Migrant Labour in the South East 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 employed[1].

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 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 South East LEP Area

The South East LEP area is home to a population of around 3.9m people of which approximately 2.5m people are of working age. Of those that are of working age, there is a 78.0% economic activity rate across the area, 1.9% higher than the national average. Also, the unemployment rate is 7.6%, which is 0.3% below the national average.

Almost two-thirds (65.6%) of the population of the South East LEP area are qualified up to NVQ2 and above, 46.0% of the population are qualified

[1]The 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.

to NVQ3 and above, and 26.2% of the population of the area are qualified to NVQ4 and above. On average, the LEP area is less qualified than the UK population. As shown by, the proportion of people in the South East LEP area qualified to NVQ4 and above is 5.1% lower than the national average.

The LEP area has a business base of approximately 156,000 companies, and an annual GVA equivalent to 6% of England GVA. The South East LEP area benefits from strong economic resilience in manufacturing, environmental technologies, agriculture, tourism and creative industry sectors. The rural economies of East Sussex, Essex and Kent are the largest compared to other LEPs in the UK and are worth over £10 billion a year.

The South East LEP economic strategy expects the regeneration of the Thames Gateway to be completed in the near future. This will be a beacon for smaller and more deprived areas to make significant progress towards becoming thriving communities. As a national priority, the Thames Gateway will be a key provider of economic growth. Other areas of strategic growth include investment in coastal communities and the rural economy.

Section 4 – Migrant Worker Volumes

Between November 2008 and February 2012, approximately 5,317 Non-EEA migrant workers were employed in the South East LEP area. This represents an annual average of 1,596 migrants and equates to approximately 0.08% of the economically active population in the area.

Between April 2010 and March 2011, approximately 6,503 A8 EU migrant workers were employed in the South East LEP area. As a percentage of the workforce, these A8 EU migrant workers represent approximately 0.33% of the economically active population in the area.

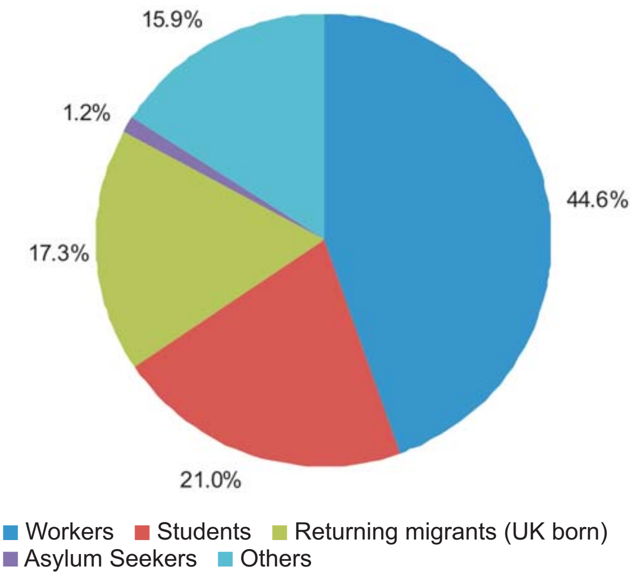
Therefore, Non-EEA and A8 EU migrant workers represent 0.41% of the economically active population. In comparison with other LEPs in the greater East region[2], The South East has the lowest economic activity rate of Non-EEA and A8 EU migrants. Across the East of England region as a whole, Non-EEA and 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 111,790 migrants of all ages entered the South East LEP area between mid-2006 and mid-2010. This equates to an annual average of 27,948 migrants of all ages entering the area every year.

As can be seen by Chart 1, only 44.6% of the 27,948 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 South East LEP Area (% of all migrants)



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

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

However, some Local Authorities within the South East LEP area have significant differences in their migrant composition than is show in Chart 1. The districts that have a much higher than average proportion of migrant workers are Swale (68.9% workers), Thurrock (66.5% workers), Harlow (64.6% workers) and Southend-on-Sea (57.4% workers). This means that these districts have a much lower proportion of students, retuning migrants and asylum seekers in comparison to the South East LEP area as a whole.

The 21.0% student migrant composition of the South East LEP is not representative of many districts in the LEP area. The Local Authorities with the highest proportions of students are Canterbury (60.2% students), Colchester (54.0% students), Medway (22.0% students), Chelmsford (21.8% students), Dartford (21.5% students) and Maidstone (21.1% students). The remaining 26 Districts in the South East LEP area have an 8.0% average proportion of migrant students.

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	Nurses	787	1	Process Operative (Other Factory Worker)	1648
2	Care assistants & home carers	584	2	Warehouse Operative	952
3	Musicians	582	3	Packer	811
4	Medical practitioners e.g. doctors & surgeons	387	4	Farm Worker/Farm Hand	499
5	Teacher, secondary education	258	5	Cleaner, Domestic Staff	378
6	Chefs, cooks	253	6	Crop Harvester	304
7	IT, software professionals	210	7	Care Assistants/Home Carers	223
8	Clergy	178	8	Kitchen & Catering Assistants	212
9	Artists	128	9	Fruit Picker (Farming)	199
10	Social workers	125	10	Waiter/Waitress	136
11	Teacher/lecturer in higher education	97	11	Sales & Retail Assistants	116
12	Sports players	78	12	Food Processing Operative (Fruit / Veg)	111
13	Managers, residential & day care managers	65	13	Maid/Room Attendant (Hotel)	92
14	Managers, marketing & sales	55	14	Labourer, Building	90
15	Directors/chief executives of major organisations	54	15	Launderer/Dry Cleaner /Presser	77

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

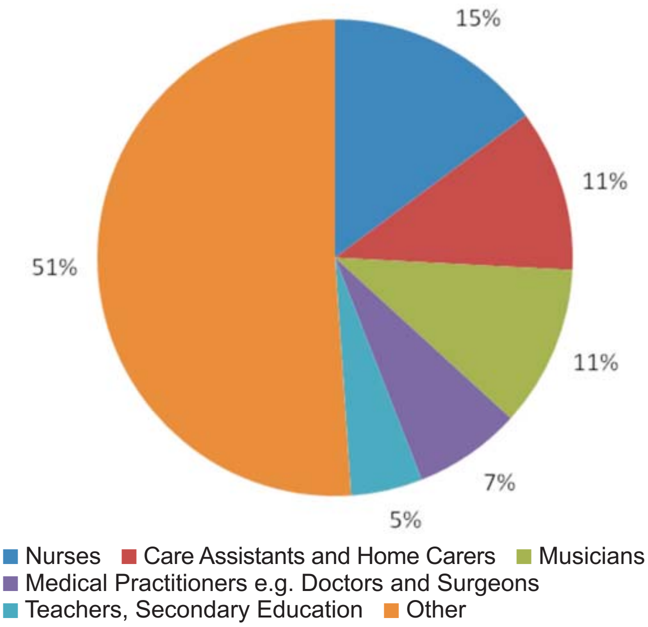
Section 5 – Occupational Patterns

Across the South East LEP area, Non-EEA migrant workers have been employed in almost 150 different SOC[3] code areas since November 2008. A8 EU migrant workers have, in comparison been employed in just over 120 different SOC 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 72% for Non-EEA and 90% for A8 EU migrants). Table 1 provides details of the top 15 occupations filled by both Non-EEA and A8 migrant workers.

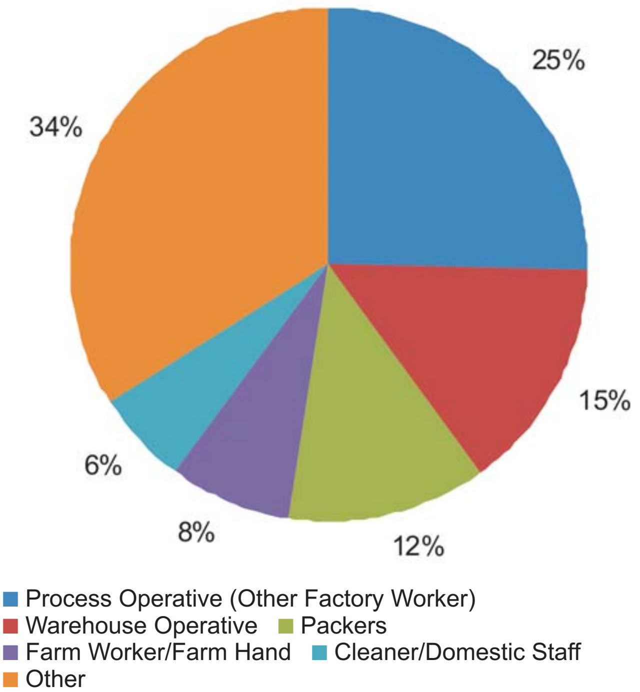
Nurses are the largest single occupational group of Non-EEA migrant workers recruited in the area, employing 15% of all Non-EEA migrant workers in the LEP area. A further 11% of all Non-EEA migrant workers are employed as Care Assistants/Home Carers, 11% as Musicians, 7% as Medical Practitioners, and 5% as Teachers. 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 just over a quarter (25%) of migrant workers undertaking these roles between April 2010 to March 2011. A considerable number of migrants also took roles as Warehouse Operatives (15%), Packers (13%), Farm Workers/Farm Hands (8%), and Cleaners/Domestic Staff (6%). 34% of A8 EU migrant workers were employed in other roles, as shown in Chart 3 below.

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 nationals 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 Health Care to Construction, and from Agriculture to Leisure Services. However, as with occupations, a much smaller list of industries account for the vast

[3]Standard Occupational Classification

majority of both Non-EEA and A8 EU migrant workers.

The 10 most common Non-EEA migrant worker industries account for 82% (circa 4,380 employees) of all Non-EEA migrants employed in the LEP area between November 2008 and February 2012. The 10 most common industries employing A8 EU nationals accounted for almost all the 6,503 employees of all A8 workers employed in the South East LEP area during the one year period under analysis (April 2010 – March 2011).

The data suggests that the largest employing industry of Non-EEA migrant workers is the Human Health and Social Work Activities sector. This covers a range of work from Hospital Activities, to Medical Nursing to Dental Practice.

The Human Health Activities sector accounts for 25% of all Non-EEA migrant workers (circa 1,300 workers), followed by the Creative, arts and entertainment activities sector with 14% of All Non-EEA migrant workers (circa 760 workers).

The data suggests that the largest employing industry of A8 EU migrant workers in the South East LEP area is Administrations, 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.

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	Human health activities	25%	1	Administration, Business & Managerial Services	54%
2	Creative, arts & entertainment activities	14%	2	Agriculture Activities	18%
3	Education	13%	3	Hospitality & Catering	10%
4	Residential care activities	11%	4	Health & Medical Services	5%
5	Food & beverage service activities	5%	5	Manufacturing	5%
6	Human Health & Social Work Activities	4%	6	Retail & Related Services	3%
7	Sports activities, amusement & recreation activities	3%	7	SBS Sectors	3%
8	Manufacture of motor vehicles, trailers & semi-trailers	3%	8	Construction & Land Services	1%
9	Financial service activities, except insurance & pension funding	3%	9	Education & Cultural Activities Activities	1%
10	Activities of membership organisations	2%	10	Entertainment & Leisure Services	1%

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

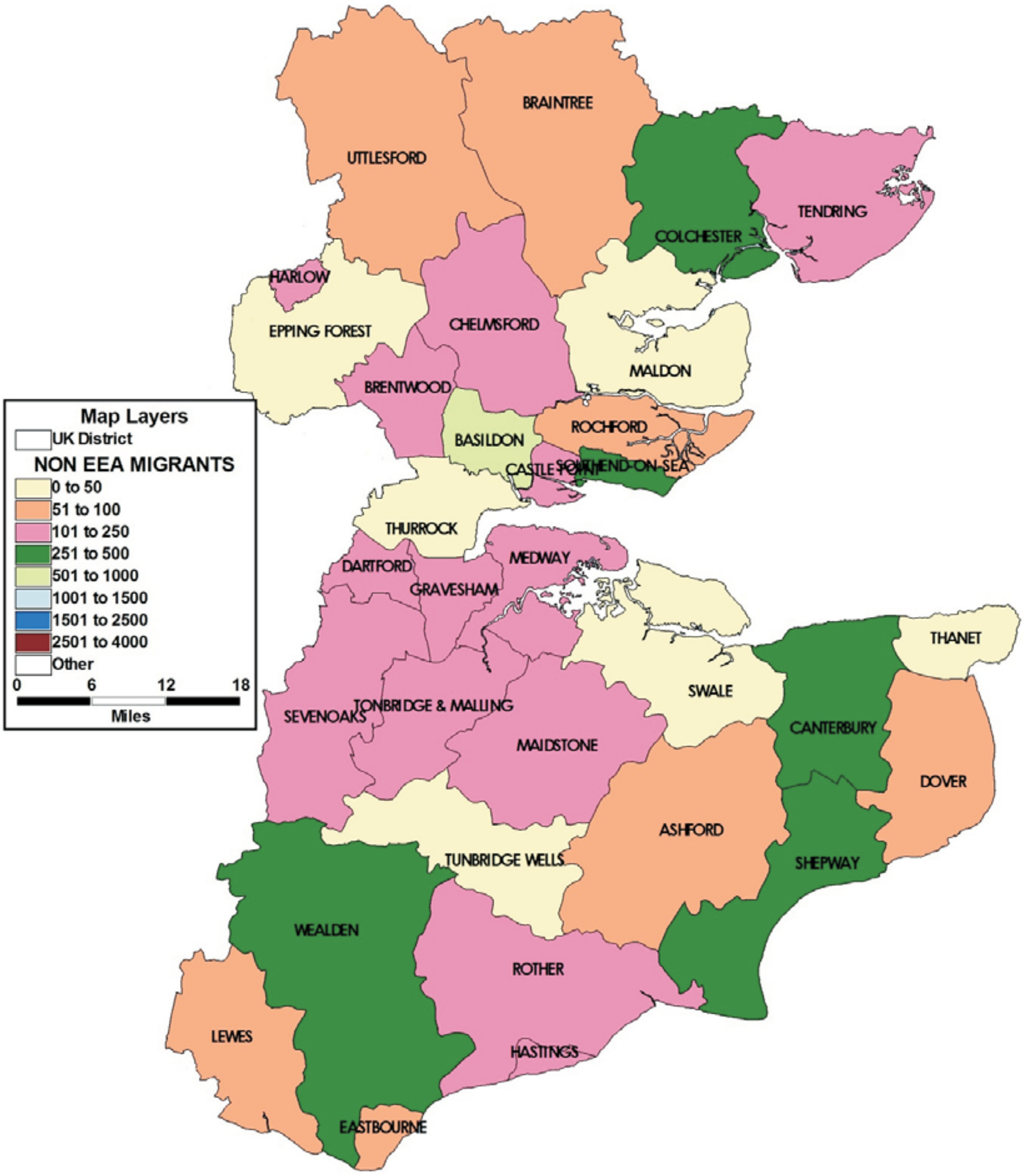
The Agricultural Activities sector accounts for a significant number of migrant workers with 18% of all A8 EU workers operating in that sector. Hospitality & Catering is also an important sector with around 10% of workers employed within it.

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 South East 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: Basildon (533), Shepway (471), Colchester (405) and Canterbury (401). Thurrock witnessed the lowest levels of Non-EEA migration with just 4 Non-EEA migrants during the period November 2008 – March 2012. This was followed by Maldon (7), Epping Forest (22), Swale (23) and Thanet (43).

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



Source: Certificates of Sponsorship, United Kingdom Border Agency

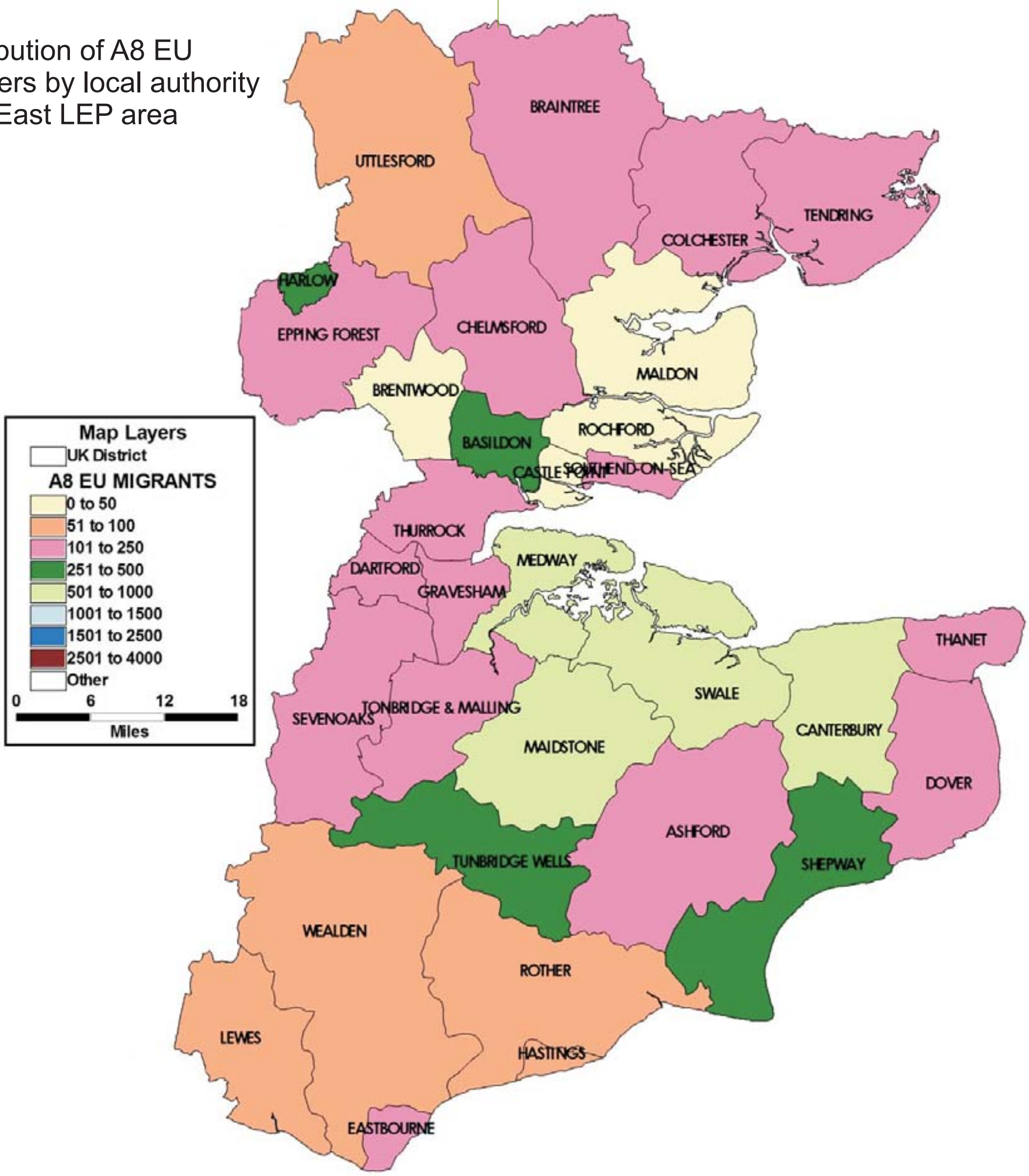
Map 2 presents the distribution of A8 EU migrant workers and reveals that all local authorities in the area have witnessed some degree on inward migration. Those with the greatest number of A8 EU migrant workers are identified as: Swale (678), Maidstone (671), Canterbury (621), and Medway (561). The districts with the fewest numbers of A8 EU migrant workers are Rochford (11), Maldon (32), Castle Point (33), Brentwood (49) and Rother (52).

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

Section 8 – Overall Local Reliance

Using DWP data on the number of unemployment claimants looking for work in different occupations, it is possible to asses the capacity of the local economy to absorb the impact of 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 South East LEP area looking for work in that occupation.

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



Source: Worker Registration Scheme, United Kingdom Border Agency

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
Nurses	8.3%	Process Operative (Other Factory Worker)	3.3%
Care Assistants/Home Carers	345.0%	Warehouse Operative	698.9%
Musicians	6.9%	Packer	168.4%
Medical Practitioners	2.6%	Farm Worker/Farm Hand	37.1%
Teacher, Secondary Education	40.7%	Cleaner/Domestic Staff	740.4%
Chefs/Cooks	247.0%	Crop Harvester	16.5%
IT, Software Professionals	73.8%	Care Assistants/Home Carers	943.8%
Clergy	2.8%	Kitchen & Catering Assistants	827.4%
Artists	43.0%	Fruit Picker (Farming)	25.1%
Social Workers	56.0%	Waiter/Waitress	444.9%

■ 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 demonstrates that only three 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; Chefs/Cooks; and Youth and Community Workers). All other top 10 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 on Non-EEA migrants in the future.

Table 3 also demonstrates that 6 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; Packer; and Cleaner/Domestic Staff. 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 4 roles, the number 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 the A8 EU migrant labour:

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

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 what 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.

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 4

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

Rank	Occupation	Causes of Hard-to-Fill Vacancies
1	Nurses	Low number of applicants with the required **skills** Not enough people interested in doing this type of job
2	Care Assistants/Home Carers	Low number of applicants with the required **skills** Job entails shift work/unsocial hours
3	Musicians	Low number of applicants with requiredattitude/motivation
4	Medical Practitioners	Not enough people interested in doing this type of job Low number of applicants with the required **skills**
5	Teacher, Secondary Education	Low number of applicants with the required **skills** **Lack of qualifications** the company demands
6	Chefs/Cooks	**Lack of work experience** the company demands Job entails shift work/unsocial hours
7	IT, Software Professionals	Low number of applicants with the required **skills** **Lack of work experience** the company demands
8	Clergy	**Lack of qualifications** the company demands Low number of applicants with the required **skills**
9	Artists	Not enough people interested in doing this type of job Low number of applicants with the required **skills**
10	Social Workers	Low number of applicants with the required **skills** Job entail shift work/unsociable hours

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 South East 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 South East LEP area and is based on an approximation between occupations and JACs[4] 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	Warehouse Operative	Low number of applicants with the required attitude/motivation Not enough people interested in doing this type of work/job
3	Packer	Low number of applicants generally
4	Farm Worker/Farm Hand	Poor career progression/lack of progress Not enough people interested in doing this type of work/job
5	Cleaner/Domestic Staff	Low number of applicants with the required **skills** Low number of applicants generally
6	Crop Harvester	Poor career progression/lack of progress Not enough people interested in doing this type of work/job
7	Care Assistants/Home Carers	Low number of applicants with the required **skills** Job entails shift work/unsociable hours
8	Kitchen And Catering Assistants	Job entails shift work/unsocial hours Low number of applicants with the required attitude/motivation
9	Fruit Picker (Farming)	Poor career progression/lack of progress Not enough people interested in doing this type of work/job
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

[4]Joint Academic Coding System

Table 6

Local FE & HE provision[5] by broad occupation

Top 10 Non-EEA Migrant Occupations	Level 2	Level 3	HE	Top 10 A8 EU Migrant Occupations	Level 2	Level 3
Nurses	Y	Y	Y	Process Operative (Other Factory Worker)	L	L
Care Assistants/Home Carers	Y	Y	Y	Warehouse Operative	N	L
Musicians	L	L	L	Packer	N	L
Medical Practitioners	N	N	L	Farm Worker/Farm Hand	L	L
Teacher, Secondary Education	L	L	L	Cleaner/Domestic Staff	Y	L
Chefs/Cooks	Y	Y	N	Crop Harvester	L	L
IT, Software Professionals	L	Y	Y	Care Assistants & Home Carers	Y	Y
Clergy	N	L	L	Kitchen/Catering Assistants	Y	L
Artists	L	Y	Y	Fruit Picker (Farming)	L	L
Youth & Community Workers	L	L	Y	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

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 5 of the 10 areas. Only in relation to the HE provision relevant to Chefs/Cooks is there no apparent relevant provision. While there is some limited provision in relation to Musicians, Medical Practitioners, Secondary Teachers and Clergy trades at HE level.

At FE level there appears to be only limited provision relevant at Level 3 for those interested in Music, Secondary Teaching, Clergy and Youth & Community Worker 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 4 out of 10 roles appear to have adequate level 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: Health and Social Work Activities, Manufacturing, Agriculture, Food Services, Education and Retail.

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.

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

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 Basildon, may face particular shortages as the number of Non-EEA migrant workers reduces. Any future reduction in A8 EU migrants would appear to affect Swale, Maidstone, Canterbury and Medway 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 1,600 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 South East 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)

	Local Authority estimates in England and Wales by broad stream					
LA Name	**Workers**	**Students**	**Returning migrants (UK born)**	**Asylum Seekers**	**Others**	**Total**
Uttlesford	875	32	575	0	296	1,778
Maldon	323	15	346	0	91	774
Brentwood	646	44	531	1	300	1,523
Rochford	220	22	288	4	82	616
Shepway	1,370	114	591	17	579	2,671
Braintree	1,239	113	602	5	400	2,358
Rother	442	74	571	5	391	1,483
Hastings	988	109	333	297	408	2,135
Harlow	1,638	136	290	34	437	2,535
Thurrock UA	3,269	274	445	142	786	4,915
Castle Point	223	36	235	6	90	588
Basildon	1,467	204	719	36	558	2,984
Southend-on-Sea UA	2,899	349	745	136	922	5,050
Tendring	939	139	615	12	231	1,936
Lewes	772	149	619	3	291	1,834
Swale	2,319	304	371	20	350	3,364
Tonbridge and Malling	1,231	243	763	0	375	2,611
Wealden	843	249	926	8	558	2,584
Epping Forest	1,082	244	632	46	442	2,445
Tunbridge Wells	1,759	414	960	10	643	3,786
Thanet	2,004	428	503	45	724	3,703
Dover	1,337	349	588	38	541	2,852
Gravesham	2,073	471	336	81	739	3,701
Ashford	1,544	480	655	93	638	3,410
Sevenoaks	963	408	756	1	445	2,572
Eastbourne	1,468	571	605	73	637	3,354
Maidstone	2,988	1,167	652	22	701	5,531
Dartford	1,233	543	247	97	409	2,529
Chelmsford	1,775	914	942	10	562	4,202
Medway UA	5,175	2,094	908	14	1,343	9,533
Colchester	2,583	5,952	1,086	22	1,383	11,026
Canterbury	2,150	6,868	915	21	1,453	11,407

Source: Office of National Statistics

Appendix 2:

Indicative Migration Estimates (mid 2006 to mid 2010) percentages

	Percentage composition of Local Authority estimates by broad stream (and relative importance with other local authorities)				
LA Name	**Workers**	**Students**	**Returning migrants (UK born)**	**Asylum Seekers**	**Others**
Uttlesford	49%	2%	32%	0%	17%
Maldon	42%	2%	45%	0%	12%
Brentwood	42%	3%	35%	0%	20%
Rochford	36%	4%	47%	1%	13%
Shepway	51%	4%	22%	1%	22%
Braintree	53%	5%	26%	0%	17%
Rother	30%	5%	39%	0%	26%
Hastings	46%	5%	16%	14%	19%
Harlow	65%	5%	11%	1%	17%
Thurrock UA	67%	6%	9%	3%	16%
Castle Point	38%	6%	40%	1%	15%
Basildon	49%	7%	24%	1%	19%
Southend-on-Sea UA	57%	7%	15%	3%	18%
Tendring	49%	7%	32%	1%	12%
Lewes	42%	8%	34%	0%	16%
Swale	69%	9%	11%	1%	10%
Tonbridge and Malling	47%	9%	29%	0%	14%
Wealden	33%	10%	36%	0%	22%
Epping Forest	44%	10%	26%	2%	18%
Tunbridge Wells	46%	11%	25%	0%	17%
Thanet	54%	12%	14%	1%	20%
Dover	47%	12%	21%	1%	19%
Gravesham	56%	13%	9%	2%	20%
Ashford	45%	14%	19%	3%	19%
Sevenoaks	37%	16%	29%	0%	17%
Eastbourne	44%	17%	18%	2%	19%
Maidstone	54%	21%	12%	0%	13%
Dartford	49%	21%	10%	4%	16%
Chelmsford	42%	22%	22%	0%	13%
Medway UA	54%	22%	10%	0%	14%
Colchester	23%	54%	10%	0%	13%
Canterbury	19%	60%	8%	0%	13%

Source: Office of National Statistics