

Update: May 2021

This policy was approved by the University Executive in March 2021. It is due to launch later in 2021. We are awaiting completion of a new travel management supplier tender prior the policy going live.

This document will be updated with additional details, including relevant links, as noted in red.

Please visit: edin.ac/sustainable-business-travel for updates on the policy status and to ensure you have an up-to-date copy of the Sustainable Travel Policy.

Why are we introducing a University Travel Policy?

Business Travel is one of the University's principal sources of carbon emissions and has a significant impact on the delivery of the Zero by 2040 climate strategy. Whilst travel can have numerous advantages in terms of delivering global impact including research, exchange of ideas and improving partnerships, the environmental impacts of travel need to be recognised and considered.

In recent years the University's travel pattern has become unsustainable in terms of financial and environmental impact, growing by up to 15% annually since 2012. Certain travel is vital for our staff and students to further learning, teaching and research. However, the Covid-19 pandemic has helped us identify opportunities to significantly reduce travel associated with some of our activities. As such, the University has agreed that future travel must be undertaken considering the environmental, social and economic impacts, and weighing these against the expected benefits of our journeys. This approach is known as **Climate Conscious Travel**.

In adopting Climate Conscious Travel, we will ensure the key focus of any travel decisions consider the safety of our travellers, a reduction in carbon emissions and management of our financial costs. Our Climate Conscious Travel approach is:

Being aware of the environmental impacts of travel and looking to minimise the overall number of journeys taken on behalf of the University. Where this is not possible, we will endeavour to choose low-carbon travel options.

Whilst managing and minimising carbon emissions of personal and professional life is our collective responsibility, the University has committed to reporting and offsetting all emissions resulting from travelling on behalf of the University as part of the *Zero by 2040* climate strategy.

Further details on Climate Conscious Travel, including advice and guidance for travellers, travel bookers and management groups, is available at: <https://www.ed.ac.uk/sustainability/what-we-do/travel/climate-conscious-travel/sustainable-travel-policy-2021>

Introduction

These procedures are mandatory and should be regarded as standard practice for any travel taken on behalf of the University by staff and students (hereby known in this document as Business Travel). Where travel is paid for by existing restricted grant funding, certain principles regarding authorising of travel are not mandatory, and are noted accordingly in this policy document.

Nominated University Travel Suppliers

The University has nominated suppliers for:

- National and International air, rail and ferry travel
- Local, national and international accommodation
- Taxis within Edinburgh

- Coach hire
- Car hire
- City car rental scheme
- Edinburgh City bicycle sharing scheme

As of 28.05.2021, the University of Edinburgh Travel Management Service single supplier for air, rail, Eurostar and accommodation bookings is Key Travel.

Our Travel Management Service provider offers a dedicated travel hub and offers all University business travellers online booking tools for airline, rail (including Eurostar) and hotel bookings, as well as branch bookings via telephone/email. By utilising a single supplier, it allows the University to have a clear record of travel and accommodation booked, as well as destinations and itinerary, which is of vital importance during critical incidents. Our chosen suppliers provide a fully managed service which includes 24-hour support and a dedicated online booking tool and offline support team. This ensures the University can provide a duty of care to all staff and students whilst they travel on University business.

Further details of the University's nominated suppliers can be found in the relevant sections of this policy, or by searching the [buy@Ed](#) database.

All nominated University of Edinburgh service providers are subject to regular performance reviews.

Purpose of policy

To ensure consistency of message across all policies and support the development of a strong policy framework, we have developed four key themes that form the basis of each policy:

- Use internal University suppliers whenever possible
- Sustainability and environmental impact
- Promote value for money
- Minimising risk wherever possible

The primary purpose of this policy is to better manage the University's carbon emissions and the associated environmental impacts, improve staff and student safety and wellbeing when traveling and reduce overall travel expenditure.

This policy sets out the procedures for booking business travel and accommodation when travelling locally, nationally or internationally on behalf of the University and applies to all staff, students and visitors.

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

This policy was approved by the University Executive on 23 March 2021 and is will be effective from 01.10.2021 The updated policy will be communicated to staff and published on the University's website.

This policy is co-owned by the Finance Department and the Department of Social Responsibility and Sustainability, and will be reviewed annually.

Scope of policy

The policy applies to all permanent and temporary staff of the University, and to any students or visitors who travel locally, nationally or internationally on behalf of the University. For the avoidance of doubt, this includes those paid under consultancy contracts, invited speakers and those invited for the purpose of academic engagement (for example to attend a doctoral thesis defence).

In exceptional circumstances, where travellers are unable to meet the following requirements, requests must be pre-approved by the travellers Head of School or Department.

1. Principles

1. Compulsory pre-booking process

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 Department Director. In some instances, 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.

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 1.6 regarding risk assessments below).

1.2 In order to minimise the environmental impact of travel, consideration should be given for 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:

<https://www.ed.ac.uk/sustainability/what-we-do/travel/climate-conscious-travel/sustainable-travel-policy-2021/key-policy-information>.

1.3 Alternatives to international travel must be considered prior to booking travel and clearly shown during the pre-authorisation process. 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.

1.4 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:

<https://www.insurance.finance.ed.ac.uk/>

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 found at: <https://www.ed.ac.uk/staff/business-travel/travel-insurance>

1.5 Combining travel for University purposes and personal travel is acceptable where the traveller meets all of 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.

1.6. All national and international travel requires an appropriate risk assessment to be completed prior to booking, considering the risk of travel to the traveller, to the chosen destination, for the activity being undertaken, at the time of the trip and any steps taken to minimise this risk. Completing a risk assessment is essential to complete the travel booking process but should also be reviewed prior to commencing travel to ensure it remains accurate. Risk Assessment templates can be found at:

<http://www.docs.csg.ed.ac.uk/Safety/covid/TRA1-CV19.docx>. Once completed, the Risk Assessment must be made available to the Insurance Office in advanced 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.

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 must be signed off by the Head of School or Department Director, or authorised delegate (e.g. Health and Safety Manager) prior to booking of travel.

For the avoidance of doubt, all national and international travel (including for trips within the UK) requires a risk assessment to be completed and signed-off prior to booking travel, regardless of destination or duration of trip.

1.7 The University will reimburse claimants for costs associated with vaccinations and other necessary medical requirements for overseas University travel. The University's Occupational Health Unit 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 Unit, these may be expensed back via the Expenses Policy. <https://www.ed.ac.uk/finance/for-staff/financial-regulations-policies-and-procedures/expenses-policy>

2. Booking travel

2.1 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: <https://www.ed.ac.uk/sustainability/what-we-do/travel/climate-conscious-travel/sustainable-travel-policy-2021/key-policy-information>

2.2 local travel

2.2.1 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.

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:

<https://www.ed.ac.uk/finance/for-staff/financial-regulations-policies-and-procedures/expenses-policy>

2.2.2 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, please visit: <https://www.ed.ac.uk/transport/public-transport/buses/pre-paid-bus-tickets>.

2.2.3 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.

2.2.4 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: <https://www.ed.ac.uk/transport/driving/car-club>

2.2.5 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 <https://www.ed.ac.uk/finance/for-staff/financial-regulations-policies-and-procedures/expenses-policy>

2.2.6 For local journeys outside of Edinburgh, or for journeys within Edinburgh that are not covered in sections 2.2.1- 2.2.5 of this policy, travellers are asked to follow the expenses policy which outlines acceptable travel reimbursements. See: <https://www.ed.ac.uk/finance/for-staff/financial-regulations-policies-and-procedures/expenses-policy>

2.3 National and international travel

2.3.1 All University related domestic, national and international travel undertaken by rail, air, or Eurostar must be booked via University's chosen Travel Management Supplier and charged to the relevant cost centre. For the avoidance of doubt, this includes national travel within another country, when booked as part of a journey to or from the UK.

Exceptions to booking via the University's chosen Travel Management Supplier are limited to:

- when travelling by bus, tram, taxi, or other local mode of transport
- where you are in another country (i.e. not in the UK) when booking domestic travel within this country
- when booking group travel (where quotes from other travel suppliers may be sought).

In these limited exceptions, the use of University Credit Cards, direct purchase orders, or use of the University expenses system is acceptable.

To view the current University expenses policy, please visit:

<https://www.ed.ac.uk/finance/for-staff/financial-regulations-policies-and-procedures/expenses-policy>

2.3.2 Air travel is not permissible for travel within Great Britain 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.

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

2.3.3 For international flights, economy class should be used where possible. Premium Economy and Business class may be allowable for disability or for other health related reasons. Where economy class is not suitable, travellers should notify their Head of School or Department Director in advanced of booking travel.

First class travel is not accepted for any air journey.

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.

2.3.4 Where it is no longer possible to take a University business trip, the traveller is responsible for notifying the Travel Management Company or cancelling other travel bookings. This must be done as soon as possible to minimise cancellation charges.

3. Accommodation

3.1 All bookings for accommodation in Edinburgh must be booked with the University's Accommodation, Events and Catering department (ACE). These bookings can be made direct with ACE or through the Travel Management Company's online booking tool. If ACE have no suitable bookings, alternative accommodation may be procured.

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

3.2 For accommodation outside of Edinburgh, bookings must be made via Key Travel. Exceptions to this are when accommodation is provided as part of an event or meeting; where preferential rates are provided to attendees directly through the event; or where accommodation is paid for from existing restricted research grants.

3.3 Where possible, the cost of “room-only” accommodation must not exceed the following values. Where travellers are unable to source accommodation within these values for their trip, this must be clearly stated within the travel authorisation process.

Location	Maximum amount
London	£180 per night (inc VAT)
UK (outside of London)	£120 per night (inc VAT)
Europe	£120 per night (inc VAT)
North America	£180 per night (inc VAT)
South America	£120 per night (inc VAT)
Asia & Australasia	£120 per night (inc VAT)
Africa	£120 per night (inc VAT)

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.

3.4 Costs associated with arranging private accommodation with friends or relatives while away for University purposes will not be reimbursed by the University.

3.5 The use of a sleeper train or bus service (e.g. the Caledonian Sleeper) is permitted for overnight travel.

4. Carbon Offsetting

4.1 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 will be available in due course: [edin.ac/carbon-sequestration](https://www.ed.ac.uk/edin.ac/carbon-sequestration)

5. Subsistence

5.1 Details of all subsistence can be found within the University Expenses policy. To view the current expenses policy, please visit

<https://www.ed.ac.uk/finance/for-staff/financial-regulations-policies-and-procedures/expenses-policy>

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: [edin.ac/zero-waste](https://www.ed.ac.uk/edin.ac/zero-waste)