

Migrant Labour in the New Anglia Local Enterprise Partnership Area

Section 1 – Purpose and Uses

Commissioned by the East of England Strategic Migration Partnership in February 2012, this report aims to assist colleges, universities, the local enterprise partnership (LEP) and others to:

- Understand the scale and types of both EU and Non-European Economic Area (EEA) migrants securing employment in the locality;
- Identify industries and occupations likely to be most affected by forthcoming changes in immigration policy;
- Assess the adequacy of existing local learning provision and shape the future curriculum offers in order to meet the needs of an economy with less access to foreign workers from outside the EEA in the future.

The data on economic migrants used in this report is primarily drawn from two sources:

- Data on Non-EEA migrants entering the UK under Certificates of Sponsorship during a 40 month period between November 2008 and February 2012 has been provided by the United Kingdom Border Agency. This data provides details of Certificates of Sponsorship used by companies when recruiting Non-EEA migrant workers. The data provides an insight into both the industries and occupations using migrant labour.
- Data on migrants from the so-called A8 Accession States of the European Union which joined the EU in 2004. This data provides details of A8 nationals granted permits to work in the UK under the Worker Registration Scheme operated by the United Kingdom Border Agency. The data also provides details of industries and occupations in which migrant workers have been employed¹.

It should be noted that the majority of the occupation and industry/sector estimates provided in this report relate to a one year period and therefore reflect the flow of new migrant

workers into the area. The stock of migrant workers in the area will be significantly larger than these estimates as they will reflect an accumulation of migrants over time.

Section 2 – Policy Context

The Coalition Agreement committed the government to introducing an annual limit on the number of Non-EU economic migrants admitted into the UK. The immigration cap for Non-EEA workers for the year from April 2012 is 21,700 - about 6,300 lower than in 2009. Of those, 20,700 are tier two skilled migrants entering graduate occupations with a job offer and sponsorship. The other 1,000 are people allowed in under a new "exceptional talent" route – such as scientists, academics and artists. The former tier one general route - open to highly skilled migrants without a job offer will be closed. However, these limits do not apply to a category of workers who come to the UK in an "intra-company transfer" with their multi-national employer.

The Coalition also asked the Migration Advisory Committee to undertake a full review of jobs and occupations skilled to Level 4 (degree level) and above to inform the Tier 2 shortage occupational list, where there would be a justification to fill roles using labour from outside the European Economic Area. This work was completed in February 2012.

Together these changes in policy will, unless appropriate action is taken, have a significant impact upon areas and industries which have become reliant on Non-EEA migrant labour to bridge key labour and skills shortages.

Section 3 – Economic Summary of the New Anglia LEP area

The New Anglia LEP area is home to a population of around 1.6m people of which approximately 977,900 are of working age. Amongst those of working age, there is a 78.9% economic activity rate, which is 2.7% higher than is seen across the UK. The unemployment rate in the area is 6.6%, which is 1.3% below the national average of 7.9%.

Almost two-thirds (64.6%) of the population of the New Anglia LEP area are qualified to NVQ2 and above, 47.3% of the population are qualified to

¹The Worker Registration Scheme was a temporary measure used between 2004 and April 2011 to monitor incoming workers from eight new member states of the European Union (the so called "A8 countries"). The A8 countries that joined the European Union in 2004 were: the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Slovakia and Slovenia.

NVQ3 and above, and 26.6% of the population of the area are qualified to NVQ4 and above. The proportion of the population possessing qualifications at NVQ3 and above is slightly lower than the national average.

The New Anglia LEP area has a business base of approximately 60,000 companies and is said to contribute £26.4 billion to the UK economy. Nationally recognised strengths of the New Anglia economy are the energy, agriculture and tourism sectors. Tourism alone generates £4 billion each year for the LEP area and is the focus of the Visit East Anglia scheme – a private sector led tourism body that hopes to develop this already strong sector. A Norfolk and Suffolk Rural Economy Board has also been established to look at the potential for jobs growth in the food, drink and agriculture sector. Norfolk is home to a number of famous and nationally important agricultural companies such as the Bernard Matthews Farms.

Section 4 – Migrant Worker Volumes

Between November 2008 and February 2012, approximately 3,639 Non-EEA migrant workers were employed in the New Anglia LEP area. This represents an annual average of 1092 migrants and equates to approximately 0.14% of the economically active population in the area.

Between April 2010 and March 2011, approximately 4,755 A8 EU migrant workers were employed in companies based across the New Anglia LEP area. As a percentage of the workforce, these A8 EU migrant workers represent approximately 0.6% of the total economically active population in the area.

Therefore, Non-EEA and A8 EU migrant workers represent 0.74% of the economically active population. In comparison with other LEPs in the greater East region², New Anglia has the third highest economic activity rate of Non-EEA and A8 EU migrants. Across the East of England region as a whole, Non-EEA and A8 EU migrant workers represent 0.66% of the economically active population.

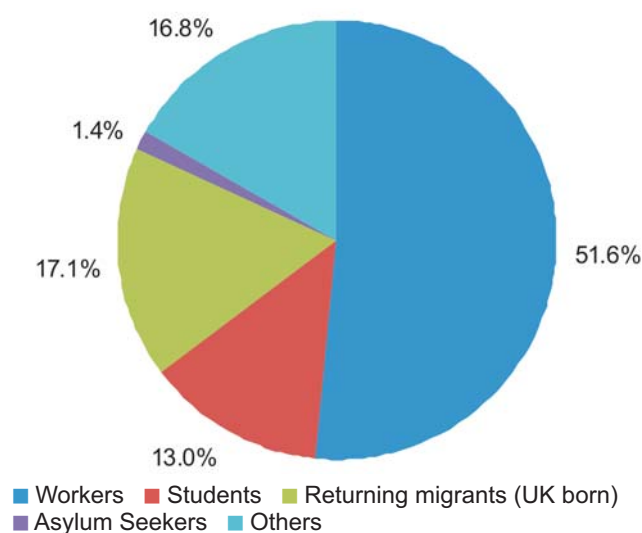
Whilst the two data sources used to estimate Non-EEA and A8 EU migrant volumes provide a useful picture of inward migration into the area, they can only provide a partial insight as they do

not capture data on all migrants entering the area from other EU nations not covered by the Worker Registration Scheme requirement or those arriving as asylum seekers (who are then given leave to remain) or UK nationals returning home after a period overseas.

Data constructed by the Office of National Statistics using administrative sources, such as registrations for National Insurance Numbers, higher education student enrolments and registrations at GP surgeries provides perhaps the most comprehensive estimate of the total inward migration to the area. Using this source an estimated 43,754 migrants of all ages entered the New Anglia area between mid-2006 and mid-2010. This equates to an average of 10,939 migrants of all ages entering the area every year.

As can be seen in Chart 1 only approximately half of the 10,939 estimated annual migrants come to work in the area, with large proportions also studying or returning to the UK from periods abroad.

Chart 1: Estimated Composition of Migrants Entering the New Anglia LEP Area (% of all migrants)



Source: Immigration Estimates to Local Authority 2006 - 2010, Office of National Statistics.

However, some Local Authorities within the New Anglia LEP area have significant differences in their migrant composition than is shown in Chart 1. Districts that have a much higher than average proportion of migrant workers are King's Lynn &

²Greater East region refers to those local authorities included in LEP areas with some presence in the East of England statistical region.

West Norfolk (70.7% workers), Ipswich (68.4% workers), Great Yarmouth (64.0% workers), Breckland (62.5% workers) and North Norfolk (62.0% workers). These districts typically saw much lower levels of other categories of migrants, especially returning migrants.

The 13.0% student composition of the New Anglia LEP area totals 5,698 migrants (over the periods mid 2006 – mid 2010). 83.1% (4,733) of these students reside in the Norwich District – composing 43.5% of the Norwich migrant population. All other Districts in the New Anglia LEP area are composed of less than 7% students. The average student composition of the remaining 13 Districts in the New Anglia LEP area is only 3.0%. To balance out its high proportion of students, Norwich has the lowest proportion of migrant workers in the New Anglia LEP area (29.7%).

Section 5 – Occupational Patterns

Across the New Anglia LEP area, Non-EEA migrant workers have been employed in approximately 115 different SOC code areas since November 2008. A8 EU migrant workers have, in comparison, been employed in just over 70 different SOC³ code areas.

While migrants have been employed in a wide range of occupations, a much smaller number of occupations account for the vast majority of all migrant roles (circa 85% for Non-EEA and almost 100% A8 migrants).

Table 1 provides details of the top 15 occupations filled by both Non-EEA and A8 migrant workers.

Table 1

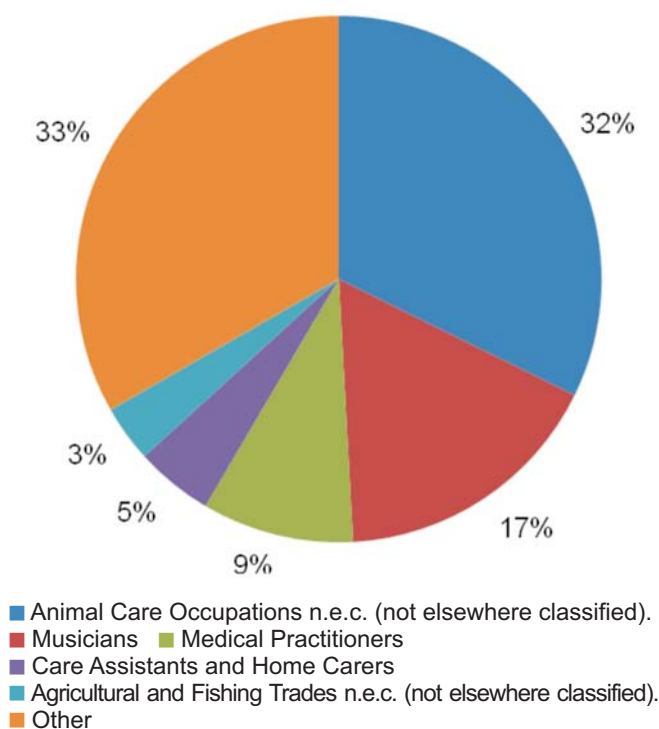
Most popular occupations currently filled by Non-EEA and A8 EU migrants

Rank	Non-EEA Occupations	No. of Migrants	Rank	A8 EU Occupations	No. of Migrants
1	Animal Care Occupations n.e.c. (not elsewhere classified).	1175	1	Process Operative (Other Factory Worker)	3047
2	Musicians	613	2	Farm Worker/Farm Hand	607
3	Medical Practitioners	339	3	Warehouse Operative	243
4	Care Assistants & Home Carers	174	4	Cleaner/Domestic Staff	240
5	Agricultural & Fishing Trades n.e.c. (not elsewhere classified)	127	5	Crop Harvester	161
6	Nurses	122	6	Kitchen & Catering Assistants	126
7	Researchers, Scientific	121	7	Packer	90
8	Chefs/Cooks	117	8	Food Processing Operative (Meat)	69
9	Teacher, Secondary Education	80	9	Care Assistants & Home Carers	61
10	Actors/entertainers	47	10	Chef/Other	45
11	Energy Plant Operatives	46	11	Waiter, Waitress	44
12	Teacher/Lecturer in Higher Education	37	12	Labourer, Building	42
13	Engineers, mechanical	35	13	Agricultural Machinery Operator	34
14	Metal Working Production & Maintenance Fitters	35	14	Fruit Picker (Farming)	34
15	Researchers n.e.c. (not elsewhere classified)	34	15	Food Processing Operative (Fruit/Veg)	33

Sources: Worker Registration Scheme, DWP and Certificates of Sponsorship, UKBA

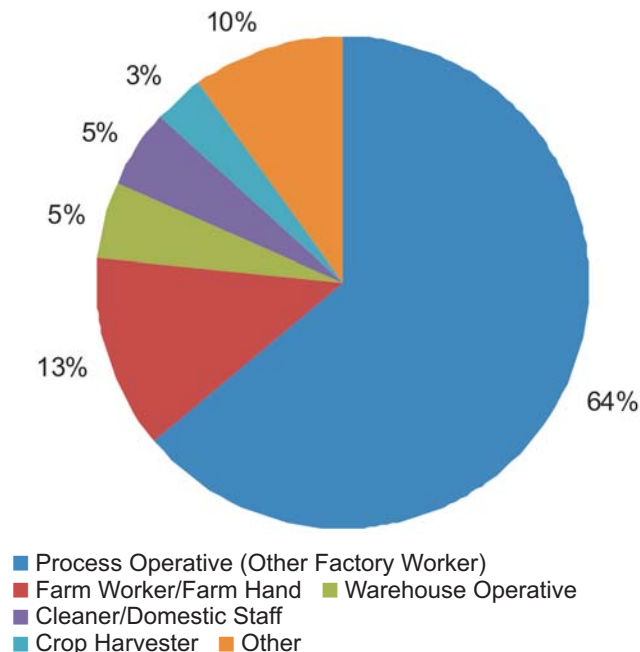
Animal Care Occupations n.e.c. is the largest single occupational group of Non-EEA migrant workers recruited in the area, employing 32% of all Non-EEA migrant workers in the LEP area. A further 17% of all Non-EEA migrant workers are employed as Musicians, 9% as Medical Practitioners, 5% as Care Assistants/Home Carers and 3% in Agricultural and Fishing Trades n.e.c. Chart 2 below demonstrates the proportion of Non-EEA migrants in the top 5 most popular occupations.

Chart 2: Top 5 Occupations Currently Filled by Non-EEA Migrant Workers



Process Operative (Other Factory Worker) is the occupation most commonly filled by A8 EU migrants, with over half (64%) of migrant workers undertaking these roles between April 2010 to March 2011. A considerable number of migrants also took roles as Farm Worker/Farm Hand (13%), Warehouse Operatives (5%) and Cleaner/Domestic Staff (5%). Only 10% of A8 EU migrant workers were employed in other roles, as shown in Chart 3 to the right.

Chart 3: Top 5 Occupations Currently Filled by A8 EU Migrant Workers



The data presented in Table 1 clearly shows the significant difference in the occupational make-up of migrants from Non-EEA nations and those from A8 EU countries. Non-EEA tend to be employed in higher order occupations requiring high levels of skills and qualifications. A8 EU nations are concentrated in occupations towards the lower half of the occupational spectrum requiring only low or intermediate level skills.

Section 6 – Sectoral Patterns

Migrant workers have been employed by companies working in a very wide range of industries operating in the area, from civil engineering to publishing and from food and drink manufacturing to IT services. However, as with occupations, a much smaller list of industries accounts for the vast majority of both Non-EEA and A8 EU migrant workers.

The 10 most common Non-EEA migrant worker industries account for 91% (circa 3,309 employees) of all Non-EEA migrants employed in the East Anglia LEP area between November 2008 and February 2012. The 10 most common industries employing A8 EU nationals accounted for almost all 4,755 employees of all A8 workers employed in the LEP area during the one year period under analysis (April 2010 – March 2011).

Table 2

The top 10 industries using Non-EEA and A8 EU migrants

Rank	Non-EEA Industries	% of Migrants	Rank	A8 EU Industries	% of Migrants
1	Sports Activities & Amusement & Recreation Activities	47%	1	Administration, Business & Managerial Services	68%
2	Human Health Activities	12%	2	Agriculture Activities	17%
3	Education	8%	3	Hospitality & Catering	5%
4	Creative, Arts & Entertainment Activities	8%	4	SBS Sectors	3%
5	Residential Care Activities	5%	5	Manufacturing	2%
6	Food & Beverage Service Activities	3%	6	Health & Medical Services	2%
7	Other Professional, Scientific & Technical Activities	2%	7	Entertainment & Leisure Services	1%
8	Crop & Animal Production, Hunting & Related Service Activities	2%	8	Retail & Related Services	1%
9	Scientific Research & Development	2%	9	Education & Cultural Activities	1%
10	Human Health & Social Work Activities	2%	10	Transport	1%

Sources: Worker Registration Scheme, DWP and Certificates of Sponsorship, UKBA

The data suggests that the largest employing industry of Non-EEA migrant workers is the Sports Activities and Amusement and Recreation Activities sector. This covers a range of specific functions including the operation of sports facilities and horse racing activities.

The Human Health Activities sector accounts for 12% of all Non-EEA migrant workers (circa 434 workers), followed by the Education industry with 8% of all Non-EEA migrant workers (circa 283 workers). Human Health Activities refers to a range of nursing work located in hospitals or nursing homes. The Education industry refers to all levels of learning from primary education through to university level teaching. Other forms of education, such as driving instruction and sports education are also covered by this industry code.

The data suggests that the largest employing industry of A8 EU migrant workers in the LEP area is Administration, Business and Managerial Services. However, it should be noted that high volumes of migrant workers choose to use the services of recruitment agencies when finding work and it is likely that, in a number of cases, these recruitment companies have wrongly been identified as the direct employers of migrant workers using them rather than the actual industry in which the migrant worker is working.

The Agricultural Activities sector accounted for a significant number of migrant workers with 17% of all A8 EU workers operating in that sector. Hospitality and Catering was also an important sector with around 5% of workers employed within it.

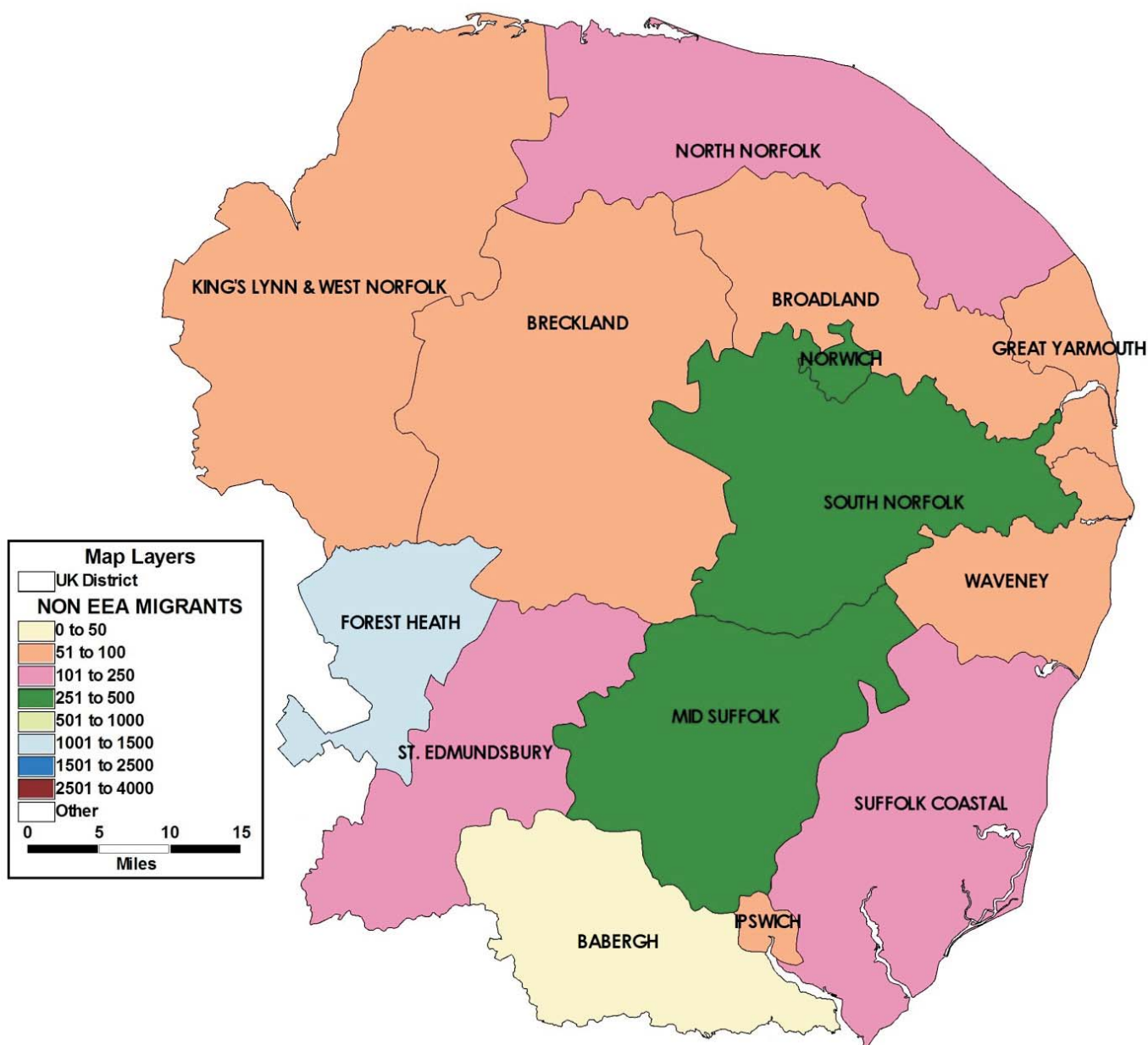
Section 7 – Geographic Patterns

Using the postcodes from all companies employing Non-EEA migrant workers and the resident local authority of A8 EU migrant workers, it has been possible to map the distribution of both groups across the New Anglia LEP area.

As can be seen from Map 1, all Local Authorities have witnessed some degree of inward Non-EEA migration. Those with the greatest number of Non-EEA migrant workers are identified as:

Forest Heath (1379), Mid Suffolk (480), Norwich (389), South Norfolk (275) and Suffolk Coastal (185). Babergh has witnessed the lowest levels of Non-EEA migration with 46 Non-EEA migrants during the period November 2008 – March 2012. This was followed by Waveney (52), Breckland (77), King's Lynn & West Norfolk (86) and Ipswich (98).

Map 1: Number of Non-EEA migrant workers by local authority in the New Anglia LEP area

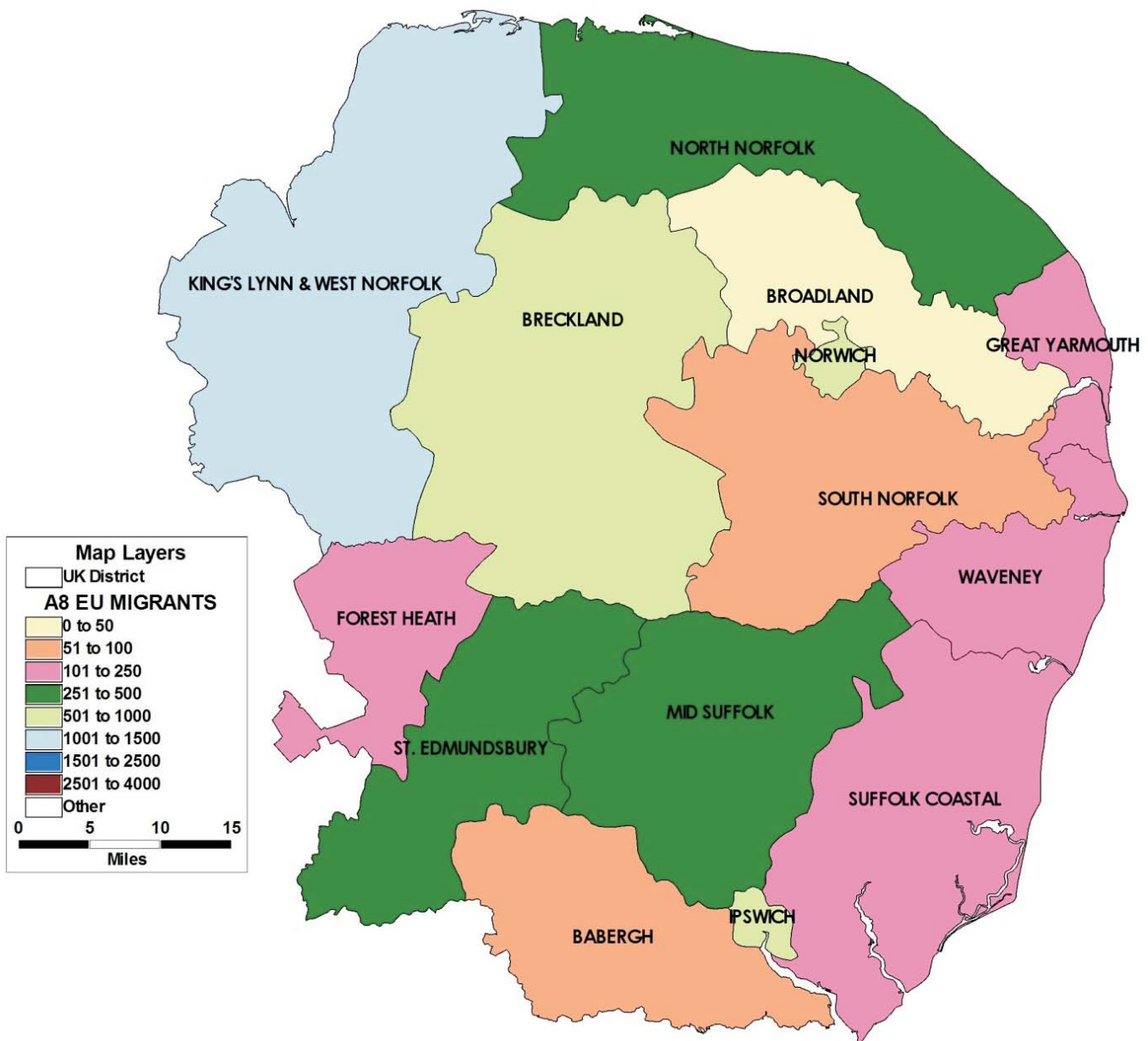


Source: Certificates of Sponsorship, United Kingdom Border Agency

Map 2 displays the distribution of A8 EU migrant workers and reveals that all Local Authorities in the area have witnessed some degree on inward migration. Those with the greatest number of A8 EU migrant workers are identified as: King's Lynn & West Norfolk (1372), Norwich (670), Ipswich (581), Breckland (555) and St. Edmundsbury

(356). The districts with the fewest number of A8 EU migrant workers are Broadland (46), South Norfolk (54), Babergh (83), Great Yarmouth (105) and Waveney (107).

Map 2: Distribution of A8 EU migrant workers by local authority in the New Anglia LEP area



Source: Worker Registration Scheme, United Kingdom Border Agency

Data presented in this section demonstrates a significant divergence in the geographic distribution between the two groups of migrant workers. King's Lynn & West Norfolk, for example, appears to have seen few Non-EEA migrants but is the highest user of A8 EU migrant workers.

Forest Heath, in contrast, has witnessed very low A8 EU migration but is the highest user of Non-EEA migrant workers in the LEP area.

Section 8 – Overall Local Reliance

Using DWP data on the number of unemployment claimants looking for work in different occupations, it is possible to assess the capacity of the local economy to absorb the impact of a reduced number of migrant workers in the future. Table 3 compares the number of migrant workers in each occupation to the number of unemployed people in the New Anglia LEP area looking for work in that occupation.

Table 3 demonstrates that only 2 occupations currently employing large numbers of Non-EEA migrants have high numbers of indigenous workers looking to move into the roles (Care Assistants/Home Carers; and Chefs/Cooks). All other top ten occupations suffer from an under-supply of indigenous workers. The data, therefore, suggests that companies looking to recruit individuals in these occupations may find it difficult to fill any void generated by a reduced supply of Non-EEA migrants in the future.

Table 3 also demonstrates that 7 occupations currently employing high volumes of A8 EU migrants have high numbers of indigenous workers looking to move into these roles, for example, Warehouse Operative; Cleaner/Domestic Staff; and Kitchen and Catering Assistants. This indicates that the local economy could adjust relatively easily to a reduced supply of future A8 EU migrant workers. However, there is no guarantee that the unemployed looking to

Table 3

Comparison of migrant roles and occupations sought by UK nationals

Non-EEA Top 10 Occupations	Ratio of unemployed to migrants	A8 EU Top 10 Occupations	Ratio of unemployed to migrants
Animal Care Occupations n.e.c. (not elsewhere classified).	23.4%	Process Operative (Other Factory Worker)	7.2%
Musicians	3.3%	Farm Worker/Farm Hand	32.1%
Medical Practitioners	0.0%	Warehouse Operative	880.7%
Care Assistants/Home Carers	563.2%	Cleaner/Domestic Staff	533.3%
Agricultural & Fishing Trades n.e.c. (not elsewhere classified)	31.5%	Crop Harvester	21.7%
Nurses	20.5%	Kitchen & Catering Assistants	754.0%
Researchers, Scientific	16.5%	Packer	561.1%
Chefs/Cooks	294.9%	Food Processing Operative (Meat)	529.0%
Teacher, Secondary Education	56.3%	Care Assistants/Home Carers	1606.6%
Actors, entertainers	53.2%	Chef, Other	775.3%

- Under supply of local labour compared to migrant labour supply
- Balance of local labour supply and migrant labour supply
- Over supply of local labour compared to migrant labour supply

Sources: Worker Registration Scheme, UKBA, & JSA Claimants, Sought Occupations. DWP February 2012.

move into these roles have either the skills or work experience to be a success in these roles, and many may require support to achieve them.

In the following three roles, the number of unemployed indigenous workers looking to move into roles falls substantially below the number of migrant workers currently recruited. This data, therefore, suggests the area may find it difficult to fill any void generated by a reduced labour supply in the A8 EU migrant labour:

- Process Operative (Other Factory Worker)
- Farm Worker/Farm Hand
- Crop Harvester

As can be seen, this apparent under-supply of indigenous workers looks likely to particularly

affect the Agriculture and Manufacturing sectors, a trend that was also seen across most LEP areas within the East of England region.

Section 9 – Causes of Hard-to-Fill Vacancies

Using data from the National Employer Skills Survey, it is possible to identify the causes of hard-to-fill vacancies amongst occupations that have historically been filled by migrant workers. By understanding the causes of hard-to-fill vacancies amongst indigenous workers, it may be possible for local partners to better direct resources and effort towards resolving these issues going forward.

Table 4

Ranked causes of hard-to-fill vacancies by occupations of Non-EEA migrants

Rank	Occupation	Causes of Hard-to-Fill Vacancies
1	Animal Care Occupations n.e.c. (not elsewhere classified)	Low number of applicants with the required skills Low number of applicants generally
2	Musicians	Low number of applicants with required attitude/motivation
3	Medical Practitioners	Not enough people interested in doing this type of job Low number of applicants with the required skills
4	Care Assistants & Home Carers	Low number of applicants with the required skills Job entails shift work/unsocial hours
5	Agricultural & Fishing Trades n.e.c. (not elsewhere classified)	Low number of applicants generally Not enough people interested in doing this type of job
6	Nurses	Low number of applicants with the required skills Not enough people interested in doing this type of job
7	Researchers, Scientific	Not enough people interested in doing this type of job Lack of work experience the company demands
8	Chefs/Cooks	Lack of work experience the company demands Job entails shift work/unsocial hours
9	Teacher, Secondary Education	Low number of applicants with the required skills Lack of qualifications the company demands
10	Actors, entertainers	Not enough people interested in doing this type of job Low number of applicants with the required skills

Sources: National Employer Skills Survey 2007, Learning and Skills Council

Table 5 below provides data from the National Employer Skills Survey regarding the causes of hard-to-fill vacancies in relation to the top 10 occupations filled by A8 EU migrants.

Table 5 demonstrates that reasons other than skills, qualifications and work experience account for the majority of hard-to-fill vacancies filled by A8 EU nationals. A lack of interest in available roles is often cited as a common reason for hard-to-fill vacancies.

Tackling these non-skills related causes will clearly be important if UK nationals are going to be persuaded to move into these roles if A8

migrant numbers fall in the future.

Section 10 – Local Training Infrastructure

This section provides a top-level overview of the range of learning provision available in the New Anglia LEP area relevant to the key occupations filled by both Non-EEA and A8 EU migrant workers. FE data related to FE college provision in the academic year 2010/11 and is based on approximation between Sector Subject Areas and those occupations identified as having the most migrant workers currently employed. Data on the HE provision relates to HE providers operating within the New Anglia LEP area and is based on an approximation between occupations and JACs⁴ codes.

Table 5

Ranked causes of hard-to-fill vacancies by occupations of A8 EU migrants

Rank	Occupation	Causes of Hard-to-Fill Vacancies
1	Process Operative (Other Factory Worker)	Not enough people interested in doing this type of work/job Lack of qualifications the company demands
2	Farm Worker/Farm Hand	Poor career progression/lack of progress Not enough people interested in doing this type of work/job
3	Warehouse Operative	Low number of applicants with the required attitude/motivation Not enough people interested in doing this type of work/job
4	Cleaner/Domestic Staff	Low number of applicants with the required skills Low number of applicants generally
5	Crop Harvester	Poor career progression/lack of progress Not enough people interested in doing this type of work/job
6	Kitchen & Catering Assistants	Job entails shift work/unsocial hours Low number of applicants with the required attitude/motivation
7	Packer	Low number of applicants generally
8	Food Processing Operative (Meat)	Not enough people interested in doing this type of job Lack of qualifications the company demands
9	Care Assistants/Home Carers	Low number of applicants with the required skills Job entails shift work/unsociable hours
10	Chef, Other	Low number of applicants with the required skills Not enough people interested in doing this type of job

Sources: National Employer Skills Survey 2007, Learning and Skills Council

Table 6

Local FE & HE provision⁵ by broad occupation

Top 10 Non-EEA Migrant Occupations	Level 2	Level 3	HE	Top 10 A8 EU Migrant Occupations	Level 2	Level 3
Animal Care Occupations n.e.c. (not elsewhere classified)	L	Y	L	Process Operative (Other Factory Worker)	L	L
Musicians	L	Y	L	Farm Worker/Farm Hand	L	L
Medical Practitioners	N/A	L	Y	Warehouse Operative	L	N
Care Assistants/Home Carers	Y	Y	Y	Cleaner/Domestic Staff	Y	L
Agricultural & Fishing Trades n.e.c. (not elsewhere classified)	L	L	L	Crop Harvester	L	L
Nurses	Y	Y	Y	Kitchen & Catering Assistants	Y	L
Researchers, Scientific	L	Y	L	Packer	L	N
Chef/ Cooks	Y	L	N	Food Processing Operative (Meat)	Y	Y
Teacher, Secondary Education	L	L	L	Care Assistants/Home Carers	Y	Y
Actors, entertainers	L	Y	L	Chef, Other	Y	L

Y = Adequate provision N= No provision L = Limited provision

Sources: 2010/11 F05, Individualised Learner Record, Learning & Skills Council & 2010/11 HE Enrolments, Higher Education Statistics Agency

Table 6 shows that in relation to the top 10 roles currently filled by Non-EEA migrants, there appears to be adequate HE provision in 3 of the 10 areas. Only in relation to HE provision relevant to Chefs/Cooks is there no apparent relevant provision. While there is some limited provision in relation to Animal Care, Musician, Agricultural/Fishing, Researcher, Secondary Teacher and Actor trades at HE level.

At FE level there appears to be only limited provision at level 3 for those interested in working in Animal Care, Music, Agricultural/Fishing, Research, Teaching and Acting roles.

Table 6 also provides data on the volume of provision relevant to the 10 roles most commonly filled by A8 EU nationals. The table shows that in almost all areas there is some local FE provision although it is limited in volume. At level 2, only 5

out of 10 roles appear to have adequate levels of local provision.

Section 11 – Issues for Consideration

While small as a percentage of the total labour force, this report has demonstrated that migrant workers appear to be supporting the labour market at both ends of the skills spectrum, filling vacancies where there are genuine skills gaps amongst indigenous workers, as well as semi-skilled and unskilled vacancies which UK workers appear to have little interest in applying for.

Both Non-EEA and A8 EU migrant workers have played important parts in a number of sectors in the local economy, including: Sporting Activities, Health, Manufacturing, Education, Agriculture and Creative Arts.

⁵Level 2 = GCSE equivalent, Level 3 = A-level equivalent, HE = Any degree level programme

Some important local companies have become used to being able to draw in international workers to bolster the domestic workforce and they may well face particular challenges if this source of labour is reduced or eliminated.

While all local authority areas have seen some inward migration over recent years this has not been evenly distributed and some local areas, such as Forest Heath and Mid Suffolk, may face particular shortages as the number of Non-EEA migrant workers reduces. Any future reduction in A8 EU migrants would appear to affect King's Lynn & West Norfolk, Norwich and Ipswich worst of all.

Eight of the top 10 occupations employing non-EEA migrants appear to suffer from low levels of unemployed UK nationals looking for work within these roles. The data suggests that companies looking to recruit individuals in these occupations may find it difficult to fill any void generated by a reduced supply of Non-EEA migrants in the future.

The government's decision to only consider highly skilled migrant workers with degree level qualifications in the future is likely to cause particular issues for those employers which have historically recruited Non-EEA migrant workers as Chefs/cooks and Care Assistants. While there appears to be significant numbers of indigenous

workers looking to work in these roles, there is evidence of both skills and non-skills barriers which have prevented these occupations being filled in the past.

Non-skills related reasons such as "a lack of interest" and "shift working" appear to explain why many employers which now use significant numbers of A8 EU migrants have historically been unable to fill roles from the indigenous population. Tackling these non-skills barriers would seem a clear priority for the future. This is particularly important for those employing Process Operatives who currently employ over 3,000 A8 EU migrants in these roles.

It appears from the top-line analysis of learning provision that there may be a need to increase the number of training places in certain key areas such as: intermediate provision relevant to process manufacturing, agricultural trades and hospitality and catering roles.

Many of the issues faced by the New Anglia LEP area in terms of key occupations and industries affected by the likely reduction in Non-EEA migrant workers are either the same or similar to those faced by neighbouring areas. It may therefore make sense for partners to discuss these issues with neighbours to see whether there are opportunities for collaborative action.

Appendix 1: Indicative Migration Estimates (mid 2006 to mid 2010)

LA Name	Local Authority estimates in England and Wales by broad stream					
	Workers	Students	Returning migrants (UK born)	Asylum Seekers	Others	Total
Norwich	3,237	4,733	869	379	1,667	10,887
Waveney	683	107	468	0	292	1,551
Great Yarmouth	1,722	145	288	8	527	2,691
South Norfolk	581	60	535	0	220	1,397
Broadland	494	44	473	8	192	1,210
Ipswich	4,547	228	404	214	1,250	6,643
Breckland	2,397	117	628	0	693	3,835
St. Edmundsbury	1,115	49	524	0	434	2,121
Forest Heath	1,318	54	608	6	405	2,392
Suffolk Coastal	1,298	51	759	2	393	2,503
Mid Suffolk	407	21	497	0	157	1,082
North Norfolk	1,089	31	450	1	187	1,757
Babergh	606	20	503	1	180	1,310
King's Lynn & West Norfolk	3,094	38	491	10	743	4,375

Source: Office of National Statistics

Appendix 2: Indicative Migration Estimates (mid 2006 to mid 2010) percentages

LA Name	Percentage composition of Local Authority estimates by broad stream (and relative importance with other local authorities)				
	Workers	Students	Returning migrants (UK born)	Asylum Seekers	Others
Norwich	30%	43%	8%	3%	15%
Waveney	44%	7%	30%	0%	19%
Great Yarmouth	64%	5%	11%	0%	20%
South Norfolk	42%	4%	38%	0%	16%
Broadland	41%	4%	39%	1%	16%
Ipswich	68%	3%	6%	3%	19%
Breckland	63%	3%	16%	0%	18%
St. Edmundsbury	53%	2%	25%	0%	20%
Forest Heath	55%	2%	25%	0%	17%
Suffolk Coastal	52%	2%	30%	0%	16%
Mid Suffolk	38%	2%	46%	0%	15%
North Norfolk	62%	2%	26%	0%	11%
Babergh	46%	2%	38%	0%	14%
King's Lynn & West Norfolk	71%	1%	11%	0%	17%

Source: Office of National Statistics