



# Technical Note: Discounts, Exemptions, Reimbursements and Charge Levels

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**Date:** 26 August 2022

**Confidentiality:** Public

**Subject:** Discounts, exemptions and reimbursements

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**Checked:** 

**Approved:** 

## Introduction

This first section of this technical note sets out a potential suite of discounts, exemptions and reimbursements for the proposed Sustainable Travel Zone. The second section deals with proposed charge levels. Consideration of both elements is key to the design of the scheme, ensuring it meets its objectives, whilst seeking to minimise adverse impacts.

The work has been informed by the responses to the 2021 Making Connections consultation and engagement with key groups that took place as part of that, as well as consideration of the draft Equalities Impact Assessment undertaken as part of the Strategic Outline Case.

## 1. Discounts, Exemptions, And Reimbursements

This section sets out the assessment that informs initial considerations for discounts, exemptions, and reimbursements, as well as identifying where further work will be undertaken to refine these.

Definitions for each are set out below:

- 1) An **exemption** for those vehicles that will be exempt from the Sustainable Travel Zone charge. Under this category you do not have to pay for the charge or register your details if the DVLA holds the relevant information for your vehicle.
- 2) A **discount** is when some drivers and/or vehicles will qualify for a discount (which may be a 100% discount) from the Sustainable Travel Zone charge if they meet certain criteria. Under the discount criteria an application will have to be made and documentation presented (for example: name, address, vehicle registration number) to show that you are entitled to a discount.
- 3) A **reimbursement** is a way to allow those who are eligible to be reimbursed for their journey to/from the Sustainable Travel Zone in certain circumstances. It is intended that the rules will be applied so that reimbursement is provided to only those that have a vital need to travel by motorised vehicle rather than some other transport mode.

In addition, there is a potential to include 'sunset' periods to a discount, exemption or reimbursement for a temporary period of time e.g. one year from scheme opening date. No sunset periods have been put forward for the proposed discounts, exemptions, and reimbursements at this stage. This could be subject to change following feedback from the Autumn 2022 consultation.



## Assessment

The assessment uses the following approach:

1. Five assessment **principles** have been established
2. A long list of potential **user categories** has been assembled in Table 2, in part based on a cross-check against other UK schemes (see Appendix A)
3. **Overall assessment** to derive a proposed shortlist for consultation

### 2. Assessment Principles

#### a) Findings from the Equality Impact Assessment (EqIA)

The first principle looks at the potential for a discount/exemption/reimbursement to mitigate a potential adverse effect identified in the Equality Impact Assessment (EqIA) draft report. The EqIA draft report considers the effects of the proposals on protected characteristic groups as well as those on low incomes and identifies particular circumstances where potential adverse effects could be addressed through a discount/exemption/reimbursement. The protected characteristic groups are:

- Sex
- Age
- Disability
- Religion or belief
- Ethnicity
- Sexual orientation
- Gender reassignment
- Pregnancy and Maternity

#### b) The Strategic objectives of the scheme

The second principle looks at whether discounting or exempting certain groups can contribute to or would adversely impact the strategic objectives of the programme. The strategic objectives are:

- To reduce traffic by 15% from the 2011 baseline, freeing up road space for more public transport services, and other sustainable transport modes;
- To ensure public transport is more affordable, accessible and connects to where people want to travel, both now and in the future;
- To raise the money needed to fund the delivery of transformational bus network changes, fares reductions and improved walking and cycling routes;
- To make it safe and attractive to walk and cycle for everyday journeys;
- To support decarbonisation of transport and improvements to air quality; and



- To make Greater Cambridge a more pleasant place to live, work travel or just be.

### **c) The potential for a discount to influence and support wider air quality policy**

Cambridge City Council has designated an Air Quality Management Area (AQMA) in the City Centre because of the high average levels of NO<sub>2</sub>. In 2019 a feasibility study to investigate whether introducing one or more clean air zones in Cambridge would help reduce air pollution was published, but this alone would not tackle the congestion and traffic reduction identified as being needed. Nonetheless, any wider price-based demand management scheme could seek to reduce the emissions from buses, taxis, private hire vehicles and LGVs through differential pricing levels.

### **d) Whether the journey is indispensable**

This principle refers to instances where a journey is considered indispensable e.g. some journeys, such as those undertaken by emergency service vehicles cannot be made by any other means, or at any non-charged times.

### **e) The ability to administer and / or legally enforce**

This is a high-level assessment of the administrative burden and enforceability of the discount, exemption, or reimbursement. A Green/Amber scale is used in Table 2 to indicate the complexity of the delivery. An explanation is provided to outline the Green/Amber rating, and how each discount, exemption or reimbursement could be implemented. The deliverability column in Table 2 also outlines if further detail/ input is required at the consultation stage. Green indicates perceived ease of deliverability due to low administrative burden, and/or existing experience from other charging schemes. Amber implies potential complexity of deliverability and/or further detail required at the consultation stage.

## **3. Long List of User Categories for Assessment**

The user categories considered for discounts, exemptions and reimbursements are:

- Emergency vehicles
- Military vehicles
- Disabled tax class vehicles
- Accredited breakdown vehicles/ Recovery vehicles
- NHS exempt vehicles (exempt from vehicle tax)
- Dial-a-ride services
- Certain Local Authority operational vehicles e.g. waste and recycling collection vehicles
- Blue badge holders
- Low-income households
- People residing within the zone
- People employed at a workplace within the zone



- NHS staff who need to use a car to carry certain items (controlled drugs, clinical waste etc) or responding to an emergency
- Emergency services personnel responding to an emergency in their own vehicles
- Registered local authority, charity, domiciliary care or care home worker
- Car club vehicles
- Zero emission vehicles
- Vehicles used by charities and not-for-profit groups
- Hackney carriages (taxis)
- Private Hire Vehicles
- Locally registered bus services
- Coaches
- HGVs and LGVs
- Vehicles with over 9 seats (includes school minibuses etc)
- NHS patients travelling to appointments
- Powered two-wheeled vehicles, registered with DVLA

#### **4. Assessment Summary**

Table 1 below shows how the user categories have been assessed against the key principles and the final column in the table indicates the overall assessment conclusion which informs the proposed shortlist for consultation.



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**Table 1 - Discounts, exemptions and reimbursements: draft assessment**

<b>Vehicle category or group</b>	<b>EqIA (protected characteristic group identified)</b>	<b>Impacts on strategic aims and objectives</b>	<b>Ability to influence wider air quality policy?</b>	<b>Indispensable journey: unable to be made by an alternative mode/time of day</b>	<b>Deliverability/enforceability (amber/green)</b>	<b>Overall assessment</b>
<b>Emergency vehicles</b>	Not applicable	No significant impact	No	Yes	Green, replicating approach taken in London. Low administrative burden due to existing DVLA classification	<b>Included within scheme as an exemption</b>
<b>Military vehicles</b>	Not applicable	No significant impact	No	Yes	Green, replicating approach taken in London. Low administrative burden due to existing DVLA classification	<b>Included within scheme as an exemption</b>



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<b>Vehicle category or group</b>	<b>EqIA (protected characteristic group identified)</b>	<b>Impacts on strategic aims and objectives</b>	<b>Ability to influence wider air quality policy?</b>	<b>Indispensable journey: unable to be made by an alternative mode/time of day</b>	<b>Deliverability/enforceability (amber/green)</b>	<b>Overall assessment</b>
<b>Disabled tax class vehicles</b>	<p>Disability/ older people/ children and young people (those travelling to Special Educational Need schools)</p> <p>EqIA assessment highlighting an adverse impact if no exemption introduced</p>	No significant impact	No	No	Green, replicating approach taken in London. Low administrative burden due to existing DVLA classification	<b>Included within scheme as an exemption</b>
<b>Accredited breakdown vehicles/ Recovery vehicles</b>	Not applicable	Potential adverse impact on congestion and safety if not exempt	No	Yes	Green, vehicles are required to be registered by DVLA as 'recovery vehicles'	<b>Included within scheme as an exemption</b>



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Vehicle category or group	EqIA (protected characteristic group identified)	Impacts on strategic aims and objectives	Ability to influence wider air quality policy?	Indispensable journey: unable to be made by an alternative mode/time of day	Deliverability/enforceability (amber/green)	Overall assessment
<b>NHS exempt vehicles (exempt from vehicle tax)</b>	Older people/ disability	No significant impact	No	Yes	Green, replicating approach taken in London. Low administrative burden due to existing DVLA classification	<b>Included within scheme as an exemption</b>
<b>Dial-a-ride services</b>	Older people/ disability EqIA assessment highlighting an adverse impact on older people and disability groups if no exemption introduced	No significant impact	No	No	Green, Local Authorities to provide list of vehicles	<b>Included within scheme as an exemption</b>



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<b>Vehicle category or group</b>	<b>EqIA (protected characteristic group identified)</b>	<b>Impacts on strategic aims and objectives</b>	<b>Ability to influence wider air quality policy?</b>	<b>Indispensable journey: unable to be made by an alternative mode/time of day</b>	<b>Deliverability/enforceability (amber/green)</b>	<b>Overall assessment</b>
<b>Certain Local Authority operational vehicles e.g. waste and recycling collection vehicles</b>	Not applicable	No significant impact	No	Yes	Green, Local Authorities to provide list of vehicles	<b>Included within scheme as an exemption</b>



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Vehicle category or group	EqIA (protected characteristic group identified)	Impacts on strategic aims and objectives	Ability to influence wider air quality policy?	Indispensable journey: unable to be made by an alternative mode/time of day	Deliverability/enforceability (amber/green)	Overall assessment
<b>Blue badge holders</b>	Disability/ older people/ children and young people (those travelling to Special Educational Need schools) EqIA assessment highlighting an adverse impact on several protected characteristic groups if no discount introduced.	No significant impact	No	No	Green, registration scheme for up to 2 vehicles. Medium administrative burden but readily enforceable, as per other UK schemes.	<b>Included within scheme as a 100% discount</b> The principle of allowing 2 vehicles to register will need to be tested at consultation.
<b>Low-income households</b>	Intersectional i.e. can apply to all groups  EqIA assessment highlights a potential impact	No significant impact	No	No	Amber, method for discount to form part of consultation with Local Authorities	<b>Included within scheme as a tapered discount of between 25-100% dependent on hardship</b>



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Vehicle category or group	EqIA (protected characteristic group identified)	Impacts on strategic aims and objectives	Ability to influence wider air quality policy?	Indispensable journey: unable to be made by an alternative mode/time of day	Deliverability/enforceability (amber/green)	Overall assessment
<b>People residing within the zone</b>	Not applicable	Adverse impact as over 50% of morning peak trips are residents	Yes – if discount is offered to them, air quality benefit undermined	No	Amber, achievable but size of population would make this a significant task requiring multiple forms of verification to ensure all residents are covered.	<b>No discount, exemption or reimbursement</b> due to significant erosion of scheme benefits and strategic aims relating to congestion and air quality. However, residents may apply for the suite of discounts, exemptions and reimbursements in this table, where they meet the criteria.



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Vehicle category or group	EqIA (protected characteristic group identified)	Impacts on strategic aims and objectives	Ability to influence wider air quality policy?	Indispensable journey: unable to be made by an alternative mode/time of day	Deliverability/enforceability (amber/green)	Overall assessment
<b>People employed at a workplace within the zone</b>	Not applicable	Adverse impact as majority of peak hour trips are journeys to work	Y – if discount is offered to them, air quality benefit undermined	N	Amber, achievable but size of workforce and number of employers would make this a significant task. It would be down to employers to confirm employees, this would be difficult to verify.	<b>No discount, exemption or reimbursement</b> due to significant erosion of scheme benefits and strategic aims relating to congestion and air quality. However, people employed within the zone may apply for the suite of discounts, exemptions and reimbursements in this table, where they meet the criteria.



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Vehicle category or group	EqIA (protected characteristic group identified)	Impacts on strategic aims and objectives	Ability to influence wider air quality policy?	Indispensable journey: unable to be made by an alternative mode/time of day	Deliverability/enforceability (amber/green)	Overall assessment
<b>Tradespeople undertaking work in the zone</b>	Not applicable	Adverse impact as contribute to congestion and pollution. Not possible to differentiate trips to undertake work vs other trips using the vehicle.	Yes – if discount offered, air quality benefit undermined	No	Amber, a discount could be applied only to registered account holders. It would not, however, be possible to verify/enforce against use for non-business purposes.	<b>No discount, exemption or reimbursement</b> due to significant erosion of scheme benefits and difficulty identifying trips. However, see proposals below for LGVs used by charities and potential zero emission discount. Tradespeople will also benefit from faster and more reliable journeys that could deliver business efficiency savings to offset some or all of the charge.



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<b>Vehicle category or group</b>	<b>EqIA (protected characteristic group identified)</b>	<b>Impacts on strategic aims and objectives</b>	<b>Ability to influence wider air quality policy?</b>	<b>Indispensable journey: unable to be made by an alternative mode/time of day</b>	<b>Deliverability/enforceability (amber/green)</b>	<b>Overall assessment</b>
<b>NHS staff who need to use a car to carry certain items (controlled drugs, clinical waste etc) or responding to an emergency</b>	Not applicable	No significant impact	No	Yes	Amber, detail to be worked up in consultation with NHS trusts. Likely to be similar to London Congestion Charge.	<b>Included within scheme as a reimbursement</b>
<b>NHS patients travelling to appointments who are unable to use public transport</b>	Older people/ disability/ pregnancy and maternity/ gender reassignment	No significant impact	No	Yes	Amber, detail to be worked up in consultation with NHS trusts. Likely to be similar to London Congestion Charge.	<b>Included within scheme as a reimbursement</b>



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<b>Vehicle category or group</b>	<b>EqlA (protected characteristic group identified)</b>	<b>Impacts on strategic aims and objectives</b>	<b>Ability to influence wider air quality policy?</b>	<b>Indispensable journey: unable to be made by an alternative mode/time of day</b>	<b>Deliverability/enforceability (amber/green)</b>	<b>Overall assessment</b>
<b>Emergency services personnel responding to an emergency in their own vehicles</b>	Not applicable	No significant impact	No	Yes	Amber, detail to be worked up in consultation with NHS trusts.	<b>Included within scheme as a reimbursement</b>
<b>Registered local authority, charity, domiciliary care or care home worker</b>	Not applicable	No significant impact	No	Yes	Amber, detail to be worked up in consultation with Local Authorities and care home providers. Likely to be similar to London Congestion Charge	<b>Included within scheme as a reimbursement</b>



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Vehicle category or group	EqIA (protected characteristic group identified)	Impacts on strategic aims and objectives	Ability to influence wider air quality policy?	Indispensable journey: unable to be made by an alternative mode/time of day	Deliverability/enforceability (amber/green)	Overall assessment
<b>Car club vehicles</b>	Not applicable	Positive impact - dissuade car ownership and promote behaviour change	Yes	No	Amber, detail to be worked up in consultation with Local Authorities and trade bodies.	<b>Included within scheme as a 100% discount:</b> reduces reliance on car ownership and promotes objectives of the scheme
<b>Zero emission vehicles (private vehicles)</b>	Not applicable	Zero emission vehicles contribute to congestion	Yes	No	Green, discount or exemption could be linked to DVLA classification. This could be further simplified through use of an account.	<b>No discount, exemption or reimbursement.</b> Forecast is for significant increases in zero emission vehicles over next 5 years that would erode traffic reduction and revenue for transport investment.



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Vehicle category or group	EqIA (protected characteristic group identified)	Impacts on strategic aims and objectives	Ability to influence wider air quality policy?	Indispensable journey: unable to be made by an alternative mode/time of day	Deliverability/enforceability (amber/green)	Overall assessment
<b>Hackney carriages (taxis)</b>	Disability	Positive impact	Yes – if zero emission vehicles	No	Green, detail to be worked up in consultation with Local Authorities and trade bodies.	<b>Included within scheme as a 100% discount</b> if follow Cambridge City Licensing conditions, i.e. if zero emission (from 2028) or wheelchair accessible. This will support achievement of wider air quality policy.
<b>Private Hire Vehicles</b>	Disability	Positive impact	Yes – if zero emission vehicles	No	Green, detail to be worked up in consultation with Local Authorities and trade bodies	<b>Included within scheme as a 100% discount</b> if follow Cambridge City Licensing conditions, i.e. if zero emission (from 2028) or wheelchair accessible. This will support achievement of wider air quality policy.



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Vehicle category or group	EqIA (protected characteristic group identified)	Impacts on strategic aims and objectives	Ability to influence wider air quality policy?	Indispensable journey: unable to be made by an alternative mode/time of day	Deliverability/enforceability (amber/green)	Overall assessment
<b>Locally registered bus services</b>	All groups	Positive impact on many objectives	Yes, if linked to CPCA zero emission bus target	No	Green, detail to be worked up in consultation with Local Authorities and bus operators	<b>Included within scheme as a 100% discount</b> with potential to link this to the CPCA's 2030 zero emission bus ambition This will support achievement of wider air quality policy.
<b>Coaches</b>	N/A	As regular users of the network a discount could support wider decarbonisation of transport and improvements to air quality	Yes	No	Amber, detail to be worked up subject to consultation	Explore the potential for a 50% zero emission discount as part of the Autumn 2022 consultation.



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<b>Vehicle category or group</b>	<b>EqIA (protected characteristic group identified)</b>	<b>Impacts on strategic aims and objectives</b>	<b>Ability to influence wider air quality policy?</b>	<b>Indispensable journey: unable to be made by an alternative mode/time of day</b>	<b>Deliverability/enforceability (amber/green)</b>	<b>Overall assessment</b>
<b>HGVs and LGVs</b>	Not applicable	As regular users of the network a discount could support wider decarbonisation of transport and improvements to air quality	Yes	No	Amber, detail to be worked up subject to consultation	Explore the potential for a 50% zero emission discount as part of the Autumn 2022 consultation.
<b>Vehicles with over 9 seats e.g. school minibuses</b>	Possibly	As regular users of the network a discount could support wider decarbonisation of transport and improvements to air quality	Yes	No	Amber, detail to be worked up subject to consultation	Explore the potential for a 50% zero emission discount as part of the Autumn 2022 consultation.



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Vehicle category or group	EqIA (protected characteristic group identified)	Impacts on strategic aims and objectives	Ability to influence wider air quality policy?	Indispensable journey: unable to be made by an alternative mode/time of day	Deliverability/enforceability (amber/green)	Overall assessment
<b>Vehicles used by charities and not-for-profit groups</b>	Yes	Positive impact on accessibility	No	No	Amber, detail to be worked up in consultation with Local Authorities	<b>Included within scheme as a reimbursement</b> journey unable to be made by an alternative mode, potentially supporting groups with protected characteristics
<b>Motorised two-wheeled vehicles (motorbikes and mopeds) registered with DVLA</b>	Not applicable	Potential adverse impact (safe and attractive for cyclists)	No - limited	No	Green, discounts or exemptions could be applied against DVLA classification. This could be further simplified through an account.	<b>No discount or exemption:</b> no significant impact on congestion reduction, sustainable travel or air quality and safety benefits



## Summary of proposals

Following the assessment, the following suite of exemptions and discounts are proposed:

**Table 2 - Discounts and Exemptions summary**

Category	Proposed discount / exemption
Emergency vehicles	Exempt
Military vehicles	Exempt
Disabled tax class vehicles	Exempt
Breakdown services	Exempt
NHS tax-exempt vehicles (definition to be detailed following engagement with the NHS)	Exempt
Dial-a-ride services	Exempt
Certain local authority operational vehicles	Exempt
Blue badge holders	Nominate up to 2 vehicles for 100% discount
Low-income households	Potential for tapered discount 25 - 100%
Car club vehicles (official providers)	100% discount
Buses	100% discount with potential to link this to the CPCA's 2030 zero emission bus ambition
Hackney Taxis	100% discount if follow Cambridge City Licensing conditions, i.e. if zero emission (from 2028) or wheelchair accessible
Private Hire Vehicles	100% discount if follow Cambridge City Licensing conditions, i.e. if zero emission (from 2028) or wheelchair accessible

In addition, we propose the consultation seeks views on whether coaches, minibuses (vehicles over 9 seats), LGVs and HGVs should be offered a discount, and if so how much, if they are zero emission.

Alongside the proposed discounts and exemptions, as part of the public consultation we will explore with providers and develop reimbursement schemes for the following groups:

- NHS patients clinically assessed as too ill, weak or disabled to travel to an appointment on public transport, including those who:
  - o Have a compromised immune system;
  - o Require regular therapy or assessments; and
  - o Need regular surgical intervention.



- NHS staff using a vehicle to carry certain items (such as equipment, controlled drugs, patient notes or clinical specimens, blood and breast milk), or responding to an emergency when on call;
- NHS and other emergency services staff responding to an emergency when on call;
- Other essential emergency service trips made in business vehicles that are not specifically listed above for exemptions, e.g. fire safety inspections;
- Registered local authority, charity, domiciliary care or care home workers; and
- Minibuses and LGVs used by charities and not-for-profit groups.

## Charge Levels

Reflecting the consultation feedback, it is proposed that the charge for private cars driving in the Zone would be £5 per day. This would be a daily charge. Whilst a £10 charge performed better in modelling work in terms of traffic reduction and revenue raising, it is considered that a lower charge meets the scheme’s objectives whilst reducing the financial burden on those paying. The £5 charge achieves both the required level of traffic reduction and funding for the transformational bus package, whereas a £10 charge would reduce traffic and raise funding beyond the policy need. In line with other schemes and reflecting that different vehicle types can have different network impacts, the charge would then be scaled for other vehicle categories. The full list of proposed charges for each vehicle type is set out in table 4.

**Table 3 - Summary of proposed Sustainable Travel Zone charge levels**

<b>Vehicle category</b>	<b>Proposed charge level (per day)</b>
Cars	£5
Motorbikes and mopeds	£5
LGVs	£10 Explore a 50% discount for zero emission vehicles as part of the consultation
Vehicles with over nine seats (not including registered bus services and coaches)	£10 Explore a 50% discount for zero emission vehicles as part of the consultation
HGVs	£50 Explore a 50% discount for zero emission vehicles as part of the consultation
Coaches	£50 Explore a 50% discount for zero emission vehicles as part of the consultation
Registered bus services	100% discount, with potential to link this to the CPCA’s 2030 zero emission bus ambition



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<b>Vehicle category</b>	<b>Proposed charge level (per day)</b>
Hackney Carriages (Taxis)	100% discount if follow Cambridge City Licensing conditions, i.e. if zero emission (from 2028) or wheelchair accessible £5 for those not meeting this
Private Hire Vehicles	100% discount if follow Cambridge City Licensing conditions, i.e. if zero emission (from 2028) or wheelchair accessible £5 for those not meeting this

The principle of the pricing structure is to reflect the impacts of vehicle size and likely impact on congestion, pollution (air quality) and carbon emissions. Whilst motorbikes and mopeds could be perceived as smaller and having lower emissions than cars, there are potential risks in terms of the safety, noise and conflicts with other road users if these proliferate as a result of a lower charge level. This is particularly true in Cambridge due to high cycling levels. For this reason, we are proposing that the charge for the vehicle group is the same as cars, particularly given the significant increase in people walking and cycling following the introduction of the charge.

LGVs are generally larger vehicles and are more likely to be repeat visitors to the charging area on multiple locations. Through the application of a higher charge, it is intended to stimulate demand for consolidation of deliveries and rationalisation of LGV use during the hours of the Sustainable Travel Zone operation. LGV drivers will also benefit from lower traffic levels, enabling them to make more visits during a day.

HGVs have a significant impact on congestion, produce greater emission levels in general than a car, and impact on more vulnerable road users. The proposal is to charge these £50 a day to dissuade unnecessary trips during the Zone hours of operation, where we expect to see far higher levels of walking and cycling, and to stimulate demand for the use of freight consolidation centres.

Coaches also have a significant impact on congestion and impact on more vulnerable road users, and so a £50 daily charge is also proposed. It is hoped that this will stimulate demand for coach trips to make better use of park and ride or rail services. Consideration as to the likelihood of coach trips changing their visit patterns in response to the operational hours of the Zone will be explored as part of the proposed consultation.

For HGVs, LGVs and coaches, the suggestion is to explore views on a discount for zero emission vehicles through the proposed consultation. The purpose of this would be to recognise that the scheme aims to improve air quality and reduce carbon emissions and encourage a switch to zero-emissions vehicles for heavier users of the network.

Expanding the bus network is at the heart of the proposals and therefore it would not be appropriate to charge registered bus services. The options appraisal identified an opportunity for the scheme to support the CPCA's ambition for all local bus services to be zero emission by 2030. We are therefore proposing to review the discount for non-zero emission buses on that timescale.



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The Equality Impact Assessment draft report undertaken for the emerging proposals identifies taxis and private hire vehicles as important in supporting groups without access to a car and for whom bus travel is not a suitable alternative. Policy ambitions are already in place through licensing arrangements to encourage a switch to zero emission vehicles for these heavy users of the network and, therefore, it is proposed to apply a 100% discount to those Hackney Carriages and Private Hire Vehicles that meet these conditions.

## **Next Steps**

This note has set out a draft set of proposals to be included in the proposed public consultation, where views will be sought from the public and key stakeholders.

The Equalities Impact Assessment will also continue to be developed and used to refine the suite of discounts, exemptions and reimbursements. In addition, further work will be undertaken to further consider the scale and administration to inform a more detailed assessment as part of the Outline Business Case.



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## **Appendix A: Considerations from other Charging Schemes**

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Existing charging schemes have been examined to benchmark the proposed Sustainable Zone Charge against other schemes and develop proposed exemptions, discounts and reimbursements for further assessment.

- London Congestion Charge
- London Ultra Low Emission Zone (ULEZ)
- Birmingham Clean Air Zone (Class D CAZ)
- Bath Clean Air Zone (Class C CAZ)
- Portsmouth Clean Air Zone (Class B CAZ)
- Oxford Zero Emission Zone (ZEZ)
- Bradford Clean Air Zone (yet to be implemented)

### **LONDON CONGESTION CHARGE**

The discounts, exemptions and reimbursements for London's congestion charge are summarised in Table 4.



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**Table 4 - London Congestion Charge exemptions, discounts and reimbursements**

<b>Exemptions, discounts and reimbursements</b>	<b>London Congestion Charge</b>
<b>Exemptions</b>	<ul style="list-style-type: none"><li>• Emergency service vehicles, such as ambulances and fire engines</li><li>• NHS vehicles that are exempt from vehicle tax</li><li>• Vehicles used by disabled people that are exempt from vehicle tax and have a 'disabled' taxation class</li><li>• Vehicles for more than one disabled person (for example Dial-a-rid) that are exempt from vehicle tax and have a 'disabled' taxation class</li><li>• Two-wheeled motorbikes and mopeds</li><li>• Certain vehicles registered in European Economic Area must be registered to qualify for an exemption</li><li>• Black cabs</li><li>• PHVs designated as wheelchair-accessible vehicles will have an exemption if registered with London TPH.</li></ul> <p>Other exemptions:</p> <ul style="list-style-type: none"><li>• HM Coastguard and Port Authorities</li><li>• Certain operational vehicles used by the London boroughs</li><li>• The armed forces</li><li>• Royal Parks Agency (NB this is a "reduced rate" vehicle subject to registration)</li></ul>



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<b>Exemptions, discounts and reimbursements</b>	<b>London Congestion Charge</b>
<b>Discounts</b>	<p><b>All discounts must pay an annual £10 registration charge for each vehicle</b></p> <ul style="list-style-type: none"> <li>• 90% residents' discount if the location check confirms address is within the discount zone</li> <li>• 100% discount for Blue Badge holders (up to 2 vehicles)</li> <li>• 100% discount for breakdown vehicles operated by organisations in the European Economic Area (accredited to BS EN ISO9001:2008)</li> <li>• 100% discount for vehicles with 9+ seats and not licensed with DVLA as a bus</li> <li>• 100% discount for motor tricycles which is one metre or less wide, and two metres or less long</li> <li>• 100% discount for vehicles registered with the DVLA and a taxation class of 'recovery vehicle'</li> <li>• 100% discount for fully electric vehicles</li> </ul>
<b>Reimbursements</b>	<p>Certain NHS staff and patients, local authority employees, charity employees or volunteers, and workers at a care home within the Congestion Charge zone may be eligible for reimbursements.</p>

**CAZ/ ULEZ/ ZEZ**

This section outlines the discounts, exemptions, and reimbursements in London's Ultra Low Emission Zone (ULEZ), Oxford's Zero-Emission Zone, and the following Clean Air Zones:

- Birmingham Clean Air Zone (Class D CAZ)
- Bath Clean Air Zone (Class C CAZ)
- Portsmouth Clean Air Zone (Class B CAZ)
- Oxford Zero Emission Zone (ZEZ)
- Bradford Clean Air Zone (yet to be implemented)

There are four types of Clean Air Zones (CAZs), which are classed A to D. Clean Air Zones only target specific vehicles, depending on their class. The classes and the vehicles they charge are:

- Class A: Buses, coaches, taxis, private hire vehicles
- Class B: Buses, coaches, taxis, private hire vehicles, heavy goods vehicles



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- Class C: Buses, coaches, taxis, private hire vehicles, heavy goods vehicles, vans, minibuses
- Class D: Buses, coaches, taxis, private hire vehicles, heavy goods vehicles, vans, minibuses, cars, and the local authority has the option to include motorcycles

As CAZs target polluting vehicles, all vehicles (even in the above categories) do not pay the charge if:

- Buses, coaches, heavy goods vehicles are Euro 6 standard
- Vans, minibuses, taxis, private hire vehicles, cars are Euro 6 (diesel) and Euro 4 (petrol) standard
- Motorcycles are Euro 3 standard

On top of these vehicles which do not qualify for the charge, there are national exemptions in all CAZs for:

- Vehicles that are ultra-low emission
- A disabled passenger tax class vehicle
- A disabled tax class vehicle
- A military vehicle
- A historic vehicle
- A retrofitted with technology accredited by the Clean Vehicle Retrofit Accreditation Scheme (CVRAS)
- Certain types of agricultural vehicles.

In addition to the vehicles that do not qualify for the scheme and the above exemptions, there are also location-specific discounts, exemptions and reimbursements in CAZ/ ULEZ/ ZEZs. These are outlined in Table 6.



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**Table 5 – CAZ/ULEZ/ZEZ- relevant exemption, discounts and reimbursements**

Exemptions and discounts	London ULEZ	Birmingham CAZ	Bath CAZ	Portsmouth CAZ	Oxford ZEZ	Bradford CAZ (yet to be implemented)
<p><b>Discounts, exemptions, reimbursements</b></p>	<p>Emergency service vehicles, such as ambulances and fire engines are exempt</p> <p>Wheelchair-accessible PHVs are granted a grace period until October 2025, during which they will be exempt. A list of designated wheelchair accessible PHVs is provided by TfL.</p> <p>London-licensed taxis are exempt from ULEZ charges. Currently subject to a 15-year age limit.</p> <p>The following are also exempt:</p> <ul style="list-style-type: none"> <li>• Special agricultural vehicles</li> <li>• Non-road going vehicles which are allowed to drive on the highway (excavators)</li> <li>• Certain types of mobile cranes</li> </ul> <p>100% discount for minibuses for community transport (until Oct 2023).</p> <p>100% discount for showman's vehicles.</p> <p>The same as London Congestion Charge zone</p>	<p>Emergency service vehicles, such as ambulances and fire engines are exempt</p> <p>Recovery vehicles are exempt if they are:</p> <ul style="list-style-type: none"> <li>- Used exclusively for vehicle recovery, and;</li> <li>- Over 3.5 tonnes</li> </ul> <p>Commercial vehicles were temporarily exempt until May 2022.</p> <p>Workers in the CAZ could get a temporary exemption until May 2022.</p> <p>Community and school transport vehicles are exempt</p> <p>100% discount for residents, until May 2023.</p> <p>Visitors to specified hospitals can claim a one-time voucher which can be used to pay the CAZ daily fee.</p>	<p>Emergency service vehicles, such as ambulances and fire engines</p> <p>Health vehicles exempt from road tax</p> <p>Volunteer vehicles supporting emergency services exempt for up to four years from the launch of the zone</p> <p>Exemption for hard-to-replace vehicles, which include agricultural, showman's, recovery, and general haulage vehicles</p> <p>The following exemptions will expire on 15 March 2023:</p> <ol style="list-style-type: none"> <li>1 Wheelchair accessible taxis and private hire vehicles</li> <li>2 Community transport</li> <li>3 Blue Badge holders</li> <li>4 Community health, education or social care workers</li> <li>5 Exemptions under the terms of the Financial Assistance scheme (declined finance)</li> </ol> <p>Large motorhomes and horse transporters classed as PHGV can pay a discounted daily charge of £9 (rather than the standard £100 for HGVs)</p>	<p>Emergency service vehicles, such as ambulances and fire engines</p> <p>Specialist Heavy Vehicles (Special/ Recovery/ Special Concessionary Vehicles)</p> <p>Non-commercial buses exempt for up to 10 days per year</p> <p>HGV sized horse transporters exempt for up to 10 days per year</p> <p>Community and school transport exempt on weekdays for two years from launch.</p> <p>Rail replacement buses/ coaches are exempt</p> <p>6-month sunset period for non-compliant wheelchair accessible vehicles, which has now ended.</p>	<p>Emergency service vehicles, such as ambulances and fire engines</p> <p>100% discounts for Blue Badge holders for up to 2 vehicles</p> <p>100% discount for disabled tax class vehicles</p> <p>100% discount for students in acute financial hardship</p> <p>50% discount for petrol-electric hybrid PHVs and Hackney carriages licensed outside Oxford</p> <p>90% discounts for residents in the zone</p> <p>100% discount if:</p> <ul style="list-style-type: none"> <li>• Undertake community-based regulated healthcare</li> <li>• Provide community-based social services</li> </ul> <p>100% discount for buses operating scheduled services in Oxford</p>	<p>Emergency service vehicles, such as ambulances and fire engines</p> <p>Households in the Bradford district</p> <p>Up to 3 vehicles for each Bradford business</p>



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