



Sustainable Travel Policy

Introduction

The Sustainable Travel Policy sets out how all local, national and international travel taken on behalf of the University should take place.

It outlines the University's strategy to minimize our environmental impact, ensure the safety of staff and students, and obtain value for money for our travel expenditure.

At its core, this policy supports our 'Climate Conscious Travel' approach of:

- understanding the environmental impacts of travel and using lower-carbon methods of transport where possible;
- minimising the overall number of journeys to reduce carbon emissions; and
- sequestering the carbon emissions from travel

These procedures are mandatory and should be regarded as standard practice for any travel taken on behalf of the University by staff, students and third parties acting on behalf of, or for, the University.

This policy was updated and approved University Executive on 6 August 2024 and will take effect on 1 September 2024. This policy will be reviewed no later than five years from date of approval.

The University Travel Oversight Group has been established to guide and supervise all aspects of travel management at the University. The Sustainable Travel Policy will be overseen by this group.

1. Purpose

1.1. To support the development of a strong policy framework, we have developed three key themes:

- Better manage the University's carbon emissions and the associated environmental impacts;
- obtain best value for money for University travel bookings, as well as reducing overall travel expenditure; and
- Improve staff and student safety and wellbeing when traveling, minimising risk wherever possible.

1.2. This policy defines the University's procedures in relation to travel by staff, students and third-parties travelling locally, nationally or internationally, in support of our University activities. It outlines the requirements and responsibilities of those involved in travel to help reduce the environmental impact of University Travel as well as minimising risks associated with business and study travel.

1.3. This policy supersedes any other University, College/Support Group or School/ Planning Unit guidance on travel.

2. Scope

2.1. This policy applies to all staff (permanent or temporary), students, and any individuals travelling on university business at the university's expense, or those seeking

reimbursement for travel expenses. These individuals are collectively referred to as 'travellers.'

- 2.2. The policy covers local, national, and international travel undertaken on behalf of the University, regardless of the funding source or payment method.
- 2.3. If travel is funded externally and subject to additional restrictions, those restrictions must be followed.
- 2.4. Where travel is paid for by restricted grant funding, certain principles regarding authorising of travel are not mandatory, and are noted accordingly in this policy document.
- 2.5. For external partners, guests or visitors not claiming expenses from the university—such as invited speakers, or those attending academic engagements—the principles of this policy should still be adhered to. We expect them to be made aware of our carbon goals and encouraged to consider alternatives to flying where possible.
- 2.6. For consultants and suppliers, we expect our policy of no domestic flights within the UK to be respected, and any accommodation bookings in Edinburgh should be arranged through the University's Accommodation, Events and Catering department (ACE).

Exceptions

- 2.7. In exceptional circumstances where travellers cannot meet these requirements, all exceptions to this policy should be documented in writing with approval to the Head of School or Department prior to travel.
- 2.8. For the avoidance of any doubt, those excluded types of bookings and cohorts outlined in sections 5.16 and 5.17 do not require exception approval.

3. Roles and Responsibilities

- 3.1. The table below outlines the roles and responsibilities of different parties related to travel:

Role	Responsibilities
Traveller	<ul style="list-style-type: none"> • Plan and book travel in line with this policy. • Ensure they hold a valid passport and required visas for travel. • Complete all relevant risk assessments and ensure any health requirements (e.g. inoculations) are in place prior to booking any travel and risk assessments are reviewed during the booking and travel period if required. • Obtain approval where required and confirm that budget is available. • Ensure access to the correct payment method • Raise exceptions to Heads of School/Department • Notifying the TMC or cancel their individual travel bookings where it is no longer possible to take a University business trip
Booker	<p>If booking for someone else:</p> <ul style="list-style-type: none"> • Plan and book travel in line with this policy. • Confirm that any travel has the required pre-approvals before booking.

	<ul style="list-style-type: none"> • Ensure access to the correct payment method.
Line Managers	<ul style="list-style-type: none"> • In conjunction with the traveller, ensure a suitable and sufficient risk assessment is completed in advance of booking travel. • Ensure the trip is not travelling against FCDO travel advice, subject to risk assessment for limited exemptions. • Ensure the traveller can be contacted in event of an emergency.
Head of School / Department	<ul style="list-style-type: none"> • Ensure the policy is communicated to travellers and that travellers are adhering to the policy. • Process and approve or reject exceptions to the policy where appropriate. • Champion the sustainability and duty of care principles of the policy, with overall responsibility for the health and safety of travellers from their School or Department as per the University Health and Safety Policy.
Travel Oversight Group	<ul style="list-style-type: none"> • Oversee proposed developments and changes in the Sustainable Travel Policy. • Provide oversight of travel management contract performance, as well as future input to the re-tender of the contract. • Provide advice on the necessary processes including financial, risk assessment and health and safety. • Provide advice on further means to embed the concept of climate conscious travel, including incentives to support climate conscious travel. • Provide advice and guidance on communications with the University travelling community and wider University community.
Travel Management Company	<ul style="list-style-type: none"> • Plan and book travel in line with this policy. • Monitor travel risks and implement measures to ensure the safety and well-being of travellers, including real-time alerts and support during emergencies. • Provide access to a 24/7 UK-based emergency support line. • Provide ongoing support to travellers, including itinerary management (changes/refunds), emergency assistance and addressing any complaints or escalations raised. • Provide regular management information and analysis reflecting supplier performance, breakdown of spend, delivery of community benefits, market trends, savings and non-conformity report. • Negotiate rates with airlines to secure favourable terms and rates. • Promote sustainable travel practices. • Deliver regular training and guidance to enhance the overall experience for end users.

4. Compulsory pre-booking process

4.1. Authorisation process

4.1.1. All international travel (i.e. travel with an origin or destination outside the UK) must be pre-authorised by the travellers' Head of School or Director of Professional Services department. This role may be designated to authorised delegates (e.g. School Travel Managers). In the case of student travel, pre-authorisation is required from the course organiser, project supervisor, Head of School, or the Study and Work Away team (SWAY) depending on the reason for travel. During this pre-authorisation process, travellers must state the objectives of travel.

4.1.2. Where travel is within the UK or the specific trip has already been accounted for in the terms of receiving a restricted research grant, pre-approval is not required. For the avoidance of any doubt, whether a trip requires pre-authorisation or not, travel may only take place should it be deemed safe to do so (see section 4.3. regarding risk assessments below).

4.1.3. In order to minimise the environmental impact of travel, consideration should be given to the “travel hierarchy”. Further details of the travel hierarchy, as well as advice and guidance for travellers, travel bookers and management groups on achieving Climate Conscious Travel, is available at [Sustainable Travel Policy: Key policy principles](#).

4.1.4. Alternatives to international travel must be considered prior to booking travel. Examples of alternatives include use of virtual collaboration tools (VCT) as well as examining whether colleagues from across the University are attending the event and are able to carry out the same purpose.

4.2. Travel insurance

4.2.1. Travel insurance is required for all national and international travel taken on behalf of the University and must be arranged in advance of travel. The University has a fully comprehensive business travel insurance policy for employees and students who are required to travel for University purposes. Cover is free to applicants, with the exception of some high-risk destinations which may require an additional premium. Applications must be complete using the online insurance form accessed via the [Travel Insurance](#) webpage.

4.2.2. The University insurance policy is only available to those traveling for business on behalf of the University and does not extend to cover family members or others travelling with the member of staff or student. It is advised that individuals travelling on behalf of the University do not use their own personal policy or arrange their own cover for travel. The cost of a personal travel policy will not be reimbursed by the University. Further details of University insurance can be on the [Travel Insurance](#) webpage.

4.2.3. Combining travel for University purposes and personal travel is acceptable where the traveller meets all the costs relating to the 'personal' element of the trip, the primary reason for the trip is for University purposes, and the duration of the personal element does not exceed the duration of the business element of the trip. In this instance, travellers will not be covered by the University insurance for the personal period of a trip and are advised to arrange their own insurance for this portion of their trip prior to departure.

4.3. Health and safety considerations and travel risk assessment

4.3.1. All national and international travel requires an appropriate travel risk assessment process to be completed prior to booking, considering the risk of travel to the traveller, to the chosen destination including accommodation, for the activities being undertaken and any other pertinent issues, at the time of the trip and any steps taken to minimise this risk. Completing a travel risk assessment process is essential to complete the travel booking process but must also be reviewed prior to commencing travel to ensure it remains accurate, with any amendments implemented or followed through. Risk Assessment templates can be found on the [Risks Assessments and Travel Plan](#) webpage.

- 4.3.2. The responsibility to complete and review a travel risk assessment falls to the individual traveller or, in the instance of group travel or student travel, the trip leader or trip authoriser. However, all risk assessments for international travel must be signed off by the Head of School or Director of Professional Services department, or authorised delegate (e.g. Health and Safety Manager or Line Manager) for national travel.
- 4.3.3. For the avoidance of doubt, all national and international travel (including for trips within the UK) requires a risk assessment process to be completed. This should be proportionate to the risk - advice on requirements can be obtained from the Health and Safety Department.
- 4.3.4. Once completed, the Risk Assessment must be made available to the Insurance Office in advance of the trip taking place and should be attached to the online insurance application form, as cover cannot be confirmed unless it has been submitted.¹
- 4.3.5. The University will reimburse claimants for costs associated with vaccinations and other necessary medical requirements for overseas University travel. The University's Occupational Health Service offers a range of vaccines that are charged to Schools or Planning Units through internal charging. Where vaccines cannot be obtained via the Occupational Health Service, these may be expensed back via the [Expenses Policy](#).

4.4. Emergency Contacts

- 4.4.1. In order for the University to identify and manage any risks associated with international travel, travellers must inform the University of their overseas travel plan and emergency contact details using the travel risk assessment.
- 4.4.2. It is a mandatory requirement for travellers to provide their overseas contact details to the University through the University's TMC and/or their school department.
- 4.4.3. In an event of an emergency incident, the University will contact travellers in the country where the emergency incident occurs. Travellers must respond to the University's text or email and confirm their safety as soon as they practically can.

5. Booking travel

- 5.1. For all travel, the travel hierarchy should be followed wherever possible. This states that travel should be avoided where possible by utilising virtual services such as Zoom or Microsoft Teams. For further information on the travel hierarchy, please visit [Sustainable Travel Policy: Key policy principles](#).

Local travel

- 5.2. The University supports active transport (walking and cycling) within Edinburgh by providing access to relevant facilities for cyclists whilst on-campus, and by working with the City of Edinburgh Council and other partners to develop the Edinburgh Cycle Hire scheme and other relevant infrastructure. The University also offers eligible staff significant savings on bicycles and accessories through the Cycle to Work scheme.

¹ There are discussions ongoing on the requirement of making national risk assessments available to the Insurance Office. Once these discussions are complete, this point and the relevant procedures will be updated accordingly.

- 5.3. Staff may claim business mileage at current HMRC rate if they are using their own bicycle for work purposes. Further details of this are available within the [Expenses Policy](#).
- 5.4. Where active transport is not practical, for disability, safety reasons or complexity of journey, public transport should be taken. Within Edinburgh, the University supports this by providing access to pre-paid travel cards which offer a modest discounted fare on Lothian Bus and Tram services. Individual schools and departments will be able to provide details on the availability of pre-paid travel cards. For information in pre-paid bus tickets, visit the [Public bus & tram services](#) site.
- 5.5. Where it is not practical to travel by public transport, for disability, for safety reasons or complexity of journey, taxis may be used. Within Edinburgh travellers must use the contracted taxi provider where available: Central Taxis. In doing so, travellers will receive a preferential rate and the journey will be invoiced directly to the University. Individual schools and departments will be able to provide details on the relevant Central Taxi account. Where Central Taxis cannot provide suitable service, or for journeys out with Edinburgh, the use of other taxi providers is acceptable.
- 5.6. For journeys where taxis are not suitable (e.g. for complex journeys with multiple stops) the use of Enterprise Car Club may be used. The University supports this by providing discounted rate for staff and students when using the car club for business purposes. For more information, please visit Enterprise Car Club.
- 5.7. The use of private vehicles for University business is strongly discouraged and should be used only when no reasonable alternatives exist. Where staff choose to use their own private vehicle for University purposes, it is the staff member's responsibility to ensure the car has the appropriate business insurance cover and is in a roadworthy state for the duration of the trip. It should be noted that standard personal vehicle insurance cover will not usually cover business trips. The claiming of costs associated with the use of a private hire vehicle are outlined in the [Expenses Policy](#).
- 5.8. For local journeys outside of Edinburgh, or for journeys within Edinburgh that are not covered in sections 5.2 to 5.7 of this policy, travellers are asked to follow the [Expenses Policy](#) which outlines acceptable travel reimbursements.
- 5.9. Further details about vehicle use, including private vehicle use, are outlined in the [Vehicle Policy](#).

National and international travel

- 5.10. The following processes are to be completed when booking travel and are designed to improve traveller safety, the quality of carbon data and management information, and obtain best value for money.

Travel Management Company

- 5.11. The University has partnered with a Travel Management Company (TMC) to provide a one-stop-shop, covering accommodation, rail, flights, and group bookings or student fieldtrips. They also provide visa services and overseas vehicle hire to support with full itinerary planning.
- 5.12. Key advantages of booking through the travel provider include:

- Ensuring the safety of staff by maintaining the ability to trace and repatriate colleagues during emergencies, such as terrorist attacks
- Wide range of negotiated fares and rates (e.g. exclusive deals and discounts with airlines)
- Cost savings and flexibility with itinerary changes and cancellations, as well as support with securing refunds
- Tools and reporting to help monitor and report on travel-related carbon emissions.
- Expertise in managing intricate travel plans.

5.13. It is strongly advised to book all travel arrangements through the TMC, even if an exclusion applies, unless a significant cost saving can be demonstrated by using an alternative supplier.

5.14. Individuals who make their own arrangements out with the TMC must ensure that their bookings complies with this policy and must take personal responsibility for arranging alternative travel and accommodation arrangements in the event of unforeseen changes to their travel plans.

5.15. The overall benefits of using the TMC, including time saved by staff and the comprehensive support provided, are considered to outweigh any potential cost savings from independent bookings by schools or departments.

Exemptions for the use of the Travel Management Company

5.16. The use of the TMC is mandatory, except for the following types of bookings:

- The following low-cost carriers: EasyJet; Ryanair; Norwegian Air Shuttle; Aer Lingus; JET2; Indigo; and Wizz Air
- Accommodation
- Rail
- Local and national vehicle hire²
- Booking domestic travel when within an international country, including
 - when you are travelling by bus, tram, taxi, or other local mode of transport, and
 - when booking domestic travel within this country.

5.17. The use of the TMC is not required for the following group:

- Post Graduate Research (PGR) students

PGR students are not required to book their travel through the TMC at this time. This particular exclusion will be reviewed by the Travel Oversight Group as internal processes are improved.

5.18. Despite the exclusions outlined above, it is strongly advised that travellers use the TMC to book travel and accommodation for the advantages outlined in section 5.12.

5.19. These exclusions must be processed exclusively through direct bookings with the travel provider. The use of any TMCs other than the University's approved TMC is not permitted.

² Local and national vehicle hire must be booked through the University's [approved suppliers](#).

5.20. For these exclusions, the use of local University credit cards and/or the use of the University expenses system is acceptable. For detailed travel payment information, please refer to the [Booking Travel](#) SharePoint site.

5.21. For the avoidance of any doubt, the exceptions process (outlined in section 2.7) does not apply for these excluded bookings/cohort detailed above in sections 5.16 and 5.17, however the standard approvals required in the pre-booking process is still required for all travel bookings (outlined section 4.1).

6. Air travel

6.1. Air travel is not permissible for travel within Great Britain (England, Scotland, and Wales) except for the following exceptions:

- For journeys to locations out with mainland Great Britain, including to islands such as Shetland or the Outer Hebrides, as well as to Northern Ireland
- To connect with an onward flight to a location out with mainland Britain. For example, flying from Edinburgh to London Heathrow to connect to a flight to Dubai
- For disability or other health-related reasons
- Where childcare or other caring responsibilities mean that flights are the only viable option to ensure the wellbeing of travellers and those they care for.

6.2. In these limited exceptions, approval is required from the travellers Head of School or Director of Professional Services department prior to booking travel.

6.3. You are permitted to fly to UK destinations rather than take the train on days when industrial action is taking place on the rail network.

6.4. For international flights, economy class should be used where possible. First class travel is not accepted for any air journey. Premium Economy and Business class may be allowable for disability or for other health related reasons. Where economy class is not suitable, travellers should obtain approval from their Head of School or Director of Professional Services department in advanced of booking travel.

7. Accommodation

7.1. All bookings for accommodation within Edinburgh must be booked with the University's Accommodation, Events and Catering department (ACE). These bookings can be made directly with ACE. If ACE have no suitable bookings, alternative accommodation may be procured.

7.2. Where accommodation is paid for from restricted research grants, it is recommended that accommodation in Edinburgh is booked through ACE as you are entitled to special rates at University of Edinburgh accommodation. However, this is not mandatory.

7.3. For the reasoning outlined in section 5.12, it is recommended that the TMC is used for accommodation (outside of Edinburgh). However, it is recognised that there may be reasoning as to why a Traveller may book direct. This includes when accommodation is provided as part of an event or meeting; where preferential rates are provided to attendees directly through the event; Research field trips; or where the University has developed long-standing preferential arrangements for accommodation with key partners - for example CERN or in Gujarat or where accommodation is paid for from restricted research grants.

- 7.4. There is a presumption against the use of Airbnb (or other self-catering accommodation platforms) on the grounds of staff and student safety. However, where they are chosen as the safest alternative for vulnerable travellers, who would otherwise be at risk using hotels, bookers must ensure a thorough risk assessment is completed and that health and safety guidance is considered.
- 7.5. Where possible, the cost of “room-only” accommodation must not exceed the following guideline values. Where travellers are unable to source accommodation within these values for their trip, this must be clearly stated within the travel authorisation process. It is recognized that in certain high cost locations (such as major capital or regional cities, or areas of high tourism) that it is possible that these values cannot be achieved. For the avoidance of doubt, multiple quotes are not required prior to booking.

Location	Maximum amount
London and major cities across globe	£250 per night (inc VAT)
UK (outside of London) and all other locations	£180 per night (inc VAT)

- 7.6. Prior to booking accommodation travellers should consider all aspects of the available choices, for example, ensuring that they can travel safely to the venue once at their destination or to avoid additional transport costs once at the chosen accommodation.
- 7.7. On checking out, the traveller will be required to settle all incidental charges using personal means or a university credit card. These costs are subject to rules as set out in the Expenses Policy.
- 7.8. Costs associated with arranging private accommodation with friends or relatives while away for University purposes will not be reimbursed by the University.
- 7.9. The use of a sleeper train or bus service (e.g. the Caledonian Sleeper) is permitted for overnight travel.

8. Rail

- 8.1. When travelling by rail, first class travel is acceptable for journeys over 2.5 hours, where travellers are anticipating working for the majority of their journey.

9. Vehicle hire

- 9.1. Local and national vehicle hire is covered within the [Expenses Policy](#).
- 9.2. If hiring a vehicle internationally, please be aware and consider that local safety and quality of cars is not always to the same standard as hiring a vehicle in the UK. You must ensure that any vehicle hired is suitable and safe to use on pick up and do not accept a vehicle that is obviously unroadworthy, for example tyres with limited tread. At times, you may require to choose a vehicle at a higher ‘quality’ level than you would in the UK to achieve the same level of vehicle, which may be also at a higher cost.
- 9.3. It is the traveller's responsibility to ensure they have the correct licence to drive in the country they have hired the vehicle as well as suitable vehicle insurance as part of the hire contract.

10. Carbon Offsetting

- 10.1. The University has committed to undertaking direct carbon sequestration. As such, travellers should not undertake individual-level carbon offsetting when booking travel. Further details of the University scheme are available on the [Forest and Peatland programme](#) webpage.
- 10.2. For researchers funded through Wellcome, please refer to the [Wellcome Carbon offset policy for travel](#). The funds referred to in the Wellcome policy are awarded as part of Wellcome-funded research grants. They should be requested in the proposal budget at application stage [alongside travel costs].

11. Subsistence

- 11.1. Details of all subsistence can be found within the University [Expenses Policy](#).
- 11.2. In accordance with the University's Zero Waste strategy, it is recommended that travellers source low-carbon food where possible, and minimise single-use plastics for the duration of a trip. For guidance and advice, please visit our [Zero Waste](#) site.