

Migrant Labour in the Greater Cambridge and Greater Peterborough 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

Assessing migrant labour reliance in Local Enterprise Partnerships across the East of England

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 2011 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 multinational 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 Greater Cambridge and Greater Peterborough LEP Area

The Greater Cambridge and Greater Peterborough LEP area is home to a resident population of around 1.3m people of which approximately 860,400 are of working age. Amongst those of working age, there is an 80.2% economic activity rate across the area, which is 4.1% higher than that seen across the UK. The unemployment rate in the area is 8-6.9%, which is 1% below the national average of 7.9%.

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.

Just over two-thirds of the population are qualified to NVQ2 and above; 50.3% qualified to NVQ3 and above; and 32.2% qualified to NVQ4 and above. The proportion of the population possessing qualifications at NVQ3 and above is just slightly lower than the national average.

The area has a business base of approximately 60,000 companies and its main economic strengths reside in ICT, creative industries, bio-medical, low carbon and environmental goods, high value engineering and manufacturing sectors.

The area's growth has been constrained due to under-investment in transport and broadband infrastructure, as well as skills disparities and shortages.

Section 4 – Migrant Worker Volumes

Between November 2008 and February 2012 approximately 5,365 Non-EEA migrant workers were employed in the Greater Cambridge & Greater Peterborough LEP area. This represents an annual average of 1,610 migrants and equates to approximately 0.23% of the total economically active population.

Between April 2010 and March 2011, a total of 7,200 A8 EU migrant workers were employed in companies based across the Greater Cambridge & Greater Peterborough LEP area. As a percentage of the workforce, these A8 EU migrant workers represent approximately 1.04% of the total economically active population in the area.

Therefore, Non-EEA and A8 EU migrant workers represent 1.27% of the economically active population. In comparison with other LEPs in the Greater East region², Greater Cambridge & Greater Peterborough has the 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.

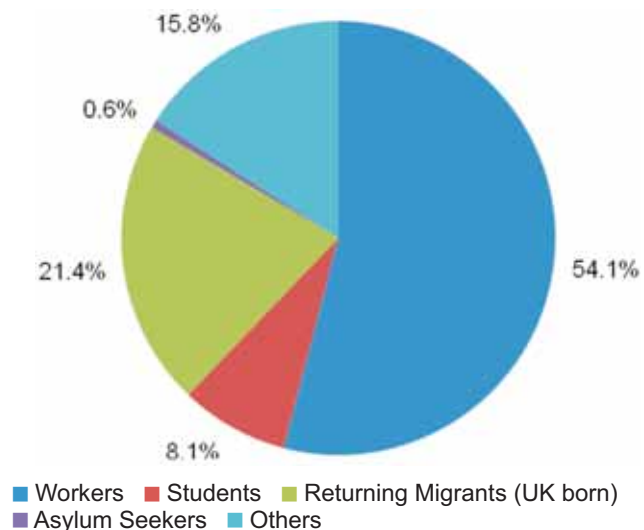
Whilst the two data sources used to estimate Non-EEA and A8 EU migrant volumes provide a useful picture of inward migration into the area, they can only provide a partial insight as they do not capture data on all migrants entering the area from other EU nations not covered by the Worker

Registration Scheme requirements 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 67,500 migrants of all ages entered the Greater Cambridge and Greater Peterborough area between mid-2006 and mid-2010. This equates to an annual average of 16,900 migrants of all ages entering the area every year.

As can be seen in Chart 1 only approximately half of the 16,900 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 Greater Cambridge and Greater Peterborough LEP Area (% of all migrants)



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

However, some Local Authorities within the Greater Cambridge and Greater Peterborough LEP have significant differences in their migrant composition than is shown in Chart 1. The districts that have a much higher than average proportion of migrant workers are Fenland (75.8%

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

workers), East Cambridgeshire (75.0% workers), King's Lynn & West Norfolk (70.7% workers) and Peterborough (66.2% workers). These districts saw much lower levels of other categories of migrants, especially returning migrants.

However, levels of migrant students in all but two districts in the Greater Cambridge and Greater Peterborough LEP area are below 10%. Cambridge is composed of 48.4% students and South Cambridgeshire is 14.4% students. Therefore, the 18.1% student migrant composition of the entire LEP area is heavily influenced by Cambridge Local Authority's student population. The remaining 10 Local Authorities have an average student composition of only 3.4%. To balance out its high proportion of students, Cambridge has the lowest proportion of migrant workers in the LEP area (29.0%).

Section 5 – Occupational Patterns

Across the Greater Cambridge & Greater Peterborough LEP area, Non-EEA migrant workers have been employed in approximately 140 different SOC code areas since November 2008. A8 EU migrant workers have, in comparison, been employed in just under 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 79% for Non-EEA migrants and 92% for A8 EU migrants). Table 1 provides details of the top 15 occupations filled by both Non-EEA and A8 migrant workers.

Table 1

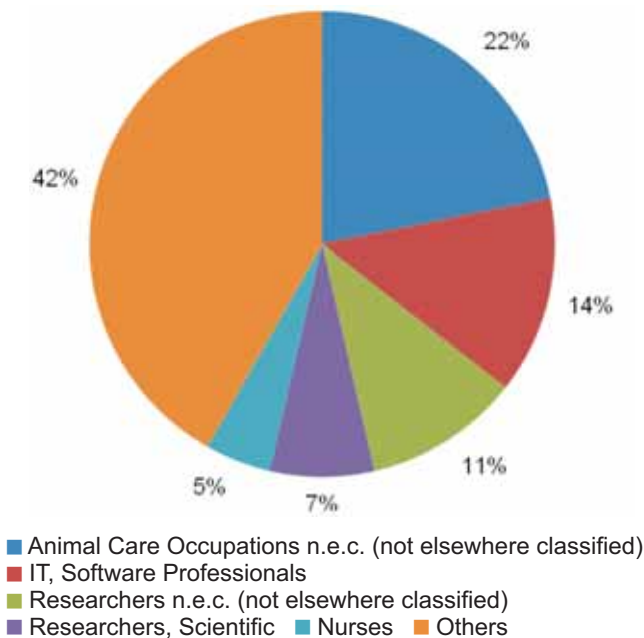
Most popular occupations currently filled by Non-EEA and A8 EU migrants

Rank	Non-EEA Top 15 Occupations	No. of Migrants	Rank	A8 EU Top 15 Occupations	No. of Migrants
1	Animal Care Occupations n.e.c. (not elsewhere classified)	1173	1	Process Operative (Other Factory Worker)	4044
2	IT, Software Professionals	734	2	Farm Worker/Farm Hand	894
3	Researchers n.e.c. (not elsewhere classified)	582	3	Warehouse Operative	392
4	Researchers, Scientific	389	4	Cleaner/Domestic Staff	299
5	Nurses	245	5	Packer	225
6	Medical Practitioners	228	6	Kitchen & Catering Assistants	150
7	Agricultural Fishing Trades n.e.c. (not elsewhere classified)	167	7	Labourer, Building	142
8	Care Assistants & Home Carers	127	8	Carpenter/Joiner	93
9	Chefs/Cooks	121	9	Food Processing Operative (Meat)	80
10	Musicians	94	10	Waiter/Waitress	71
11	Technicians, Engineering	83	11	Maid/Room Attendant (Hotel)	66
12	Managers, Information & Communication Technology	82	12	Sales & Retail Assistants	62
13	Teacher, Secondary Education	78	13	Chef, Head	41
14	Clergy	70	14	Agricultural Machinery Operator	40
15	Teacher/Lecturer in Higher Education	66	15	Crop Harvester	40

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

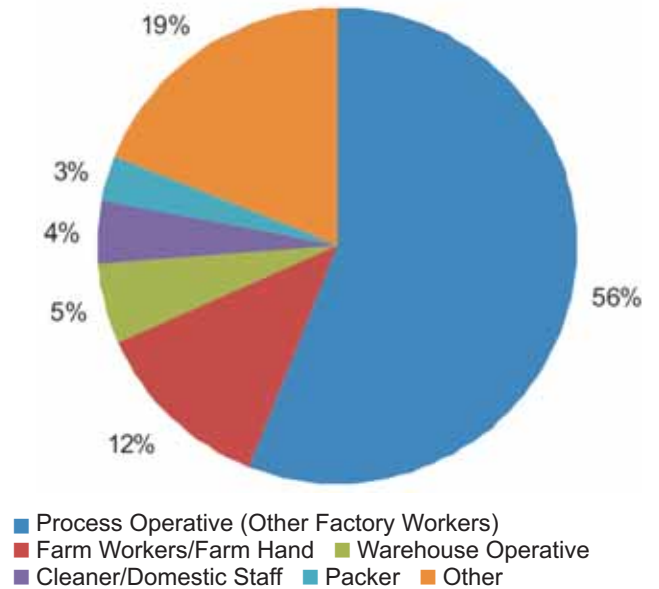
Animal Care Occupations n.e.c. is the largest single occupational group of Non-EEA migrant workers recruited in the area, employing 22% of all Non-EEA migrants. A further 14% of all Non-EEA migrant workers are employed as IT Software Professionals, 11% as Researchers n.e.c., 7% as Researcher, scientific and 5% as Nurses. 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) is the occupation most commonly filled by A8 EU migrants, with over half (56%) 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 (12%), Warehouse Operative roles (5%) and Cleaner/Domestic Staff roles (4%). Only 19% of A8 EU migrant workers are 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 85% (circa 4,541 employees) of all Non-EEA migrants employed in the Greater Cambridge and Greater Peterborough LEP area between November 2008 and February 2012. The 10 most common industries employing A8 EU nationals, however, account for almost 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	25%	1	Administration, Business & Managerial Services	70%
2	Education	19%	2	Agriculture Activities	15%
3	Computer Programming, Consultancy & Related Activities	14%	3	Hospitality & Catering	5%
4	Human Health Activities	7%	4	Manufacturing	3%
5	Scientific Research & Development	5%	5	SBS Sectors	2%
6	Other Professional, Scientific & Technical Activities	3%	6	Retail & Related Services	2%
7	Human Health & Social Work Activities	3%	7	Education & Cultural Activities	1%
8	Other Service Activities	3%	8	Health & Medical Services	1%
9	Food & Beverage Service Activities	3%	9	Transport	1%
10	Crop & Animal Production, Hunting & Related Service Activities	3%	10	Entertainment & Leisure Services	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 operation of sports facilities and racehorse activities.

The Education industry accounts for 19% of all Non-EEA migrant workers (circa 1,012 workers), followed by the Computer Programming, Consultancy and Related Activities industry with 14% of all Non-EEA migrant workers (circa 774 workers). 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 Computer Programming, Consultancy and Related Activities Industry refers to range of services including software development, leisure and entertainment programming and computer

facilities management.

The data suggests that the largest employing industry of A8 EU migrant workers in the Greater Cambridge and Greater Peterborough 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 accounts for a significant number of migrant workers with 15% of all A8 EU workers operating in that sector. Hospitality and Catering was also an important sector with 5% of workers employed within it.

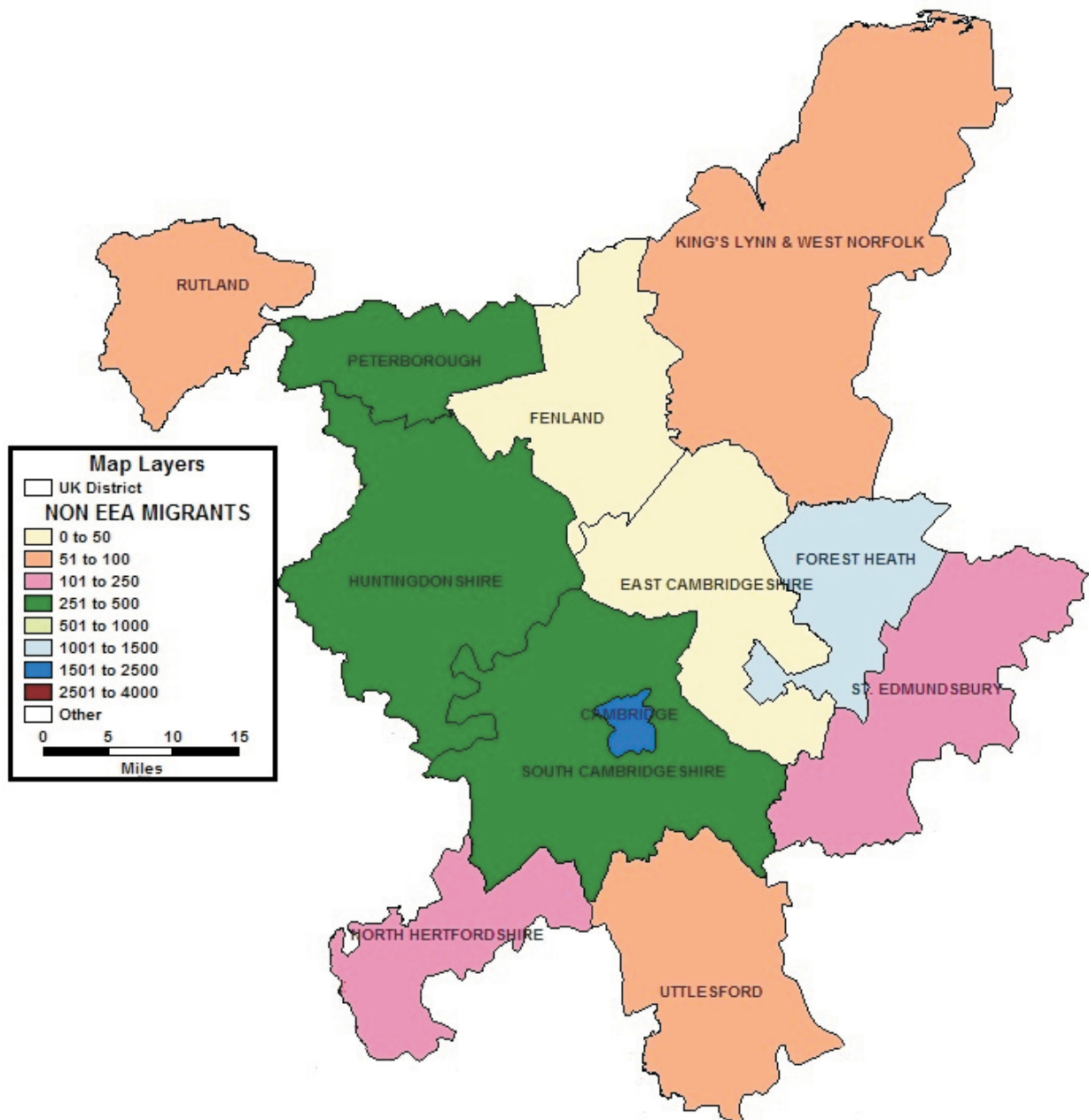
Section 7 – Geographic Patterns

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 Greater Cambridge & Greater Peterborough 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: Cambridge (2451), Forest Heath (1379), Huntingdonshire (290), Peterborough (277) and South Cambridgeshire (274). Fenland and East Cambridgeshire have witnessed the lowest levels of Non-EEA migration with both authorities gaining less than 50 Non-EEA migrants during the period November 2008 – March 2012.

Map 1: Number of Non-EEA migrant workers by local authority in the Greater Cambridge & Peterborough LEP area



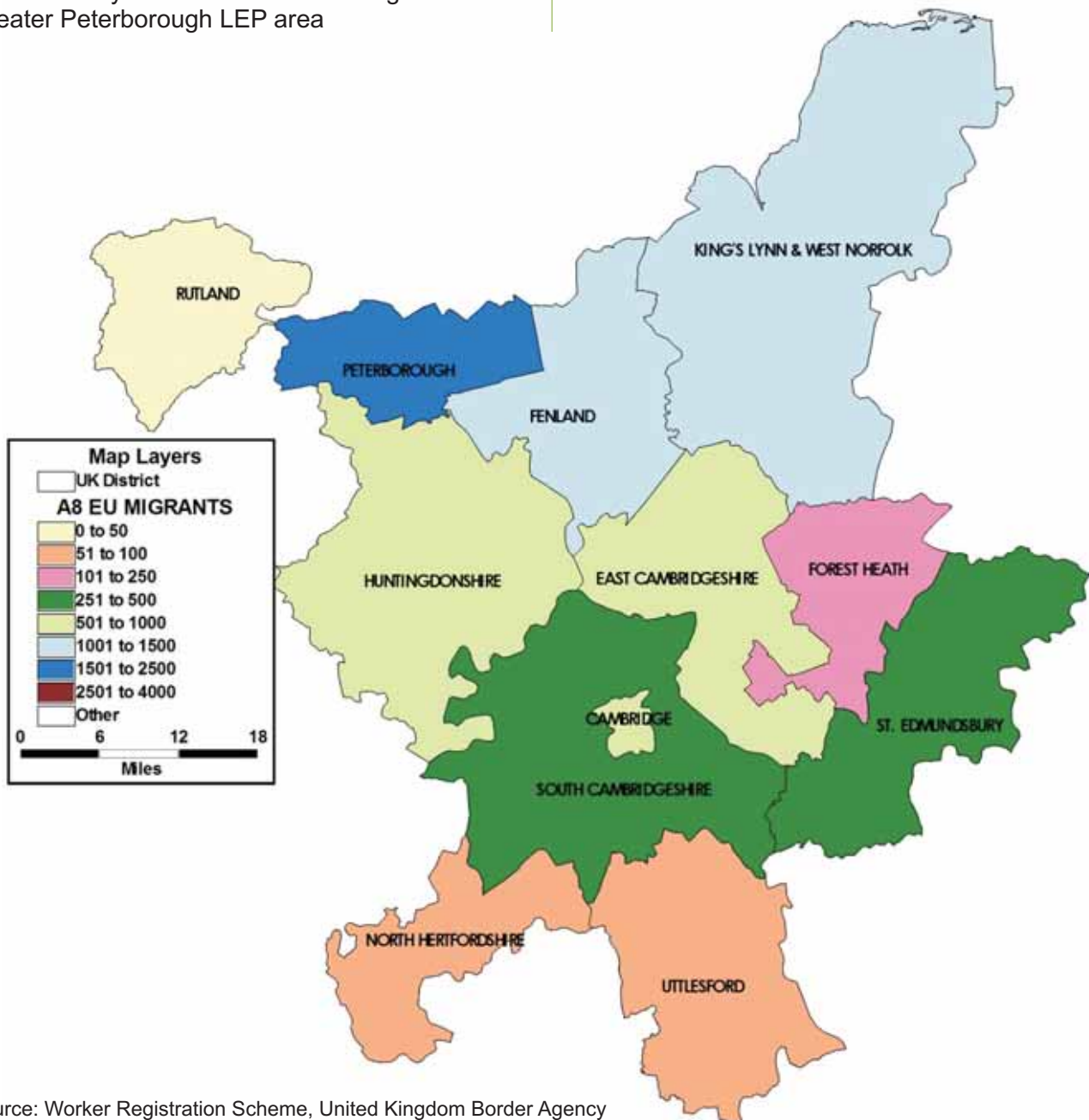
Source: Certificates of Sponsorship, United Kingdom Border Agency

Map 2 presents the distribution of A8 EU migrant workers and shows that all local authorities in the area have witnessed some degree of inward migration. Those with the greatest number of A8 EU migrant workers are identified as: Peterborough (2075), King's Lynn & West Norfolk (1372), Fenland (1031), and Huntingdonshire (586). The districts with the fewest number of A8 migrant workers are North Hertfordshire (55) and Uttlesford (83).

Map 2: Distribution of A8 EU migrant workers by local authority in the Greater Cambridge & Greater Peterborough LEP area

Data presented in this section demonstrates a significant divergence in the geographic distribution between the two groups of migrant workers. Both Fenland and King's Lynn & West Norfolk, for example, appear to have seen very few Non-EEA migrants but are amongst the highest users of A8 EU nationals in the LEP area.

Forest Heath, in contrast, has witnessed the second highest level of employment of Non-EEA migrants but has seen much lower levels of migration from A8 EU nationals.



Source: Worker Registration Scheme, United Kingdom Border Agency

Sections 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 reduced numbers 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 Greater Cambridge and Greater Peterborough LEP area looking for work in that occupation.

Table 3 demonstrates that only one occupation currently employing large numbers of Non-EEA migrants has a high number of indigenous workers looking to move into the role (Care Assistants and Home Carers). 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

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)	16.6%	Process Operative (Other Factory Worker)	2.6%
IT, Software Professionals	12.3%	Farm Worker/Farm Hand	10.6%
Researchers n.e.c. (not elsewhere classified)	2.6%	Warehouse Operative	487.9%
Researchers, Scientific	3.9%	Cleaner/Domestic Staff	182.3%
Nurses	6.1%	Packer	253.9%
Medical Practitioners	0.0%	Kitchen And Catering Assistants	364.5%
Agricultural Fishing Trades n.e.c. (not elsewhere classified)	9.0%	Labourer, Building	376.8%
Care Assistants & Home Carers	468.5%	Carpenter/Joiner	225.8%
Chefs/Cooks	12.4%	Food Processing Operative (Meat)	408.8%
Musicians	16.0%	Waiter/Waitress	219.9%

- 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.

Table 3 also demonstrates that eight 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 Packer. 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 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 two 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 any reduced labour supply in A8 EU migrant labour:

- Process operative (other factory worker)
- Farm worker/farm hand

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 which 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.	Low number of applicants with the required skills Low number of applicants generally
2	IT, Software Professionals	Low number of applicants with the required skills Lack of work experience the company demands
3	Researchers N.E.C.	Not enough people interested in doing this type of job Lack of work experience the company demands
4	Researchers, Scientific	Not enough people interested in doing this type of job Lack of work experience the company demands
5	Nurses	Low number of applicants with the required skills Not enough people interested in doing this type of job
6	Medical Practitioners	Not enough people interested in doing this type of job Low number of applicants with the required skills
7	Agricultural Fishing Trades N.E.C.	Low number of applicants generally Not enough people interested in doing this type of job
8	Care Assistants & Home Carers	Low number of applicants with the required skills Job entails shift work/unsocial hours
9	Chefs/Cooks	Lack of work experience the company requires Job entails shift work/unsocial hours
10	Musicians	Low number of applicants with required attitude/motivation

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

The data provides a useful insight into what employers believe to be the main causes of recruitment difficulties amongst occupations which have benefitted from significant numbers of Non-EEA migrant workers. It is clear that skills and experience deficiencies amongst the indigenous workforce are present in many cases. Tackling these skills gaps would therefore be essential if the area had to cope with fewer Non-EEA migrants in the future.

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 or the poor attitude of applicants is often cited as the most 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 EU migrant numbers fall in the future.

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	Packer	Low number of applicants generally
6	Kitchen/Catering Assistants	Job entails shift work/unsocial hours Low number of applicants with the required attitude/motivation
7	Labourer, Building	Not enough people interested in doing this type of job Lack of work experience the company demands
8	Carpenter/Joiner	Low number if applicants with the required skills Lack of work experience the company demands
9	Food Processing Operative (Meat)	Not enough people interested in doing this type of job Lack of qualifications the company demands
10	Waiter/Waitress	Job entails shift work/unsocial hours Low number of applicants with the required attitude/motivation

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

Section 10 – Local Training Infrastructure

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

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 7 of the 10 areas. Only in relation to HE provision relevant to Chefs/Cooks is there no apparent relevant provision. While there is some provision it is limited in relation to Animal Care and Agricultural Fishing 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, Medical and Chef/cook 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 3 out of 10 roles appear to have adequate levels of local provision.

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.	L	L	L	Process Operative (Other Factory Worker)	L	L
IT, Software Professionals	L	Y	Y	Farm Worker/Farm Hand	L	L
Researchers n.e.c. (not elsewhere classified)	N/A	N/A	Y	Warehouse Operative	L	N
Researchers, Scientific	L	Y	Y	Cleaner/Domestic Staff	Y	L
Nurses	Y	Y	Y	Packer	L	N
Medical Practitioners	N/A	L	Y	Kitchen/Catering Assistants	Y	L
Agricultural Fishing Trades n.e.c. (not elsewhere classified)	L	L	L	Labourer, Building	L	L
Care Assistants/Home Carers	Y	Y	Y	Carpenter/Joiner	L	L
Chefs/Cooks	Y	L	N	Food Processing Operative (Meat)	L	L
Musicians	L	Y	L	Waiter/Waitress	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

⁴Joint Academic Coding System

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

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, Education, Computing, Agriculture, Hospitality and Manufacturing.

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 Cambridge and Forest Heath, may face particular shortages as the number of Non-EEA migrant workers reduces. Any future reduction in A8 EU migrants would appear to affect Peterborough, Fenland and King's Lynn & West Norfolk worst of all.

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 4,000 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 Greater Cambridge and Greater Peterborough 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
Cambridge	5,918	9,879	1,842	23	2,752	20,413
South Cambridgeshire	2,295	705	1,212	18	681	4,911
Rutland UA	222	60	406	0	125	814
North Hertfordshire	948	143	725	35	371	2,222
Peterborough UA	10,195	954	842	622	2,797	15,411
Huntingdonshire	2,564	116	964	36	707	4,387
East Cambridgeshire	3,179	105	525	1	430	4,240
St. Edmundsbury	1,115	49	524	0	434	2,121
Forest Heath	1,318	54	608	6	405	2,392
Fenland	3,374	85	307	4	680	4,453
Uttlesford	875	32	575	0	296	1,778
King's Lynn and 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
Cambridge	29%	48%	9%	0%	13%
South Cambridgeshire	47%	14%	25%	0%	14%
Rutland UA	27%	7%	50%	0%	15%
North Hertfordshire	43%	6%	33%	2%	17%
Peterborough UA	66%	6%	5%	4%	18%
Huntingdonshire	58%	3%	22%	1%	16%
East Cambridgeshire	75%	2%	12%	0%	10%
St. Edmundsbury	53%	2%	25%	0%	20%
Forest Heath	55%	2%	25%	0%	17%
Fenland	76%	2%	7%	0%	15%
Uttlesford	49%	2%	32%	0%	17%
King's Lynn and West Norfolk	71%	1%	11%	0%	17%

Source: Office of National Statistics