



Towards Sustainability

The UK Automotive Sector

Fifth Annual Report



1. Chief Executive’s Statement

Welcome to the Fifth Annual Sustainability report. I trust that you will find the new format clear and easy to follow.

I am very pleased to be able to welcome PSA Peugeot Citroën, and Powertrain Ltd as new signatories and to include their data for 2003 in this report. We now include data representing 98 per cent of car assembly in the United Kingdom, as well as data from major component and light van suppliers. We believe this is an outstanding achievement for the sector.

The report demonstrates the increasingly prudent use of resources and the industry remains an excellent prospect as a place to work and enjoy employment.

A report by the World Business Council for Sustainable Development called, *Mobility 2030; Meeting the challenges to sustainability*, highlights global issues the industry faces; we refer to these and other issues raised, all of which are examined by teams here at SMMT.

The UK is the fourth largest producer and second largest market for cars in the EU. We need to maintain a strong understanding of the issues of sustainability in our industry and retain a position of influence. I am confident that this report helps that process.

We remain committed to the issues raised and gaining the greatest understanding of them.



Christopher Macgowan, Chief Executive, SMMT

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Sustainability Report Signatories, Major location of sites included in data reports





-  Vehicle Production
-  Engine Major Component Production
-  Central Logistics
-  Research and testing

Table 1.0 Worldwide Car Assembly ('000s units)

World	Europe	Year	2003
1		Japan	8,480
2	1	Germany	4,811
3		USA	4,504
4	2	France	3,198
5		Korea	2,730
6	3	Spain	2,583
7		China	2,120
8	4	UK	1,657
9		Canada	1,262
10	5	Italy	1,026

Source: SMMT

The United Kingdom is the eighth largest producer of passenger cars in the world.

It is the fourth largest market for passenger cars

Source: SMMT Motor Industry of Great Britain: World Automotive Statistics

Major sites only for indicative purposes

Signatories

The signatories to this process are:

- Audi
- Bentley Motors
- BMW Group
- Ford Motor Company Limited
- GKN Driveline Limited
- Honda UK Manufacturing Limited
- Jaguar Cars Limited
- Land Rover UK Limited
- LDV Limited
- MG Rover Group Limited
- Nissan Motor Manufacturing (UK) Limited
- Nissan Technology Centre Europe
- Perkins Engines
- PSA Peugeot Citroën Automobiles UK Limited
- Powertrain Limited
- Rolls-Royce Motor Cars Limited
- SEAT
- Skoda Auto
- Toyota GB plc and Toyota Motor Manufacturing UK Limited
- Vauxhall Motors Limited
- Volvo Car UK Limited
- Volkswagen Group UK Limited
- Volkswagen Commercial Vehicles

The Society of Motor Manufacturers and Traders Limited

The Society of Motor Manufacturers and Traders (SMMT) exists to provide services and support for the UK industry. Since 1902 it has served the ever-changing needs of its members and the environment in which they operate.

With over 600 members, SMMT supports a large range of companies representing the whole value supply chain including vehicle manufacturers, component suppliers, research, design, engineering companies and many others.

Functions include representation to government at home and abroad on key issues, national and international events, and exhibitions. The Society is also at the forefront in tackling issues like competitiveness, the skills shortage and R & D through projects like Industry Forum, training, as well as managing the Automotive Academy and the Foresight Vehicles Programme.

The sustainability strategy was launched in 2000, using 1999 data and today its signatories include all the major car producers in the UK.

During the report period the number of signatories has increased, and so the report continues to develop. The historical data in the report, therefore, should not be considered solely in the light of the present signatories.

This year we have opted to indicate the degree by which data has changed in absolute terms as a result of new input.

Changes in signatories' from the fourth report

A number of changes have taken place in the signatories' report this year:

2003 data includes: Powertrain and PSA Peugeot Citroën Automobiles UK Limited.

2003 data excludes: Dunlop, ERF Limited, Volex Wiring Systems and Unipart Group of Companies.

As an indication of this, the net impact of these changes on the following key indicators are:

	change attributable to signatory changes	overall change 2003 to 2002	net
Turnover:	up £2.06 bn	up £3.42 bn	up £1.36 bn
Energy use:	down 193.3 Gwh	down 400.0 Gwh	down 206.7 Gwh
Employment:	up 932	down 1,830	down 2,762
Waste to Landfill:	up 6,295 tonnes	down 14,154 tonnes	down 20,449 t

Data is excluded from four signatories for the following reasons; changes in business function from automotive to logistics, modification of production patterns and internal changes in reporting regimes.

There were no major changes in site operations to common signatories 2003 versus 2002.

Report Coverage

The data for this report refers to the 2003 calendar year.

The data contained in the report indicates trends amongst signatories. It is not necessarily a true reflection of data on a year by year basis. Where we are aware of data issues which have skewed the data, we highlight this in the text.

Report Format

Data in the report is quoted in a number of ways:

- Whole industry data (WI)
- All car sales in the United Kingdom (AC)
- SMMT members data (SMMT)
- Signatories to the Sustainability Report, sub divided into:
 - All signatories (AS)
 - **Vehicle manufacturing signatories (VMS)**

We indicate where data is specific to VMS. This is consistent with previous reporting methods. Therefore, per vehicle data only includes data from vehicle producing signatories.

Throughout the report we refer to the *Strategy Commitment* and we comment in terms of the *Strategy Achievement* for 2003.

This report follows the format of the Global Reporting Initiative (GRI) sustainability reporting guidelines. www.globalreporting.org

The format is developed for sector level reporting.

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2. Executive Summary and Key Performance Indicators

Table 2.1 Key Performance Indicators	2002	2003	Change	REPRESENTATION
Number of signatories (AS)	24	22	-2	REDUCED
Economic Performance (Sector) (WI)				
Automotive manufacturing sector turnover (£billions)	£43.1bn	£43.5 bn	+£0.4bn	INCREASED
Total number of cars and CVs produced (UK) (WI)	1.82m	1.84m	+0.2m	INCREASED
Total new car registrations (UK) (AC)	2.56m	2.58m	+0.2m	INCREASED

Economic Performance (Signatories)

Signatories' combined turnover (£billions) (AS)	£35.73bn	£39.16 bn	+£3.43bn	INCREASED
Total number of vehicles produced by signatories (AS)	1,441,794	1,731,894	290,100	INCREASED

Product Environmental Performance

Average new car CO ₂ emissions (g/km) (AC)	174.2	172.1	-2.1	IMPROVED
Average new car fuel economy (miles per gallon) (AC)	37.1	37.7	0.6	IMPROVED
Number of models meeting Euro IV (AC)	116	157	41	IMPROVED

Company Operational Performance (signatories)

Total combined energy use (GWh) (AS)	6,540 a	6,126	-414	IMPROVED
<i>Energy used per vehicle produced (MWh/unit) (VMS)</i>	<i>4</i>	<i>2.8</i>	<i>-1.2</i>	IMPROVED
Total combined water use ('000m ³) (AS)	9,108	8,404	-704	IMPROVED
<i>Water use per vehicle produced (m³/unit) (VMS)</i>	<i>5.6</i>	<i>3.4</i>	<i>-2.2</i>	IMPROVED
Total combined CO ₂ equivalents (tonnes) (AS)	1,954,295 b	1,644,225	-310,070	IMPROVED
<i>CO₂ equivalents per vehicle produced (tonnes/unit)</i>	<i>1.2</i>	<i>0.7</i>	<i>-0.5</i>	IMPROVED
Total combined emissions of VOC (t) (AS)	6,240	7,337	1,097	DETERIORATED
<i>VOC emissions per vehicle produced (kg/unit) (VMS)</i>	<i>4.2</i>	<i>4.1</i>	<i>-0.1</i>	IMPROVED
Total combined waste to landfill (tonnes) (AS)	70,896	56,743	-14,153	IMPROVED
<i>Waste to landfill per vehicle produced (kg/unit) (VMS)</i>	<i>40.5</i>	<i>17.9</i>	<i>-22.6</i>	IMPROVED

Social Performance (signatories)

Signatories' average staff turnover (AS)	7.00%	6.10%	-0.9	IMPROVED
Signatories' combined number of employees (AS)	89,455	87,625	-1,830	REDUCED

a Revised from 6,681Gwh, or down 2.1%

b Revised from 2,142,706 tonnes, or down 8.8%

fuel economy data re-calculated from previous years, based on SMMT and DfT information

The data presented throughout the report illustrates the development of key sustainability indicators over the last five years, since the report began.

In the summary we indicate progress on the previous calendar year.

During 2003 the sector became cleaner and consumed less resources. It continued to be a safe, flexible working environment, and in production and market terms grew in size.

Major developments in data for 2003 include an increase in the production and registration of vehicles in the United Kingdom.

Product – improvements in CO₂ emissions from new vehicles and a continued move by manufacturers towards early introduction of new emissions standards. Enhanced vehicle safety standards.

Operational – an absolute reduction in energy consumption, water use, CO₂ and waste to landfill, an increase in VOCs in absolute terms. An improvement in performance per vehicle across all indicators.

Social Performance – staff turnover remains low. We report on Health and Safety, where the record of the sector is impressive and significant work is ongoing. Training levels remain consistently high

The industry is a significant generator of income and employment, although absolute employment numbers have declined.

We have highlighted our

strategy commitments
strategy achievements

to report further on progress.

3. Sector Profile

Table 3.1 Sector Fact Sheet	1999	2000	2001	2002	2003
Automotive manufacturing sector turnover (WI)	£44.2bn	£42.5bn	£42.2bn	£43.1bn	£43.5bn
Share of total manufacturing turnover (UK turnover)	9.6%	9.1%	9.1%	9.3%	9.1%
Total Net Capital Investment (WI)	£2.13bn	£2.08bn	£2.23bn	£2.17bn	£2.16bn
Automotive sector value added (WI)	£7.7bn	£7.8bn	£8.97bn	£9.42bn	£10.45bn
Total employees directly dependent on the automotive sector (WI)	867,000	849,000	835,800	847,100	841,000
Value of exports (WI)	£19.1bn	£19.8bn	£18.0bn	£20.9bn	£21.5bn
Percentage of total UK export	11.5%	10.5%	9.5%	11.2%	11.3%
Sector value added share of UK GDP	3.9%	3.4%	3.9%	3.9%	3.8%
UK sector share of global passenger car production	4.5%	4.0%	3.7%	4.0%	4.0%
No. of UK volume passenger car manufacturers (WI)	-	9	9	11 a	9
No. of UK commercial vehicle (CV) manufacturers (WI)	-	10	10	9	
Number of cars and CVs produced	2.02m	1.81m	1.68m	1.82m	1.84m
New car registrations (AC)	2.19m	2.22m	2.45m	2.56m	2.58m
Cars and light CVs on the road	29.5m	29.9m	30.5m	31.3m	31.9m

a The number of "volume" manufacturers incorrectly included Rolls-Royce and Bentley

The UK remains a significant producer of and market for, automotive and component production, design and associated services. The UK is uniquely placed in having 12 worldwide brands with a production interest in the UK, in vehicles or engines. This gives the industry strength and depth, and the opportunity for global development.

As the fourth largest market in the world the ‘state of play’ in the UK impacts the sector globally. Although employment in the sector is declining overall, investment remains strong.

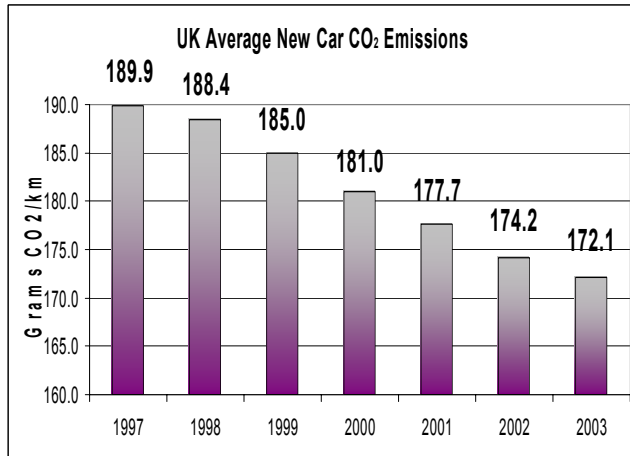
The industry is highly export focused, many manufacturers exporting more than 50 per cent of production to markets worldwide; Europe and North America are major markets for UK-made products, other markets include Japan and Australia the success of exports is vital to ongoing development.

The UK continues to manufacture a wide range of product derivatives, from supermini to luxury vehicles, and all model variants in between.

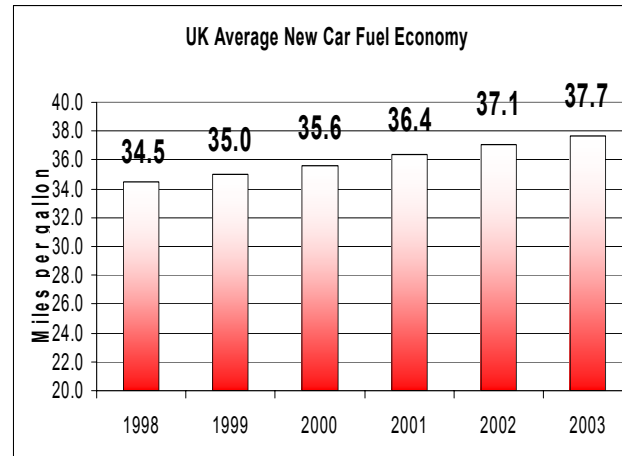
Finally, the number of vehicles on the road in the UK continues to increase, up by 600,000 in the last year. There are important sustainability issues resulting from this growth, and SMMT recognises that automotive manufacturers and traders have a role to play in helping address this. We looking at ways of enhancing our involvement in this debate, we report more comprehensively on this in the sustainable mobility section.

4. PRODUCT - Environmental Performance (1)

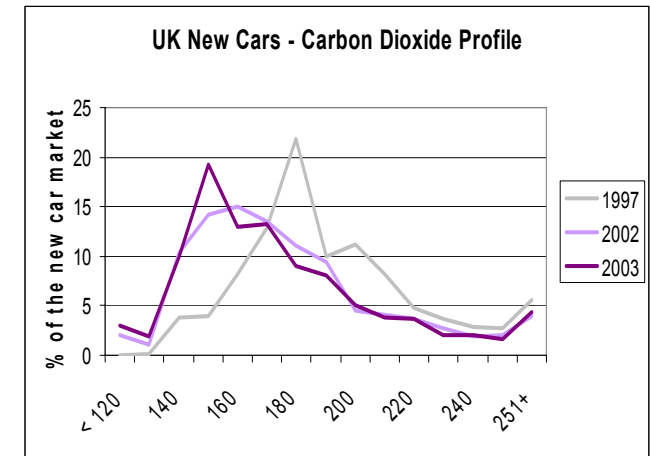
4.1 Absolute Product CO₂ (AC)



4.2 Fuel Economy (AC)

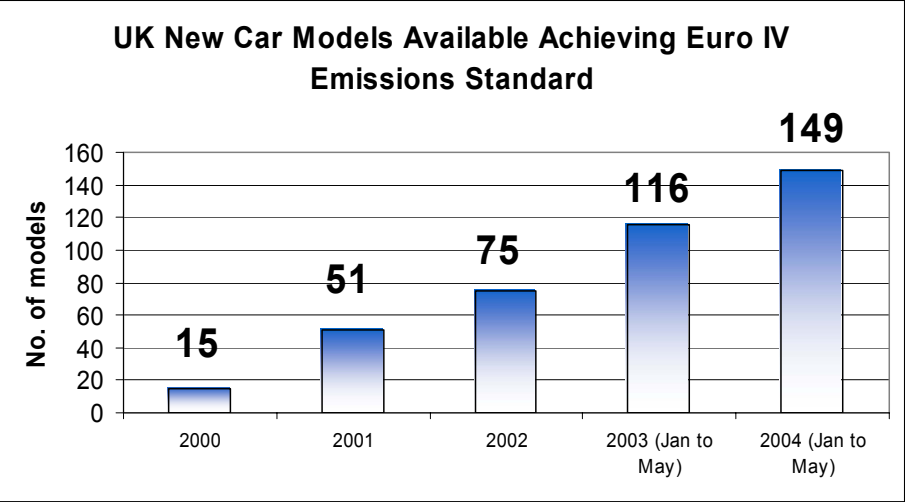


4.3 CO₂ Product Trends (AC)



4. PRODUCT Environmental Performance (2)

4.4 Tailpipe Emissions .



4.5 Vehicle Recycling



STRATEGY COMMITMENT: *to continue to research, develop and bring cleaner technologies to the market to improve tailpipe emission standards*

From 1 January 2005, all new types of passenger cars will be required to conform to the new emission standards (Euro IV). As the arrival of the new regulation nears, the number of models complying with the new standards increases. From 1 January 2006, this will be extended to all new registrations.

Manufacturers continued to make new Euro IV models available prior to the deadlines.

Discussions continue with the European Union on new standards that will be required for Euro V for passenger cars. The outcome of these negotiations will be finalised during 2005.

STRATEGY ACHIEVEMENT: manufacturers continuously work to research, develop and introduce improvements in tailpipe emissions

STRATEGY COMMITMENT: *to continue to facilitate efforts to improve the level of material recovery from End of Life Vehicles (ELV)*

Implementation of End of Life Vehicle (ELV) Regulation continues in the UK and the details of the administrative arrangements are now under further discussion.

The world market for scrap steel was strong in 2003 largely due to demand driven from China. This has supported the price for this commodity.

Research and development continues on building demand, and on processes to recycle other materials such as plastics from motor vehicles. Many manufacturers are already using recycled plastic in car parts and demand a recycled content in the plastic they buy. This helps to stimulate the marketplace for recyclables.

STRATEGY ACHIEVEMENT: continued compliance with regulation and development and research in other areas, future success sensitive to commodity prices

5. PRODUCTION AND DISTRIBUTION Processes Environmental Performance (1)

5.1 Environmental Management - Summary

STRATEGY COMMITMENT: *to continue to control and reduce the environmental impact of company operations*

Table 5.1 Environmental Management Indicators	1999	2000	2001	2002	2003
Number of signatories	11	18	18	24	22
Number of manufacturing sites covered by SMMT's sustainability strategy	40	44	45	43	38
Number of manufacturing sites with a certified Environmental Management System	26 (65%)	35 (79%)	37 (82%)	35 (81%)	33 (87%)
Number of companies having minimum environmental standards applying to UK-based suppliers	-	11 (65%)	12 (67%)	12 (52%)	13 (59%)

With the signatories to the sustainability agreement now including all major UK producers, we are well placed to assess the impact of sector operations. It is apparent that all signatories have made widespread improvements during the last five years. These achievements are driven partly by regulation, partly by voluntary agreement, by management systems and by good practice. It is encouraging to see all of the signatories progressing in environmental management, and driving these developments through the supply chain.

The support work of SMMT, through groups such as the Manufacturing Environment Working Group and the Environment Team is important in enabling debate and policy positions to be developed on all important sustainability matters. These groups are widely supported by members, a significant commitment of time and effort. SMMT believes that support for Small and Medium Enterprises (SMEs) should be greater and this is an issue we intend to address.

Developments in European environmental regulation are not always consistently applied. This is something that we have become aware of in the European Union Emissions Trading Scheme (EU ETS), where treatment of plants within the sector can be varied. We feel that consistency in this area is important, to prevent other aspects of sustainable development being hindered by unfair competitive advantage and erratic application of environmental regulation.

Signatories continue to invest in environmental management systems and are looking to suppliers to embrace these environmental standards further. Though statistically the extension of such schemes does not appear to be increasing, the good practice associated with them and general management is bringing about environmental improvements.

SMMT awaits the developments of the International Standards Organisation to include environment of criteria in quality reporting systems, how this is implemented and whether this will impact on stand alone systems such as ISO 14001 and EMAS.

In this section of the report SMMT gives an honest indicator of the range of improvement in key indicators and highlights the relevant issues.

STRATEGY ACHIEVEMENT: the reduction in impact on the environment of company operations continues across nearly all key indicators, driven by a combination of factors

5. PRODUCTION AND DISTRIBUTION Processes Environmental Performance (2)

5.2 Environmental Management - Inputs

INPUT	1999	2000	2001	2002	2003
Total combined energy use (GWh) (AS)	6,110	7,013	6,857	6,540 a	6,126
Energy use (kWh) per employee (AS)	64,175	70,108	71,166	74,685	69,912
Energy use (kWh) per £1million turnover (AS)	303,828	309,717	281,036	186,943	156,419
<i>Energy use (MWh/unit) per vehicle produced (VMS)</i>	<i>3.1</i>	<i>3.9</i>	<i>4.3</i>	<i>4</i>	<i>2.8</i>
Total combined water use ('000m ³) (AS)	-	9,620	10,105	9,108	8,404
Water use per employee (m ³ /employee) (AS)	-	96.2	104.9	101.8	95.9
Water use (m ³) per £1million turnover (AS)	-	457	414	255	215
<i>Water use (m³) per vehicle produced (VMS)</i>	<i>-</i>	<i>5.3</i>	<i>6.2</i>	<i>5.6</i>	<i>3.4</i>

a revised from 6,681

In the report we measure two major inputs into the production process:

- Energy Use
- Water Use

Both of these key indicators have significantly decreased in absolute and relative terms, and in key measures against employee, turnover and per vehicle. Data per vehicle is based on those signatories producing vehicles in the UK, as opposed to engines and components.

During the last five years there have been a number of structural changes influencing this data, for example the end of car production at Luton and the transfer of Dagenham to engine production only. These changes may have impacted the data, but overall energy and water reductions are significant, and sustained.

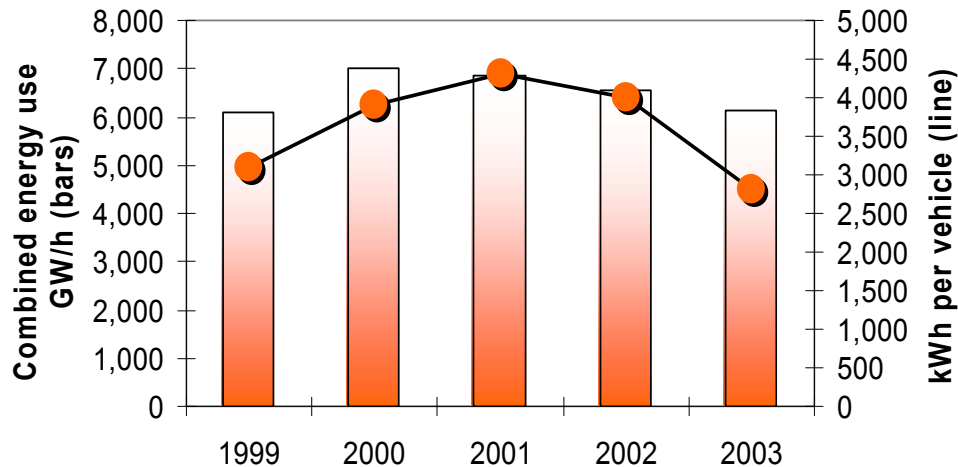
Most of the signatories have objectives for further reduction in energy and water use.

Design and resource use

With the combined objective of increasing body stiffness and reducing the number of parts, the number of body pressings in new cars is reducing by up to 50 per cent compared to the previous model counterpart. This should impact favourably on the time and energy required in production of the vehicle.

5. PRODUCTION AND DISTRIBUTION: Processes Environmental Performance – Inputs Focus (3)

Signatories' Combined Energy Use



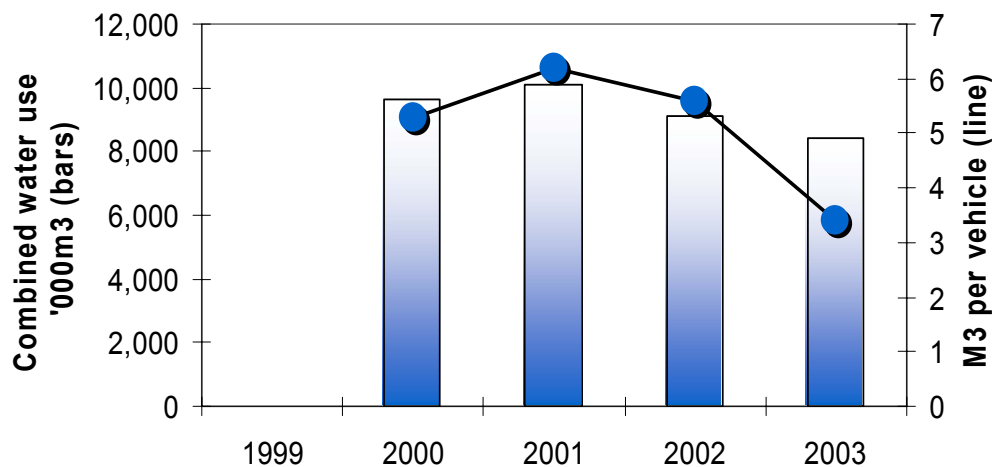
5.2.1 Combined Energy Use

Both absolute (down 6.3 per cent) and measures per vehicle (down 30 per cent) have seen significant reductions on 2002 data.

Looking at the performance of individual signatories, nearly 80 per cent have improved or seen no change. For the remainder, one signatory has seen substantial establishment of new production facilities, and one other smaller input has re-assessed validation of its data resulting in increased returns for 2003 over 2002.

Energy use per vehicle has fallen as a result of a decrease in total energy used and increase in production. The addition of a new vehicle assembler signatory explains the greater relative change in this indicator over and above the absolute indicator.

Signatories' Combined Water Use



5.2.2 Combined Water Use

Again, both in absolute terms and per vehicle, there have been significant reductions on 2002 data.

Improvements in the amount of water used per vehicle are particularly significant, falling from 5.6m³ per vehicle in 2002 to 3.4m³ in 2003, a 39 per cent reduction.

In absolute terms the reduction in water consumption was not so great (7.7 per cent). Five signatories saw an increase in water consumption in absolute terms in 2003.

This may indicate that the very largest water users have made significant gains in water saving. Further improvements may be less substantial.

5. PRODUCTION AND DISTRIBUTION Processes Environmental Performance (4)

5.3 Environmental Management - Outputs

OUPUT	1999	2000	2001	2002	2003
Total Combined CO ₂ equivalent (tonnes) (AS)	1,821,586	2,182,926	2,149,771	1,954,295 a	1,644,225
CO ₂ equivalent (tonnes) per employee (AS)	19.3	21.8	22.3	23.9	18.8
CO ₂ equivalent (tonnes) per £1million turnover (AS)	90.6	95.3	88.1	59.9	42.0
<i>CO₂ equivalent (tonnes) per vehicle produced (VMS)</i>	<i>1.1</i>	<i>1.1</i>	<i>1.3</i>	<i>1.2</i>	<i>0.7</i>
Total Combined Emissions of VOC (kg) (AS)	4,018,951	7,136,682	6,926,340	6,240,100	7,336,780
Emissions of VOC (kg) per employee (AS)	42.2	71.3	71.9	69.7	83.7
Emissions of VOC (kg) per £1million turnover (AS)	199.8	339.0	284.0	174.6	187.4
<i>Emissions of VOC (kg) per vehicle produced (VMS)</i>	<i>2.9</i>	<i>4.4</i>	<i>4.6</i>	<i>4.2</i>	<i>4.1</i>
Total Combined Waste to landfill (tonnes) (AS)	54,954	80,399	121,207	70,897	56,743
Waste to landfill (tonnes) per employee (AS)	0.6	0.8	1.3	0.8	0.6
Waste to landfill (tonnes) per £1million turnover (AS)	2.7	3.7	4.9	2.0	1.4
<i>Waste to landfill (kg) per vehicle produced (VMS)</i>	<i>-</i>	<i>40.3</i>	<i>66.4</i>	<i>40.5</i>	<i>17.9</i>
Total Combined Packaging waste for recovery (tonnes) (AS)	10,900	20,272	16,768	17,053	15,038
Packaging waste (tonnes) for recovery per employee (AS)	0.11	0.2	0.17	0.3	0.2
Packaging waste (tonnes) for recovery per £1million turnover (AS)	0.5	0.9	0.7	0.7	0.4
<i>Packaging waste (kg) for recovery per vehicle produced (VMS)</i>	<i>5.6</i>	<i>10.5</i>	<i>8.4</i>	<i>8</i>	<i>6.5</i>
Total Combined Packaging waste for recycling (tonnes) (AS)	1,802	5,058	6,344	5,801	12,587
Packaging waste (kg) for recycling per employee (AS)	18.9	50.5	65.8	61.4	143.6
Packaging waste (kg) for recycling per £1million turnover (AS)	89.6	240	260	153	321.4
<i>Packaging waste (kg) for recycling per vehicle produced (VMS)</i>	<i>1.1</i>	<i>2.5</i>	<i>3.5</i>	<i>2.8</i>	<i>5.1</i>

a revised from 2,142,706

A further improvement in all key indicators, with the exception of (in absolute and per employee terms) of Volatile Organic Compounds (VOC) solvents from painting. The inclusion of a new manufacturer in the data is key to this increase. The per vehicle indicator shows a decrease.

Dramatic improvements have taken place in the reduction in waste to landfill during 2003. Even allowing for the additional data from Powertrain and PSA Peugeot Citroën, there has been an absolute reduction of over 14,000 tonnes in waste to landfill.

Although improvements in recovery rates have slowed, data suggests this is as a result of waste minimisation.

Recycling has increased dramatically, additionally the data suggests that waste minimisation, an important focus of strategy, is increasing.

5. PRODUCTION AND DISTRIBUTION Processes Environmental Performance – Outputs Focus (5)

5.3.1 Combined CO₂ Equivalent

As expected with the associated reduction in energy consumption, we see a reduction in CO₂ emissions (down 15.8 per cent). However, signatories are now undertaking three actions beyond energy reduction alone to reduce CO₂ output and its impact further.

- Investing in renewable energy; installation of a wind energy generation plant at Dagenham in 2004 (this is not included in this data) will reduce CO₂ emissions. A second manufacturing signatory has the target of using 10 cent renewable energy in manufacturing operations by 2009.
- Purchasing energy from low carbon suppliers. This practice amongst some signatories will support the market and encourage the development of renewable energy, with the premise of maintenance of cost competitiveness.
- Becoming carbon neutral, through membership of schemes based on mitigation of carbon generation.

5.3.2 Combined Emissions of VOCs

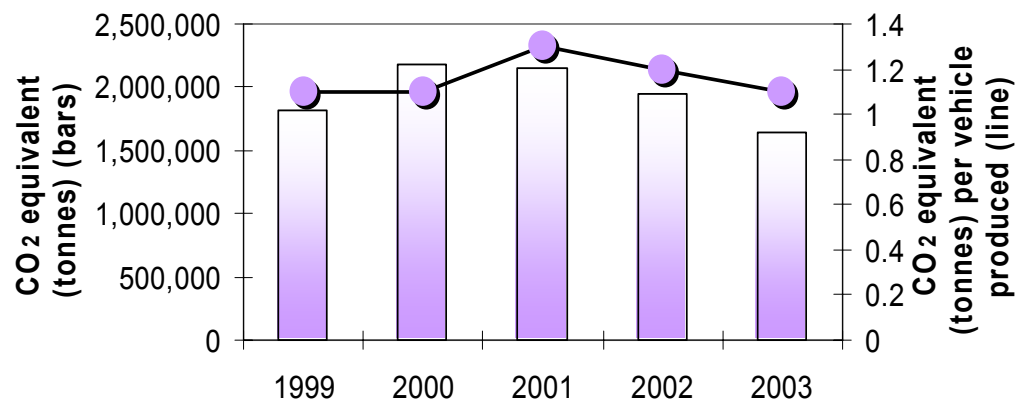
With the inclusion of a further manufacturer in the 2003 data the absolute amount of VOCs emitted increased (up 17.6 per cent). The amount per employee also increased.

The absolute increase is primarily due to increased output from these signatories, as well as data from new signatories.

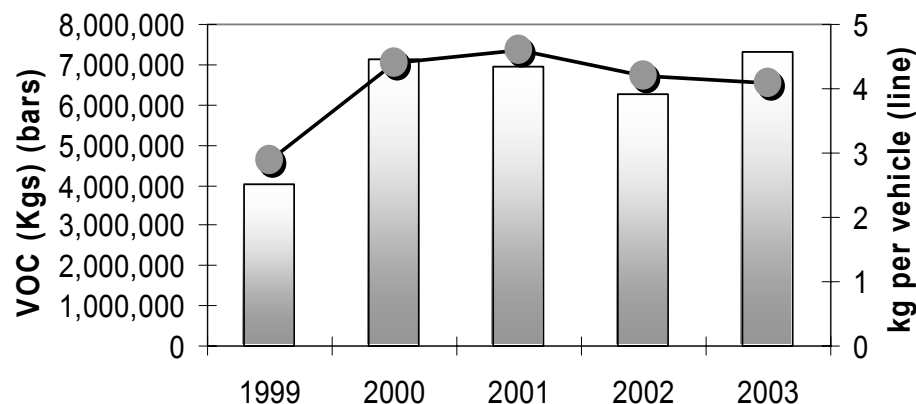
The slight reduction in VOC per vehicle (down 2.3 per cent) can partially be explained by a change in model mix in some plants to larger vehicles, or by the change in practice to increased painting at assembly, as opposed to the component manufacture stage.

Over 50 per cent of signatories increased output of VOCs.

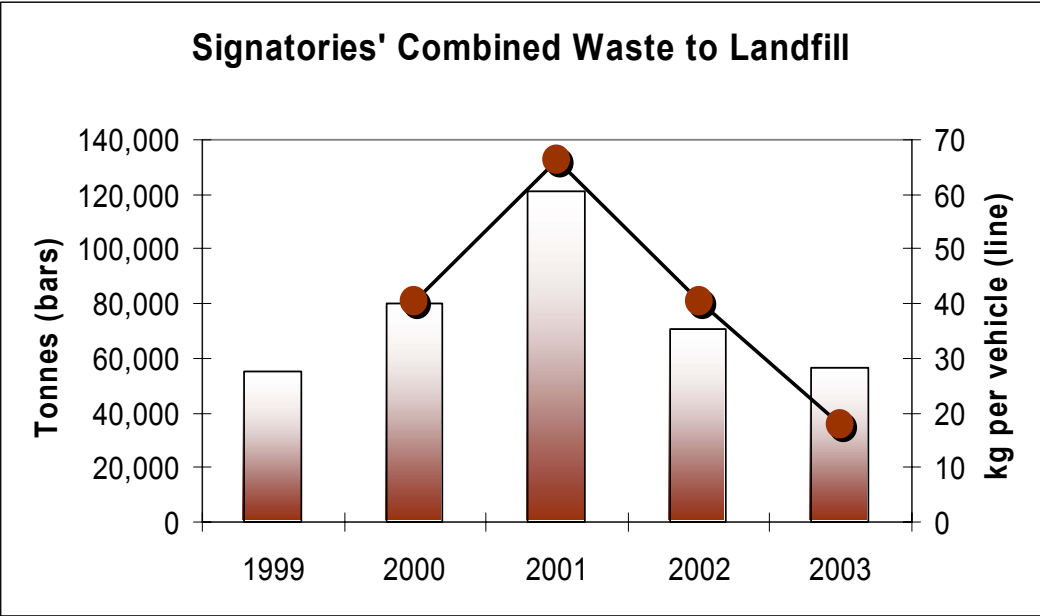
Signatories' Combined CO₂ Emissions - Production and Distribution



Signatories' Combined VOC Emissions



5. PRODUCTION AND DISTRIBUTION Processes Environmental Performance – Outputs Focus (6)



5.3.3 Combined Waste to Landfill

Since 2001, both in absolute terms and per vehicle, the progress in this indicator has been dramatic. This continued in 2003.

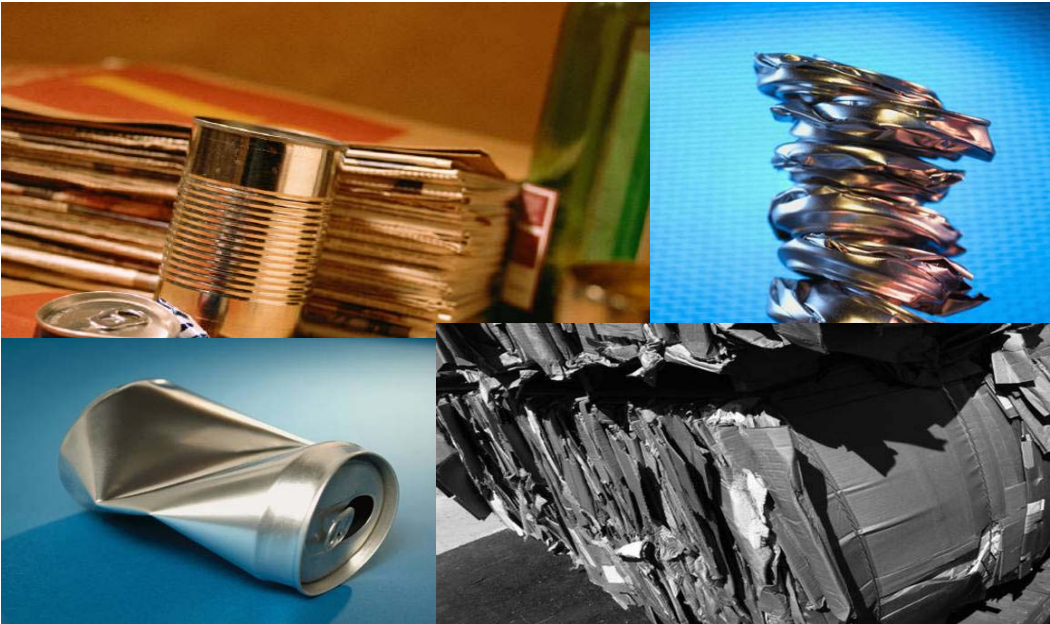
Over 85 per cent of all signatories saw a reduction in waste to landfill. Tonnes to landfill per vehicle was down 56 per cent.

In absolute terms we have seen reductions in waste to landfill of up to 90 per cent from some signatories, overall down 20 per cent (without allowing for data from new signatories).

One signatory with an objective of zero tonnes to landfill was close to achieving this in 2003.

Another signatory reduced waste to landfill by over 13,000 tonnes alone.

This is an outstanding achievement for this sector.



5.3.4 Combined Recycling and Recovery

In line with the reduction in waste to landfill, recovery and recycling of packaging waste continues to improve. Packaging obligations for 2003 for most signatories changed.

Some reductions in the amount of waste recovered have occurred, and we believe this is in line with a strong policy on waste minimisation combined with tougher UK obligations, and the greater use of re-usable packaging, which can be a key element to environmental sustainability.

We have concerns about the consistent methods of reporting by signatories in this area and plan to revise terminology to differentiate between obligations (for packaging waste) and on site recycling in forthcoming reports.

The trend for 2003 remains true compared to previous years.

6. Economic Performance (1)

6.1 Contribution to the UK Economy

STRATEGY COMMITMENT: *to continue to seek economic growth and secure competitiveness in the global environment*

Table 6.1 Contribution to UK Economy	1999	2000	2001	2002	2003
Value of UK Automotive Exports (WI)	£19.1bn	£19.8bn	£18.0bn	£20.8bn	£21.5 bn
Expenditure on Business R&D (WI)	£1145m	£929m	£930m	£960m	£955m
Sector share of total GDP at market price (WI)	0.80%	0.80%	0.90%	0.90%	0.90%

6.2 Production Indicators

Table 6.2 Economic Indicators	1999	2000	2001	2002	2003
UK Automotive manufacturing sector turnover (WI)	£44.2bn	£42.5bn	£42.2bn	£43.1bn	£43.5bn
Signatories combined turnover (AS)	£20.1bn	£21.03bn	£24.4bn	£35.7bn	£39.2bn
Total UK number of new cars produced (AC)	1,786,623	1,641,317	1,492,146	1,629,744	1,657,558
Total UK number of new CVs produced	185,905	172,442	192,872	191,267	188,871
Total UK number of new vehicles produced	1,972,528	1,813,759	1,685,018	1,821,011	1,846,429
Total no. of new vehicles produced by signatories		1,572,642	1,470,659	1,441,794	1,731,894
Total number of new car registrations (AC)	2,197,615	2,221,647	2,458,769	2,563,631	2,579,050
Total number of new CV registrations	288,100	298,043	313,411	322,258	363,687
Total number of new vehicle registrations	2,485,715	2,519,690	2,772,180	2,885,889	2,942,737

Production of automotive units is increasing in the UK, supported by increased exports. Some brands have had notable sales success and expanded into new markets in 2003.

The industry in the UK has found its place in the strategy of many global brands. This is due to the UK history in automotive manufacture, a strong skills base and a sound cost base. An important base of research, development and testing of automotive products remains here in the UK, supported by some of the global brands as well as domestic producers.

There is no doubt the future will bring challenges, as markets and production in Eastern Europe grow and China becomes a major production centre, for domestic and export production. The need to meet the challenge of low cost production sources will remain a key issue for the coming years.

STRATEGY ACHIEVEMENT: notable successes in production expansion for vehicles and components, but developments in this global market stress the need to remain competitive

6. Economic Performance (2)

6.3 Investment

Table 6.3 Investments	1999	2000	2001	2002	2003
Auto manufacturing sector net capital investment	£2.13bn	£2.08bn	£2.23bn	£2.17bn	£2.16bn
Inward direct investment into auto manufacturing	£3.48bn	£2.73bn	(-£0.85bn)	(-£0.23bn)	£535m
Expenditure on business research and development	£1,14bn	£0.93bn	£0.93bn	£0.96bn	£0.95bn
Signatories combined UK investments	-	£1.28bn	£1.22bn	£1.52bn	£1.80bn

£0.91bn from new signatories, or those not previously submitting data

Investment in capital plant and equipment and in research and development is key to the future success of the UK as an automotive centre in world production.

Net changes in investment by signatories, allowing for new signatories and those who have returned data for the first time in 2003, sees a decreased level of investment than in 2002.

This is not an absolute cause for concern as it reflects new model and plant development patterns.

It does illustrate the importance of retaining new model and component development in the UK, across all model types and sizes.

6.4 Employment

STRATEGY COMMITMENT: *to continue to secure and enhance employment opportunities where appropriate*

Table 6.4 Employment Indicators	1999	2000	2001	2002	2003
Number of jobs dependent on the sector	867,000	849,100	835,800	847,100	841,000
· Automotive manufacturing	260,000	251,600	237,300	229,400	220,000
· Automotive supply and use	607,000	597,500	598,500	617,700	621,000
Signatories total combined employees (AS)	95,214	100,036	96,357	89,455	87,625

Employment in the manufacturing element of the sector is falling.

This is not a reflection of the overall decline of the sector, but a response to increase competitiveness to match the best manufacturing output in the world, something many UK based plants achieve.

The industry faces the challenges of recruitment and of being seen as an employment opportunity for young people.

Working in the industry though, for the vast majority of employees, is a rewarding and long term experience .

The objective of achieving a vibrant, diversified workforce is being achieved. Efforts to bridge the skills gap are supported by the Automotive Academy, managed by SMMT. See www.automotiveacademy.co.uk

STRATEGY ACHIEVEMENT: signatories work hard to make the sector a sustainable place to work and to increase diversity and skills

6. Economic Performance (3)

6.5 Supply Chain Efficiency

STRATEGY COMMITMENT: *to support Industry Forum and work to enhance supply chain efficiency*

The number of signatories driving quality standards throughout the supply chain has increased from 11 to 13. This process has been key to quality improvement of the final product and ensuring consistent quality of component supply.

This process is being undertaken by encouraging suppliers to work to ISO 9001 standards, and TS16949.

The supply chain focus is being extended by assemblers to looking at the level of recycled content in components and the recyclability of those components.

We are aware of the increasing internationalisation of component sourcing in the automotive sector. Quality standards, as well as environmental standards, are being employed by signatories in this process, not just in domestic supply lines.

Further, UK owned component signatories are constructing and developing production sites overseas to respond to local and global demand. Standards of sustainability gained in the UK serve as a benchmark when undertaking this development.

6.5.1 Modal choice for shipment of materials and product

For the first time in 2003 we looked specifically at the modes of transport used by signatories in their operations.

Table 6.5 Transport Mode by Signatory Site					
goods in			goods out		
road	rail	water	road	rail	water
37	5	5	42	9	2

Road is the number one modal choice for moving supplies and finished products. The largest production volume site in the UK remains road-only connected.

Where road is used, all signatories continue to improve logistical services. One signatory has increased the cube utilisation (efficiency of packaging product into trailers) of its fleet by eight per cent overall, and in Europe replaced 12 truck routes by greener modes.

For other modes, in March 2003 a new railhead opened at Castle Bromwich. This will save 45 million truck movements at Castle Bromwich over 10 years and 25 million from a sister plant in Halewood. Swindon is rail connected and investigation of using this mode for distribution into Europe is being undertaken.

The use of local short sea shipping is now having an impact, a new facility in Newcastle upon Tyne will save 900,000 truck miles.

Other plants have direct rail connections and quay-sides owned or used by signatories.

STRATEGY ACHIEVEMENT: signatories continue to drive quality through the supply chain and where practical continue to develop the use of alternative modes of transport, in their logistics networks

7. Social Performance (1)

STRATEGY COMMITMENT: *continue to improve the skills, facilities and opportunities available for employees*

7.1 Production and Distribution Processes

7.1.1 Employee Profiles

Percentage of female employees	9.6 per cent
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For the first time this year we asked signatories to report on the percentage of staff that were female. It comes as no surprise that the industry is very male dominated.

The overall percentage of female employees was just under 10 per cent. This compares to a figure of just under 14 per cent for a national survey carried out in 1993. This data, though, represented a wider cross section of the automotive sector.

The percentage of female employees ranges from as low as four per cent in a manufacturing operation to as high as 35 per cent in a retail and distribution signatory.

This is significantly lower than the UK economy as a whole as female employees make up 45 per cent of the UK workforce (ONS), up from 41 per cent in 1984.

This is the first year that we have asked signatories to provide details on their employee profile and we acknowledge that we need to do more work in this area. This will allow us to gain a better profile of the workforce in our sector.

7.1.2 Employee Development

In terms of employee support and development outside training and specific Health and Safety programmes, we received detailed information on three services being offered by signatories.

- **Occupational health services** – ensuring staff have support for injury and receive full awareness training on health risks.
- **Confidential counselling** – to help employees with personal issues.
- **Stress management** – recognising the extent to which stress impacts on quality of life.

Signatories realise the value of good employee management and ensuring the sector is a valued place of employment.

STRATEGY ACHIEVEMENT: difficult to quantify fully, but low staff turnover, flexible working policies, high levels of training, good health and safety and high quality of staff facilities all indicate some success

7. Social Performance (2)

Production and Distribution Processes

7.1.3 Health and Safety

Table 7.1.3 a Reported Lost Time Incidents - signatories only

2002	2003	change
669	710	6 % increase

Note: from signatories providing comparable data for 2002 and 2003

In a global context, the record of the United Kingdom in Health and Safety is good, as is demonstrated in the table (7.1.3b) from the International Labour Organisation for manufacturing.

The rise in reportable (RIDDOR) incidents for signatories, (table 7.1.3a) in 2003 however, is disappointing.

In the United Kingdom, the Motor Industry Safety Group, with representatives from manufacturer's, component suppliers, the Health and Safety Executive and SMMT, meets six times per year to co-ordinate the sector's approach to Health and Safety in the industry. Data from the group is shown in the graph. (This includes a great number of companies than the sustainability signatories.)

For 2003 the group identified a number of developments taking place in the industry:

- A decrease in the number of reportable accidents (for the wider industry), but an increase in the duration.
- A change in the nature of reported incidents away from physical, evident injury to non-evident psychological events.
- Continued and consistent training in health and safety.
- Improved data collection, information on 'near misses' is now collected by signatories.
- A growing concern of the danger of forklifts and other transport equipment in manufacturing operations.
- Design of the workplace and workplace equipment to improve ergonomic performance, to address back and repetitive strain injuries.

The industry has a positive attitude towards Health and Safety and is looking towards ways of illustrating this in its management and reporting processes.

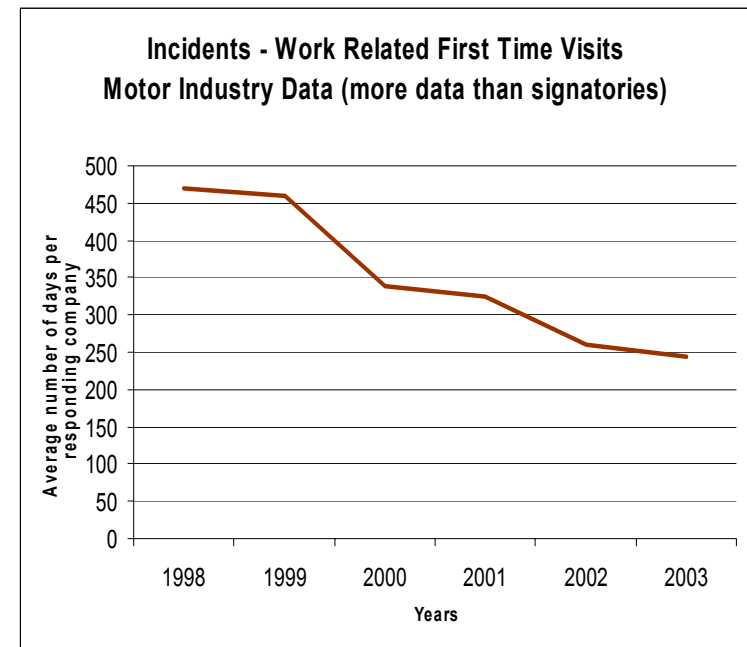


Table 7.1.3 b Manufacturing Industry Reported Fatalities

	1999	2000	2001	2002
UK	ND	47	48	43
Canada	189	209	192	227
Mexico	326	376	348	283
United States	722	668	598	564
Japan	342	318	323	275
Korea	397	443	380	ND
Austria	26	26	24	32
France	179	163	ND	ND
Germany	218	198	190	176
Italy	273	256	282	ND
Poland	117	161	138	112
Spain	209	198	188	136
Sweden	13	5	8	8

Source: International Labour Organisation

ND = No Data

7. Social Performance (2)

Production and Distribution Processes

7.1.4 Training

Total number of training days (for reporting signatories)	241,549
Average number of training days per employee	3.8
Number of young people in apprenticeships (Automotive Sector)	17,054
(2002/2003)	



Training within all companies is extensive and the approaches include:

- Becoming more sophisticated; major companies now offer **internal training web sites**, enabling employees to undertake web-based training packages. Signatories are setting up workspace and stations for employees to be able to take full advantage of web-based training while at work.
- This concept is extended to on-site **open learning centres**, a location for employees to develop all aspects of training including language development, especially for those whose first language is not English.
- As well as information technology based training, however traditional training is still in place. A number of signatories in 2003 have reported on the development of **modern apprenticeship based schemes**. There is recognition that this is necessary to secure a future skilled workforce.
- Training is becoming more **internationally focused**. With many signatories involved in global operations, the opportunity to visit other company sites and see and understand practices and methods abroad is now commonplace. This is particularly prevalent in the set up of new production facilities where contact with international colleagues remains open long after development stages. This form of ‘on the job’ training is invaluable in ensuring UK industry remains in touch and competitive with international plants, to take full advantage and match their developments.
- Although, as in many other industries, the traditional management structure has been replaced with a flatter, streamlined alternative, in many plants the team based approach is matched with **leadership development skills**. This is equally applied to retailing operations in car showrooms.
- Signatories continue to support **membership of professional organisations**.
- There is a recognition and development of training towards **NVQs**.
- Development in training company car drivers on **safe driving courses**. The sector is looking to provide examples to other sectors to encourage them to train and develop those personnel for whom driving is part of their employment.
- Links to **Sector Skills Councils** for the retail motor industry see www.automotive-skills.org.uk.
- Development of the Automotive Academy www.automotiveacademy.co.uk

7. Social Performance (4)

Production and Distribution Processes

7.1.5 Staff Turnover

Less than 6.1 per cent overall

Staff turnover has fallen again compared to previous years. There is a variation in data from signatories, the highest having a staff turnover of over 12 per cent and the lowest less than three per cent. This data compares with a staff turnover figure of 32 per cent in call centres (Personnel Today), 25 per cent all sectors (Information Data Services) and 18 per cent in distribution and logistics (Freight Transport Association).

The low level of staff turnover is a strong indicator of the overall stability and attractiveness as a place to work, re-enforcing the message that the United Kingdom continues to be an excellent location for the production of vehicles.

7.1.6 Employee Consultation and Welfare

Number of Signatories with a staff suggestion scheme : 12 = 55 per cent

Number of Signatories with a staff suggestion scheme (VMs): 9 = 75 per cent

The number of companies who have a 'stand alone' staff suggestion scheme is just over 55 per cent in the case of all signatories and 75 per cent in the case of those manufacturing vehicles. Interestingly, the Japanese owned companies do not favour rewarded staff suggestion schemes, instead they look to the **Kaizen management technique** of continuous improvement to satisfy the need for staff to develop ideas impacting in the workplace.

One signatory quoted savings of over £10 million from their employee suggestion scheme, another saved £1.5 million.

On employee welfare we asked signatories to respond to two specific areas this year.

- **flexible working policy**
- **aims and objectives for employee support**

In April 2003, legislation was introduced to increase employees' opportunity for flexible working and all signatories gave examples of how this had been integrated into their policy. In many cases they offer maternal and paternal leave, leave for carers and foster parents exceeding legal requirements. Some are actively encouraging the concept of career breaks for all employees and the extension of flexible working to allow staff to take time away from employment for a variety of reasons:

- Creating and **developing 'work/life' balance** is now cited in some signatories' policy; one of the many tools towards this objective is increasing the capability for tele-working and home-working.
- The incorporation of **employee families** into the workplace is common with social events at work for all family members.
- Support for **longer term pay deals** is increasing, with signatories signing longer term agreements with trade unions.

7. Social Performance (5)

7.2 Products and Relationships

STRATEGY COMMITMENT: *continue to engage positively with external stakeholders*

7.2.1 National Stakeholder Engagement

The Environment Team at SMMT all have contact with stakeholder groups. This includes the Low Carbon Vehicle Partnership, the Cleaner Transport Forum, the Air Quality Forum, the UK Climate Impact Programme, local authorities, academic institutions and government departments. Signatories also engage with government and non-governmental organisations on a national and local level.

7.2.2 Community Involvement

As significant employers in their own right, all signatories embrace the local and extended community in some of the following ways:

- Companies are now giving employees the opportunity to **work in the community** on a regular scheduled basis paid by the company. One signatory cited 16 hours per annum an example. We expect this type of direct community involvement to develop with more signatories.
- **Local schools and colleges**, are supported in a number of ways. For example some signatories offer support to colleges in vocational training schemes, many offer school visits; signatories gift, equipment and information technology to schools. They also provide information packs.
- Data for schools to use in the education process.
- Placement for **teaching staff in plant and factory** to enable them to obtain experience in industry.
- Allowing schools the **free use of sports facilities** where the school does not have its own.
- **Plant tours** for schools, colleges and interested groups.
- The direct support of **literacy and numeracy schemes** for schools.
- **Support for the local disabled community**, one signatory provides facilities for a local 'powerchair football' league.
- **Blood donation** by employees.
- **Design foundation**, to support new and innovative design for a huge range of products.
- Supporting **awards for engineering and the environment** for younger and new talent.



STRATEGY ACHIEVEMENT: further developing success in engaging with many stakeholders

8. Sector Issues (1)

8.1 Sustainable Mobility

In the Summer of 2003, the World Business Council for Sustainable Development (WBCSD) reported on the issue of sustainable mobility in the report *Mobility 2030: meeting the challenges to sustainability* (www.wcsd.org)

The report, supported by automotive manufacturers, component suppliers and fuel suppliers takes a long term look at the issue of sustainable mobility, and we address the issues raised in this section.

The global forecast is that between now and 2050 the demand for personal transport will more than double, with fastest rates of growth in developing regions, Eastern Europe, Russia, India and China. In OECD Europe, the projected growth in personal motorised vehicle ownership is forecast to increase by 40 per cent in the next 45 years.

Demand for mobility by all modes, - road, rail and air - is growing.

8.2.1 Emissions, CO₂ and Global Warming

Global warming, climate change and the relationship with CO₂ are everyday news. Although all sectors, domestic, commercial and industrial contribute to global warming through CO₂ generation, transport is the sector that currently shows greatest growth. Road transport is presently measured as a major contributor to transport generated emissions.

Mobility 2030 suggests that in the developed world, through improvements in technology already in place, emissions from road transport will stabilise. This is not the forecast for the developing world, where per capita income rises will result in a sharp increase in demand for transport.

Different scenarios exist between now and 2050 relative to carbon emissions and these are dependent on the introduction and, importantly, adoption of low carbon powertrains and ultimately the move to hydrogen power. The Foresight Vehicle Technology Roadmap further illustrates these developments [see www.foresightvehicle.org.uk/technology_road_map.asp](http://www.foresightvehicle.org.uk/technology_road_map.asp)

Research estimates that between 85 and 90 per cent of vehicle emissions are generated in the use phase. Therefore reducing CO₂ emissions from the manufacturing product, and from the fuel used (potentially on a well to wheel analysis, so including bio-fuels) will together reduce total CO₂, the so-called integrated approach.

The impact of mitigation measures mean that there is a need to consider plans for adaptation to climate change. SMMT, together with the United Kingdom Climate Impacts Programme, is working to support the automotive and engineering sector to become fully aware of the effects of climate change and the need to adapt.



8. Sector Issues (2)

8.0 Sustainable Mobility continued

8.2.2 Emissions and Air Quality

The European Union has an active programme to improve air quality, reducing emissions from road transport through the so-called Euro standards of regulation . This programme is ongoing.

In 2005 there will be the introduction of the Euro IV emissions standards for new car types, and on all newly registered cars a year later. Presently discussions are taking place on Euro V with the EU Commission. Air quality, both NOx and particulates, will be further addressed. The use of particulate filters on diesel vehicles is being considered by this regulation.

Manufacturers often adopt these new standards in advance of regulation, and the performance of the new car fleet is frequently better than present regulation.

The longer term forecasts in *Mobility 2030* are for new vehicle technology dramatically to reduce road-side emissions between now and 2015.

Unfortunately, more stringent emissions regulation impacts energy efficiency. Engine power requirements on a like for like basis will marginally increase as a result of employing emissions control equipment.

8.3 Responsible Product Use

With 85 to 90 per cent of emissions being generated during the use of the product, encouraging responsible use is vital in the future of sustainable mobility.

In relation to questions put to signatories there are a range of activities highlighted to encourage responsible use of automotive transport by signature company employees. These include:

- green travel plans
- discounted travel card
- training in the use of the product
- advanced driving skills
- minibus driving skills
- car sharing

SMMT is undertaking work to develop the concept of responsible motoring, as outlined in our guide *Driving for the future*, published in 2003.

SMMT believes that in all aspects of sustainable mobility, driver education is critical to success. This is a theme which will develop during 2005 and will be reported on next year.

8. Sector Issues (3)

8.0 Sustainable Mobility continued

8.4 New Vehicle Technology

Table 8.4 **New Vehicle Technology**
Alternate Fuelled Vehicles

	2000	2001	2002	2003
Petrol/Gas	94	971	2,473	3,185
Petrol/Electric hybrid	263	719	339	1,079
Electric only	0	0	35	2
TOTAL AFV	357	1,690	2,847	4,266
Market share %	0.02	0.07	0.11	0.17

New vehicle technology can be perceived as representing a dramatic change in the size, shape and powertrains of everyday cars.

In reality every new model incorporates significant improvements in environmental technology over its predecessor and this progress in terms of emissions and product energy efficiency is discussed in this report.

Developments for the next two to three years include:

- 'stop-start' technology, switching off the engine in stationary traffic
- further development of petrol-electric hybrid models
- development of diesel-electric hybrid models
- the introduction of 'smart' gear shift change indicators for manual gearboxes
- continual development to give better miles per gallon and reduce emissions

Research in the UK is looking at developments for the future. The New Vehicle Technology Fund and SMMT managed Foresight Vehicle Programme support this work.

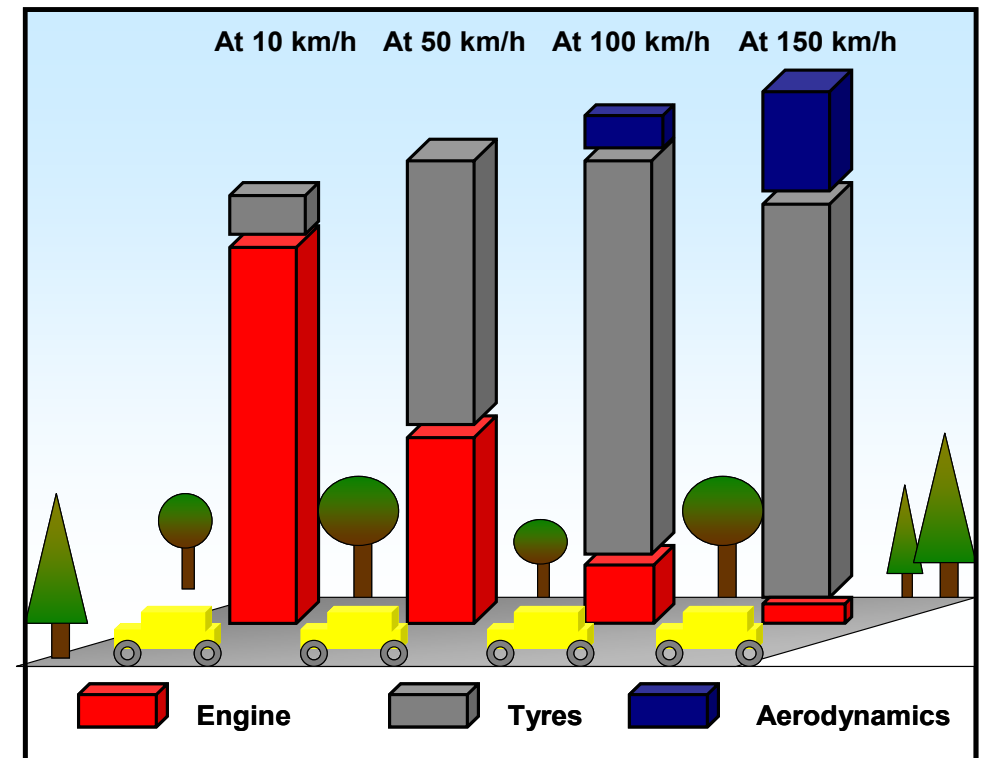
8.5 Noise


Road noise is generated from three sources, engine, tyres and aerodynamics, and as the chart 8.5 shows, the proportion and total of these three varies according to speed. Therefore different technology will be required to address these issues according to vehicle speed.

Road surface development as well as tyre development is reducing tyre noise.

Standards and regulations have been in place for noise since the 1970s, and developments continue to address this issue further.

Chart 8.5 Noise Levels, generation and speed





8. Sector Issues (4)

8.0 Sustainable Mobility continued

8.6 Congestion

The number of vehicles on UK roads is increasing, as too is the mileage being travelled by those vehicles, so, demand for road space overall will increase. There is the opportunity, though, to improve road space utilisation through:

- Improved use of infrastructure; improving infrastructure design, managing travel patterns, increasing vehicle utilisation, introducing new technology to roads and vehicles and effective incident response.
- Raising the profile of driver education.
- Better spatial management; reducing the demand for road travel through the use of alternative modes, enhancing the planning and building process and fiscal strategies.

SMMT is aiming to gain a greater understanding of these issues and how they impact congestion.

A co-operative, co-ordinated, fiscally balanced strategy will help address this issue and develop methods of ensuring our increased desire for mobility in all transport modes is a sustainable one. SMMT plans to undertake work here.

8.7 Safety

Car occupant and pedestrian safety is improving. The voluntary NCAP rating scheme has raised the profile of improved vehicle technology and road safety, and we are pleased to see the first five-star rating for a supermini in 2004.

Manufacturers have developed voluntary agreements for the introduction of Anti-lock Braking Systems (ABS) during 2004 to enhance safety further.

However, in 2003 road deaths rose by two per cent on 2002.

This can be put down to a 14 per cent increase in deaths from motorcyclists and a one per cent increase in deaths from car drivers. The Royal Society for the Prevention of Accidents (ROSPA) suggests a six point plan to improve road safety:

1. Train motorcyclists to build experience on smaller machines before moving up to larger ones, particularly true of 30 to 40 year olds.
2. Lower the drink drive limit to 50mg, and undertake random breath tests.
3. Enhance ongoing motorist training.
4. Take action to reduce work-related driving deaths, including company car drivers.
5. Change clocks by one hour to provide lighter evenings in spring and autumn.
6. Promote higher police presence.

9.0 For Further Information on Signatories, and other contacts

Table 9.0 Further Contacts

Signatory Name	Web site
Audi	www.volkswagen-environment.de
Bentley Motors	www.bentleymotors.com
BMW Group	www.bmwgroup.com
Ford Motor Company	www.ford.com
GKN Driveline	www.gknplc.com
Honda UK Manufacturing	www.mfg.honda.co.uk
Jaguar Cars	www.jaguar.com
Land Rover UK	www.landrover.com
LDV	www.ldv.com
MG Rover Group	www.mg-rover.com
Nissan	www.nissan.co.uk and www.nissan-global.com
Perkins Engines	www.perkins.com
PSA Peugeot Citroën Automobiles	www.sustainability.psa-peugeot-citroen.com
Powertrain Limited	www.powertrainltd.com
Rolls-Royce Motor Cars	www.rolls-roycemotorcars.com
SEAT	www.volkswagen-environment.de
Skoda Auto	www.volkswagen-environment.de
Toyota	www.toyota.co.uk and www.toyota.co.jp
Vauxhall Motors	www.vauxhall.co.uk
Volvo Car UK	www.volvocars.co.uk
Volkswagen Group	www.volkswagen-environment.de
Volkswagen Commercial Vehicles	www.volkswagen-environment.de

Look for links to 'about us' or 'company' to be directed to sustainability and environmental information.

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Organisation	Web site
Auto Industry	www.autoindustry.co.uk
Automotive Academy	www.automotiveacademy.co.uk
Department for Food Environment and Rural Affairs (DEFRA)	www.defra.gov.uk/environment/sustainable
Department for Transport (DfT)	www.dft.gov.uk
Department of Trade and Industry (DTI)	www.dti.gov.uk/sustainability/
EC Sustainable Development	www.europa.eu.int/comm/sustainable
Energy Savings Trust	www.transportenergy.org.uk
Environment Agency	www.environment-agency.gov.uk
European Environment Agency	www.eea.eu.int
Foresight Vehicle Programme	www.foresightvehicle.org.uk
LowCVP	www.lowcvp.org.uk
Royal Society for the Prevention of Accidents	www.rospa.org.uk
Sector Skills Council for the Automotive Sector	www.automotive-skills.org.uk
SMMT	www.smmt.co.uk
Sustainable Development Research Network	www.sd-research.org.uk
The Carbon Trust	www.thecarbontrust.co.uk
The Sustainable Development Commission	www.sd-commission.org.uk
The World Business Council for Sustainable Development (WBCSD)	www.wbcsd.org
UK Climate Change Impact Programme	www.ukcip.org.uk
UK Commission for Integrated Transport	www.cfit.gov.uk
UK GOV SITE	www.sustainable-development.gov.uk
UN Division for Sustainable Development	www.un.org/esa/sustdev
United Kingdom Petroleum Industries Association (UKPIA)	www.ukpia.com
Vehicle Certification Agency (VCA)	www.vca.gov.uk



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