Public Mobility Working Group Meeting

7th May 2026, 10.00 – 12.30

Online via MS Teams

Actions

- Zemo to raise the issue of the lack of suitable zero-emission mini-buses and the limited availability of purpose-built vehicles with DfT.
- Zemo to seek clarity from DfT on whether zero-emission bus policy applies to coaches.
- Zemo to organise a dedicated session on Zero Emission/Clean Air Zones.

Links

- Meeting agenda
- Meeting presentation

Attendees

Andy Eastlake	Zemo
Adrian Felton	Daimler Truck
Caroline Whitney	Community Transport Association
Chris Ashley	Zemo
Daniel Fisher	Transport for Greater Manchester
Jonathan Murray	Zemo
Lois Loxley	Zemo
Naomi Baster	C40 Cities
Neil Stockley	Zemo
Rebecca Kite	CPT
Sukky Choongh	SMMT

Competition Law Compliance

DOs and DONTs

Commercial decisions must be taken independently by individual companies.

All participants must be aware that exchange of commercially sensitive information or intimation of intended commercial decisions, directly or indirectly, can result in competition law infringement.

Member conduct at meetings and teleconferences

There must be no communication of the following information:

- Individual company or industry prices, including differentials, discounts, rebates, allowances, price levels or changes, mark-ups, terms of sale and credit terms.
- Company plans as regards development, design, production, distribution or marketing of products/services, divestments, closures or expansion.
- Rates for production or transportation of products. • Bids for contracts or procedures for responding to bid invitations.
- Matters relating to individual suppliers and customers/potential customers, progress on negotiations or content of negotiations.

If at any point during a meeting discussion appears to be breaching policy guidelines, the Chair or a participant should immediately raise their concern and close the discussion.

The Meeting Minutes below have been signed by Zemo Working Group Chair to confirm that all parties present have agreed to previous minutes and all members have read, understood and will abide by the Zemo Competition Law Compliance Statement:

X _____

JONATHAN MURRAY
ZEMO PARTNERSHIP

1 Welcome

Rebecca Kite (RK) welcomed attendees.

Competition law was flagged to the group with a written statement on screen.

Department for Transport representatives were unable to attend. Their presentation was nevertheless discussed, with questions to be forwarded to DfT for response.

2 Minutes and Matters Arising

The minutes from the previous meeting were agreed.

3 Government Policy and Monitoring Updates

Department for Transport representatives were unable to attend.

Neil Stockley (NS) provided an overview of the DfT update. Key points included:

- No confirmed date was yet available for when new non-zero-emission buses would no longer be permitted; this will be established through secondary legislation.
- Recent funding included £73.2m additional funding announced in March, alongside the wider £2.3bn Local Transport Grant for smaller cities, towns and rural areas.
- The Z Manufacturing Expert Panel had completed its work. Collective procurement was highlighted as an area of interest.

A significant discussion focused on the lack of suitable zero-emission mini-buses and the limited availability of purpose-built vehicles. Members highlighted:

- The market is dominated by converted electric vans.
- Existing funding arrangements do not adequately support smaller community-transport vehicles.
- Zemo agreed to raise the issue with DfT.

Members sought clarity on whether zero-emission bus policy applies to coaches. The discussion indicated that the manufacturing work is primarily focused on local-service buses, although a coach operating a scheduled/local bus service may fall within the relevant definition. Further clarification was requested.

The group discussed whether repowering existing diesel buses should be considered alongside new vehicle manufacture.

It was confirmed that the Bus Manufacturing Expert Panel did not cover repowering. However:

- Repowering was identified as potentially important to achieving zero-emission objectives.
- The Zero Emission Vehicle Repower Accreditation Scheme (ZEVRAS) already provides a relevant standard.
- Scotland has funded repowering through its ZEB programme, while equivalent funding had not yet been seen in England.

The group agreed that the future role of the Bus Manufacturing Expert Panel and its annual pipeline should be followed up, including ensuring that approaches do not unintentionally exclude non-UK OEMs.

Questions raised during the discussion would be collated and sent to DfT.

4 Guest Presentations

4.1 C40 Cities – Integrated zero-emission urban mobility

Naomi Baster (NB) presented international examples of integrated, sustainable urban mobility.

The presentation emphasised that decarbonisation requires both electrification and mode shift. Cities need to increase walking, cycling and public transport use while reducing reliance on motorised vehicles and transitioning high-mileage vehicles to zero emissions.

Examples included:

- Hong Kong: integrated ticketing across rail, bus, ferries and taxis.
- Vienna: integrated fares and affordable annual public transport passes.
- Copenhagen: cycling integrated with public transport as a first/last-mile solution.
- Singapore: close integration between transport, housing and land-use planning.
- Curitiba: long-term integrated urban and transport planning.
- Jakarta: integration of informal/private microbus operators into the wider public transport system.

Key lessons identified:

- Sustainable transport needs both “carrots” and “sticks” — attractive alternatives alongside measures such as congestion charging and parking controls.
- Sustainable transport can be treated as a merit good, recognising wider social and economic benefits.
- Stable and diverse funding mechanisms are essential.
- Accessibility and inclusion should be built into transport planning from the outset rather than treated as an additional cost.

- Institutional alignment and long-term planning are important characteristics of successful integrated systems.

C40 also highlighted work on high-mileage vehicle charging, sustainable transport advertising/revenue strategies and knowledge-sharing between cities.

4.2 Transport for Greater Manchester – Bus franchising and multimodal integration

Daniel Fisher (DF) outlined Greater Manchester's transition to a franchised bus network and its parallel zero-emission bus programme.

Key lessons included:

- Bus patronage had experienced long-term decline, making market reform and sustained investment necessary.
- Greater Manchester's entire bus network became franchised in January 2025.
- Franchising provides greater ability to align investment and services with wider strategic objectives, but it carries significant ongoing financial and operational responsibilities.
- Zero-emission bus deployment has progressed alongside franchising, with around 30% of the fleet zero emission at the time of the presentation and an expectation of approaching 40% by the end of the financial year.

A key lesson was the importance of early, transparent agreement between authorities, operators and manufacturers on:

- ownership;
- funding;
- delivery responsibilities;
- cost and operational risk; and
- residual values.

Greater Manchester's experience also demonstrated the value of contingency planning where infrastructure or depot projects do not proceed according to the original timetable.

Future challenges include:

- depot capacity, as zero-emission buses require more space;
- maintaining sufficient funding for both capital investment and operations;
- improving bus speed and reliability;
- balancing bus, walking, cycling and general traffic requirements;
- potential repowering of relatively young diesel buses; and
- improving the efficiency and residual value assumptions underpinning zero-emission fleets.

DF also noted that Greater Manchester is reviewing its forecasting models following the disruption caused by COVID-19 and is continuing to work closely with the distribution network operator on electricity connections.

4.3 Community Transport Association

Caroline Whitney (CW) introduced CTA as the UK membership body for non-commercial transport operators, with more than 1,400 members.

CW stressed that community transport is an important safety net, particularly for people who cannot access conventional public transport, and is especially important in rural and semi-rural areas. A passenger survey indicated that 46% of CTA passengers would not travel by another available means.

Community transport can:

- provide demand-responsive and dial-a-ride services;
- connect people to major bus and rail services;
- provide first/last-mile connections;
- use vehicles flexibly for several different purposes; and
- fill gaps where commercial services are not viable.

The Dorset example demonstrates how flexible use of vehicles and local partnerships can reconnect communities that have lost conventional bus services.

CW stressed the importance of mapping existing "shadow networks" before implementing franchising or other major network changes, so that community transport is incorporated rather than overlooked.

A successful consortium model demonstrated that community transport operators can participate effectively in enhanced partnerships when treated as equal partners.

CW discussed the particularly difficult economics of electrifying community transport:

- only 8% of the CTA fleet was electrified in the England data presented;
- most operators have small fleets and limited capital;
- electric mini-buses can cost substantially more than diesel equivalents;
- many operators rely on the second-hand market;
- many do not have depots; and
- public charging infrastructure is generally designed around cars rather than larger vehicles.

The group identified a significant gap in government support for electric mini-buses. CTA is undertaking a wider UK survey to improve understanding of fleet numbers, vehicle sizes and the scale of investment required.

Potential solutions discussed included shared charging infrastructure, partnerships with larger fleets and alternative financing models.

5 Zemo Work Programme

5.1 Zemo Public Affairs Update

Neil Stockley (NS) provided an update on Zemo's public affairs work.

The Net Zero Transport Sector Transition Plan remains on hold, while Zemo is updating its existing policy work into a new baseline document reflecting recent government announcements, market developments and priorities raised by members.

Other activities include:

- a parliamentary roundtable planned for the Autumn;
- member activity around shared messaging on private charging;
- an EV misinformation workshop scheduled for 20 May.

The group recognised evidence that Clean Air Zones have contributed to reductions in nitrogen dioxide and can deliver wider health benefits. However, concerns were raised about:

- weakening policy momentum;
- fragmentation between local approaches;
- the lack of a national framework for Zero Emission Zones; and
- what should replace Clean Air Zones where local authorities remove or move beyond them.

Zemo's emerging policy position is to consider:

- stronger air-quality standards;
- clear requirements for measures following Clean Air Zones;
- continued investment in zero-emission buses, charging and active travel;
- improved traffic management and air-quality monitoring; and
- a consistent framework for Zero Emission Zones, including guidance and support for SMEs and local authorities.

Members stressed that Zero Emission Zones should not be introduced before the market (particularly the second-hand zero-emission vehicle market) is sufficiently developed to support them. There was concern that premature implementation could disproportionately affect SMEs and increase vehicle costs.

NS agreed to organise a dedicated session on Zero Emission Zones.

industry responses and potential asks of government (Zemo).

6 Members Roundtable

Details of all upcoming Zemo Events can be found on the Zemo Events Webpage

End.