



BRIEFING PAPER

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The motor industry: statistics and policy

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2. Production, exports and registrations
3. Future of motor industry in the UK
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Summary

Key statistics:

- The UK motor vehicle manufacturing industry contributed £15.2 billion to the economy in 2017, 0.8% of total output, but 8.1% of manufacturing output.
- The industry employed 162,000 people across Great Britain in 2016.
- 1.75 million vehicles were produced in the UK in 2017, 80% of which were exported
- The value of exports totalled £34.3 billion in 2016, but imports totalled £40.8 billion, so a trade deficit of £6.6 billion was recorded.
- There were 2.5 million car registrations in 2017, the third highest annual total in the last ten years.

The industry has performed well in recent years, achieving strong growth in employment, production, economic output and exports. But the industry faces fundamental challenges, including profound shifts in global demand, environmental concerns and the advent of new technologies such as driverless cars.

Perhaps most importantly, the UK's decision to leave the EU has significantly increased uncertainty in the industry. Although some argue that the opportunity to strike new trade deals will off-set any additional complexity in the UK-EU trading relationship.

The UK automotive manufacturing sector is highly integrated with the rest of Europe, in both finished cars and component parts. For instance, the UK imported £13.95 billion's worth of vehicle engines and parts in 2017, 79% of which came from the EU. The manufacturers' trade body (EEF) and the automotive trade body (SMMT) have both called on the Government to protect this close integration.

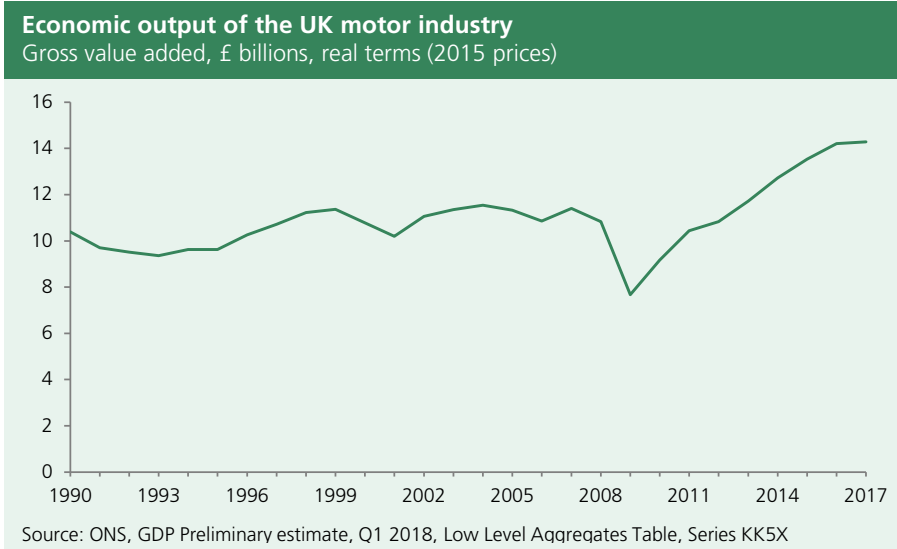
The Government's industrial strategy for the automotive sector focuses on the development of ultra-low emission, connected and autonomous vehicles. Against the backdrop of emission scandals, the diesel share of the new car market has started to decline, and is forecast to continue to do so.

1. Contribution to the economy

1.1 Gross Value Added

The motor vehicle manufacturing industry is defined as including the manufacture of parts, bodies and trailers for cars and commercial vehicles.¹

The industry contributed £15.2 billion to the economy in 2017, 1% of total UK output, and 8% of the manufacturing industry's output.²



The industry's economic output was broadly flat during the two decades before the 2008 financial crisis. Output dropped sharply in 2009, during the recession, but bounced back strongly in 2010 and has grown steadily thereafter. In real terms, the motor manufacturing industry was worth 25% more in 2017 than in 2007, although growth appears to have levelled off in the last year.

The motor industry's output as a proportion of all manufacturing output has increased. In 2007, the manufacturing of motor vehicles accounted for 5.4% of UK manufacturing. In 2017 it accounted for 8.1%.

As a percentage of the whole UK economy, motor vehicle manufacturing was worth 0.8% in 2017.

¹ [Standard Industrial Classification \(SIC\) code 29](#). Gross Value Added (GVA) is a measure of economic contribution similar to GDP

² ONS, [GDP Preliminary estimate, Q1 2018, Low Level Aggregates Table](#)

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Economic output of the UK motor industry

Gross value added

	£ billions		% of manufacturing	% of UK total
	Current prices	Real terms (2015 prices)		
2000	9.4	10.8	6.0%	0.8%
2001	8.5	10.2	5.8%	0.8%
2002	8.1	11.1	6.4%	0.8%
2003	8.1	11.4	6.6%	0.8%
2004	7.6	11.5	6.6%	0.8%
2005	8.1	11.3	6.5%	0.8%
2006	8.1	10.9	6.1%	0.7%
2007	7.5	11.4	6.4%	0.7%
2008	8.2	10.8	6.2%	0.7%
2009	5.9	7.7	4.9%	0.5%
2010	8.4	9.2	5.6%	0.6%
2011	8.2	10.4	6.2%	0.7%
2012	8.6	10.8	6.5%	0.7%
2013	11.5	11.7	7.1%	0.7%
2014	13.3	12.7	7.5%	0.8%
2015	13.5	13.5	8.0%	0.8%
2016	14.6	14.2	8.3%	0.8%
2017	15.2	14.3	8.1%	0.8%

Source: ONS, *GDP Preliminary estimate, Q1 2018, Low Level Aggregates Table*

ONS series: KL6D; KK5X; KL8V; KL8A

Note: Includes the manufacture of parts, bodies and trailers for cars and commercial vehicles (SIC code 29)

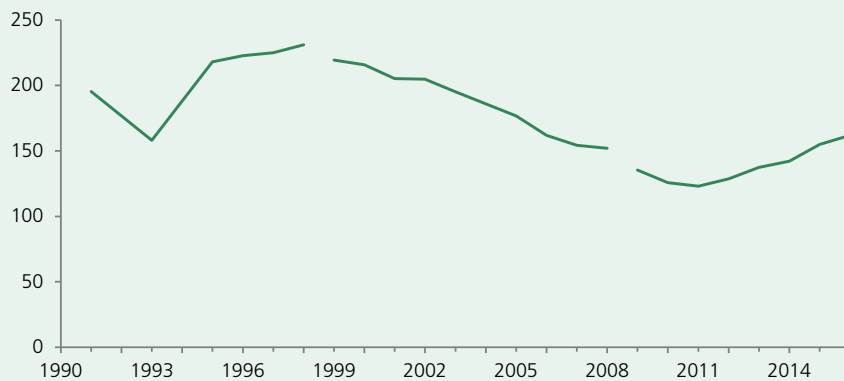
1.2 Employment

There were 162,000 employees in the motor vehicle manufacturing industry in Great Britain in 2016. This is 7% of UK manufacturing employees and 1% of all employees.³

In common with other parts of the manufacturing industry, increases in productivity and the growth of other industrial bases (particularly in the Far East) have led to significant falls in the number of people employed in the manufacture of motor vehicles in Great Britain, from 502,000 in 1971 to the current total of 162,000.

However in recent years employment in the sector has been growing. Since 2010 employment has grown by 29% from 126,000 to 162,000.

Motor manufacturing employees
Great Britain 1000s



Sources: 91-98: Annual employment survey, 98-08: Annual business inquiry; 09-16: Business register and employment survey

Employment by region

The West Midlands has, by far, the largest number of people employed in the manufacture of motor vehicles of any UK region or country. 54,000 employees in the industry work in the West Midlands, around a third of all motor industry employees in the industry in Great Britain.

Employment in the manufacture of motor vehicles
2016

	000s	% of manufacturing	% of all employment
West Midlands	54	18%	2%
North West	24	7%	1%
North East	15	13%	1%
South East	16	6%	0%
Yorkshire and The Humber	8	3%	0%
Wales	9	6%	1%
East Midlands	8	3%	0%
East	9	4%	0%
South West	10	4%	0%
London	5	5%	0%
Scotland	4	2%	0%
Great Britain	162	7%	1%

Source: ONS Nomis database, Business Register and Employment Survey

³ Source: ONS, *Business register and employment survey*, 2017, via [NOMIS database](#)

Future employment trends

Lloyds Bank conducted a survey of the UK automotive manufacturing sector (published 1 March 2017) and found that:

The vast majority (87 per cent) of automotive manufacturers plan to create new jobs over the next two years. If their plans are replicated across the UK's automotive manufacturing firms, it would create almost 85,000 new jobs – a figure that remains unchanged year-on-year.⁴

However, in the context of Brexit, there have been concerns that over the long term there could be job losses in the industry. The Business, Energy and Industrial Strategy Committee conducted an inquiry into the impact of Brexit on the automotive industry. They stated that should the UK leave the Customs Union and Single Market “hundreds of thousands” of jobs could be lost in the industry:

...it is difficult to see how it would make economic sense for multinational volume manufacturers—the bulk of the UK automotive sector—to base production in the UK in a no deal or WTO tariff scenario. The shift of manufacturing to countries within the customs union and single market would be inevitable; the cost in UK jobs could be in the hundreds of thousands, and inward investment in the hundreds of millions. For the automotive sector, no deal would undoubtedly be hugely damaging. The Government should not seriously contemplate this outcome.⁵

The SMMT (the UK's automotive trade association) agreed, they said:

There is no escaping the fact that being out of the customs union and single market will inevitably add barriers to trade, increase red tape and cost. Settling for “good” access to each other's markets is not enough as it will only damage the UK's competitiveness and reduce our ability to attract investment and the high quality jobs that go with it.⁶

For more information on Brexit and the automotive industry see [Section 4](#).

⁴ Lloyds Bank, [Survey of the UK automotive manufacturing sector](#), 1 March 2017

⁵ House of Commons Business, Energy and Industrial Strategy Committee, [The impact of Brexit on the automotive sector](#), 1 March 2018, p8

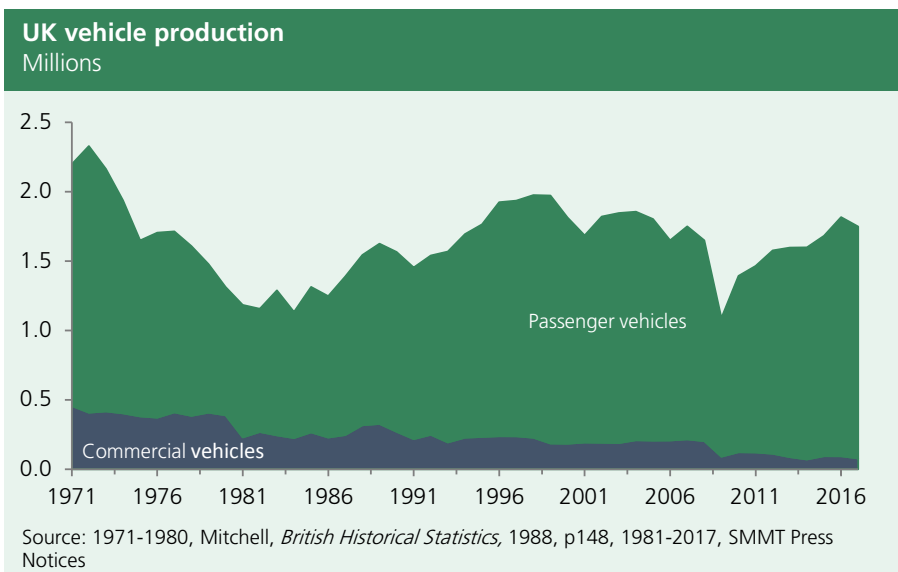
⁶ SMMT, [Industry topics: Brexit](#), [last accessed 14th April 2018]

2. Production, exports and registrations

2.1 Vehicle production

There were 1.75 million vehicles produced in the UK in 2017, of which 1.67 million were passenger vehicles and 78,000 were commercial vehicles.

Vehicle production in the UK peaked in 1972 at 2.3 million and fell through the 1970s before picking up again in the mid-1980s and 1990s as a result of foreign investment. For example, Nissan opened their first European plant in Sunderland in 1986.



Vehicle production fell by over 30% in 2009 during the global financial crisis. In 2016 production rose above the 2007 pre-crisis level for the first time. However, vehicle production levels remain lower than in the late 1990s.

The recent growth has been driven by the production of passenger cars, which in reached its highest level since 1999 in 2016. The production of commercial vehicles has been in steady decline since the 1970s, and has not recovered from its steep fall during the 2009 recession.

	Passenger cars	Commercial vehicles	All vehicles	% change on year
2007	1,535	216	1,750	6%
2008	1,447	203	1,650	-6%
2009	999	91	1,090	-34%
2010	1,270	123	1,393	28%
2011	1,344	121	1,465	5%
2012	1,465	112	1,577	8%
2013	1,510	88	1,597	1%
2014	1,528	71	1,599	0%
2015	1,588	94	1,682	5%
2016	1,723	94	1,817	8%
2017	1,671	78	1,749	-4%

Source: SMMT, Vehicle production press releases

2.2 Foreign investment

There are now no British-owned mass car manufacturers operating in the UK. Yet, as in the 1980s, the UK has been successful in attracting foreign investment in recent years.

The UK is home to seven foreign volume car manufacturers, with other companies specialising in commercial or luxury brands. A number of motor companies have made recent decisions which have favoured the UK. For example:

- Honda have almost doubled production at their Swindon plant in 2012;⁷
- Toyota added 1,500 jobs to its Burnaston plant in 2012⁸
- GM announced it would be manufacturing the next generation Astra at Ellesmere Port from 2013⁹
- Jaguar Land Rover invested £400 million in a new engine plant, equipment and the expansion of its design centre in 2015
- China's Zhejiang Geely Group spent £250m on a new factory for the London Taxi Company, creating 1,000 jobs in 2015¹⁰
- In October 2016, Nissan announced that it would produce two new models in Sunderland¹¹
- Honda announced a £240m investment into its Burnaston site in March 2017¹²

⁷ Financial Times, [Honda aims to double production in Europe](#), 13 February 2012

⁸ BBC News, [Toyota jobs offered at Burnaston factory open day](#), 14 January 2012

⁹ BBC News [Vauxhall's Ellesmere Port plant to build new Astra](#), 17 May 2012

¹⁰ Telegraph [Britain's motor industry gets £650m boost](#), 25 March 2015

¹¹ Financial Times, [Nissan to build new models in UK despite Brexit vote](#), 27 October 2016

¹² Financial Times, [Toyota and Nissan take different roads to Brexit](#), 16 March 2017

2.3 Trade

Value of motor industry trade

The motor industry is heavily reliant on trade. The value of motor vehicle (commercial and passenger) exports from the UK in 2017 was £34.3 billion, up from £31.5 billion in 2016. The value of imports was £40.8 billion in 2017, meaning there was a trade deficit of £6.6 billion in motor vehicles in 2017.

UK trade in motor vehicles			
£ billion			
	Exports	Imports	Balance
2007	16.7	26.2	-9.5
2008	18.0	24.0	-6.0
2009	13.3	18.9	-5.5
2010	19.1	23.8	-4.8
2011	22.5	25.7	-3.1
2012	23.9	25.7	-1.9
2013	26.4	29.5	-3.2
2014	27.3	33.3	-6.0
2015	27.0	37.8	-10.8
2016	31.5	39.8	-8.3
2017	34.3	40.8	-6.6

Source: HMRC, uktradeinfo, SITC codes 781, 782, 783

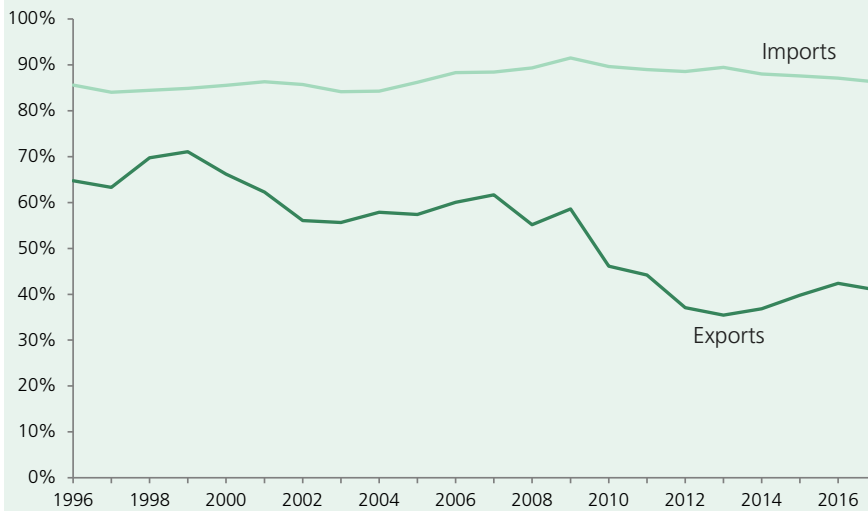
Note: Balance is exports minus imports (arrivals plus imports; and dispatch plus exports)

Exports have more than doubled since the 2009 recession, but imports have also increased by over 50%. As a result, the trade balance remained negative in all these years.

In 2017, 86% of UK's imports came from the EU, while only 41% of UK's export went to the EU. Whereas the percentage of imports coming from the EU has remained consistently high over the last 20 years, the share of UK exports going to the EU has fallen sharply from a peak of 71% in 1999. This change is the result of exports to non-EU countries growing much faster than exports to EU countries.

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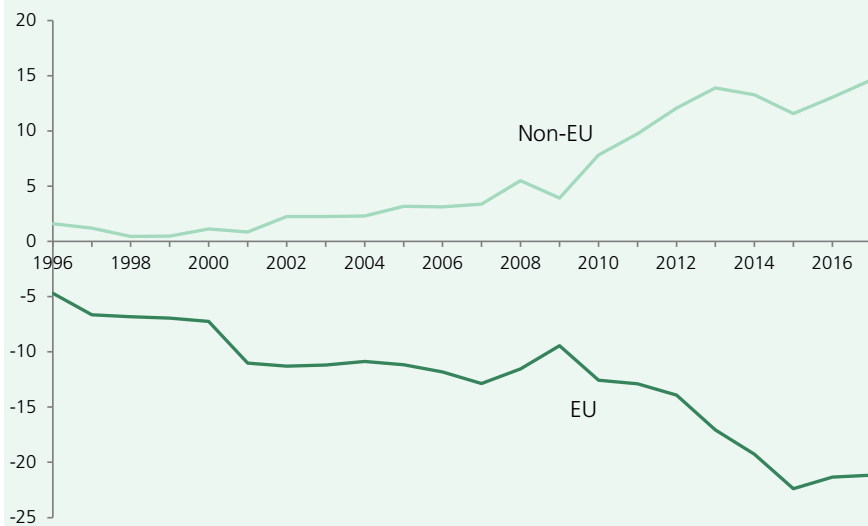
Share of UK imports and exports in motor vehicles coming from and going to the EU %



Source: HMRC, uktradeinfo, SITC codes 781, 782, 783

Another way to look at this is by decomposing the net trade balance position between EU and non-EU countries. The graph below shows that the UK runs a widening trade surplus in motor vehicles with non-EU countries, and a widening trade deficit with EU countries. In 2017, the UK's trade deficit of £6.6 billion was the result of a £21.2 billion deficit with the EU and of a £14.6 billion surplus with non-EU countries.

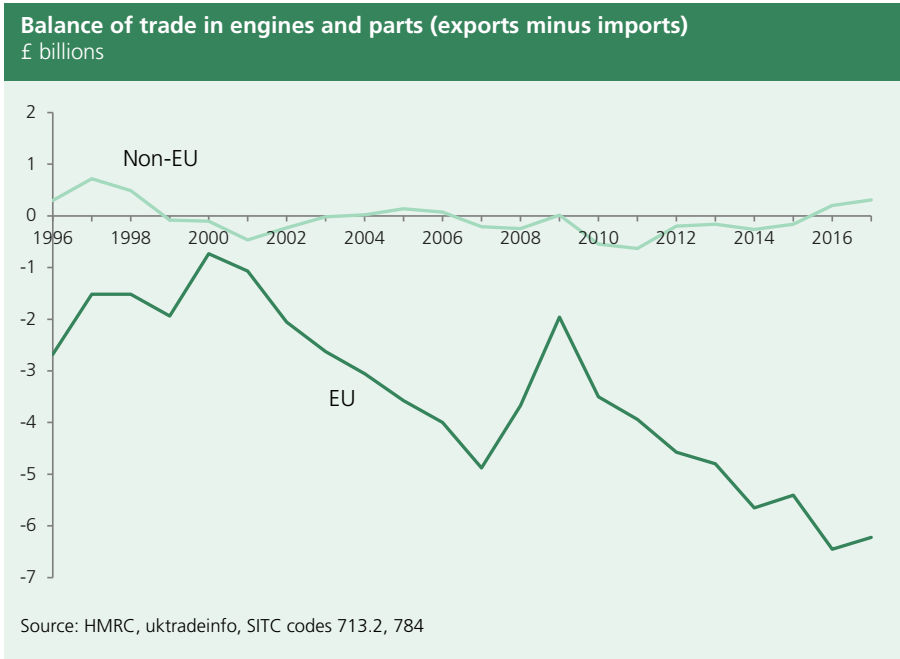
Balance of trade in motor vehicles (exports minus imports) £ billions



Source: HMRC, uktradeinfo, SITC codes 781, 782, 783

The UK does not trade in finished vehicles only – it also imports and exports the engines and parts that are assembled in these vehicles. In 2017, the UK imported £11.0 billion's worth of engines and parts from the EU to produce its vehicles. EU imports accounted for 79% of total imports in engines and parts.

Overall, the UK's trade balance in engines and parts was a deficit of £5.9 billion in 2016, driven by trade with the EU.



Number of vehicles traded

In 2017 the UK exported 1.3 million cars. 53.9% of these cars went to the EU – or around 70,000 cars.¹³ After the EU, the next two largest destinations for UK-built cars were the US (15.7%) and China (7.5%).¹⁴

The UK exported 80% of the cars it produced in 2017.¹⁵

¹³ SMMT, [2017 UK car manufacturing declines by -3% but still second biggest output since turn of the century](#), 31 January 2018

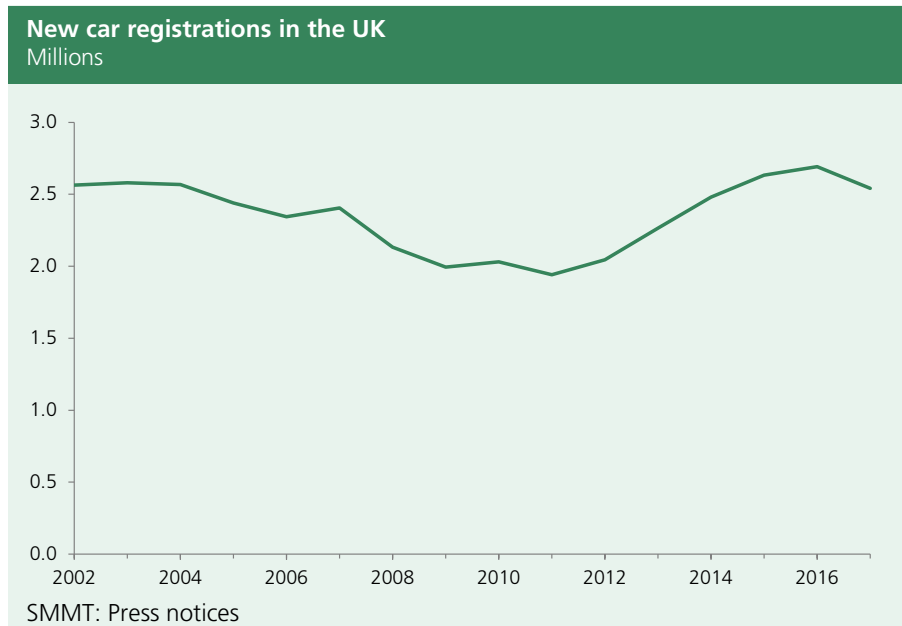
¹⁴ Ibid

¹⁵ Ibid

2.4 UK car registrations

New vehicle registrations in the UK declined between 2003 and 2011 from 2.6 million to 1.9 million.¹⁶

Since then the number of registrations has recovered. In 2017, 2.5 million new cars were registered in the UK, down 5.7% on the 2016 figure (2.7 million) but still the third highest annual total in the last ten years.¹⁷



¹⁶ SMMT, [UK new car market declines in 2017 but demand still third highest in 10 years](#), 5 January 2018

¹⁷ Ibid

3. Future of motor industry in the UK

The previous sections show that the UK motor industry has done well in recent years. Lloyds Bank's survey of the UK automotive manufacturing sector (1 March 2017) found evidence for continued optimism in the short term:

Investment and growth

The research revealed average investment over the next two years is due to hold firm at 19 per cent of turnover and forecast a 15 per cent growth in turnover over the next two years, providing there are no political or economic shocks affecting demand or supply.

Job creation

The vast majority (87 per cent) of automotive manufacturers plan to create new jobs over the next two years. If their plans are replicated across the UK's automotive manufacturing firms, it would create almost 85,000 new jobs – a figure that remains unchanged year-on-year.¹⁸

Despite the strong performance of recent years and positive forecasts, the industry worldwide faces fundamental challenges. A PwC report on the future challenges in the automotive industry singled out these three:

- Demographic changes and profound shifts in global economic power are causing massive upheavals in demand.
- Consumer expectations are changing radically.
- New technologies are dramatically changing vehicles, from the advent of the 'connected car' and enhanced driver support to better fuel efficiency and new or improved powertrains.¹⁹

The development of ultra-low emission, connected and autonomous vehicles are areas that the Government decided to focus on in its [industrial strategy](#). Details are reported in [section 5.1](#) of this briefing paper.

The long-term future of the UK motor manufacturing industry depends in large part on how attractive it remains to foreign investment compared with competitor countries. In turn, the UK's attractiveness depends on a range of factors, including the productivity of UK plants, the ease of importing and exporting in and out of the UK (trade arrangements), exchange rates and domestic demand.

The key factors underpinning the attractiveness of the UK could be fundamentally altered by Brexit, positively and negatively.

¹⁸ Lloyds Bank, [Survey of the UK automotive manufacturing sector](#), 1 March 2017

¹⁹ PwC, [How to be No. 1: facing future challenges in the automotive industry](#)

4. Brexit

The UK motor industry is highly integrated with the rest of Europe. Since the UK's decision to leave the European Union on the 23rd June 2016 there have been concerns regarding the impact of Brexit on the motor industry have been expressed by a number of interested parties. The Business, Energy and Industrial Strategy Committee conducted an inquiry into the impact of Brexit on the industry (see section 4.2 for more details), they concluded that:

Overall, no-one has argued there are advantages to be gained from Brexit for the automotive industry for the foreseeable future. We urge the Government to acknowledge this and to pursue an exercise in damage limitation in the negotiations. This involves retaining as close as possible a relationship with the existing EU regulatory and trading framework in order to give volume car manufacturing a realistic chance of surviving in this country.²⁰

It has been argued that Brexit poses three main risks to the UK automotive industry:

Trade Risks: tariff barriers

The imposition of tariffs (a tax on trade) is an important risk associated with the failure to secure a trade deal. In the absence of a trade deal, the UK-EU trade would fall back on World Trade Organisation (WTO) terms and tariffs.

WTO rules would see the application of a 10% tariff on vehicles and an average 4.5% tariff on vehicle components, according to the SMMT. The SMMT warns that these tariffs would increase the cost of production, undermine competitiveness and potentially increase the cost of cars for consumers (see section 4.2 for more details on the SMMT's position on Brexit).²¹

Trade Risks: non-tariff barriers

Tariffs are only one type of barrier that free trade deals can reduce or eliminate. Non-tariff barriers can be just as important or more important. For instance, non-tariff barriers include safety regulations that in practice can prevent a firm from selling into a foreign market if its products are not recognised as safe in that market.

Labour issues

The ability for automotive firms to access EU labour and move workers to and from the EU easily has been seen as very important.

Opportunities from Brexit

Whilst most stakeholders have been pessimistic about the impact of Brexit on the automotive industry there have been some optimistic voices.

²⁰ House of Commons Business, Energy and Industrial Strategy Committee, [Brexit and the implications for UK business: Automotive inquiry: report published](#)

²¹ SMMT, [Written evidence submitted by the Society of Motor Manufacturers and Traders \(OBJ0098\) to the Exiting the European Union Committee](#), published 1 March 2017, para. 5

Matthew Lynn (a financial journalist writing in the Spectator) argues that free from EU regulation UK manufacturers can lead on new technologies such as hydrogen engines and driverless cars. Lynn also argues that post Brexit the UK car industry will be better placed to diversify away from EU markets. He points to growing markets in Asia as opportunities for UK car makers.²²

Patrick Minford (professor of applied economics at Cardiff Business School) has argued that the UK's car industry will be more profitable after Brexit over the short and medium term. He cites favourable exchange rates and growing competition as benefits of Brexit for the car industry. Minford argues that this 'profitable transition' after Brexit, combined with the UK car industry's highly skilled workforce, will lead to a more 'productive future' for the industry.²³

Similarly, Andrew Lilico (an economist and commentator) has argued that "as the UK is a large net importer from the EU, it would be likely to gain in the short term from tariffs being imposed."²⁴

4.1 Government position

The Government has stated that they

"want our deep and special partnership with the EU to include automotive, ensuring trade is as free and frictionless as possible with as little disruption as possible to the industry"²⁵

More specifically they have stated that they want to see:

"zero tariffs on trade in goods, frictionless trade and to minimise the regulatory and market access barriers for both goods and services"²⁶

Secretary of State for Business, Energy and Industrial Strategy Greg Clark reiterated these priorities in a speech at the EEF manufacturing conference in 2018. In this speech Mr Clark outlined what the government wanted to achieve from a 'good deal' with the EU:

The ability to trade with a now growing European market without tariffs or complex customs requirements.

And having confidence that non-tariff barriers like regulatory and product standards won't be used to exclude us.

....

Our expertise and rigour is renowned around the world and we want to keep British experts influential in international and European standards organisations wherever it makes sense to do so.²⁷

²² Lynne, M, [Brexit is an opportunity for the UK-based car industry to change up a gear](#), May 2017

²³ Minford, P (writing in the Financial Times), [Brexit will make UK manufacturing more profitable](#), March 2017

²⁴ Lilico, A (writing in CapX), [The short-term benefits of a no-deal Brexit](#), October 2017

²⁵ HC, [Parliamentary Question 114976](#)

²⁶ HC, [Parliamentary Question 112207](#)

²⁷ Secretary of State for Business, Energy and Industrial Strategy, [Greg Clark speech at the EEF Manufacturing Conference dinner](#). February 2018

On the issue of alignment with EU regulation the Government has noted:

The majority of safety standards applied to the automotive sector are agreed at an international level in the form of UNECE regulations and the UK will continue to accept products complying with these regulations after it exits the EU.

With regards to the EU27, under the Repeal Bill the Government will ensure that UK regulations and standards for motor vehicles are fully aligned with those in the EU on the day we leave the EU. Maintaining alignment going forwards will be a matter for future parliaments following the outcome of negotiations on the future economic partnership.²⁸

The Government's automotive sector deal (see Section 5) acknowledged that the "UK automotive industry has benefitted from the European market".³²

UK Government position on future economic relationship with the EU

The Government published the White Paper [The United Kingdom's exit from and new partnership with the European Union](#) in February 2017. The Paper confirmed that the Government would not seek continued membership of the Single Market and customs union and that a new British immigration system would "control the number of people coming to the UK from the EU."²⁹

The Prime Minister made a [speech](#) at Mansion House in further outlining the UK's desired future economic relationship with the EU in March 2018. The speech acknowledged that outside the Single Market the UK's access to EU markets would be "less than it is now". The Prime Minister also confirmed that though the some regulations would be aligned that there would be some areas where the UK wanted the right to diverge.³⁰

Secretary of State for Exiting the European Union David Davies alongside Chief EU negotiator Michel Barnier announced that the UK and EU had agreed an 'implementation period' (or transitional period) to last from 'Exit day' until 31 December 2020.³¹

4.2 Business Energy and Industrial Strategy Committee report

The Business Energy and Industry Strategy Select Committee published the report [The impact of Brexit on the automotive sector](#) in March 2018. The Committee made a number of recommendations to the Government. The key recommendations concerning the Government's negotiating position during Brexit talks are outlined below:

- The Government should prioritise continued friction-free access to the single market in automotives over securing the freedom to secure new trade deals with third countries.

²⁸ HC, [Parliamentary Question 129532](#)

²⁹ HM Government, [The United Kingdom's exit from and new partnership with the European Union](#), February 2017

³⁰ Theresa May PM, [Speech on our future economic partnership with the European Union](#), 2 March 2018 (see also Institute for Government, [The Prime Minister's Mansion House Brexit speech](#), 3 March 2017)

³¹ European Commission, [Draft Agreement on the withdrawal of the United Kingdom of Great Britain and Northern Ireland from the European Union and the European Atomic Energy Community](#), p74

³² Department for Business, Energy & Industrial Strategy, [Automotive Sector Deal](#), 10 January 2018

- The Government should prioritise securing a customs arrangement which removes the risks of tariffs being imposed on vehicles produced in the UK.
- The Government should seek to ensure that it is able to retain regulatory alignment with the EU regulatory framework for the short to medium term.
- The Government should prepare the ground to negotiate new trade deals which allow for a lower than usual threshold for domestic content in vehicles or ideally to be able to continue to include EU content for FTAs with other countries in the future. In negotiating the roll-over of existing EU FTAs to the UK, the Government should seek to secure the necessary amendments to allow UK content to count as EU content for rules of origin purposes in the automotive sector.
- The Government should prioritise ensuring that our key manufacturing sectors such as automotive retain sufficient access to essential skills to ensure that gaps can be filled adequately with UK workers.³³

Views of manufacturers

The Business Energy and Industrial Strategy Committee received evidence from a number of manufacturers operating in the UK. In their evidence manufacturers raised a number of specific tariff, non-tariff and labour concerns.

Manufacturers noted that a continued convergence on ‘type approval’ regulation was very important. ‘Type approval’ is the testing and approving of vehicles as safe for the road. Currently cars approved in the UK are automatically deemed roadworthy across the European Union and *vice a versa*. Ford Motor Company stated that

...establishing certainty over the UK’s status as an authority that can issue European approvals is important to avoid weakening the competitiveness for the UK.³⁴

Honda said that the issue of Type Approvals was of ‘critical importance’. They stated that if the VCA lost the ability to approve cars for the EU market than they would have to relocate Type Approval activity to another Member State.³⁵

‘Rules of Origin’ was also raised as an important issue. ‘Rules of Origin’ are specific terms in Free Trade Agreements which determine how much of the final product must be produced in the exporting country for preferential tariffs to apply. Ford stated that ‘Rules Of Origin’ could “add a significant cost” to their business if UK manufactured products are no longer considered EU originated.³⁶ Vauxhall similarly stated that

³³ House of Commons Business, Energy and Industrial Strategy Committee, [The impact of Brexit on the automotive sector](#), 1 March 2018, p28-30

³⁴ [Written evidence from Ford Motor Company](#) to the Business Energy and Industrial Strategy Committee, 20 October 2017

³⁵ [Written evidence from Honda Motor Europe](#) to the Business Energy and Industrial Strategy Committee, 20 October 2017

³⁶ Written evidence from Ford Motor Company to the Business Energy and Industrial Strategy Committee, 20 October 2017

any 'Rules of Origin' changes "will have a drastic impact on UK trade with any countries outside the EU".³⁷

Ford raised a concern that the financing arm of their business 'Ford Credit Europe' could lose its banking passport secured by the EU Capital Requirements Directive.³⁸

All manufacturers were concerned about their ability to move staff around their European operation easily. Ford were concerned that future visa processes would be "cumbersome" and that they could place a "prohibitive cost" to access the skills they needed.³⁹

Honda stated that there is not a "sufficient volume of local labour to meet [their] needs in the near term." They said that

Removing EU27 Nationals, without a sufficient transition period, from the labour pool available to the Swindon factory would result in staffing shortages with a potential impact on manufacturing activity.⁴⁰

In addition to their own ability to access talent, Vauxhall raised concerns of the impact of stricter immigration legislation on businesses in their supply chain.⁴¹

Manufacturing decisions post the EU referendum

There have been a number of favourable production decisions by automotive manufacturers since the referendum decision:

- Nissan announced it will produce the Qashqai and X-Trail models at its Sunderland plant.⁴²
- BMW announced plans to build the new e-mini at its UK plant in Cowley.⁴³
- Toyota announced a £240 million modernisation of its plant in Burnaston.⁴⁴
- Carlos Tavares, Chief Executive of Vauxhall's owner PSA Peugeot Citroen, has said that Brexit uncertainty is a "big concern". Vauxhall cut 650 jobs at the Ellesmere Port plant in early 2018. Union representatives for workers at the plant blamed slowing car sales in the UK and worries over Brexit for the job losses.⁴⁵ However Vauxhall have announced that the next generation of Vauxhall's Vivaro van will be built at its Luton plant.⁴⁶

On the other hand Jaguar Land Rover and Aston Martin have said that future investment decisions were on hold pending outcome of Brexit talks.⁴⁷

³⁷ [Written evidence from Vauxhall Motors](#) to the Business Energy and Industrial Strategy Committee, 26 October 2017

³⁸ [Written evidence from Ford Motor Company](#) to the Business Energy and Industrial Strategy Committee, 20 October 2017

³⁹ Ibifd

⁴⁰ [Written evidence from Honda Motor Europe](#) to the Business Energy and Industrial Strategy Committee, 20 October 2017

⁴¹ [Written evidence from Vauxhall Motors](#) to the Business Energy and Industrial Strategy Committee, 26 October 2017

⁴² Nissan Motor Company Ltd. [Nissan makes further commitments to Sunderland plant](#), 27 October 2016

⁴³ Guardian, [BMW pledges to build new e-Mini at UK car plant](#), 25 July 2017

⁴⁴ Guardian, [Toyota invests £240m in Derbyshire plant – but warns over Brexit tariffs](#), 16 March 2017

⁴⁵ Guardian, [Brexit: carmakers step up warnings on impact of uncertainty](#), 6 March 2018

⁴⁶ BEIS, [Further boost for UK auto sector as PSA confirms new generation of vans to be built in UK](#), 4 April 2018

⁴⁷ Guardian, [Brexit: carmakers step up warnings on impact of uncertainty](#), 6 March 2018

4.3 Positions of the trade associations

SMMT

The SMMT (the industry body for motor manufacturers and traders) have committed to working closely with government to ensure the interests of the automotive industry are safeguarded during Britain's exit from the European Union.⁴⁸

SMMT priorities for the UK's future relationship with the EU

Shortly after the referendum vote the SMMT argued that the government should focus on five priorities:⁴⁹

- 1 Securing continued membership of the Single Market
- 2 Securing continued membership of the Customs Union
- 3 Guaranteeing unrestricted access to talent across Europe
- 4 Creating regulatory certainty through harmonisation
- 5 Securing the UK's position in current EU trade deals and those under negotiation

In light of [The United Kingdom's exit from and new partnership with the European Union](#) White Paper and the bringing forward of the Great Repeal Bill the SMMT published a discussion paper on [Delivering the industries Brexit priorities](#). The SMMT have stated that their "position remains unchanged in relation to the five main priorities". They called on the Government to take the following action in relation to these priorities:

Single Market – To achieve automotive priorities on tariff-free trade and avoiding non-tariff barriers, government must demonstrate how it intends to secure a future trade agreement with the EU that affords the automotive industry the benefits currently enjoyed as members of the Single Market.

Customs – Under a new customs agreement with the EU, government should prioritise the free-flow of automotive goods at the border to avoid costs, maintain competitiveness and support the just-in-time manufacturing process. Key issues include continued application of common customs rules and procedures without burdensome checks or reporting.

Talent – Government must address the needs of the automotive industry in its ability to recruit and access talent when assessing how the UK ends freedom of movement and implements new immigration controls. Key issues include access to labour to fill skills gaps and the current ability for automotive companies to quickly and easily move employees to address operational issues or support project teams.

Regulation – Government should demonstrate how existing automotive regulation fits within plans for the 'Repeal Bill' and work through options for how future EU regulation affecting the UK automotive industry can be effectively implemented. Key issues include future influence on regulations affecting the UK automotive industry, the potential to create non-tariff barriers

⁴⁸ SMMT, [Brexit, SMMT's position](#), [last accessed 4 April 2018]

⁴⁹ SMMT, [Brexit Position Paper](#), 7 December 2016

through regulatory divergence and the ability for the UK to type approve vehicles for the European market.

Trade – Clarity is needed on how the UK will treat both existing EU Free Trade Agreements and those currently under negotiation. Key issues include establishing solutions to issues around Rules of Origin, understanding how existing preferential access to markets can be secured as well as benefits from regulatory discussions between the EU and other key markets.⁵⁰

Following the Prime Minister's Mansion House speech on the 2nd March 2018 at the SMMT said:

There is no escaping the fact that being out of the customs union and single market will inevitably add barriers to trade, increase red tape and cost. Settling for "good" access to each other's markets is not enough as it will only damage the UK's competitiveness and reduce our ability to attract investment and the high quality jobs that go with it.⁵¹

SMMT estimates on the impact of a 'no deal Brexit'

The SMMT have stated that a 'cliff-edge' scenario, where the UK agrees no trade deal with the European Union and the EU and UK's trading relationship reverts to World Trade Organisation rules⁵², could cost the industry up to £4.5 billion in tariffs. SMMT have argued that should such a scenario transpire

"...current arrangements should continue to apply, including maintaining membership of the Single Market and customs union to ensure continuity and certainty."⁵³

EEF (the manufacturers organisation)

The EEF called on the Government to focus on four priorities:⁵⁴

- 1 Access to key markets for goods and services, looking at the EU and existing trade deals in the first instance, as well as looking towards opportunities in new markets. The UK must be prepared to make a contribution to the EU in order to achieve this as part of its negotiating strategy.
- 2 Ensuring regulatory certainty, including addressing the interwoven legal systems, developing regulatory cooperation with the EU and, in time, focusing on a flexible legislative environment for the UK with a Comprehensive Legislative Review.
- 3 Addressing the UK skills gap, calling for the Government to maintain the current skills base and a new immigration policy, which enables manufacturers to access much needed skills.
- 4 Establishing domestic policies focused on shoring up investment, supporting productivity, enhancing investment through a new industrial strategy for a stronger manufacturing base, and a pause on meeting the deficit target; both of which have since become Government policy.

⁵⁰ SMMT, Delivering UK automotive Brexit priorities, July 2017

⁵¹ SMMT, [Brexit, Statement following Prime Minister's Mansion House speech](#), [last accessed 4 April 2018]

⁵² WTO rules would mean 10% tariff on vehicles and an average 4.5% tariff on components

⁵³ SMMT, Delivering UK automotive Brexit priorities, July 2017, p2

⁵⁴ EEF, [Britain and the EU: Manufacturing an orderly exit](#), 21 September 2016, p. 3

Confederation of British Industry

The Confederation of British Industry (CBI) have argued that the success of the UK automotive industry has been built on a “pan- European supply chain” and that therefore “full convergence on multiple regulations is key...”⁵⁵

The CBI noted two areas where they argued convergence with the EU was particularly important:⁵⁶

- Rules that determine how, and by whom, vehicles can be approved as safe for the road. CBI argue that it is important that the Vehicle Certification Agency (VCA) maintains its ability to approve cars for the European market.
- Maintaining pan- European rules on CO₂ and other air pollutants to ensure that international targets on clean air and climate change are met.

The European Automobile Manufacturers Association

The European Automobile Manufacturers Association published a [Position paper on Brexit](#). This report concludes:

Any changes to the deep economic and regulatory integration between the EU and the United Kingdom will have an adverse impact on automobile manufacturers with operations in the EU and/or the UK, as well as on the European economy in general.⁵⁷

⁵⁵ CBI, Smooth operations: An A-Z guide of the EU rules that matter for British Business, p31

⁵⁶ Ibid, p31- 34

⁵⁷ European Automobile Manufacturers Association, [ACEA Position Paper Brexit](#), p2

5. Government policy

The current UK Government policy for the automotive sector is centred on the Government's [industrial strategy](#) which was published in January 2018. The industrial strategy includes a [sector deal for the automotive industry](#).

Sector deals are partnerships between government and industry which are designed to help industries to overcome specific issues that they face. These partnerships will involve industry councils which meet regularly to identify issues and decide how to tackle them. The councils include industry leaders and government representatives.

'Sector deals' have been modelled on the long-term relationship the government has already built with the automotive industry after the establishment of the [Automotive Council](#) in 2009.

The 2018 sector deal for the automotive industry seeks to build on the successes of the past and help the industry

...reap the benefits from the transition to ultra-low and zero-emission vehicles by continuing to build the agile, innovative and cost competitive supply chain needed to secure international investment.⁵⁸

The automotive sector deal contains a number of spending commitments, some of which are re-announcements. These highlight the four key policy areas the Government is focusing on.⁵⁹

Transitioning to ultra-low and zero emission vehicles

- Investing £500 million over ten years (to be matched by £500 million from industry) to research, develop and industrialise new low- carbon technologies in the UK.
- £246 million to improve the UK's ability to design, develop and manufacture batteries for the electrification of vehicles.

Establishing the UK as a global leader in Connected and Autonomous Vehicles (CAVs), also known as 'driverless vehicles')

- £250 million of government investment to position the UK as a global leader in Connected and Autonomous Vehicles (CAVs) development and deployment. This includes:
 - £150 million for collaborative R&D projects from which, to date, £100 million has been committed to 51 projects.
 - £100 million for CAV testing infrastructure.

Improving supply chain competitiveness and productivity

- £16 million for an industry-led match-funded national supplier competitiveness and productivity improvement programme to support a sustainable and internationally competitive UK supply chain for future volume vehicle production.

The Library's paper [The Industrial Strategy](#) includes more information on the industrial strategy as a whole.

⁵⁸ Department for Business, Energy and Industrial Strategy, [Government agrees landmark Sector Deal to establish UK as world leader in future of mobility](#), January 2018

⁵⁹ Department for Business, Energy and Industrial Strategy, [Automotive sector-deal \(key commitments\)](#), January 2018

Investing in automotive research and development

- £225 million from 2023 to 2026 to support R&D in the sector, with industry providing matching funding

5.1 Electric and low emission vehicles

The [Conservative Party Election Manifesto 2017](#) included the following commitment:

Our ambition is for Britain to lead the world in electric vehicle technology and use. We want almost every car and van to be zero-emission by 2050 – and will invest £600 million by 2020 to help achieve it.⁶⁰

The Government is expected to publish a ‘zero emission road transport strategy’ in 2018, which will set out its plans to support the UK transition to zero emission vehicles.⁶¹

The 2017 Autumn Budget included commitments pertaining to electric vehicles. The Government committed to

regulate to support the wider roll-out of charging infrastructure; invest £200 million, to be matched by private investment into a new £400 million Charging Investment Infrastructure Fund; and commit to electrify 25% of cars in central government department fleets by 2022. The government will also provide £100 million to guarantee continuation of the Plug-In Car Grant to 2020 to help consumers with the cost of purchasing a new battery electric vehicle.⁶²

The Business Energy and Industrial Strategy Committee have an open enquiry on [Electric Vehicles: developing the market and infrastructure inquiry](#). The Committee is taking evidence from a range of interested parties in the automotive and energy sectors.

5.2 Driverless Cars

On the 30th March 2017 the Government set out next steps in establishing the UK as global leader in connected and autonomous vehicles. Business Secretary announced plans for first phase of £100 million investment in connected and autonomous vehicle (CAV) testing infrastructure. The investment will create CAV testing centres between Birmingham and London.⁶³

House of Lords Science and Technology Committee report

The House of Lords Science and Technology Committee published [Connected and Autonomous Vehicles: The future?](#) In March 2017 to which the Department for Transport and Department for Business, Energy and Industrial Strategy published [a response](#) in October of 2017.

The Library's paper [Electric vehicles and infrastructure](#) includes more information about Government's policy on electric vehicle infrastructure.

⁶⁰ Conservative Party, [Manifesto 2017: Forward Together: Our plan for a stronger Britain and a prosperous future](#), p24

⁶¹ HC, [Parliamentary Question 133571](#) answered on the 21st March 2018

⁶² HM Treasury, [Autumn Budget 2017](#), p46

⁶³ Department for Business, Energy & Industrial Strategy, [Government sets out next steps in establishing the UK as global leader in connected and autonomous vehicles](#), 30 March 2017

The House of Lords Committee report had four main findings:

- The Government is too focussed on highly-automated private road vehicles (“driverless cars”), when the early benefits are likely to appear in other sectors, such as marine and agriculture;
- The development of CAV across different sectors needs coordination and the Government, working with key stakeholders, must get a grip on this chiefly by establishing a Robotics and Autonomous Systems (RAS) Leadership Council as soon as possible to play a key role in developing a strategy for CAV;
- There is a clear need for further Government-commissioned social and economic research to weigh the potential human and financial implications of CAV;
- This is a fast-moving area of technology and the Government has much to do, alongside industry and other partners, to position the UK so that it can take full advantage of the opportunities that CAV offer in different sectors.

Automated and Electric Vehicles Bill 2017-19

The Automated and Electric Vehicles Bill had its [third reading in the House of Commons on 29th of January 2018](#) which passed without division. The Bill is due to receive a committee stage in the House of Lords, the date for which has yet to be announced.

The Bill has two main provisions (as outlined in the [Library’s paper on the Bill](#)):

- To ensure that compensation after an accident with an autonomous vehicle remains within the motor insurance settlement framework, rather than through product liability framework against the manufacturer
- To introduce measures to ensure the Conservative Party manifesto commitment for almost every car and van to be emission free by 2050 is delivered. Powers in the Bill would allow Government to regulate to improve consumer experience of electric vehicle charging.

6. Emission scandals and future of diesel

On the 18th September 2015, the US Environment Protection Agency alleged that Volkswagen had distorted the results of emission tests on diesel cars.⁶⁴

This caused the Volkswagen share price to drop by almost 20% on two successive days, and the resignation of the Chief Executive, Martin Winterkorn. The company announced that 1.2 million cars in the UK were affected by the relevant engine software.⁶⁵

Further information on the VW scandal can be found in this briefing from the House of Commons Library, [VW and vehicle emissions testing](#).

More broadly, the allegations have led to concern about the veracity of emissions testing and the accuracy of claims from other motor manufacturers. Mike Hawes, Chief Executive of SMMT commented that:⁶⁶

As the impact of the actions of one manufacturer becomes clearer, it is the industry that is under intense scrutiny with consumer confidence in the sector as a whole seriously dented.

The scandal has particularly affected Europe and the UK because of the rise in diesel engines over the last fifteen years. The diesel share of new cars registered in the UK went from a low of 14% in 1999 to a high of 51% in 2012. As the diesel share of new cars sold went up, so did the proportion of existing cars on the road that are fuelled by diesel. In Great Britain, it has almost between 2005 and 2015, from 20% to 38%.⁶⁷

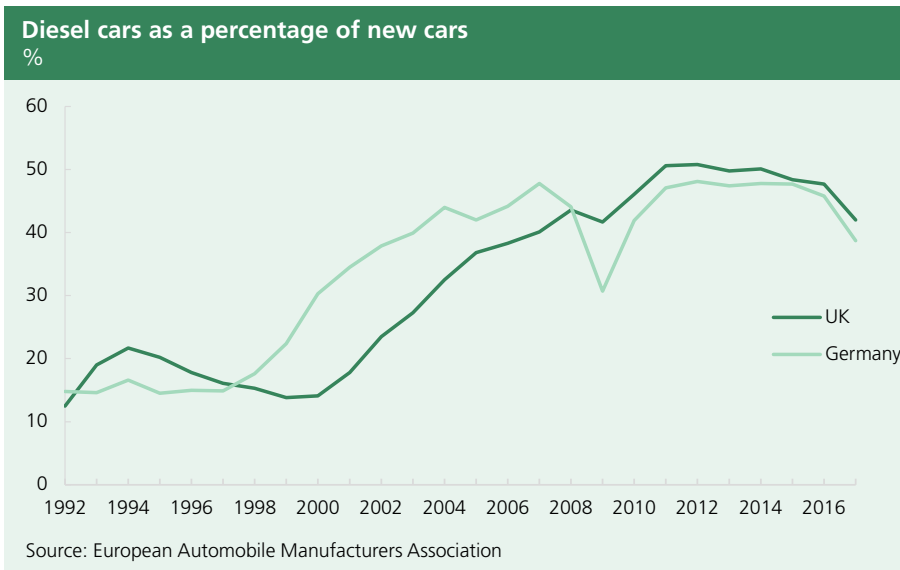
Diesel's share of the new car market in Germany followed a similar trajectory, although penetration picked up earlier than in the UK and did not go above 48%.

⁶⁴ EPA press notice, "[EPA, California Notify Volkswagen of Clean Air Act Violations](#)", 18 September 2015

⁶⁵ *The Guardian*, "[VW scandal: 1.2m UK cars affected by emissions device](#)", 30 September 2015

⁶⁶ SMMT, [Update 388](#), 5 October 2015

⁶⁷ DfT, Table [VEH0203](#)



The chart shows that diesel's market share has started to decline in the last few years. This decline can also be observed in figures for the whole of Western Europe: diesel's share of new cars in the region fell from 56% in 2011 to 44% in 2017.⁶⁸

The same is true for the UK where diesel's share of new cars fell from 51% in 2011 to 42% in 2017.⁶⁹ A report by JPMorgan (April 2017) forecasts that diesel's share of new cars in Europe is likely to fall to 30 percent by 2020.⁷⁰

6.1 The problem with diesel

Diesel cars produce less carbon dioxide per kilometre than similar petrol cars. As they sought to meet strict carbon dioxide targets, European governments introduced a range of different policies to encourage the production and purchase of diesel powered cars rather than petrol-powered alternatives. These included lower tax on the fuel itself, lower parking charges and lower rates of road tax for diesel cars.

For example, in [Budget 2001](#) the Labour Government introduced "a 3 pence per litre reduction in the duty on ultra-low sulphur diesel (ULSD)". In addition, it changed the Vehicle Excise Duty (VED) for cars registered on or after 1 March 2001, basing it on carbon dioxide emissions and fuel type (thus favouring diesel cars as they tend to have lower carbon dioxide emissions).

However, it has since become apparent that while producing less carbon dioxide, diesel engines normally produce much more nitrogen oxides and particulate matter than petrol engines. The Department for Environment, Food and Rural Affairs stated in a 2016 report that:

Road transport still accounts for 34 per cent of UK NO_x emissions in 2015 and the rate of reduction from this sector has slowed down due to the increased contribution from diesel vehicles.⁷¹

⁶⁸ ACEA, [Share of Diesel in New Passenger Cars](#), [last accessed 09/05/18]

⁶⁹

⁷⁰ Bloomberg News, [Europe's Divorce From Diesel Is About to Get Messy](#), 3 April 2017

⁷¹ DEFRA, [Emissions of air pollutants in the UK, 1970 to 2015](#), 21 December 2016, p. 7

Whilst the difference in the amount and type of emissions between diesel and petrol used to be very large, there is now only a small difference in emissions between [Euro 6](#) petrol and diesel vehicles. The Euro 6 standard imposes a significant reduction in NOx emissions from diesel engines (a 67% reduction compared to Euro 5) and establishes similar standards for petrol and diesel, but not quite identical – diesel is slightly higher on NOx and petrol slightly higher on CO.

However, the VW emissions scandal has cast doubt on compliance with and enforcement of Euro standards. The Transport Select Committee looked at these issues in detail in its report, [Volkswagen emissions scandal and vehicle type approval \(July 2016\)](#).

Further information on diesel emissions, calls for a scrappage scheme, and other policies to deal with diesel pollution can be found in the House of Commons Library briefing paper, [Parliamentary debate 19/4/17: A diesel vehicle scrappage scheme](#).

6.2 Government action

Shortly after the scandal the Government made a statement detailing its efforts to:

- establish whether the use of defeat devices goes wider than the VW Group; and
- gather much-needed evidence to restore public confidence, improve our understanding of the real world emission performance of vehicles, and strengthen our ambition and influence in pushing the EU to move to a comprehensive real world testing regime.⁷²

Since then the Government has published a [UK plan for tackling roadside nitrogen dioxide concentrations](#) (July 2017) which set out £2.7 billion pounds worth of spending commitments to meet their pledge to “be the first generation to leave the environment in a better state than we inherited it”.⁷³

The Government launched a consultation on ‘Road vehicles: improving air quality and safety’ in February 2018. This consultation closed on in March 2018. The foreword to the consultation states:

Given the recent VW Dieselgate scandal and the strong imperative to improve air quality as set out in the UK Plan for Tackling Roadside Nitrogen Dioxide Concentrations, we are investigating what more can be done. This consultation seeks your views on new penalties for vehicle manufacturers supplying vehicles fitted with defeat devices, and our proposals to implement various safety and environmental rules, including the latest EU Emissions standards for cars, vans and buses.⁷⁴

⁷² Department for Transport, [Update on Government action: Vehicle emissions testing programme](#), HCWS301, 10 November 2015

⁷³ DEFRA & DfT, [UK plan for tackling roadside nitrogen dioxide concentrations](#), July 2017

⁷⁴ Department of Transport, [Road vehicles, improving air quality and safety: moving Britain ahead](#), February 2018

7. Appendix – vehicle production

UK Vehicle Production, 1000s				
	Passenger vehicles	Commercial vehicles	All vehicles	% change
1970	1,641	458	2,099	-
1971	1,742	456	2,198	5%
1972	1,921	408	2,329	6%
1973	1,747	417	2,164	-7%
1974	1,534	403	1,937	-10%
1975	1,268	381	1,649	-15%
1976	1,333	372	1,705	3%
1977	1,304	410	1,714	1%
1978	1,223	385	1,608	-6%
1979	1,070	408	1,478	-8%
1980	924	389	1,313	-11%
1981	955	230	1,184	-10%
1982	888	269	1,156	-2%
1983	1,045	245	1,289	11%
1984	909	225	1,134	-12%
1985	1,048	266	1,314	16%
1986	1,019	229	1,248	-5%
1987	1,143	247	1,389	11%
1988	1,227	317	1,544	11%
1989	1,299	327	1,626	5%
1990	1,296	270	1,566	-4%
1991	1,237	217	1,454	-7%
1992	1,292	248	1,540	6%
1993	1,376	193	1,569	2%
1994	1,467	228	1,695	8%
1995	1,532	233	1,765	4%
1996	1,686	238	1,924	9%
1997	1,698	238	1,936	1%
1998	1,748	227	1,976	2%
1999	1,787	186	1,973	0%
2000	1,630	184	1,814	-8%
2001	1,492	193	1,685	-7%
2002	1,630	191	1,821	8%
2003	1,658	189	1,846	1%
2004	1,647	209	1,856	1%
2005	1,596	207	1,803	-3%
2006	1,442	208	1,650	-9%
2007	1,535	216	1,750	6%
2008	1,447	203	1,650	-6%
2009	999	91	1,090	-34%
2010	1,270	123	1,393	28%
2011	1,344	121	1,465	5%
2012	1,465	112	1,577	8%
2013	1,510	88	1,597	1%
2014	1,528	71	1,599	0%
2015	1,588	94	1,682	5%
2016	1,723	94	1,817	8%
2017	1,671	78	1,749	-4%

Source: 1970-1980 - Mitchell, British Historical Statistics, 1988
 1981-onwards - SMMT Press Notices
www.smmmt.co.uk/category/manufacturing

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