



House of Commons
Business, Energy and Industrial
Strategy Committee

The semiconductor industry in the UK: the Government's response

Sixth Report of Session 2022–23

*Report, together with formal minutes relating
to the report*

*Ordered by the House of Commons
to be printed 31 January 2023*

Business, Energy and Industrial Strategy Committee

The Business, Energy and Industrial Strategy Committee is appointed by the House of Commons to examine the expenditure, administration and policy of the Department for Business, Energy and Industrial Strategy.

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The Committee is one of the departmental select committees, the powers of which are set out in House of Commons Standing Orders, principally in SO No 152. These are available on the internet via www.parliament.uk.

Publication

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Committee staff

The current staff of the Committee are Matthew Chappell (Committee Operations Manager), Kenneth Fox (Clerk), Catherine Kisanji (Committee Specialist), Catherine Meredith (Second Clerk), Ashleigh Morris (Senior Committee Specialist), Lewis Pickett (Committee specialist), Delfina Raka (Committee Support Apprentice), Tim West (Senior Media Officer), Louise Whitley (Senior Committee Specialist) and Sue Wrightman (Committee Operations Officer).

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Report

1. The Committee published its Fifth Report of the 2022–23 Session, *The semiconductor industry in the UK*, on 28 November 2022.¹ The Government sent a response on 24 January 2023: that response is published as an Appendix to this Report.

2. In the first sentence of the response, the Government claims to be providing a “full response to the recommendations” in the Committee’s Report. While we welcome the appreciative and positive tone of the response, we were expecting and hoping for something more substantive.

3. The main reason for this is that the Government has yet to publish its Semiconductor Strategy which it says, in its answer to Committee recommendations 9 to 14, “will address the issues and recommendations identified by the Committee”.² These recommendations were the essence of the Report: they covered possible avenues for the development of the semiconductor industry; proposals for analysis of the industry by the Government; approaches to funding, recognising the difficult fiscal climate; and skills supply. The response addresses none of these recommendations in any detail.

4. ***We therefore request that the Government supplies us with a further response once the Strategy has been published. That response should contain:***

- ***A full response to Recommendations 9 to 14, drawing on the Strategy as appropriate;***
- ***A direct response to Recommendation 2, which invited Ministers to consider whether closer working between the UK and allies in the EU and US could be effectively delivered by requesting that the UK be invited to take part in relevant parts of the EU-US Trade and Technology Council; and***
- ***A further response to Recommendation 4, with an update on progress made in ensuring a successful transfer of the Nexperia site in Newport to a new owner. We acknowledge the difficulty for the Government in providing a fuller reply just now.***

5. ***We also take this opportunity to reiterate our view that the Semiconductor Strategy—already two years in preparation—needs to be published urgently. The delay is difficult to understand, and no reasons have been given publicly. As we observed in our earlier report, the industry has waited for the strategy and will base crucial decisions upon it. Further delay risks inhibiting the development of the semiconductor industry in the UK.***

1 [The semiconductor industry in the UK](#), Fifth Report of the Committee, Session 2022–23

2 Government response, final sentence

Appendix: DCMS response to the Business, Energy and Industrial Strategy Committee report on 'The semiconductor industry in the UK'

Introduction

The Government welcomes the BEIS Select Committee's review of the semiconductor industry in the UK, and attach a full response to the recommendations. The Government agrees fully on the importance of the semiconductor industry. In response to increased global competition and geopolitical tensions, there is a need for timely, coherent and decisive action to be taken across the market.

Semiconductors underpin the digital economy. They are the hardware that control almost every electronic device on the planet; there are tens in every mobile phone, ventilator or boiler and thousands in every car, power station or defence system. The UK's semiconductor industry makes up a vibrant part of the UK's broader innovation landscape, and is key to Government's ambitions as a science and technology superpower. It is innovation in semiconductors that has ignited the digital revolution and continued innovation in semiconductors that will enable us to make breakthroughs in quantum, 6G and AI. Semiconductors are also accelerating our ability to achieve net zero through facilitating technologies such as electric vehicles.

Over recent years the sector has become critically under pressure, as market distortions and geopolitical pressures around technology grow alongside the world's demand for chips. These factors have led to a renewed spate of investments around the world, as countries compete for influence and control over critical semiconductor technologies.

Semiconductor supply chains are inherently global, and the UK cannot and should not aim to meet our semiconductor needs domestically. Instead we should capitalise on where the UK has a genuine world-leading edge, including in R&D, design and compound semiconductors. As your report highlights, we already have clusters of expertise around the UK, including in Cambridge, Southampton, Durham, Scotland, Northern Ireland, South Wales and Bristol.

DCMS has been leading a review of the sector and the development of a UK semiconductor strategy to improve the resilience and security of UK supply chains and generate innovation-led economic growth, which we intend to publish as soon as possible. This strategy will focus on three objectives:

- Grow the UK sector—building on our existing strengths in compound semiconductors, design and R&D through targeted measures to improve skills and financing for the semiconductor sector, creating high paying jobs throughout the UK.
- Safeguarding the UK against supply chain disruption—using a strengthened UK sector to improve the resilience of global supply chains—including those

critical to our national security—by working collaboratively with industry and international partners, including through the Japanese G7 Presidency work on supply chain resilience.

- Securing the UK against the security risks associated with semiconductor technologies—we will use the National Security Investment Act, alongside other protective Government levers, to protect our industry from emerging challenges, including those surrounding state threats, and the cyber-security of semiconductors used across the UK.

As we look towards the publication of this strategy, we look forward to ongoing constructive engagement with the Select Committee on this and other matters.

Recommendations and responses

1. *The UK is an important part of global semiconductor supply chains, but it is reliant upon other countries. The UK alone will not have an end-to-end supply chain for semiconductors, but it has tradeable strengths. Government should work more closely with allies in the EU and US, and elsewhere, to safeguard security of supply, both of finished products and of the materials needed for production in the UK. Government should at the same time be working to represent the UK's expertise and to entrench and expand the UK's role in global semiconductor supply chains.* (Paragraph 52)

The Government recognises that semiconductor supply chains are inherently global in nature. No single country can establish end-to-end supply for the chips they need. It will therefore remain vital that the UK works closely with our international partners in order to guarantee and safeguard the security of our chip supply, as a central pillar of the Government's approach to the sector.

Capitalising on global investments into the sector, the Government is already in initial talks with like-minded nations on the future of the global semiconductor market, including the US, Japan, and the Republic of Korea. The Government is considering where opportunities may exist to cooperate with other Governments directly, including through multilateral fora, in order to improve the diversity and transparency of supply across the global market, and ensure that UK businesses can access the chips (and relevant dependent products) they need.

In order to ensure that the UK is able to contribute significantly to these international discussions, it will be vital that we remain a key part of the global semiconductor value chain. The Government's approach to the sector will need to capitalise on the UK's existing strengths in semiconductor chip design (and its associated intellectual property), and foster new ones, in order to secure our position.

2. *We ask Ministers to consider whether the above recommendation, on closer working between the UK and allies in the EU and US, can be effectively delivered by requesting that the UK be invited to take part in relevant parts of the EU-US Trade and Technology Council. We further ask Ministers to set out Government's position on whether a new multilateral organisation for industrial collaboration between allied democratic countries is required and, if not, which existing multilateral organisation provides the opportunity for this important work to be undertaken.* (Paragraph 53)

Recognising that chip supply chains are inherently global in nature, the Government agrees that working closely with like-minded countries must be central to the UK's ambitions to address risks across the global semiconductor value chain. As our closest trading partners, the United States of America and the European Union will be central to this cooperation.

We are already in the process of exploring opportunities to join up our approach internationally. Following the UK's 2021 G7 Presidency, where a panel of member state representatives was brought together to consider issues relating to economic security, the Government is working with the Organisation for Economic Co-operation and Development to consider how challenges to semiconductor supply chains threaten the economies of member states, and the need for a joint approach in response to these threats.

3. The exercise of controls under the National Security and Investment Act is still at an early stage. We note reservations about the speed of some assessments under the Act and under the export control process, and we will be conducting scrutiny of how powers under the National Security and Investment Act are being used via our National Security and Investment Sub-Committee. Nevertheless, it is our view that the overall purpose of the Act in monitoring acquisitions with a view to safeguarding national security is sound. We believe that it has the potential to help meet concerns about hostile access to intellectual property, knowledge and expertise within the semiconductor industry, and such powers should be used to avoid this. (Paragraph 66)

The Government agrees on the vital importance of protecting the UK's semiconductor industry from external national security threats, and the need to ensure that the use of export and investment controls is clear and easy to understand for businesses. Foreign investment is vital to the UK's domestic semiconductor sector, and as an open economy, the UK welcomes foreign trade and investment from around the world, where that trade and investment supports UK growth and jobs.

Semiconductor technologies are vital to the UK's national security and defence, and some foreign investments may therefore present a national security threat, whether deliberate or otherwise. The UK will not accept investments which compromise our national security.

To manage these risks, the UK has a number of tools at its disposal, and has been working to modernise and strengthen our national security investment and export screening powers. These updates include the strategic export controls regime, which the Government strengthened through the enhanced military-end user controls introduced in May 2022, and the National Security and Investment Act 2021 which commenced on 4 January 2022. As with all measures, the Government is keeping the impact of these changes under regular review, and will continue to strengthen and streamline our protective powers where required to secure the UK against a constantly evolving threat picture whilst maintaining a free and open economy.

4. We will further consider the Nexperia case, via the National Security and Investment Sub-Committee, once the period for appeal has expired. In the meantime, the Department should work proactively to ensure a successful transfer of the Newport site to a new owner. Ministers should update the Committee on progress made. (Paragraph 67)

The Secretary of State for BEIS has issued a Final Order on the takeover of the Newport Wafer Fab by Nexperia, which stipulates the acquisition constitutes a trigger event under the NSI Act. The order has the effect of requiring Nexperia to sell at least 86% of Newport Wafer Fab to prevent, remedy, or mitigate the national security risks. The Secretary of State considers that the Final Order is necessary and proportionate to mitigate the risk to national security.

The Secretary of State considers that a risk to national security from this acquisition relates to the technology and know-how that could result from a potential reintroduction of compound semiconductor activities at the Newport site, and the potential for those activities to undermine UK capabilities. The location of the site could facilitate access to technological expertise and know-how in the South Wales Cluster, and the links between the site and the Cluster may prevent the Cluster being engaged in future projects relevant to national security.

The Government does not routinely comment on individual acquisitions. As the company Nexperia has publicly indicated that it may launch judicial review proceedings against the Government on this decision, we cannot provide any further update until this has been completed, to avoid impacting the results of this review, or the commercial process.

5. *Semiconductors play a hidden but highly significant role in many parts of the UK's critical national infrastructure. We request that Government sets out which elements of the semiconductor supply chain constitute critical national infrastructure.* (Paragraph 70)

The Government recognises the significant role that semiconductor components play across the UK's critical national infrastructure. Ensuring the security of supply for these components must remain a priority within the UK's efforts to improve semiconductor resilience. We are already actively considering risk across the UK's critical sectors, and the forthcoming UK semiconductor strategy will set out plans to assess and action emergent supply chain threats.

The UK already has a strong regulatory framework through which to protect the supply chain security of our critical national infrastructure. As part of the Government's National Cyber Security Strategy, the Network and Information Systems (NIS) Regulations 2018 provide legal measures to boost the overall level of physical resilience and supply chain security for network and information systems that are critical for the provision of digital services (online marketplaces, online search engines, cloud computing services) and essential services (transport, energy, water, health, and digital infrastructure services). These regulations were reviewed in May 2020, and the Government is in the process of considering amendments to the NIS Regulations in order to implement many of the recommendations of this review.

Role of Government

6. *We recognise that many Government departments have an interest in the semiconductor industry, and that these interests may overlap. But, in our view, the value of semiconductors to so many sectors of the UK economy and to UK national infrastructure, combined with the national security necessity of safeguarding semiconductor supply, make it essential that a single Government department takes*

responsibility for nurturing the semiconductor industry in the UK and for security of supplies. We believe that that department should be BEIS, because of its overarching responsibility for industrial strategy, business support, engagement with industry and policy on research funding, and because of its role in protecting UK industrial assets from undue control by overseas entities. (Paragraph 79)

There is a need for clear and transparent Government leadership on semiconductor technologies, given their importance both as a UK industry, and as an underpinning technology to the world's wider digital economy.

Semiconductor chips are fundamental to the UK's digital and communications infrastructure. As the department for digital policy, DCMS is also responsible for the delivery of enablers to digital, including our semiconductor and telecommunications sectors. As set out in the Government's Innovation Strategy 2022, digital infrastructure is a key enabler to innovation across the UK. Digital services and networks underpin the UK's ambition to be a world leading science, technology and cyber power, allowing industry to grow and innovate. DCMS's work on semiconductors is complementary to the department's technology priorities, which reflect our ambition to deploy tech to build back better, safer and stronger from COVID, and shape a new golden age for tech in the UK. DCMS takes policy leadership for the Government across 5 of 17 the sensitive sectors of the economy detailed under the National Security and Investment Act, and leads on three out of five priority technologies for the National Science and Technology Council.

As with all policy areas, there are cross cutting links for semiconductors (and their supply chains) across Government. DCMS will continue to work closely across Government, including with BEIS and DIT. We will ensure that all aspects of the UK's policy on industrial strategy, research and international supply chain cooperation, are joined up and coherent.

7. While it is for those in the semiconductor industry to decide how to champion its causes, we believe that there is scope for the sector to play its part in improving the clarity of communication between the industry and Government, for instance through a collective voice for the sector. (Paragraph 81)

The Government agrees that the UK's approach to the global semiconductor sector must be industry-led if it is to succeed, supporting the market and championing sector representatives. The UK semiconductor industry, and the UK sectors reliant on a regular supply of products that require semiconductor components, will need to play a key role in the development and implementation of any semiconductor strategy. This will include identifying opportunities for the UK, and any risks emerging within global supply chains.

The UK has a vibrant mix of innovation institutions that are already playing a vital role in bringing together our semiconductor ecosystem, including our world-class universities; Catapults (in particular the Compound Semiconductor Catapult); and Public Sector Research Establishments (including the Science and Technology Facilities Council). There are also a number of private sector communities, such as those run through Techworks (the Technology Network for Embedded Systems, the National Microelectronics Institute, and Power Electronics UK), that strive to provide a voice for UK semiconductor industry stakeholders.

However, we also recognise that more needs to be done to establish and encourage clear communication and cooperation between industry and Government, and to bring together coherent leadership for the sector. Through the development of the upcoming UK semiconductor strategy, DCMS has engaged extensively with stakeholders across the semiconductor sector and dependent industries. We are exploring how we can look to industry leadership to help guide the Government's approach to the semiconductor sector moving forward. We have recently published a public invitation to tender for a feasibility study into the need for a set of new semiconductor infrastructure capabilities within the UK. This includes a strategic coordination function that would provide institutional leadership for the UK semiconductor sector's academic and innovation ecosystem—envisioned as a public-private partnership with industry.

8. *Government was correct in its decision to instigate a review of its approach to the semiconductor sector and in heralding a new strategy. The industry has waited for the strategy and will base crucial decisions upon it. Government should lose no more time and should publish its Semiconductor Strategy immediately.* (Paragraph 85)

The Government agrees on the importance of the publication of a new UK Semiconductor Strategy that sets out a clear, long-term vision for the UK's position in the sector out to industry, and the rest of the world. The Government also recognises that this strategy will be used to inform important decision making across the private sector and academia, and the UK's cooperation with international partners.

This is why we are aiming to publish the forthcoming UK semiconductor strategy as soon as possible. The strategy has been developed in close collaboration with industry and international partners. DCMS intends for its publication to be the starting point for clear and continued cooperation between the Government and industry in the sector, as we look to address systemic challenges and unlock new opportunities over the next 20 years.

9. *We recommend that the forthcoming Semiconductor Strategy should include:*

- ***An analysis of the semiconductor production and supply chain, recognising different characteristics for different subsectors of the industry, and areas of strength and weakness;***
- ***A heatmap, showing where different semiconductor industries and niches are located within the UK, and how they are positioned in relation to the supply of relevant skills, equipment, research capability, and in relation to other factors valued by firms in those industries; and***
- ***An account of which industries in the UK and which key products are dependent upon a secure supply of semiconductors at reasonable cost.***
- ***In addition, we recommend that the government produces a risk and resilience strategy for the semiconductor industry alongside its Semiconductor Strategy, as a matter of urgency.*** (Paragraph 91)

10. *We recommend that Government's Semiconductor Strategy consider scope for development of the UK semiconductor industry in the following fields:*

- *Intellectual property and design;*
- *Supporting the design chain for leading edge node chips;*
- *Matching UK manufacturing capability to UK design capability;*
- *Developing manufacturing processes for silicon semiconductors;*
- *Development of existing strengths in compound and advanced material semiconductors, to meet demand in emerging markets; Facilitating the construction of new fabs, including consideration of an open access fab in the South Wales cluster. (Paragraph 94)*

11. *It is not clear to us that the support currently offered by the government is at anything like the scale which is needed to make a real difference, or in line with a clear strategy from Ministers. (Paragraph 117)*

12. *The government must not overlook the semiconductor industry. Whilst we recognise the difficult fiscal picture in the UK, we call on Ministers to set up a new sector deal as the vehicle to work with industry to agree UK priorities and the best use of any public funds or support. This could be via additional funding or guarantees made available via the Compound Semiconductor Applications Catapult, Innovate UK or the British Business Bank. The British Business Bank should lead on scale-up investment and capital investment from public and private sources, whilst the Catapult should continue to bridge the gap between research and industry, to support start-ups. (Paragraph 118)*

13. *The UK is missing out on inward investment at a crucial time for the semiconductor industry, and we are competing with other countries. The government should secure partnerships via the US CHIPS Act, and engage with Taiwanese and other major companies to secure significant inward investment in the UK. (Paragraph 121)*

14. *We welcome the steps being taken by the government to encourage talent from overseas, although it has yet to be seen whether they will help to solve the challenges faced by the semiconductor industry in recruiting and retaining workers with the necessary skills. The forthcoming Semiconductor Strategy should not shirk this issue and should set out how the government plans to meet the very specific skills needs of the UK semiconductor industry. (Paragraph 131)*

The Government welcomes the recommendations of the Committee for the upcoming Semiconductor Strategy. The Government recognises that, as the UK is part of an inherently global semiconductor market, our approach to ensuring the resilience of the UK's supply chains will need to combine domestic and internationally-focused efforts. This comprehensive approach will be a fundamental principle of the Semiconductor Strategy. This will include seeking aligned approaches with like-minded Governments to address shared global challenges in the sector.

This will rely on—and support—a strengthened UK semiconductor sector. In seizing the opportunities presented by the UK ecosystem the Government will look to build on existing industry strengths, capitalising on our existing strengths in areas such as

semiconductor research and development, chip design and associated intellectual property, and compound semiconductors. The Government will also consider how to improve key enablers of success for UK entities, including skills availability and diversity. These efforts will be further catalysed by strengthening relationships with key partners in the sector, further recognising the interconnectedness between the UK and global sector.

The Government is committed to publishing the Semiconductor Strategy as soon as possible, which will address the issues and recommendations identified by the Committee.

Formal minutes

Tuesday 31 January 2023

Members present:

Darren Jones, in the Chair

Bim Afolami

Alan Brown

Ruth Edwards

Ian Lavery

Andy McDonald

Mark Pawsey

Alexander Stafford

Draft Report (*The semiconductor industry in the UK: the Government's response*), proposed by the Chair, brought up and read.

Ordered, That the draft Report be read a second time, paragraph by paragraph.

Paragraphs 1 to 5 read and agreed to.

Resolved, That the Report be the Sixth Report of the Committee to the House.

Ordered, That the Government's response to the Committee's Fifth Report be appended to the Report.

Ordered, That the Chair make the Report to the House.

Ordered, That embargoed copies of the Report be made available, in accordance with the provisions of Standing Order No. 134.

[Adjourned till Tuesday 7 February at 9:45am]

List of Reports from the Committee during the current Parliament

All publications from the Committee are available on the [publications page](#) of the Committee's website.

Session 2022–23

Number	Title	Reference
1st	Pre-appointment hearing with the Government's preferred candidate for Chair of the Competition and Markets Authority	HC 523
2nd	Draft Legislative Reform (Provision of Information etc. relating to disabilities) Order 2022	HC 522
3rd	Energy pricing and the future of the Energy Market	HC 236
4th	Post-pandemic economic growth: state aid and post-Brexit competition policy	HC 759
5th	The Semiconductor Industry in the UK	HC 291
1st Special	Decarbonising heat in homes: Government Response to the Committee's Seventh Report of 2021–22	HC 208
2nd Special	Energy pricing and the future of the energy market: Responses to the Committee's Third Report of Session 2022–23	HC 761

Session 2021–22

Number	Title	Reference
1st	Post-pandemic economic growth: Industrial policy in the UK	HC 385
2nd	Climate Assembly UK: where are we now?	HC 546
3rd	Post-pandemic economic growth: Levelling up	HC 566
4th	Liberty Steel and the future of the UK steel Industry	HC 821
5th	Pre-legislative scrutiny: draft Downstream Oil Resilience Bill	HC 820
6th	Pre-appointment hearing of the Government's preferred candidate for Chair of the Financial Reporting Council	HC 1079
7th	Decarbonising heat in homes	HC 1038
8th	Post Office and Horizon Compensation: interim report	HC 1129
9th	Revised (Draft) National Policy Statement for Energy	HC 1151
10th	Draft Legislative Reform (Renewal of National Radio Multiplex Licences) Order 2022	HC 1199
1st Special	Decarbonising heat in homes: Government Response to the Committee's Seventh Report of 2021–22	HC 208

Number	Title	Reference
2nd Special	Net Zero and UN Climate Summits: Scrutiny of Preparations for COP26—interim report: Government Response to the Committee's Third Report of Session 2019–21	HC 120
3rd Special	Uyghur forced labour in Xinjiang and UK value chains: Government Response to the Committee's Fifth Report of Session 2019–21	HC 241
4th Special	Mineworkers' Pension Scheme: Government Response to the Committee's Sixth Report of Session 2019–21	HC 386
5th Special	Climate Assembly UK: where are we now?: Government Response to the Committee's Second Report	HC 680
6th Special	Post-pandemic economic growth: Industrial policy in the UK: Government Response to the Committee's First Report	HC 71
7th Special	Post-pandemic economic growth: Levelling up: Government Response to the Committee's Third Report	HC 924
8th Special	Liberty Steel and the Future of the UK Steel Industry: Government Response to the Committee's Fourth Report	HC 1123
9th Special	Pre-legislative scrutiny: draft Downstream Oil Resilience Bill. Government Response to the Committee's Fifth Report	HC 1177
10th Special	Post Office and Horizon – Compensation: interim report. Government Response to the Committee's Eighth Report	HC 1267

Session 2019–21

Number	Title	Reference
1st	My BEIS inquiry: proposals from the public	HC 612
2nd	The impact of Coronavirus on businesses and workers: interim pre-Budget report	HC 1264
3rd	Net Zero and UN Climate Summits: Scrutiny of Preparations for COP26 – interim report	HC 1265
4th	Pre-appointment hearing with the Government's preferred candidate for the Chair of the Regulatory Policy Committee	HC 1271
5th	Uyghur forced labour in Xinjiang and UK value chains	HC 1272
6th	Mineworkers' Pension Scheme	HC 1346
1st Special	Automation and the future of work: Government Response to the Committee's Twenty-third Report of Session 2017–19	HC 240
2nd Special	Future of the Post Office Network: Government Response to the Committee's First Report of Session 2019	HC 382
3rd Special	Safety of Electrical Goods in the UK: follow-up: Government Response to the Committee's second report of Session 2019	HC 494
4th Special	COP26: Principles and priorities—a POST survey of expert views	HC 1000