



Research for Tomorrow, Today



Wychavon Migrant Workers Mini Scenarios Report
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October 2008

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Background and aims

In February 2004, Wychavon District Council published a report from the Vale of Evesham Agriculture and Food Distribution Policy Development Panel. This panel examined a range of issues linked to horticulture including transport and the impact of the industry on communities in the Vale of Evesham. It also looked in detail at the role of migrant workers and gangmasters.

Recommendation 37 of this report supported the call for Government to carry out detailed research into accurate measurement of the numbers of casual workers in the Food and Farming sector. It went on to state that the Vale of Evesham would make an appropriate pilot study.

With financial support from the Countryside Agency, Worcestershire Primary Care Trust and the Worcestershire Diocese, the research document 'The Extent, Size and Characteristics of the Migrant Workforce in the Vale of Evesham' was published in 2006. It found that migrant workers in horticulture are often skilled people with aspirations to move into other employment. They also make a positive contribution to the economy as tax payers and as customers for local businesses. Local employers in the horticulture sector rely on them. With low unemployment and the work being very hard, local people seem not to want the jobs.

Two years on from the publication of the research, it is clear that the picture is changing. As the British economy slows down and the pound weakens, working in the UK is no longer as attractive as it was. The economies in Eastern Europe are improving and there are fewer people coming to the UK. Furthermore, restrictions on the Seasonal Agricultural Workers Scheme have resulted in growers unable to pick crops. Local employers who, with the arrival of the Gangmasters Licensing Authority made conscious decisions to employ directly and not use labour providers, now have to turn back to these agencies to fill their labour needs.

Since late 2007, Wychavon District Council and partners from the private and public sector have been involved in the Improvement and Development Agency's 'Migration Excellence' programme. One of the objectives of this programme, agreed at a meeting with partners in late October 2007, is to carry out a 'horizon scanning' study.

Together with partners including the Worcestershire Partnership and as part of its long term planning, Wychavon District Council wishes to assess the significance of migrant workers in their local area, with particular reference to the impact on local population, housing and employment. They wish to use a 'mini scenario' approach to provide them with:

- A baseline measure of current migrant populations
- An assessment of exposure and risk
- A joined up working assessment
- Scenarios of different projections over the next 5-10 years
- A framework for updating the project
- This report summarises the key findings from our research.

Approach

Sheila Moorcroft and Andrew Myers have used a combination of

- Data collection from secondary sources such as the Institute for Public Policy Research report on migration
- Selection and analysis of original data sources such as the WRS database (Worker Registration Scheme)
- Interviews with local stakeholders - which took place during the first half of August

We have presented the detailed data tables and figures in a separate set of appendices, so that Wychavon has the full baseline data. This report includes

- The key baseline data in summary
- The trends and issues emerging from the analysis and the interviews which are likely to affect migrant workers in Wychavon, their role and impact in the local economy
- The key 'uncertainties' shaping four possible scenarios of the number of migrant workers in Wychavon in coming years
- Four scenarios outlining the impact, implications and risks to Wychavon, its population and economy of both increased and decreased numbers of migrant workers in the area
- Conclusions and recommendations

Why mini-scenarios?

This project has taken a futures approach and used mini scenarios as the mechanism for presenting the findings for several reasons. Scenarios enable us to

- Incorporate data, issues and inputs from a wide range of stakeholders and sources into an integrated view of the future context of the policy issues under consideration
- Explore different views of the future and their implications for Wychavon
- Recognise that the future is not only uncertain, but could develop in very different directions from the one we 'expect'
- Provide a framework for discussing wider issues and implications of future decisions
- Learn the lessons of futures we might neither want, nor expect.

The mini scenarios outlined in this report do not attempt to predict precisely what will happen; based on the stakeholder interviews, published reports and statistics they present informed views of possible outcomes.

In addition, in collaboration with Wychavon, IDeA also wanted to use this project as a means of demonstrating how futures could be used to explore and inform a more integrated look at local policy with regard to migration - or indeed any other area of policy.

Key trends and issues

From our detailed review of published secondary sources, primary data provided by Wychavon and from publicly available sources such as the WRS databases, we have put together detailed data tables in the accompanying Data Appendix. This appendix report also includes the summary of the interviews with the local stakeholders.

Using the data we have assembled in the Data Appendix, the following key trends, issues and developments emerge. These trends and developments provide the main inputs into the development of the mini scenarios.

Area	Key trends and issues to consider	Possible impacts/ implications	Source: Table (T)/ Figure (F) / Page number
Population			
	According to best available data, Wychavon population is growing faster than other local districts, except Bromsgrove		T1
	Wychavon's population is also ageing fastest		T3
	Total population in Wychavon is likely to grow 4.7% between 2006 and 2026		T4
	Wychavon's workforce age population (18-64) will decline by 2% by 2016, at a faster rate than other local districts	Putting pressure on local employers and the job market	F3
	The 'young old' 65-69 will grow by 43% to 2016; all over 65s by 33%	Care needs will increase	T6
	Wychavon is one of the least deprived area in the West Midlands	Making it an attractive focus for inward migration	T8
	Commuting distances out of Wychavon are increasing; up 50%		P14

	between 1991 and 2001		
	Increasing number of children with English as a second language. Worcester's first Polish school opened in March 2008; 43 already attend; 60 are signed up for September		F8
West Midlands	General population movement in the West Midlands shows a significant outward movement of those aged 16-34; And again among those aged 40 - 70	Young workers are leaving; West Midlands is dominated by its urban centres.	F19
	Under 10s, and 30 -40 year olds show positive Inward migration to the West Midlands	Young families are moving into the West Midlands areas	F19
Migration			
National	UK-wide net immigration has been rising steadily since 1997; likewise immigration from A8 countries		F9
	West Midlands as a whole received ca 8% of total UK Nino registrations - the fifth largest regional inflow		T13
	At the UK level, between 2004 and 2007 two thirds of approved work applicants are Polish; 10% Slovakian and 10% Lithuanian		F12
	Between 2004 and 2007 total numbers of approved applications in the UK grew strongly by 64%, to 206,995: <ul style="list-style-type: none"> ∞ from Poland they doubled; ∞ from Hungary up 140%; ∞ from Slovakia 69%. 		T11
	At the UK level, numbers of WRS approved applications for most A8 countries peaked in 2006 or before, with the exception of people coming from Hungary; those from		T11

	Slovakia have levelled off		
	At the UK level, the summer quarters of 2006 were the peak periods for A8 immigration		F16
	At the national level, the proportion working in agriculture is declining slightly also in food/ fish meat processing		F16
Wychavon	Non UK national Nino registrations in Wychavon having been relatively steady in 2002-4, doubled in 2004/5 to 540 and had almost doubled again by 2006/7 to 1030. The highest for any single district in Worcestershire, and nearly 30% of the total in the county. The county total has trebled since 2002/3		T10
	In Wychavon, the largest proportion of registered workers are in agricultural activities, and this has been growing from 22% in 2004/6 to 34% in April 2008; also in administration and managerial up from 12% to 19% - the latter includes all agency staff including those working in food and agriculture	Sector shifts as well as overall decline in numbers	T15a
	Food processing is declining down from 29% to 22% over the same time period, but static compared to April 07. Other sectors too are declining.		T15a
	Approved applications in Worcestershire have grown from 100/ quarter in Q2 2004, to ca 550 in Q1 2008; in Wychavon from ca 50/ quarter to 200 / quarter		F15
	Allowing for seasonal peaks and troughs, numbers of approved applicants in Wychavon have been rising steadily between 2004 Q2 and Q1 2008; growth in Worcester has been faster, as has Redditch	Local competition for workers	F13, F14
	Wychavon attracts internal migration from elsewhere in the UK, as well as from overseas. Until 2006, internal migration, as recorded exceeded international migration		F11

	The majority of registered workers are 18-34; over 85% in Wychavon in 2007/8. A slight decline in the 18-24 and a very slight rise in 25-34 age groups.		T16 / F18
	<p>Those post codes in the Wychavon district with the highest concentrations of migrant worker registrations , as of May 2005, include some which are wholly within the WDC and others which are contiguous to the WDC and are only partially within WDC</p> <ul style="list-style-type: none"> ▪ WR11 Evesham area n=640 ▪ WR9 Droitwich area n=251 ▪ WR10 Pershore area n=170 ▪ B96 Redditch Area n=674 ▪ GL20 Tewkesbury area n=237 ▪ DY10 Kidderminster area n=198 	Localised pressure points likely to increase?	T32
<i>Stay or go</i>			
<u>National</u>	Against a backdrop of declining numbers of migrant workers in total in 2007 over 2006, the proportion with dependants grew, although the total number fell		T18
	The proportion with dependants has grown from 4.4% in 2004 to 9.5% in 2007	More service needs; more likely to stay longer.	T18

West Midlands	35% say they would like to stay permanently; 20% for about a year; the rest for 3 months or less - this group is growing		F20
	Once here, they seem to be more likely to stay longer	Stay or go?	F20
	Relative prosperity, less favourable exchange rates and their home economies improving were seen as the main triggers for them leaving, or not coming		Interview
	Opening up of other EU countries - less likely, but possible		Interview

Worcestershire	<p>Based on estimates of numbers of dependants/ 1000 migrants when they first register, the average in 2004/6 compared with 2007/8</p> <ul style="list-style-type: none"> ∞ Doubled in the West Midlands (150) ∞ Doubled in Worcestershire (134.5) ∞ More than tripled in Wychavon (105.6) - although still one of the lowest proportions locally ∞ Redditch has the largest concentration (173) ∞ Malvern Hills second largest (150) 	<p>Numbers are likely to be higher, because migrants will get established first then bring family over.</p>	<p>T19</p>
Wychavon	<p>Many areas in Worcestershire saw a decline in numbers of dependants from 2006 - 2007; Wychavon bucked this trend and is the only area to have grown year on year</p>	<p>Migration from elsewhere locally into Wychavon?</p>	<p>T19</p>
Claiming Benefits	<p>At the national level, the proportion of those with a NINo who were claiming benefit dropped sharply in 2003/4 over the previous year, and has continued to drop since then</p>	<p>Not 'sponging'</p>	<p>F23</p>
<p>Local Economy</p>			
	<p>In 2006 Wychavon district had 47,700 employee jobs; 69% full time, 31% part time - in line with national averages</p>		<p>T20</p>
	<p>Numbers of jobs in Wychavon has declined 0.8% between 2001 and 2006 compared with 3% for West Midlands</p>	<p>The Wychavon economy is proving resilient?</p>	<p>T21</p>
	<p>The number of registered businesses grew by 8%, between 2001 and 2006; compared with 9.4% in the West Midlands and 9.5%</p>		<p>F24</p>

	VAT registrations showed a slight increase year on year in Wychavon from 2002; but declined in West Midlands after 2003		F25
	Unemployment is low, 1.5% in Wychavon in May 2008; more than 2:1 were men. Only in Bromsgrove and Malvern Hills is it lower. <ul style="list-style-type: none"> ▪ West Midlands (3.9%) ▪ Worcester and Redditch (2.6%) ▪ Worcestershire (1.9%) 		T22
	Local employers often cannot find local employees via Job centre; wrong skills, wrong attitudes		Interview
Importance of migrant workers	Local employers regard migrant workers as essential to their business - when asked to rate their importance out of 5, the average score was 5/5	There is little realistic alternative;	T37
	Other stakeholders see the significance to the local economy lower- 3/5	Migrants have been enabling growth locally	T37
	Impact on local economy of losing / a drop in numbers coming from A8 of: 10% - 2.9/5 - employers scoring higher than other stakeholders	Some individual companies an immediate problem; no replacement locally; hospitality in particular badly hit	T38
	30% - 3.6 /5 - with employers tending to score the impact higher	Return of the gang-masters; bussing in local people from Birmingham; unable to pick / process crops	T38
	50% - 4.8/5 - huge problem and knock on effects	Bankruptcies; downturn in local	T38

		economy; significant knock on effects; reduced turnover through out; move production elsewhere	
Finding a job/workers	UK employment agencies are the most frequent place to find a job; 38% used them		T23
	Word of mouth 30% - the significance of word of mouth in recruitment is highlighted in the focus groups discussions and the local interviews: <ul style="list-style-type: none"> ▪ Direct contact with employer (14%) ▪ Recruitment agency in home country (10%) 	Many are from similar areas back home, domino effect once start to leave? Local reputation is important	Focus Group/ Interviews
	Lack of willingness to use gang masters among employers even looking for seasonal workers		
	Lack of skills in local area, make better use of migrants and their skills	Need for better training, skill matching, qualification matching; ‘be a good employer’	Interviews
Housing supply/market			
	Ca 50,000 homes in Wychavon; 75% owned, versus national average of 68%	A tight local housing market	P44
	Those postcodes with the highest concentrations of migrant workers, do not display the highest house price rises; except WR9 - Please note, these postcodes include different areas from the table above. ∞ WR10 Pershore area + 117%		T33

	<ul style="list-style-type: none"> ∞ WR11 Evesham area + 168% ∞ WR9 Droitwich area + 218% ∞ DY10 Kidderminster area+ 74% ∞ B96 Redditch Area + 87% ∞ GL20 Tewkesbury area + 181% ∞ 		
Affordable housing	<p>Affordable housing is in short supply, and is forecast to continue to be so across Wychavon</p> <ul style="list-style-type: none"> ∞ In Wychavon Annual gross need - 1325 ∞ Annual shortfall 274/ year ∞ New supply per annum needed 2011 - 470 ∞ New supply per annum needed Post 2011 - 464 	A housing market down turn will have serious knock on effects in affordable housing and local supply	T28
	<ul style="list-style-type: none"> ∞ In Droitwich Annual gross need - 386 ∞ Annual shortfall - 45/ year ∞ New supply per annum needed 2011 - 120 ∞ New supply per annum needed Post 2011 - na 		T29a
	<ul style="list-style-type: none"> ∞ In Evesham Annual gross need - 577 ∞ Annual shortfall - 148/ year ∞ New supply per annum needed 2011 - 200 New supply per annum needed Post 2011 - na 		T29b
	<ul style="list-style-type: none"> ∞ In Pershore Annual gross need - 143 		T29c

	<ul style="list-style-type: none"> ∞ Annual shortfall - 21 year ∞ New supply per annum needed 2011 - 60 ∞ New supply per annum needed Post 2011 - na 		
	<p>Annual need of subsidised affordable housing, buy or rent</p> <ul style="list-style-type: none"> ∞ Wychavon 363 ∞ Droitwich 66 ∞ Evesham 147 ∞ Pershore 23 		T28, T29a-T29c
Migrant worker housing	<p>In the West Midlands, nearly 80% of A8 migrants rent or stay with friends/ family</p> <ul style="list-style-type: none"> ∞ 68% of A8 workers rent - higher than average (59%) ∞ 10% stay with friends or family - higher than average (8.4%) ∞ 7% are in social renting above average (6%) 	Most migrant workers are not a source of housing pressures	T30
	Poles and Slovaks are most likely to be living with non family, 66% and 60%		F27
	There is some local exploitation of migrant workers' lack of knowledge of regulations re housing		Focus Groups
	Housing was not seen as a problem by employers and other stakeholders		Interview
	Seasonal workers are often provided with hostel accommodation by their employer 5%		T30 / Interview

A8 economies			
	GDP growth continues, but the rate is slowing in most A8 countries; Poland, Slovakia and Slovenia continue to experience increased growth as of early 2008		F41, T35
	Unemployment levels are falling, but are still relatively high overall - Poland 13%, Slovakia 8.6%,	Relative benefits of working abroad may begin to disappear	F42, T36

Exchange rate	The Zloty, Koruna: £ exchange rate is strengthening	Wages in the UK are falling relatively	F43
<i>Other issues</i>			
	In 2009 Germany and France as well as other EU countries, open their borders to A8 migrants	Some may go there instead; English still a strong draw	Interviews
	Inadequate quotas and lack of up to date, local information on which to base UK strategy	Other sectors / higher skills given priority mean that crops will not get picked, subsequent losses	Interviews
	Inconsistent application of inspections by GLA	Time consuming administration and a distraction	Interviews
	Lack of regulation of non agricultural sectors by GLA	Uneven playing field	Interviews
	Lack of adequate English a problem sometimes; English a big draw / USP		Interviews

Baseline statistics for Wychavon – a summary

In addition to the trends and changes highlighted above, the following tables highlight key data for Wychavon. Please note, depending on the source, some data is reported using annual figures, whilst others use data across two years.

Total population 2001- 2006

Wychavon	2001	2002	2003	2004	2005	2006
Population estimates	113,000	113,600	114,300	115,00	115,700	116,300

Wychavon Population by age to 2016

Population estimates	2006	2007	2008	2009	2010	2011	2016
0-17	24,100	24,000	24,000	24,000	23,900	23,900	23,600
18-64	70,200	70,600	70,600	70,400	70,300	70,000	68,800
65+	22,000	22,400	23,000	23,800	24,400	25,300	29,400
Total	116,300	117,000	117,600	118,100	118,600	119,200	121,800

Wychavon employment and local economy

Wychavon	2001	2002	2003	2004	2005	2006
Employee jobs	48,100	45,300	45,300	45,900	45,800	47,700
Number of businesses	5,200	5,290	5,345	5,460	5,550	5,660
VAT registrations	455	425	455	465	465	470

Housing stock and shortfall

Social housing stock by area	2006
Droitwich	2,651
Worcester*	553
Evesham	3247
Pershore	815
TOTAL	7,266

* That part of Worcester, that falls within Wychavon

Housing	2006	2007	2008	2009	2010	2011	2016
Total shortfall/(surplus) existing stock – private	(89)	na	na	na	na	na	na
Total shortfall/(surplus) existing stock – social	363	na	na	na	na	na	na
Annual new supply - private	330	330	330	330	330	330	278
Annual new supply - social	140	140	140	140	140	140	186

Migration and migrant workers in Wychavon

Migration	2001/02	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08
Internal, UK national migration flows	800	800	800	500	500	na	na
International migration flows	-300	-100	-100	100	200	na	na
NINos	na	220	230	540	970	1,030	na
WRS	na	na	na	610	690	775	710

Migrant workers by Sector in Wychavon

Sector (%)	2004/06	2006/07	2007/08
SBS sectors*	28.5	21.9	21.8
Agriculture activities	21.9	28.4	33.8
Hospitality and catering	17.7	11	9.2
Administration, business and managerial services	11.5	15.5	19
Manufacturing	11.5	12.9	10.6
Construction and land services	2.7	2.6	0.7

* includes food packing and processing

Migrant workers by Age

Age (%)	2004/06	2006/07	2007/08
<18	0.4	0.6	0.7
18-24	53.8	51.6	47.2
25-34	36.2	36.8	37.3
35-44	5.4	4.5	7.7
45-54	3.8	5.2	4.9
55-64	0.4	0.0	0.7
65+	0.0	0.0	0.0
Others	0.0	1.3	1.4
Length of stay (%)	2004/06	2006/07	2007/08
< 3 months	38.5	46.5	52.9
3 to 5 months	0.4	1.3	0.7
6 to 11 months	3.1	5.7	5.1
1 to 2 years	5.4	22.3	19.6
More than 2 years	3.8	3.8	6.5
Do not know	48.8	20.4	15.2
Number of dependants (per 1,000)	2004/06	2006/07	2007/08
Estimates per 1,000	30.8	71.0	105.6

The mini scenarios

Issues in developing the scenarios

From analysing the data, conducting the interviews and previous discussions with the project team, the critical 'uncertainties' - i.e. those issues / developments which would create different outcomes and patterns of migration in the future - were the relative differences between the UK and the A8 economies, especially the 'feel good' factor of whether UK salaries, even for low paid jobs or jobs for which A8 migrants were over qualified, continued to provide a better offer than the local job market back home.

Emerging from that are a number of uncertainties

- ∞ Whether people continue to come and go in similar patterns as before - i.e. a revolving door - and what levels of growth / shortfall may emerge
- ∞ Whether those who come are of a similar skill level, work ethic etc
- ∞ The proportion of those who decide to remain on a long term/ permanent basis; short term 1-3 years; purely seasonal
- ∞ The proportion of those with dependants
- ∞ What movement there is in terms of job type - i.e. migrants 'moving up' (or down) in terms of more / less skilled work
- ∞ The levels of government imposed quotas for different skill levels affecting overall supply of migrants into the UK

Other trends and developments which are unlikely to change over the next 5-10 years and which need to be taken into consideration include:

- ∞ The continued attractiveness of Wychavon as a location to move to from the southeast and other areas
- ∞ The general trend of outward migration of younger people from Wychavon
- ∞ The overall ageing of the resident population in Wychavon.

Using these variables, we have developed four different scenarios examining the impacts and implications of both shortfalls and increases in the numbers of migrants locally. The dominant characteristic in each case is:

- ∞ Significant reduction in numbers coming - of 20% - 30%
- ∞ A lesser reduction of 10 - 15%
- ∞ A continued supply of migrants but with a different composition in terms of origin and skill level
- ∞ A continued increase of 5% per annum - regardless of work availability.

While we have not used formal scenario frameworks, in each case, we have endeavoured to give a plausible set of circumstances which might lead to the rise / fall in migrants as postulated, and set those within the wider context of population and economic changes. These scenarios are not forecasts or extrapolations from existing data. They are pictures of plausible futures 5 or so years out based on trends and issues identified and discussed during the research. The aim is to illustrate the potential implications of a variety of circumstances for the local

economy, employment and housing of significant changes in future in the migrant population in Wychavon.

We have given each of the scenarios a name which reflects the core element differentiating that particular scenario.

Using the mini scenarios

The mini scenarios are not designed to provide clear cut detailed forecasts of the local employment or housing stock in each and every area of Wychavon. What they are designed to do is to raise awareness that the future could go in very different directions; alert people to the potential impacts and wider implications and interactions of a wider variety of trends and developments across the board.

The scenarios allow users to ask questions, see connections and raise issues that might otherwise not get raised. They provide contexts based on ‘if the following set of circumstances were to arise, what might the impacts and implications be?’ ; they are to explore not predict the future outcomes of trends combining; they aim to challenge current thinking and provoke further questions.

They can then be used to identify alternative strategic and policy options for addressing some of the issues raised and to explore the wider context of change that might indicate that one or other set of outcomes is emerging.

They should all be regarded as equally likely, so that

- ∞ The potential implications arising from widely different futures can all be learnt
- ∞ The policy implications and tradeoffs between different choices thought through and assessed
- ∞ Contingencies can be explored and developed
- ∞ Indicators of the emergence of one or other futures identified and monitored to buy time for alternative strategies to be implemented
- ∞ Options for avoiding the most damaging and encouraging the potentially most positive impacts and implications can be considered

When reading the scenarios, it is important to remember that they are written as though we are in the future; think of them as ‘stories’ that might appear in the economic / business section of a newspaper review of the year for the local area highlighting what is ‘currently’ happening in 5 years or so; but also indicating what events happened to cause us to arrive in these circumstances. All of them are set 4-5years out in the future.

An overview of the scenarios

Serious Shortfall

- ∞ Sharp reduction of well over 20% in migrant workers
- ∞ A8 economic growth stronger relative to UK
- ∞ Other EU countries opening up creating competition for migrants
- ∞ UK quotas and controls tighter
- ∞ Wychavon population growing overall
- ∞ Continued exodus of young work age population
- ∞ Fall in migrant workers having serious impact in local economy
- ∞ Housing market static and tight

A different revolving door

- ∞ Overall numbers of migrants relatively stable
- ∞ UK economy doing better than other EU mature economies
- ∞ Gang master regulation strengthened
- ∞ Population moving more strongly to urban areas
- ∞ Local economy benefitting from concern and focus on food security
- ∞ Migrants tend to be lower skilled and more from Bulgaria and Romania
- ∞ More rented accommodation, but less affordable

Slowly but surely declining

- ∞ Year on year steady reduction in numbers, up to 15%
- ∞ A8 growing faster than much of EU
- ∞ More controls on immigration in UK
- ∞ Local population in Wychavon ageing overall and growing slowly
- ∞ Migrants with dependants a more significant proportion and very much part of local economy
- ∞ Increased use of gang masters
- ∞ Some reduction in commuting creating new pool of local labour
- ∞ Pressure throughout the housing market

A steady rise

- ∞ Wychavon has managed to attract a steady rising flow of migrants
- ∞ UK remains a more popular choice overall among migrant workers
- ∞ Net inflow from within the UK continues to Wychavon; more focus on urban centres
- ∞ Local economy generally buoyant
- ∞ Wychavon collaborative ventures to attract and keep migrants coming
- ∞ Local innovation is creating new forms of housing and encouraging renovation of poor quality stock

Scenario 1- Serious shortfall

The sudden downturn in the UK economy in 2008 -9 plus other factors led to a sharp and significant drop in the numbers of migrant workers coming to Wychavon. As a result, the local economy is experiencing a 20 - 30% fall in total numbers of migrants with attendant knock on effects in the economy.

International context

The A8 economies have maintained their economic growth, albeit with slower rates in some instances, but significantly above the UK and other EU countries. A8

economies have been growing at 5 or 6%, while the rest of the EU has achieved almost zero growth, hovering dangerously close to recession, much of the time.

As a result, the A8 unemployment levels continue to fall strongly, especially in Poland but also in the Baltic states. Again, the reverse is true elsewhere in the EU, with unemployment rates remaining high.

Continued new business development and inward investment from EU companies into A8 economies and elsewhere mean that skill shortages are beginning to emerge and local wages are beginning to rise significantly across the A8 economies. Wages are, as a result, becoming more competitive and intra-A8 migration is increasing. With the relative imbalance in economic performance, the UK£: A8 currencies' exchange rates have weakened, further undermining what was previously to the UK's advantage.

In addition, Germany France and Spain have opened up their own borders, providing alternative destinations. As a result, some migrants who might have considered coming to the UK have now diverted to those countries, further reducing the overall pool of migrant workers.

[The UK context](#)

The UK economy continues to perform poorly, and while it has emerged from the recession / slow-down of 2009-10 it is still not expanding and business and consumer confidence is low. As result, people are still feeling the pinch and public opinion is no longer convinced of the economic benefits argument for allowing significant numbers of migrants into the country. Calls for ever tighter controls have continued, and are being heard.

The UK has imposed tighter quotas in response to those pressures and continued to emphasise higher skilled workers over lower skilled workers for agriculture and other sectors relevant for Wychavon - sectors where migrant workers in Wychavon have in recent years played a very important role. In 2008, agriculture accounted for 33% of migrants in Wychavon; SBS (food processing) 22%.

Gang-master regulation has however been widened to encompass all sectors, not just agriculture. While most food and agriculture employers are pleased at the emergence of a more level playing field in finding workers, the net effect elsewhere is that hospitality and other previously unregulated sectors are feeling more constrained in terms of the availability of casual or seasonal workers. Given the poor economy, it is mainly the care sector rather than hospitality that is feeling the pinch.

Fuel prices have remained high, putting continued pressure both on employers and consumers. Food prices are also continuing to rise, with supermarkets putting ever greater pressure on suppliers to cut costs - making the issues of labour rates and availability even more urgent.

[Wychavon general population](#)

Wychavon continues to be an attractive location to move to. In particular, families are still moving from the southeast or the more urban area of the West Midlands - to find cheaper housing - relatively speaking - and more pleasant surroundings in which to raise a family; secondly older people wanting to retire away from city pressures and the increasing overcrowding in the southeast are moving into the area.

The general outflow of young people aged 18-34 has continued as they go in search of work and 'more exciting' lives elsewhere. The anticipated 2% fall by 2016 in work-age population over 2006 levels appears to be well in train.

The additional impact of population movements is that the population of Wychavon is ageing faster than other local areas, again as anticipated in the early 2000s. The over 65s as a whole were forecast to increase by just over one third between 2006 and 2016; the 65-69 age group growing by 43% by 2016. They have already increased by a good 15% and there is no indication of a downward shift in life expectancy or inward migration.

Wychavon migrant workers

The need for migrant workers has continued but competition from other countries, regions, other sectors and other local employers has intensified plus the overall pool coming to the UK has continued to shrink. Despite its general attractiveness as an area, Wychavon is experiencing a significant shortfall in the total numbers of migrants of nearly 30% relative to the highs in 2006/7.

The proportion of Poles within the total migrant pool has fallen significantly as their economy took off; the £: Zloty exchange rate weakened further and further; and restrictions increased. Those who come are still relatively well qualified, but are tending to look for longer term and better paid 'proper job' opportunities rather than low skilled seasonal work. The 'gap year' group, willing to do any job for a while, are moving on or staying away.

The numbers of migrants from Bulgaria and Romania have increased and they are tending to move into the low skill seasonal work opportunities previously taken by the Polish migrants. Again, restrictions at the national level are increasing competition for these workers.

Despite the downturn in the UK economy, rising food prices have meant that food processing has continued to flourish, albeit with less favourable trading conditions creating in some respects the worst of all worlds - local opportunities for growth with little hope of being able to take advantage of them.

Migrants have tended to go for jobs in urban areas with more choice of jobs, greater opportunity to move 'up the skill ladder' to some degree and larger local populations. This move applies as much within Worcestershire, meaning that migrants have moved to the towns such as Redditch and Worcester, as further afield in the West Midlands. Those migrants who do come to Wychavon tend to be less skilled than previously and often less motivated. Poor spoken English is more of a problem making overall management more onerous.

Local employers are having reluctantly to resort to using gang-masters to a greater degree than previously, so that even when they are able to get an adequate supply - in terms of numbers - of labour, there is much less consistency within the group of employees. Use of gang-masters in turn results in greater levels of administration for employers; more daily checks on papers and identity etc; more hands on management to ensure tasks are understood and executed properly and that health and safety etc is maintained. Overheads are increasing and reliability decreasing.

Some migrants with dependants having been made redundant by local employers during the downturn are still seeking work. They have stayed here in preference to returning to the greater uncertainty of life on the dole back home.

[Impact in the local economy](#)

The local economy is suffering right across the board, all sectors, all areas, not just the Vale of Evesham. Inadequate supply of employees as the economy is beginning to grow again has meant that companies are unable to replace workers and the economy overall has continued to shrink.

Those companies and producers who are unable to fill seasonal requirements have suffered most.

- ∞ Some have radically reduced production and turnover in line with available supplies - in preference to relying on gang masters
- ∞ Some have substituted casual/ daily workers via gang masters although this has not replaced the full requirement by any means
- ∞ Significant numbers of small businesses have gone out of business
- ∞ Larger companies are beginning strategically to move both food processing and supply elsewhere - investing in A8 countries as an alternative; this is further damaging the local Wychavon economy.

Those who have fared best are the companies who had attracted full time, permanent staff. They continued to invest heavily during the downturn in training, language development - promoting 'migrant' workers as part of overall company performance and development. The word of mouth networks both in the UK and overseas continue to benefit these employers who are seen as good employers; they are able to use them to find other possible employees when necessary to augment use of agencies etc.

Those employers who were forced to lay off some of their permanent staff, including 'migrant' workers, have suffered badly and now that the economy is beginning to show signs of growing again are finding it difficult to fill the gaps with the same profile of qualified migrant workers.

Younger, willing workers continue to be in short supply in the local job market. However, the 'young elderly' - 65-69 - whose incomes are under pressure from food and fuel costs, are looking for new opportunities. Greater flexibility, redesign of jobs and different attitudes may result in some replacement of the migrant shortfall, but this is unlikely to be possible among the more arduous low skilled jobs.

The increased use of migrants through gang-masters has also had a significant knock on effect within the local economy. While seasonal workers resident in the area in hostels etc might not have shown high levels of personal spending, that spend was still within the local economy. Now it has transferred elsewhere. Local shops, pubs and other services are experiencing a further downturn.

[Housing](#)

Overall the housing market has remained very tight and very static.

The housing market slump in 2008-9 reduced house prices considerably, making them appear more affordable in absolute terms, but the local job market is still causing problems. Other factors such as the long term slump in house building nationally have continued to reduce new supply; lack of sales has increased the number of private rentals where people wanted to move away -but not at the affordable end of the market; reduced incomes and rising costs have put further pressures on household budgets increasing the need for more affordable / social housing.

Private house building stopped during the downturn, resulting in far fewer completions than needed or anticipated in original planning targets. Overall supply has all but stagnated, with affordable housing the worst hit.

Concerns about negative equity and reduced availability of credit continue to keep sales to a minimum. Where they do take place, properties becoming available via up-trading or down-trading on house sales is not occurring. Those who are able to sell tend to be retirees moving into the area with cash, so no house within the area becomes available. Those leaving the area tend to leave from family homes so that again, no property became vacant.

A tight market has been getting tighter.

Scenario 2 - Slowly but surely shrinking

Year on year reductions in the numbers of migrants coming to Wychavon, while not dramatic in any one year, are having a cumulative effect. Over a period of 3 - 5 years, the total numbers of migrants are well down on the highs of 2006-7 by upwards of 15%.

International context

The A8 economies have emerged from the general downturn in the EU much faster than the more mature economies. The cost of living has continued to rise throughout the EU, including in the A8 countries, but it is still considerably cheaper in those countries than in the UK or other mature EU economies. Unemployment, having risen slightly, has continued its downward trend in the A8 countries as companies build on their earlier investments.

The loss of consumer confidence in the wake of the housing downturn, has hampered the recovery in the UK, while other EU economies - Germany France and Spain in particular - have learned from the UK's experience after 2004, and are allowing, even encouraging, workers in, albeit with some constraints. Their economies as a result are creating new jobs and growing slowly but steadily.

UK context

The economic downturn resulted in louder calls for controls on immigration, and as a result, UK restrictions on migrants have continued to be tightly applied. This has tended to deter migrants from all A8 countries, as well as those from Bulgaria and Romania who see continental Europe as a safer bet; although illegal immigration may be rising.

Quotas have remained in place and still tend to give preference to higher skilled workers, putting the Wychavon district and other agricultural regions at a disadvantage. The better qualified migrants who are coming are also moving into more appropriately skilled jobs, they are increasingly reluctant- if they want to stay for more than just a season, to stay in agricultural work.

Wychavon general population

The background patterns of internal migration into and out of Wychavon continue - an outward trend in work force age population - especially 18-34 and an inward trend in over 65s and those with young families.

Wychavon migrant population

Since the peak of 2006/7, there has been a steady decline in numbers of A8 migrants applying to come to Wychavon each year - the easy flow of intelligent, highly qualified workers has slowed. Because the decline has been gradual, year on

year, employers did not at first react, but the job market has become tighter and it is now much more difficult to replace people with skills and a strong work ethic, once lost. Wages, terms and conditions are beginning to adjust to attract new people in to Wychavon - both UK national and migrant worker. While these changes may encourage migrants who have settled longer term to move from other local areas, it is doubtful if it will affect seasonal workers in any way.

Those migrants with dependants, who now represent a significant proportion of the declining total - a trend that was already becoming apparent in 2008, are looking to improve themselves and move up the job and pay ladder.

Those employers reliant on seasonal workers are also under pressure. They have replaced some of the shortfall in in-situ resident seasonal workers with people bussed in from the West Midlands, which brings with it a host of additional difficulties in terms of reliability, consistency, numbers each day and general management.

However, while the quotas have remained quite tight, general policing of immigration, gang masters and migrant workers is inconsistent and somewhat haphazard due to inadequate supply of inspectors and different sectors still having different regulations applied. There is growing concern as a result that illegal workers may be creeping into the local workforce, which may result in difficulties for local employers if they are found to be employing them even through gang masters - boundaries of responsibility still not being clear.

[Impact on the local economy](#)

The tight labour market and general fall in numbers of seasonal workers as well as long term staff are constraining the local economy. New business start ups and registrations have slowed and existing companies are not always able to expand as anticipated.

Those migrants who came and stayed have become an important and integral part of the local workforce. They are now taking on new more skilled and more responsible jobs with increased pay and prospects. Many more now have families and so bring a significant multiplier effect into the local economy in terms of hospitality, leisure, retail and home furnishings.

One alternative as a replacement for migrant workers has, in some instances, been 'returners' to Wychavon. The high cost of petrol is beginning to slow and even reduce the upward trend in long commutes out of Wychavon to work elsewhere. People are wanting either to work closer to home, enabling local employers to attract new people back into the area to work, or they are considering moving out of Wychavon to live nearer their work because they do not see adequate job prospects locally. The perceived lack of alternatives to journeys by car is a problem. Older people moving to the area may also provide some potential opportunity, if employers adapt and become more flexible.

Local employers and other stakeholders are now belatedly putting together a migrant worker strategy to attract and cater for both seasonal and longer term employees. Employers are also reconnecting to other sources of migrant workers in South Africa and Portugal. However, here too opportunities may be reduced on previous levels because of cost and improvement in local economies.

[Housing](#)

Despite the reduction in migrant workers, there is pressure throughout the housing market, for a variety of reasons as different factors constrain supply.

New builds slowed several years ago and have not caught up; leaving a backlog of unmet demand once the market began to recover. As a result, prices are rising again in key sectors and locations - houses for families and single person household accommodation of all types in particular are in short supply.

The main urban centres - Pershore, Droitwich, Evesham- are becoming ever more popular, providing as they do a combination of rural and urban living, in a small manageable context. Housing in more isolated areas is becoming less attractive as populations age and want to be near local services and the cost of driving increases.

The poor quality of a large proportion of local housing remains an issue, especially rented accommodation, further restricting the local housing stock in terms of acceptable and affordable housing. With the fall in seasonal renting, those houses that had been converted to HMOs are now also under utilised.

Affordable housing was already in significant short supply in 2007-8. That shortfall is increasing and further affecting the potential for growth in the local economy as migrant workers with families look to settle down and buy instead of rent.

Scenario 3 - A different revolving door

Overall numbers have remained fairly stable over time, but the composition of migrants both in terms of nationality, skill level and sourcing has changed radically in response to varied local conditions within the A8 economies.

International context

The A8 economies weathered the economic storm relatively well by attracting significant amounts of investment from Middle East countries and the BRIC economies to replace the slowing down of funds from the EU. The result is continued growth in employment riding on the back of greater trade links back to the Middle East and the BRIC economies but also within the A8 economies.

The main EU economies are still struggling to increase economic growth, but the UK is doing better than most. Although Germany, France and Spain have technically opened their borders to A8 and A2 country migrants, they have continued to place significant restrictions on Bulgarians and Romanians and skill level quotas prioritising higher skills.

UK context

The UK is benefitting from restrictions elsewhere.

The government has recognised that while reducing unemployment back to the low levels before the downturn is a priority, employment patterns can be very different at the local level and require varied responses. With improved discussion and data collection, there is now greater recognition that local areas such as Wychavon still face continued problems in filling low skill, low pay jobs with local people.

The quota system has therefore been changed to increase the proportion of lower skilled migrants allowed in, in part to reduce UK dependence on imported food and to improve food security. Also, with greater competition for higher skilled migrants from other EU economies, the UK is having to run faster to keep up. English continues to be a major attraction providing a distinct advantage to the UK in attracting workers of all levels. Employers are exploiting all possibilities to receive tax relief on the investment they make in providing ESOL courses for migrant workers; the main route is presenting it as part of overall skill development in local economies, in order to encourage local economic growth.

Gang master regulation and monitoring has also been strengthened to ensure that all workers are protected across all sectors, not just agriculture as before. Also, greater resources have been invested in ensuring that those seasonal migrants who come for the summer months also return at the end of the season. These changes have benefitted agriculture since there is now more of a level playing field in terms of competing with other sectors to attract and employ migrant workers.

[Wychavon general population](#)

The general trends of an ageing population within Wychavon and a general outflow of work age population has continued.

[Wychavon migrant population](#)

Wychavon has benefited from the change in UK policy on skill level quotas. Migrant workers in the area are still predominantly in agriculture and food processing. Seasonal workers have continued to arrive in a steady flow, at about the same levels as in 2008, although now, instead of highly qualified students arriving from Poland, they tend to be less skilled workers from Bulgaria and Romania - as well as Poland. Employers are needing to spend more time on ensuring that instructions are both understood - English tends to be even less well spoken and understood than previously - and followed through so that standards for supermarkets etc are maintained.

A local collaborative venture involving various stakeholders within Wychavon has helped achieve this steadier flow of migrants and is regarded locally as a significant success. Having recognised the potential threat to the local economy of a drop in migrant workers, interested parties came together to develop a coherent strategy actively to identify and encourage migrants into the area. Advertising and direct recruitment have played a part; so too have local initiatives involving the local colleges in Pershore and Evesham. The aim was to provide a combination of work, skill development and English courses to encourage people to come to Wychavon rather than elsewhere - whether short or long term - but also to encourage seasonal workers to return the following year, or even come back and apply for more permanent jobs.

The continued interest in local food and supermarkets' desire not only to source locally but to prove local sourcing have provided a backdrop against which these initiatives have been possible. Supermarkets are keen to demonstrate social responsibility as well as local supply - these initiatives provide local suppliers with an added USP (Unique Selling Proposition).

Local gang masters are also playing a more significant role in providing seasonal and casual labour. While employers are still reluctant to use gang master labour because of the lack of continuity in workforce week on week, the greater clarity and consistency in regulation and monitoring has eased other problems vis a vis administration. For some, there is also no alternative.

Those A8 migrants who originally came for 1-2 years or longer, especially those with dependants, have, in the main, stayed. During the downturn, those who were laid off from more skilled jobs met with considerable resentment about 'scrounging' when taking benefits, but many then looked to less skilled jobs to bridge the gap. Others took advantage of local college opportunities and are now well placed to re-enter the workforce in more skilled jobs as local employers begin to recruit again.

Ironically, the original Polish migrants are now seen almost as locals, because of their reputation for hard work and reliability plus their integration into the

community through schools and local churches. The new wave of migrants from Bulgaria and Romania are experiencing greater levels of suspicion, possibly because of lower skill and less English.

Impact on the local economy

The role of agriculture and food processing in the local Wychavon economy has remained strong both because of government policies on food security and supermarket strategies in response to them and on consumer demand for local sourcing because of both food and environmental concerns. Increased food prices have enabled continued steady, if not spectacular, growth and investment in local agriculture and food processing. Being able to recruit consistent numbers of migrant workers year on year has enabled a longer term perspective and forward planning by employers - further boosting and steadying the local economy.

Migrant workers' wider contribution to the local economy in terms of spending is relatively low per capita, but cumulatively important, especially for local supermarkets, pubs and restaurants.

Housing

The original concerns about year on year growth in the numbers of migrants and the attendant pressures on local services and housing in particular have so far proved ill founded. While the local economy continues to be very reliant on migrant workers, the vast majority of migrants are seasonal and are housed in hostels or other accommodation provided by employers as part of the deal to attract them.

Housing pressures locally have continued, but they are primarily those resulting from general inward migration and continued lack of affordability of both rented and owned properties. The downturn resulted in under investment in Wychavon and elsewhere and a halt in construction for two to three years, such that house prices overall are rising strongly again.

There is more rented accommodation - people who could not sell have rented out, and conversions for multi occupancy by migrants have improved the condition of many houses. However, supply does not match demand in many areas in terms of the type of properties available, and shortfalls are worse than originally foreseen.

Migrants who have dependants have tended to need social housing in the first instance, and during the downturn needed housing support. However, once the economy started to grow, they have been trying to get on the housing ladder rather than remain in rented accommodation. Demand is likely to outstrip supply.

Scenario 4 - A steady rise

There has been and continues to be a steady rise in the numbers of migrants coming to Wychavon, with more than 15% rises on the levels in 2007.

International context

The UK economy weathered the economic storm quicker and better than other EU economies and the overall global downturn left the A8 economies seriously weakened: A8 growth and job creation have stalled. As a result the upward trend in migrants wanting to and actually coming to the UK in general and Wychavon in particular, has continued.

Although Germany France and Spain - and other EU countries - have all opened their borders, the UK still remains the first choice for many migrants. It is a more known quantity; its reputation in terms of employment and prospects, while not

perfect, is better than the unknown quantity that is other countries' welcome. Language also continues to play a role: most migrant workers speak some English either from school or media exposure, and see it as an added factor in employability later if and when they return home.

[UK context](#)

Consumer confidence and housing finance recovered remarkably quickly after the downturn in 2008-9, helped in part by the Olympics. Learning from the American example, concerted effort by the Bank of England, the banks and the government reduced inflation and increased the supply of credit within the financial system. While growth has been significantly reduced, it still exists and has continued.

The housing market has been moving again, although house price inflation has not returned to the same extent and there are still some issues around negative equity in those areas where price bubbles were strongest, and burst hardest. Consumer confidence is rising again overall with the attendant benefits in spending.

Greater political priority is now focused on food supply as part of concerns both about food security per se and the role of local sourcing in meeting climate change targets. The food and agriculture sectors are therefore being given greater priority within the overall migrant quota system.

The other focus in terms of migrant workers between 2008- 12 had been on adequate skills for completing the Olympic stadia on time; that has now passed. However, there are still pressures in terms of the focus on the four UK growth areas if house building is to meet the intended targets.

[Wychavon general population](#)

Populations are concentrating into the local urban areas within Wychavon because of the costs of commuting, lack of public transport and desire to be near services and schools etc. However, the smaller local villages are still proving very popular with 'the young elderly' - possibly causing knock on effects for services in years to come.

[Wychavon migrant population](#)

Wychavon is continuing to attract significant numbers of migrant workers to keep up with local economic growth, especially in agriculture and food processing. Other sectors are also benefiting from the arrival of more migrants with dependants and in turn needing new workers.

Word of mouth recommendations about quality of life, attitudes of local employers and general facilities have played an important role in maintaining the flows from Poland. Local employers are being more proactive in recruiting and advertising direct in order to capitalise on this good reputation.

Many students and other seasonal workers still see learning some English as one of the reasons to come to the UK rather than go elsewhere in Europe. In order to capitalise on this, there has been a strong emphasis on ESOL provision locally; the integration of language as part of a summer package of 'working / learning holiday' for seasonal workers, and English as part of the overt training on offer for longer term employees have proved a popular attraction. While this has undoubtedly added some costs for employers - since workers are given time off for study, increasingly tax relief is available and the alternative of inadequate supplies of workers, crops staying in the ground - or never getting into the ground, and a general downward spiral was even more untenable.

With the downturn in Poland, the incipient trend of returnees in 2008 stopped, and as a group, they continue to dominate the inflow of workers. They also tend still to be younger, well qualified and hard working. More applicants are also arriving from Bulgaria and Romania, but the networks are not yet as well established, and they tend to look for work through the gang masters - bussed in from the West Midlands on a daily basis. They provide an important safety net of supply in the local economy.

The low and inconsistent level of policing and monitoring of gang masters remains a source of concern to local employers, especially with regard to potential influx of illegal workers.

The growth in the economy also means that sectors other than agriculture are turning to migrant workers to meet supply. Care, general administration and hospitality are all growing in significance for local employment for migrant workers in Wychavon. This is part of a general trend of migrants who stay for more than 3 months moving on to other work.

[Impact on the local economy](#)

The food and agriculture sectors are continuing to grow, food prices remain high and demand for locally grown and farm secure, branded foods - both processed and unprocessed - is providing steady growth. Business formation continues to rise, and is now stronger than other areas locally - a reverse of the 2007/8 situation. Migrants are also beginning to set up more businesses, moving on from 'Polish shops and plumbers'.

Without the continued influx of migrant workers - seasonal and longer term stays - local employers would not be able to take advantage of the opportunities emerging. Local people still do not want to take on many of the lower skilled lower paid jobs on offer, especially the seasonal work, despite the higher levels of unemployment overall. Wychavon remains a relatively tight job market - as a result, Wychavon employers are also beginning to target other local migrants who have settled in the Worcestershire area, trying to attract them into the local Wychavon economy.

Wages are tending to rise in line with demand. There are signs that longer distance commuters are also beginning to explore the benefits of working nearer to home. A slightly lower wage with significantly lower travel / commute costs are proving a popular draw for better qualified jobs. As a result, some of the local exodus among the work age population is reducing.

The knock on effects of more local migrants, especially those with dependants, together with a gradual decrease in long distance outward commuting are having a strong positive effect on the rest of the economy. Retail, leisure and catering in particular are benefitting. So too, local schools and health care are experiencing growing demand. This in turn is increasing the range of jobs on offer locally, creating its own momentum for employment.

[Housing](#)

Wychavon builders and new housing associations made a concerted bid for workers from the Olympic site, once work there began to slow down nearing completion in late 2011 and early 2012. As a result, they are beginning to make significant inroads into the shortfalls in local housing. Conversion of poor quality properties was set as a major priority; as a result supply of new homes for rent are moving ahead; joint ownership schemes are also proving popular with local and migrant

families alike, eager to get on the house buying ladder. Levels of affordable housing are increasing slightly despite increased demand.

Very remote properties are becoming less popular because of travel and petrol costs, although small villages remain a strong draw for older people moving into the area for better quality of life. There are a number of schemes where isolated properties are being extended to create quasi self contained 'co-housing communities' so that outlying villages can retain some of their local services. These developments are often part of a 'commitment deal' - low rent/ favourable buying terms and conditions in return for a commitment from owners / renters to stay and contribute actively to the community for a minimum length of time.

Lack of public transport remains an issue for an ageing rural population. Shared ownership car clubs are often part of the commitment deal schemes and are also developing in the villages - providing a substitute for taxis / public transport as a means of enabling elderly rural residents to have access to towns. The budget trade off between the costs of care, transport and subsidy are proving positive. They also fit within the wider policy remit of enabling choice and providing personalised services for older residents - of whom there are growing numbers wishing to stay in their own homes.

Conclusions

Wychavon is potentially between a rock and a hard place: the economy is highly dependent on short and longer term migrant workers. Inadequate housing supply and wider population movements are making an already tight housing market, even tighter. However, while the local economy is vulnerable on a number of levels, but also faces a number of opportunities for change.

1. There is likely to be gradual growth in the overall population in Wychavon - requiring more housing often in the sectors and areas already under supplied. Without initiatives to address shortfalls more proactively, housing could become a significant constraint on the local economy.
2. Population growth will be uneven across the age ranges: net inflow in the over 65s and those with young families; net outflow in the younger workforce age groups. This pattern will place further pressures on the need for migrant labour to fill jobs; it will also have knock on effects for local health and social care services longer term.
3. UK nationals moving within the UK to Wychavon is likely to continue to be an equally significant, if not more significant, contributor to local population growth as migrant workers.
4. Local urban centres are likely to feel the most pressure from population growth, because of rising fuel costs and desire for easy access to local services.
5. Smaller centres and villages will remain popular in the short term, but without changes in transport and service provision may face significant ageing population related pressures.
6. Very rural areas may face a down turn in house prices, even within a general upturn in the housing market, as a result of rising fuel costs, transport and service access.

7. The Wychavon local economy is extremely dependent on migrant workers, for both short and long term employment needs.
8. A significant drop in local availability of migrant workers - seasonal or longer term - would have serious consequences for local employers and the local economy as a whole.
9. Current quotas emphasising higher skilled workers are beginning to place constraints on the local economy, which needs low skilled workers who are not available - or willing - locally.
10. Concerns about food security and climate change targets present Wychavon and other rural areas with a potential opportunity and leverage to change national quota policy.
11. While growth in the numbers of migrants will bring its own problems in terms of housing, the bigger threat is a significant downturn in supply and availability of both longer term and seasonal workers.
12. Lack of appropriate and adequate quality housing is a significant constraint on the potential for growth within the local economy.
13. Demand for housing in the main local urban areas will continue to grow strongly.
14. A number of opportunities exist for collaborative ventures to enhance and promote Wychavon as a destination for migrant workers and to recruit workers more pro actively. These centre round the use of the colleges to provide ESOL and other skills development; a collaborative proactive campaign on recruitment and marketing of Wychavon; local shared ownership and 'commitment deals' housing initiatives.
15. Rising fuel costs present an opportunity to promote and encourage people to work locally rather than pay for long commutes.
16. The arrival of the 'young old' presents an opportunity for more flexible job opportunities and employment locally; it also presents a long term growth in demand for social care and long term support.
17. Lack of consistency the remit of the GLA - i.e. not all sectors are covered - and lack of clarity about boundaries of responsibility - i.e. papers / legality etc of workers - create burdens for local employers.
18. Gang-masters are not regarded as a welcome source of employees - reliability, quality and consistency as well as administrative issues all play a role.

Recommendations

The following recommendations apply variously to Wychavon District Council and other local stakeholders. Any number of stakeholders could take the lead on the recommendations below, in order to take action to avoid the negative impacts and encourage the more positive outcomes implicit in the scenarios.

- a) **Market / promote Wychavon strongly** Develop specific initiatives to market Wychavon and target groups of workers to ensure that even within a constrained total of low skilled workers, Wychavon remains well placed to get the workers local employers need.
- b) **Invest to attract** - Recognise the importance of migrant workers to the local economy and invest accordingly.

- c) **Provide ESOL and other training/ work experience packages** - The local colleges, especially Pershore with its expertise in agriculture, should work with local employers and other stakeholders to develop a range of offers to attract and encourage overseas students / workers for short and long term stays.
- d) **Identify and examine the 'hot spots'** Examine further the local data on concentrations of migrant workers and children with ESOL in local schools in order to plan ahead more effectively.
- e) **Work with local migrant communities** - Strengthen word of mouth recommendations and build on the positive experiences and attitudes among the migrant worker community.
- f) **Use the scenarios to examine other impacts and implications** - Enable local councillors, employers and stakeholders to discuss the wider implications of the scenarios for service provision, impacts and options.
- g) **Use the project as a model for elsewhere** - Share the experience and enable other local districts/ councils to learn from and develop their own local mini scenarios to create a more holistic view of local circumstances.
- h) **Explore a range of housing options** - Recognise the pressures for housing, the inadequacy of much of the local supply and the potential of innovative schemes to meet local needs: use good quality hostel accommodation to encourage workers to Wychavon rather than elsewhere; use shared ownership and / or 'commitment deals' to make more housing affordable and encourage people to stay locally for longer; invest in and upgrade what is already there.
- i) **Capitalise on concerns about food security, food miles and local supply** - Work collaboratively, locally and with other agricultural areas, to encourage a change of national policy on quotas and skill levels to ensure a steady supply of labour. Draw on the power of the supermarkets in this process.
- j) **Ensure clarity and consistency of gang master regulation** - Campaign for more effective implementation of Gang master and other migrant worker related regulation.

Updating Wychavon data

There are numerous data sources available that can be accessed to update information relating to the trends and issues about Wychavon, which we have examined. Some of the key ones are listed below.

Updates	Reporting	Source
Population estimates	<ul style="list-style-type: none"> Population estimates for total and by age groups are updated on an annual basis (August each year), so there is an update that is imminent. The ONS website, although based on 2001 Census Data is also useful in looking at population trends at different levels (e.g local authority, SOA). 	www.worcestershire.whub.org.uk/home/wccindex/wcc-pep-ri-index/wcc-pep-ri-index-population.htm www.neighbourhood.statistics.gov.uk/dissemination/LeadAreaSearch.do?a=7&r=1&i=1001&m=0&s=1220178838593&enc=1&areaSearchText=Wychavon&areaSearchType=13&extendedList=false
Schools data	<ul style="list-style-type: none"> School census data is collected on an annual basis and is broken down by district. 	www.worcestershire.whub.org.uk/home/wccindex/wcc-edu-index/wcc-edu-enjoy-achieve/wcc-edu-sch/wcc-edu-numbers-on-roll-m.htm?
Deprivation	<ul style="list-style-type: none"> The latest indices of multiple deprivation are reported. 	www.communities.gov.uk/communities/neighbourhoodrenewal/deprivation/deprivation07/
NINos	<ul style="list-style-type: none"> NINo data can be used to track numbers of A8 migrants given a national insurance number. Data is reported on an annual basis and trends can be identified over time. Data is available at national, regional and local authority level. 	www.dwp.gov.uk/asd/asd1/tabtools/nino_alloc_summ_tables_aug08.xls
Registered workers (WRS)	<ul style="list-style-type: none"> Number of approved applications and registered worker data for A8 countries is reported on a quarterly basis (along with archived information). This is a useful source in analysing trends and identifying any falls or rises in numbers. 	www.lgar.local.gov.uk/lgv/core/page.do?pageId=27879
Characteristics of registered	<ul style="list-style-type: none"> Characteristics of A8 workers such as sector employed in, age, number of dependants, nationality, and intended length of stay are 	www.lgar.local.gov.uk/lgv/core/page.do?pageId=27879

workers	reported on a quarterly basis (along with archived information).	
Labour market statistics	<ul style="list-style-type: none"> Nomis provides information on official labour market statistics and provides data on employee jobs, unemployment trends and number of businesses and number of VAT registrations. 	http://www.nomisweb.co.uk/reports/lmp/la/2038431943/report.aspx
Unemployment trends	<ul style="list-style-type: none"> Unemployment is reported on a monthly basis and figures can be compared with previous months. Data is also available at district, county, region and national level. 	www.worcestershire.whub.org.uk/home/wccindex/wcc-pep-ri-index/wcc-pep-ri-index-housingeconomy/wcc-pep-ri-index-housingeconomy-economy/wcc-pep-ri-index-housingeconomy-economy-economicsummary.htm
Housing	<ul style="list-style-type: none"> Average prices are reported on a monthly basis by town, postcode area, region and can be compared over time to analyse trends. Housing statistics are available on the CLG website and are useful in tracking current building (completions and in progress by local authority). The Research and Intelligence Unit at Worcestershire County Council has various housing data by tenure and type, as well as housing reports or assessments. 	www.home.co.uk/guides/house_prices_by_town.htm www.communities.gov.uk/housing/housingresearch/housingstatistics www.worcestershire.whub.org.uk/home/wcc-pep-ri-index-housingeconomy
A8 economies	<ul style="list-style-type: none"> To track how A8 economies are doing, GDP – real growth rate and unemployment statistics are updated and reported on an annual basis. 	www.cia.gov/library/publications/the-world-factbook/
Exchange rates	<ul style="list-style-type: none"> Exchange rates of the A8 countries compared to the UK £ are reported on a monthly basis, and trends can be generated. 	www.uktradeinfo.com/index.cfm?task=exchange&lastcountry=Ajman/UAE