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Canolfan Polisi Cyhoeddus Cymru

Post-Brexit Migration and Wales

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November 2020

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Summary

- This report analyses the potential impacts of post-Brexit migration policies on Wales' labour market, population and society, and identifies ways in which the Welsh Government might respond to the opportunities and challenges that this presents.
- In-depth analysis by experts shows the impacts will vary by occupation, sector, gender, full-time vs part-time working and in different parts of Wales.
- Ending free movement will have a significant impact on population change in Wales, which has been more reliant on non-UK migration to grow its working age population than many parts of England.
- Evidence from Scotland suggests the post-Brexit migration system could make it harder to fill vacancies in sectors where the average salary is below £25,600 and in rural communities with ageing populations.
- A reduction in immigration from European Economic Area (EEA) countries could place more pressure on those who are in work to support people of pensionable age.
- Experts believe that the UK's post-Brexit migration policy may also:
 - Have an impact on community relations and integration;
 - Put a strain on the Home Office's administration of the EU Settlement Scheme;
 - Influence perceptions of the UK as a desirable place for migrants to work; and
 - Result in reciprocal restrictions on UK nationals' rights to work in EU countries.
- The Welsh Government could try to address the issues identified in this report by:
 - Seeking agreement for regional and sectoral variations in UK migration policy;
 - Advocating for UK-EU agreements to include mobility frameworks and mutual recognition of professional qualifications; and
 - Exercising devolved powers and policy instruments directly to promote integration, address gender inequalities and safeguard the labour supply in rural communities.

Introduction

Following the UK's vote to leave the European Union in the 2016 referendum, the UK Government made a commitment to end free movement of people to the UK from EU countries. This was reflected in an Immigration Bill published in 2018 and reaffirmed in February 2020 by the Prime Minister, who stated that the new immigration system will bring 'down immigration numbers overall', 'end the reliance on importing cheap, low-skilled labour' and 'return democratic control of immigration to the British people' (Schofield, 2020).

The Immigration and Social Security Co-ordination (EU Withdrawal) Bill passed its second reading in the House of Commons on 18 May 2020. It repeals freedom of movement and creates a new points-based framework. The policy statement that lay the groundwork for the Bill (UK Government, 2020) builds on proposals made by the Migration Advisory Committee (MAC) for an Australia-style points-based system (MAC, 2020). It will:

- End EU free movement of people and reduce overall levels of migration to the UK;
- Introduce a new points-based system based on applicants' English language skills and qualifications, the salary level of job offered to them and whether they are filling a vacancy named on the Shortage Occupation List designated by the MAC;¹
- Require migrants applying through the 'skilled worker' (Tier 2) route to hold a job offer from an approved sponsor with an annual salary of at least £25,600 (or £20,480 for jobs in a specific shortage occupation or applicants with a PhD relevant to the job) plus RQF3 skills levels (A-level) and English language competence;
- Introduce a 30 per cent lower salary threshold for new entrants;²
- Not allow low-skilled or self-employed routes;
- Increase the Seasonal Agricultural Workers pilot scheme from 2,500 people to 10,000 people per year;
- Not allow regional salary thresholds; and
- Permit EU citizens who wish to visit the UK for less than six months (i.e. for tourism, business, study) to do so without a visa.

¹ The MAC also endorsed the development of specific lists for Wales, Scotland and Northern Ireland, in addition to the UK Shortage Occupation List (MAC, 2019).

² The MAC recommended that the definition of 'new entrants' should include full-time employees who have left full-time education less than five years ago and those working towards professional qualifications or moving directly into postdoctoral roles.

These radical reforms of the immigration system could have significant implications for employers and communities in Wales. This report presents evidence about their potential impacts on the labour market, population and society and identifies ways in which the Welsh Government might respond to the opportunities and challenges that they present.

Impacts on the labour market, population and society

Post-Brexit migration requirements

The UK Government White Paper on Immigration published in December 2018 proposed that the Tier 2 salary threshold be set at £30,000 (UK Government, 2018). In February 2020, the Home Office revised this downwards to £25,600 or the 'going rate' for an occupation, whichever is the greater (UK Government, 2020). Migrants whose salary exceeds £20,480 but is less than £25,600 may qualify for immigrant status if they hold a job offer from an employer in a specific 'shortage' occupation (as designated by MAC) or have a PhD relevant to the job. The resident labour market test and the restrictions on the skilled worker route will be discontinued and the minimum skills threshold will be reduced from RQF6 (bachelor's degree or equivalent) to RQF3 (A-level or equivalent).

In some ways the new regime will be less restrictive. However, because average wages in Wales are significantly lower than the UK average (Welsh Government, 2019), the salary threshold could lead to recruitment problems for employers in Wales in sectors that rely on migrant workers.

The biggest effects will be felt by employers who currently employ substantial numbers of European Economic Area (EEA)migrants who fall beneath the £25,600 salary threshold (classified as 'low-skilled' by the UK Government). In Wales, this includes large numbers of employers in sectors such as manufacturing, higher education, tourism and hospitality, culture and the arts, and health and social care (Welsh Government, 2020a).

Our analysis shows the likely impact of the £25,600 Tier 2 salary threshold on the proportion of jobs available to migrant workers in Wales and suggests that there will be significant differences between occupational groups and different parts of the country. There will also be variations by gender and between full-time and part-time workers.

Since the proposed threshold is based on annual salary, our analysis focuses on the distribution of gross annual earnings for selected groups of workers using data from the ONS Annual Survey

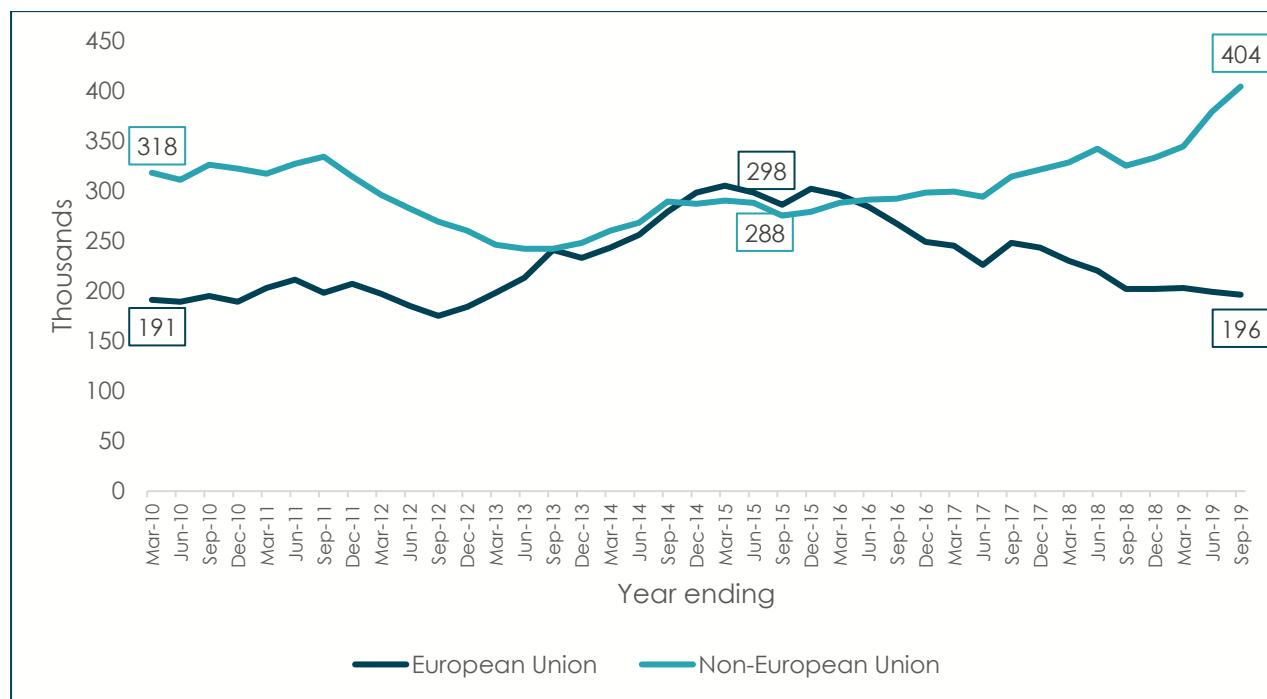
of Hours and Earnings (ASHE), carried out in April 2019 (ONS, 2019a).³ The ASHE data provide an appropriate comparator group for potential migrants.

The analysis presented here complements a separate report published by the Wales Centre for Public Policy in September 2020 which examines in greater detail the effect of post-Brexit migration rules on the health and social care workforce in Wales. That report focuses in particular on which staff groups are likely to be most affected, and the implications for the long-term workforce strategy for health and social care, including future retention and recruitment (Portes, Oommen and Johnson, 2020). The report concluded that the likely impacts of the new rules on the Welsh NHS will be small but could have a significant impact on the social care workforce.

Post-Brexit migration patterns

There has already been a significant decline in net migration from EEA countries since 2015 and it seems likely that this will continue once the new immigration rules are introduced in 2021. This decline has been offset by a rise in net migration from non-EEA countries, though much of this increase has been for the purposes of study (see Figure 1).

Figure 1: Net migration to the UK (2010-2019)



Source: Office for National Statistics

³ Note that these data exclude the self-employed. Under current UK government proposals, the self-employed would not be eligible to migrate to the UK.

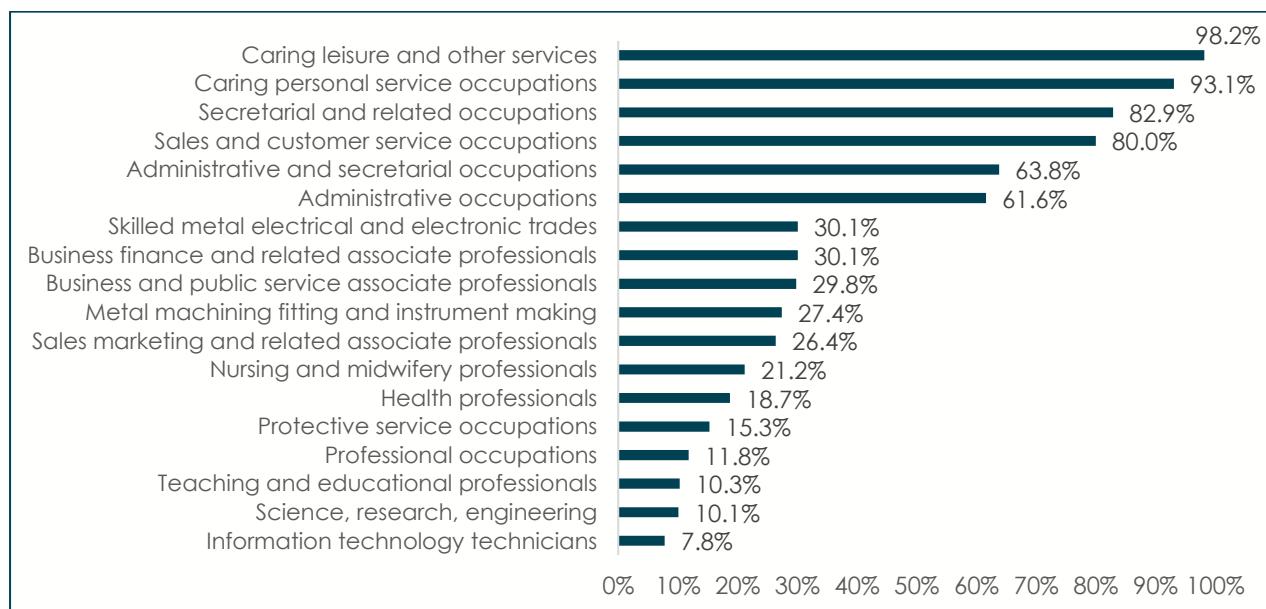
Occupational differences

The UK Government's decision to lower the salary threshold from the £30,000 minimum that it originally proposed to the lower level of £25,600, combined with the exemption of RFQ3 occupations from this threshold through the shortage occupation list, means that a higher proportion of EEA nationals will in principle meet the Tier 2 threshold.

Our analysis of ASHE data suggests that 56.5 per cent of all workers in Wales earned less than £25,600 per annum in 2019, whilst 66 per cent earned less than £30,000. So whilst the decision to reduce the threshold means that migrants will be eligible for an additional 9.5 per cent of all jobs in Wales, the lower threshold will still exclude migrants from more than half of jobs and is, therefore, likely to affect a large number of employers.

Figure 2 shows how the effects of the £25,600 threshold vary in different occupational groups within the Welsh labour market.⁴ Occupations are arranged in order of increasing eligibility for potential migrants. A large proportion of jobs in information technology; science, research and engineering; teaching and education; and professional occupations will be available to migrants. In contrast, very few jobs in caring; secretarial; sales and customer service; and administrative occupations are likely to be eligible.

Figure 2: Proportion of all full-time jobs falling below the £25,600 threshold by occupation



Source: Annual Survey of Hours and Earnings, Office for National Statistics

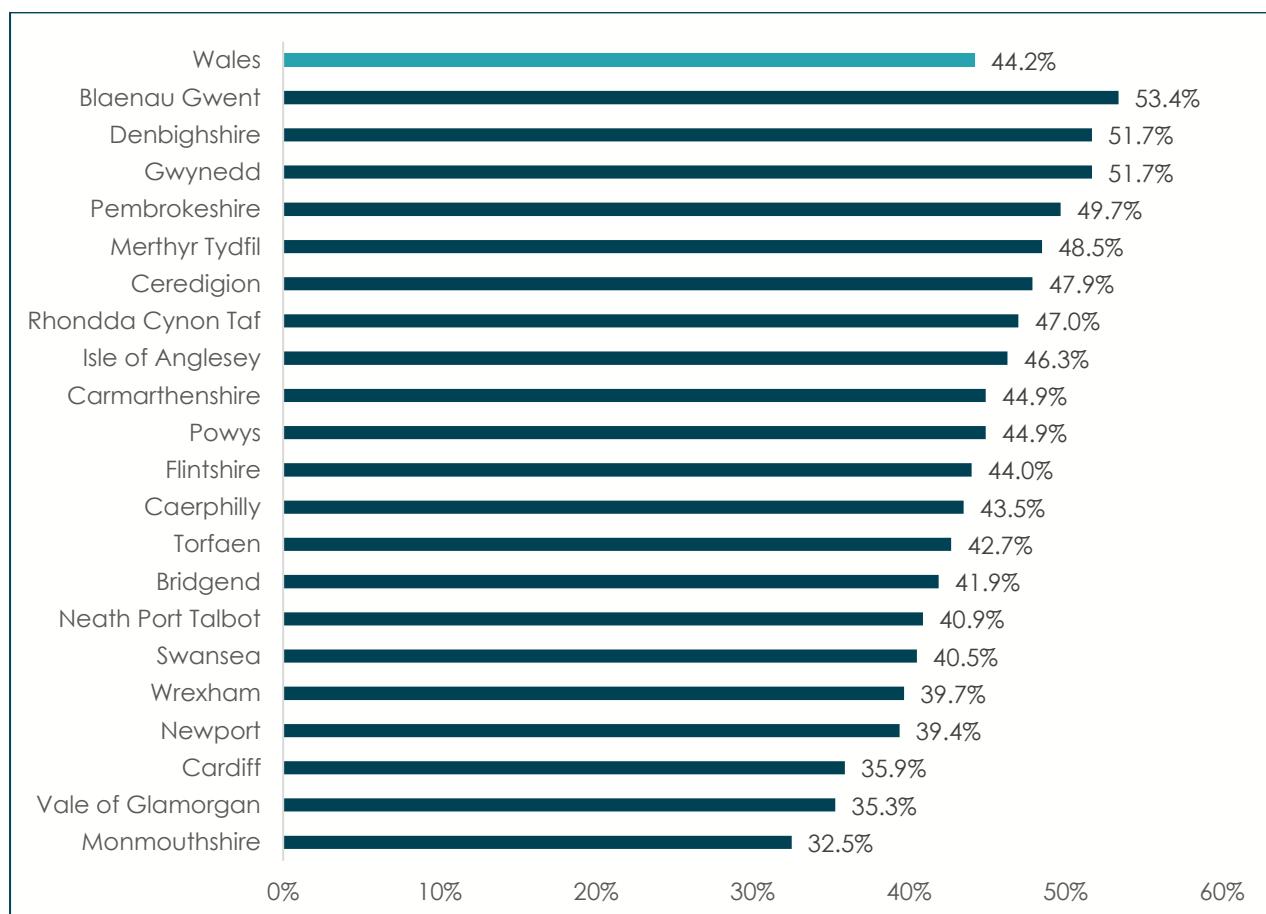
⁴ Unfortunately, the occupational data in the ASHE survey in Wales area relatively sparse due to limited sample size.

Geographic differences

Our analysis shows that the new immigration policies will have different impacts in different parts of Wales.

Figure 3 shows the proportion of jobs in each Welsh local authority that falls below the migrant salary threshold. Those local authorities with relatively high median salaries have the lowest share of jobs for which migrants would not be eligible. These include Monmouthshire, the Vale of Glamorgan and Cardiff. At the other end of the scale, local authorities where pay is relatively low have a much higher proportion of jobs for which migrants would be ineligible. These include Blaenau Gwent, Denbighshire and Gwynedd. It is in these areas that new immigration policies can be expected to have the greatest impact. The risk is that they might create labour shortages in these areas. Conversely, they could make it easier for local people to access jobs provided that they have the required skills and qualifications.

Figure 3: Proportion of all full-time jobs falling below the £25,600 thresholds by Welsh local authority



Source: Annual Survey of Hours and Earnings, Office for National Statistics

Gender differences

Our analysis shows that because on average women in Wales work in lower paid sectors and occupations than men, 67.9 per cent of jobs currently employing females would not be available to migrants once the £25,600 threshold is introduced. This may mean that the new immigration rules open up new employment opportunities for non-migrants. However, if non-migrants are not available or prepared to fill the jobs previously taken by migrants, it could result in labour shortages for some sectors and some employers.

Full-time and part-time jobs

Our analysis also shows that the new immigration rules can be expected to have different impacts on full and part time jobs. Fewer than half (44.7 per cent) of full-time jobs currently pay salaries below the £25,600 threshold, and so would be unavailable to migrants. By contrast, since part-time work generally pays less than full-time work, migrants seeking part-time work would be excluded from a greater proportion of jobs. Our analysis shows that very few part-time jobs currently exceed the £25,600 threshold. This may be problematic for family units seeking to migrate together and to mix full-time and part-time work.

Population changes

Ending free movement of people will have a significant impact on population growth in those parts of the UK – like Wales and Scotland – which have older populations and low fertility rates (ONS, 2019b; 2019c) and are more reliant on non-UK migration to grow their populations (migrants tend to be younger than the UK average and of working age). A reduction in migration is likely to lead to a decrease in population growth, or even to population decline in some rural communities, and a reduction in the numbers of working-age people will have a knock-on effect on local economies.

Wales also shows a distinct pattern of internal (i.e. within-UK) migration (ONS, 2020a). Whilst in England and Scotland, net inward international migration has tended to far outweigh net inward cross-border migration, the two have fluctuated in Wales. In 2016-17 and 2017-18, Wales gained more migrants through cross-border migration than international migration, with the converse being true for England and Scotland. This comparatively higher reliance on cross-border/internal migration compared to international migration is associated with different effects on Wales' age structure. Analysis of the most recent internal migration data by age shows a net increase across all age groups other than 20-29 year olds, which showed a net decrease (ONS, 2020b). Net international migration on the other hand resulted in a net increase of all age groups apart from those under 15 years old, with particularly large inflows for 15-24 and 25-44 year olds (ONS, 2016).

The impact of international migration to the UK on internal migration to Wales from the UK is not clear, so it is currently impossible to model the knock-on impact of changes to international migration as a result of Brexit on net cross-border migration into Wales.

Public finances

A decline in working-age population could also place more pressure on those who are in work to support people of pensionable age, and research has shown that on average EEA migrants contribute £2,300 per annum more to the UK purse than the average British citizen, easing the tax burden on other taxpayers (Oxford Economics, 2018). A reduction in the numbers of EU workers making this contribution to public finances, may imply that the tax burden on others will need to rise.

Community relations and integration

UK government ministers have talked of 'toughening up' citizenship rules after Brexit, including the introduction of a new British values test and more stringent English language requirements.⁵ The current Home Secretary has also explored the introduction of new barriers to naturalisation for EU nationals and in May 2020, the Home Office introduced a new requirement for EU nationals seeking citizenship of providing evidence that they have been living in the UK lawfully (McKinney, 2018; Home Office, 2020). These policies might be seen as representing a trend towards what has been called coercive civic integration in the UK (Joppke, 2007).

A report published for the Scottish Government in 2020 explored the impact of Brexit on community relations including increased hostility towards migrants and minority ethnic groups (Hepburn, 2020). And official data show that there has been a marked rise in recorded hate crime since the 2016 EU referendum in England and Wales (Home Office, 2019). The charity Show Racism the Red Card has argued that Brexit has been a 'major influence' in the rise of racism and race-related hate crime in Wales (as well as the rest of the UK) since June 2016.⁶

Some of the potential negative impacts of post-Brexit migration policies in Wales could be mitigated by encouraging migrants to remain and ensuring that they feel welcome and are able to integrate. This in turn points to the value of efforts to support community cohesion and inclusiveness after the transition period ends.

⁵ See: <http://www.ukpol.co.uk/sajid-javid-2018-speech-at-conservative-party-conference/>

⁶ See: 'Brexit 'major influence' in racism and hate crime rise' - <https://www.bbc.co.uk/news/uk-wales-48692863>

Administrative capacity

Creating and implementing a new immigration system in a short space of time is an enormous challenge, and some experts believe that the Home Office will struggle to implement such wide-ranging structural changes, particularly during a global pandemic. Long waiting time for decisions under the EU Settlement Scheme and for visa/naturalisation applications, which have been further impacted by the Coronavirus pandemic (Barnard, Costello and Butlin, 2020), as well as mistakes such as Windrush scandal (Bulman, 2019), all point to the complexity of the task facing the Home Office.

EU member state responses

Responses from EU institutions and Member States to the UK Government's proposals suggest the possibility of reciprocal measures which may disadvantage UK nationals seeking to work in EU countries. Although it could be seen as a negotiating tactic, the European Parliament's former chief Brexit representative, Guy Verhofstadt, for example, has warned that any restrictions on EU nationals in the UK would be mirrored in the EU (Boffey, 2018).

Perceptions of the UK as a place to work

As shown above in Figure 1, there has been a steep decline in the number of EEA nationals moving to the UK since 2016, and an increase in EEA nationals leaving it. In August 2019, the ONS released data showing that EEA net migration to the UK had fallen to a six-year low (ONS, 2019d).

This is very likely due, at least in part, to the depreciation of the pound against the euro since the Brexit referendum, which has lowered wages in the UK relative to some other EU countries (The Migration Observatory, 2017). Mitigating this is difficult, but it could perhaps be partially offset by efforts to ensure that the UK continues to be seen as welcoming to migrants and is, therefore, an attractive destination for them.

Evidence from Scotland

The Scottish Government established an Expert Advisory Group on Migration and Population to complement the UK Government's MAC. The Expert Group has published several reports exploring the potential impacts of the post-Brexit migration system on Scotland. It has estimated that there could be a 50 per cent reduction in net-migration to Scotland after Brexit, even accounting for an expected increase in non-EEA migrants due to the easing of restrictions for third-country nationals (Expert Advisory Group on Migration and Population, 2019).

The Expert Group concluded that these changes would make it harder to fill skills and labour shortages, especially in sectors where the average salary is less than £25,600 per annum. It stated that lower levels of migration would 'lead to a gradually declining and rapidly ageing workforce population' and would be 'particularly disruptive for rural and remote areas of Scotland, where the old age structure means that in-migration is the only means of countering depopulation'.

The Expert Group has also published a report containing recommendations on tailoring the migration system in Scotland by creating a new Scottish Visa and a new place-based route for migration to rural areas (Expert Advisory Group on Migration and Population, 2020), which have been rejected by the UK Government (Gordon, 2020).

The issues affecting Wales are similar issues to those highlighted by the Scottish Expert Group, and the Welsh Government might want to consider establishing a similar Expert Group on Migration and Population to advise it on post-Brexit migration policies.

The Coronavirus pandemic

The impacts of post-Brexit immigration policies are inevitably going to be intertwined with the effects of the Coronavirus pandemic on the Welsh economy and labour market. But they are difficult to forecast. It may be, for example, that higher unemployment as a result of the pandemic means that UK citizens become more willing to take jobs that would in the past have been filled by migrant workers. There is anecdotal evidence from the social care sector that its recruitment has eased since March partly for this reason.

The pandemic has had some immediate impacts on migration including the ban on all non-essential travel to and from the UK and the suspension of visa and citizenship application services. The travel lockdown in the spring had a direct effect on the UK's ability to recruit seasonal agricultural workers. Attempts to attract British workers to pick crops failed to fill all of the shortages and in April 2020 the UK Government chartered flights to fly in EU nationals to harvest fruit and vegetable crops (O'Carroll, 2020; Corker, 2020). Partly to avoid future problems of this kind, food producers have argued for revisions to the Immigration Bill to enable the recruitment of larger numbers of seasonal workers (Morris, 2020).

The Coronavirus crisis has also affected the lives of migrants because it has disrupted the functioning of the EU settlement scheme, and the ability of EU nationals living in the UK to apply to it. Barnard et al. (2020) highlight the difficulties facing migrants because of the:

- closure of EU settlement scheme support centres and local scanning centres, particularly affecting vulnerable EU citizens;
- closure of embassies, making it difficult for EU nationals to apply for ID in order to make applications to the scheme; and

- fact that EU nationals who do not pass a 'habitual residency' test cannot access Universal Credit if they have been furloughed or made unemployed.

The pandemic has also highlighted the vital contribution that 'low-skilled' key workers (who fall below the £25,600 threshold) make in a range of important services, and there has been an acknowledgement that many migrants have faced increased exposure to Coronavirus because they are in frontline occupations (Syal, 2020). Public support for key health workers from overseas led the UK Government to drop the Immigration Health Surcharge for migrant health and social workers and there have been calls for other key workers to be exempted from the £400 per annum fee (Manning, 2020).

There are other signs of a shift in public attitudes towards migrants. According to the Oxford Migration Observatory, between 2001 and mid-2016, concerns about immigration was often named by the public as 'most important issue' facing Britain (Blinder and Richards, 2020). However, by 2019 public attitudes to immigration were the most positive they had been for many years (Ford, 2019) and the UK Government's MAC has forecast that 'the UK may find itself in the position of ending free movement just as public concern falls about the migration flows that result from it' (MAC, 2018).

Recommendations

In addition to considering establishing an expert group to advise on the impacts of changes in migration policy, there are a range of ways in which the Welsh Government might want to consider attempting to address the issues identified in this report.

Influencing UK migration policy

The 2020 Home Office policy paper rejected 'different arrangements for different parts of the UK', despite the MAC's recommendation of the creation of separate shortage occupation lists for Wales and Northern Ireland, and the continuation of the Scottish shortage occupation list (MAC, 2019), in recognition of the fact that the salary threshold will have differential impacts in different parts of the UK.

The implementation of a 'single system' will have a differential impact on different parts of the UK and the Welsh Government has been clear that the UK Government's proposed post-Brexit immigration 'don't work' for Wales (Welsh Government, 2020b). The Scottish Government has taken a similar line.

The Welsh Government has sought to influence the UK Government's plans so that they take into account Wales' specific economic and demographic situation and recognise the case for a more differentiated migration system (Welsh Government, 2020a). There are three sets of measures which are particularly important to continue to press for:

Regional variations in the UK migration policy

The Welsh Government and other key stakeholders should continue to make the case to the UK Government for regional differentiation, regional salary thresholds (namely, a lower threshold in Wales), a seat on the MAC, and a Welsh Shortage Occupation List (which was recommended by the MAC).

Sectoral schemes (i.e. social care, agriculture)

The UK Government has accepted the need for the seasonal agricultural scheme. There is a strong case for a new sectoral scheme focusing on the social care sector to meet the crisis in recruitment and retention (Taylor, 2020). The MAC has recognised the crisis though it argued that the sector 'needs a policy wider than just migration to fix its problems' (MAC, 2018). The Welsh Government should seek to influence the UK Government to introduce a social care sectoral scheme or a 'Social Care Visa' (like the NHS Visa) that meets the needs of the ageing population in Wales.

Rural visa pilot

The MAC has recommended the creation of a rural pilot scheme to encourage migration to sparsely populated areas of the UK (MAC, 2018). Scotland has also argued for this, and the Welsh Government could lobby the UK Government to introduce a pilot and include Wales in it to help ensure the future supply of working-age migrants to fill key jobs in rural communities.

Influencing UK-EU negotiations

The Welsh Government should seek to ensure that the negotiations between the UK and EU take account of the importance of:

Mobility frameworks

Given the UK Government's intention to explore mobility arrangements with the EU (and potentially other countries), there may be an opportunity for Wales to continue to benefit from the mobility of businesspeople, researchers and students, and from training opportunities in the EU. The Welsh Government could lobby the UK Government to try to ensure that future UK-EU mobility arrangements, such as youth mobility schemes, include these categories of researchers/scientists/students, and does not focus exclusively on the temporary entry and stay of business people providing services (which is the standard mobility template in free trade agreements).

Mutual recognition of professional qualifications

The UK Government has signalled that it wishes to continue the mutual recognition of professional qualifications (MRPQ) with the EU, as part of the future UK-EU trade agreement. The Welsh Government could continue to highlight the importance of MRPQ for Welsh organisations, and to lobby the UK Government to include MRPQ clauses in trade agreements with other countries (especially those sending high numbers of overseas workers to Wales), to ease recruitment/retention issues.

Using devolved powers

A migrant integration strategy for Wales

Ensuring positive net migration into the future is not only about attracting new migrants to come and live and work in Wales; it is also about encouraging migrants who already live here to stay. A clearly articulated migrant integration strategy for Wales could help to retain migrants and is within the Welsh Government's control (Trevena, 2018).

Gender equality initiatives

Due to an ageing population and low fertility rates, natural change is not expected to drive population growth in Wales in the future. Developing gender inclusive policies that give (prospective) parents the choice and opportunity to raise children (such as a continued expansion in free childcare for pre-schoolers, and shared parental leave – thereby reducing the pressures on women to give up work) may help to create a more gender-inclusive society while growing the population.

Support for rural communities

The Welsh Government should continue to seek to grow the rural economy, through infrastructure and investment, to attract and retain migrants and non-migrants to rural communities. The pandemic has made this kind of support even more important for those rural communities that are dependent on hospitality and tourism and those with declining working age populations.

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