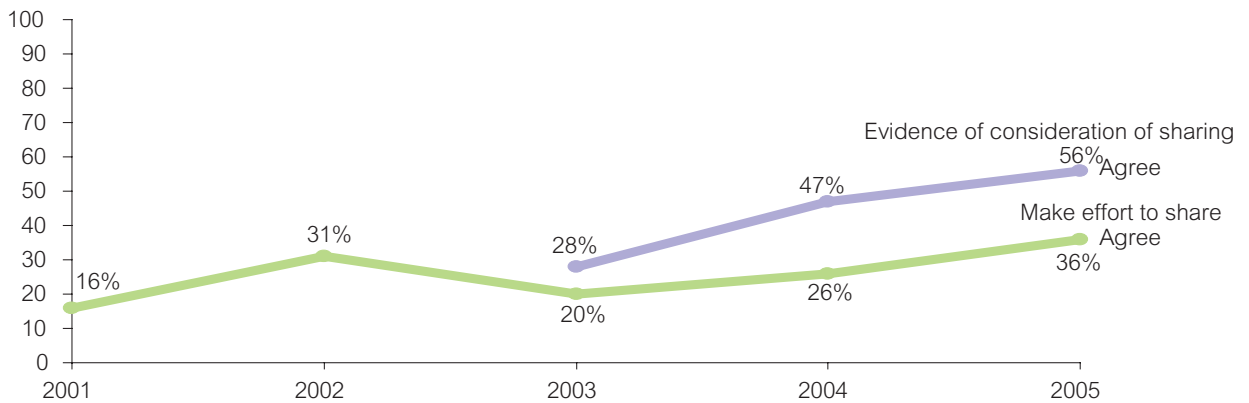


Base: Local authority planners involved in base station development: c.100, May '01, '02, '03, '04 & '05

Over a third of planners now agree that mobile phone operators make sufficient effort to share existing base stations (36%, compared with 16% in 2001). Similarly, more planners would now agree that when submitting applications, operators provide evidence of consideration of sharing other operators' sites (56% in 2005, from 28% in 2003). In spite of these increases, a minority of planners still believe that operators could be addressing the issue of mast sharing more effectively, similar to the levels seen four years ago (15% in 2005 and 19% in 2001).

Q To what extent do you agree or disagree that mobile phone operators make sufficient effort to share existing base stations?

Q To what extent do you agree or disagree that mobile phone operators have provided evidence of consideration of sharing other operators sites when submitting applications?



Base: Local authority planners involved in base station development: c.100, May '01, '02, '03, '04 & '05

Conclusions

This study amongst local authority planners who are involved in base station development, conducted annually for the last five years, shows that planners consider operators have made significant improvements in six key areas:

1. Making themselves available for discussion with planners before submitting applications
2. The provision of information about plans for mobile base stations
3. The quality of information they provide
4. Their co-operation with requests for more information about planning applications
5. The level of consultation they undertake
6. Showing willingness to consult local people directly

Operators will need to develop strategies to take into account the increasing proportion of planners who do not try to make themselves available to discuss operators' plans before applications are submitted.

This research has identified some clear concerns about efforts made to share existing masts. Operators will need to address this issue, perhaps with more robust and pro-active communication of site-sharing alternatives which have been considered.

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