



Potential impacts on the UK of future migration from Bulgaria and Romania

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The authors take responsibility for the content of the report, the interpretation of data and findings and for the conclusions drawn.

Executive Summary

Scope and methodology

This report was commissioned to provide evidence from which the UK Government can assess the potential impacts of migration from EU2 countries following the lifting of transitional controls at the end of 2013. To assess potential impact, we look at migration from Bulgaria and Romania and at patterns and characteristics of migrants, within the EU and currently to the UK. We examine the factors which may affect the scale and direction of EU2 migration after 2013. We then explore the potential impact of any further migration from the EU2 countries on services within the UK.

The review is based on an analysis of literature and data in English, Bulgarian and Romanian reviewed for its relevance and quality. The sources used and methodology are described in Annexes 1 and 2 while a full descriptive bibliography is provided in Annex 3. While the volume of research is not insubstantial, evidence is weak in a number of respects and it is not possible to predict the scale of future migration from Bulgaria and Romania to the UK numerically. There are a number of reasons for this:

- The lack of accurate data on **current** migration, particularly on the number of migrants who have settled, by country of birth, either in the UK or elsewhere within the EU, or who have been temporary migrants. Therefore, the UK record of National Insurance Numbers (NINO) database includes migrants who register and then leave the country, while the Labour Force Survey is a sample survey, in which numbers of EU2 migrants are very small.
- While research studies refer to much migration being of a temporary nature, there is no agreed definition of temporary or permanent migration and, other than where migration is on time-limited visa arrangements, UK data does not allow for them to be distinguished.
- The inherent unreliability of surveys of migration intentions, with future migration highly dependent on economic, political and social factors in Bulgaria, Romania, UK, other EU countries and even outside of the EU.

Therefore, estimates of potential migration to the UK are likely to be inaccurate and misleading and our report does not include these. What we have done is consider factors which will encourage and discourage migration, the potential impact of the migration which may occur and what preparations might be put in place. Wider issues, including the wider economic benefit of migration from EU2 countries to the UK, benefits to the economy and sectoral impacts were outside the scope of the research and are not covered in our report.

Key findings

Patterns of migration from Bulgaria and Romania

The main destination countries for EU2 migrants are Spain and Italy and, to a lesser extent, Germany. These choices reflect restrictions and freedoms on the right of Bulgarians and Romanians to work across the EU, employment opportunities and similarities in language. As time goes on, the presence of social and economic networks of existing migrants may mean that EU2 migrants continue to migrate to Spain and Italy rather than other EU member states.

In terms of characteristics of those who migrate from Bulgaria and Romania to **elsewhere in the EU**, most are young, aged under 35, with men and women in roughly equal numbers. EU2 migrants in EU member states are concentrated in a relatively small number of sectors: working in construction, in accommodation and catering and in private households in work such as care and cleaning.

According to data from the Labour Force Survey, numbers of EU2 migrants living in **the UK** are relatively low, at 26,000 Bulgarians and 80,000 Romanians. However, as a sample survey this may undercount migrant numbers. As elsewhere in the EU, EU2 migrants are overwhelmingly young,

aged under 35. However, men in a small majority and have a skill profile higher than elsewhere in the EU, with most having intermediate qualifications. This bundle of characteristics is likely to reflect current restrictions on employment of Bulgarian and Romanian nationals in the UK.

Bulgarian and Romanian migrants in the UK are concentrated in four sectors: hospitality, cleaning services, construction and trade. They also show higher rates of self-employment than other Eastern European migrants. These patterns again are likely to reflect current restrictions on their employment.

It would be reasonable to speculate that the profile and employment patterns of Bulgarians and Romanians in the UK will change once restrictions on their employment are lifted. We have considered the ways in which their profile may change and whether the pattern of migration to Spain might be replicated in the UK. While difficult to predict, we believe that EU migrants' employment patterns in Spain reflect the Spanish labour market, and opportunities for migrant workers. Therefore, it would seem most likely that any further EU2 migration to the UK will follow the pattern of EU8 migration and therefore be concentrated in lower, rather than intermediate or highly skilled work. The profile of further EU2 migrants to the UK is also likely to be young and without families, initially at least.

Drivers of migration and intentions to migrate

Migration from Bulgaria and Romania is very largely for economic reasons, with the objective of improving employment prospects and living standards. These objectives reflect the significant differences which exist between wages and living standards in Bulgaria and Romania and other EU member states. More specific reasons identified by research on migrants' motivations include education, career considerations and, for Roma people, to escape discrimination.

The UK has a considerably higher employment rate than either Bulgaria or Romania, higher GDP per capita and higher earnings so is potentially attractive to prospective economic migrants. However, while surveys in Bulgaria and Romania show some interest in migration to the UK, it is not a favoured destination and there are indications that much of the interest that exists is in temporary stays rather than long term moves.

The scale of existing EU2 migration, particularly to Spain and Italy, has been explained partly with reference to the various 'push' factors present in the EU2 countries, particularly Romania, at the time migration took place. These included high levels of unemployment around the time of accession to the EU in 2007. These may not apply at the time restrictions are removed in 2013.

The social impact of Bulgarian and Romanian migration on the UK

Our review of the impact of migration on UK services found very little literature specifically relating to migration from Bulgaria and Romania. Anticipating that evidence would be sparse, we reviewed literature on EU8 migration, interpreting findings according to ways in which EU2 migration may differ. Our conclusions on the potential social impacts of EU2 migration are as follows:

- Many services were not well-prepared for EU8 migration and found it difficult to cope with the increased demand. However, a feature of EU8 migration was its wide geographical spread across the UK, because of labour shortages at the time, the role of agencies and historic links between Poland the UK. EU2 migration is less likely to be so widely dispersed across the UK.
- In relation to health services, future migration from Bulgaria and Romania is unlikely to have a significant impact. Economic migrants, in particular, are generally young and healthy and, as such, do not make major demands on health services.
- With regard to education, potential family migration from the EU2 countries may potentially increase pressure on school places at primary level in some areas. While existing evidence suggests that migrant children do not have a negative impact on school performance, language assistance will need to be provided, at least for any new arrivals from Bulgaria and Romania.

- The impacts of migration on housing will depend on housing supply as well as the buoyancy of the local housing market. The demands on housing are highly dependent on the rate of permanent settlement of EU2 migrants and particularly family formation.
- There is a limited evidence base on the impact of migrants on the welfare system. Studies covering EU10 migrants find them to be less likely to claim benefits than other migrant groups and that those who claim benefits, the majority claim child benefits.

Factors which will influence the impact of labour migration post 2014

Available evidence suggests that the UK is not a favoured destination for Bulgarians and Romanians who are considering migration as a future option. However, the unstable economic climate within the EU and particularly rising unemployment in Southern EU countries, make this uncertain.

One consideration is whether much migration from Bulgaria and Romania to the UK has already happened, but is confined to particular sectors. This may also include spurious 'self employment' and employment in the grey economy. It is possible that once restrictions are lifted, actual numbers of EU2 citizens working in the UK may not increase substantially.

Research evidence suggests that much migration from Eastern Europe to the UK is currently temporary. However, the typical profile of current EU2 migrants to the UK as young and without children may change if longer term settlement develops. It is longer term settlement which has the most significant implications for the demand on services, including housing, education and health.

The report identifies a number of key gaps in evidence which could help inform future impacts of economic migration resulting from EU expansion.

1. Introduction

1.1 Background to the report

As well as having a positive impact on economic prosperity, migration presents challenges, nationally and at local level. It can place pressure on services such as health, education and housing. The ability of service providers to meet these demands depends to some extent on their level of preparedness. This includes having an idea of both general increases in demand and the types of services which will be accessed. The aim of this report is to provide an evidence base from which the UK Government can assess the potential impacts of migration from EU2 countries following the lifting of transitional controls at the end of 2013.

1.2 Labour mobility within the EU, and interim restrictions

Free movement of people, along with the free movement of goods, services and capital is one of the fundamental pillars of the European Union. While the policy of unrestricted labour mobility was introduced to improve the matching of labour supply and demand, concerns regarding the immediate impacts of opening labour markets have arisen for each stage of expansion. To lessen possible short-term labour market impacts related to enlargement, Accession Treaties include provision for member states to apply restrictions on free movement of workers from acceding countries for a period of up to 7 years if there is a 'serious labour market disturbance or the threat thereof'.

Bulgaria and Romania joined the EU in 2007, three years after the EU8 countries (Poland, Lithuania, Latvia, Slovenia, Slovakia, Czech Republic, Estonia and Hungary). Both in the case of EU8 and EU2 accession, concerns were expressed over possible labour market impacts on existing EU member states. These were based on the combined size of the countries joining the EU (more than 100 million inhabitants) and the large income gap with the existing member states, given that levels of income in the acceding countries was several times lower than the EU15 average. Geographical proximity of the new member states was also a factor in concerns over the possible scale of migration. Therefore, a number of countries placed restrictions on the mobility of workers from acceding countries.

The impact on a country of labour market restrictions imposed on new member countries' nationals is, at least in part, a function of labour market restrictions imposed on them by other EU member states. This is shown in EC (2012), MAC (2011), Holland et al. (2011), Kahanec (2012), Wright (2010). Therefore, it is useful to look at the restrictions which EU member states have placed on migration from Bulgaria and Romania. Table 1.1 below shows the gradual opening of labour markets of the old member states to arrivals from Bulgaria and Romania, against the background of transitional arrangements applied to workers from the EU8 countries joining in 2004.

Table 1.1. Year of granting access to the labour market for workers from Bulgaria and Romania and Central and Eastern European countries

EU15 Member States	EU2: Bulgaria Romania	EU8
Belgium	Restrictions	2009
Denmark	2009	2009
Germany	Restrictions*	2011
Ireland	2012	2004
Greece	2009	2006
Spain	2009**	2006
France	Restrictions	2008
Italy	2012	2006
Luxembourg	Restrictions	2007
Netherlands	Restrictions	2007
Austria	Restrictions	2011
Portugal	2009	2006
Finland	2007	2006
Sweden	2007	2004
UK	Restrictions	2004

*From January 2012, Germany eased restrictions for seasonal workers, skilled workers with a university degree whose employment corresponds to their professional qualification and for those taking part in in-firm training

**Having not initially applied restrictions, Spain applied these for Romanian workers from 2011

Source: EC Directorate-General for Employment, Social Affairs and Inclusion

The countries choosing to open their labour markets to workers from Bulgaria and Romania in 2007, the year of their accession, were Finland and Sweden, as well as a majority of member states that joined the EU in 2004: the Czech Republic, Estonia, Cyprus, Latvia, Lithuania, Poland, Slovenia and Slovakia. The majority of EU member states therefore imposed interim restrictions. While Spain initially did not, In July 2011 it introduced restrictions for Romanian workers until the end of 2012, while Italy lifted restrictions in January 2012. At the time of our review in August 2012 there were 10 countries applying restrictions on the movement of workers from Bulgaria and Romania: Belgium, Germany, France, Ireland, Luxembourg, Malta, the Netherlands, Austria, and the UK, and Spain.

1.3 Restrictions by the UK

The UK imposed restrictions on access to its labour market for workers from Bulgaria and Romania in 2007. These were reviewed after two and five years and maintained beyond 31 December 2008 and, again, extended beyond 31 December 2011, on both occasions on the basis of advice from the independent Migration Advisory Committee, which drew attention to the prevailing economic situation and the uncertainty as to other Member States' decisions (2011).

As EEA nationals, citizens of Bulgaria and Romania can enter and live in the UK without needing to apply for permission, as long as they can support themselves and their families in the UK without 'becoming an unreasonable burden on public funds'¹. Bulgarian and Romanian nationals are, with some exemptions, required to seek permission from the UK Border Agency before starting employment in the UK. They require an Accession Worker Card, for which purpose an employer must normally apply for approval under the work permit criteria which were in force prior to the date of accession. The exception to this is where individuals are employed under the Seasonal Agricultural Workers Scheme (SAWS) or the Sectors Based Scheme (food processing). Bulgarian and

¹ <http://www.ukba.homeoffice.gov.uk/eucitizens/bulgaria-romania/>

Romanian citizens become exempt from the work authorisation requirement where they have been employed legally continuously for a period of 12 months and may apply to be exempted from the requirement where they are highly skilled. They also do not need UK Border Agency permission to work in a self-employed capacity. However, they can apply for a registration certificate to confirm their right to work as a self-employed person in the UK.

Therefore, while having the right to live in the UK and to be self-employed, in terms of employment, the interim restrictions on migration from Bulgaria and Romania to the UK largely restrict EU2 nationals to employment under the terms of the pre-Points Based System work permits arrangements, along with non-EU nationals, and their employment is consequently generally restricted to skilled work and will normally be subject to a labour market test.

All restrictions must be lifted at the end of 2013. This will mark the end of the seven year period of limited access of Bulgarian and Romanian workers to the EU15 labour markets. All countries which have not yet lifted the labour market restrictions will be obliged to do so.

1.4 Research aims and methodology

The aim of the report is to provide an evidence base from which the UK Government can assess the potential impacts of migration from EU2 countries following the lifting of transitional controls. Evidence will be used to help inform planning and policy making by national and local government. The research therefore aimed to answer three sets of questions:

- What are the drivers of migration from the EU2 countries to the UK, which push /pull factors are most significant and what are the future intentions to migrate?
- What is the profile of the current UK diaspora population from the EU2 countries, what are migrants' demographic characteristics, where do they settle and what are their skills and family profiles?
- What is the social impact of migration, particularly on services, including health care, housing and education?

To answer these questions, we carried out a critical and policy-focused review of the literature covering research on Bulgarian and Romanian migration to the UK. We reviewed publications written in English, Bulgarian and Romanian. We also carried out analyses of relevant migration data, both EU wide and in relation to Bulgaria, Romania and the UK. The review includes both qualitative and quantitative literature looking at migration from both academic and policy perspectives and produced by a range of national and international organisations. The sources used to identify relevant evidence are described in Annex 1. Literature was reviewed for its relevance to the research and also for quality. Annex 2 sets out the selection methodology and the approach to quality assessment and inclusion or exclusion criteria for documents included in the review. A full descriptive bibliography of all sources used in the review is provided in Annex 3.

To assess the potential impact of EU2 migration, we have used evidence of the impact of EU8 migration, from 2004 onwards. This is because literature on existing EU2 migration is both limited and because its nature is very likely to change following removal of restrictions. The validity of this approach is assessed in the report, through comparing current EU8 and EU2 migration to the UK and EU more widely.

The report refers to various sources of data, compiled by international organisations (such as Eurostat data on Population Statistics, International Migration Flows, Labour Force Surveys) and OECD), as well as by national bodies (national statistical offices ONS, Bulgarian and Romanian Statistical offices). In the UK, data on migrants is also available through the Worker Registration Scheme (WRS) and the records of National Insurance Number allocations). Unfortunately none of

these data sources provides a complete picture. In this report we will predominantly refer to data compiled by NIESR and published in Holland et al. (2011), which, to our knowledge, is the most comprehensive set of data on migration from individual countries of the EU8+2 to individual countries of the EU15. Wherever relevant, we will also refer to national data. Wherever we discuss the socio-economic profile of Bulgarian and Romanian migrants we will refer to the European Labour Force Survey and the latest data published by the European Commission (2012), the UK's records of National Insurance Number allocation (NINO), as published by Holland et al (2011), and Bulgarian and Romanian national data. The limitations of the Labour Force Survey and the NINO database mean that neither provides an accurate count of migrants in the UK. The NINO database includes migrants who register and then leave the country, while the Labour Force Survey is a sample survey, in which numbers of EU2 migrants are very small. Because of these limitations, we have cautioned against using these sources to predict the number of future migrants to the UK.

The report has the following structure: Chapter 2 looks at past and current migration from Bulgaria and Romania within the EU, patterns and characteristics of migrants, drivers of migration and evidence of intentions to migrate. Chapter 3 looks at evidence particularly in relation to the UK and examines the current profile of EU2 migration. Chapter 4 examines the potential impact of migration from Bulgaria and Romania on services within the UK, focusing on health care, education services, housing and social security. Chapter 5 looks at limitations in the evidence base and draws some conclusions from the evidence presented in the report.

2. Migration from Bulgaria and Romania within the EU

Key points

- The current period of outward migration from Bulgaria and Romania follows three earlier waves: the break-up of the Eastern Block in 1989; economic crisis in the late 1990s; and the removal of visa requirements for European travel in 2001
- Currently, Bulgarian and Romanian citizens are among the most mobile in the EU, although numbers of Bulgarian migrants are substantially smaller because of differences in population size of the two countries.
- Currently, the main destination countries for EU2 migrants are Spain and Italy and, to a lesser extent, Germany. These choices reflect restrictions and freedoms on the right of Bulgarians and Romanians to work across the EU, employment opportunities and similarities in language. In time, the presence of existing networks of migrants may also be a factor.
- It is difficult to quantify migration from Bulgaria and Romania with any degree of accuracy because statistics collected from within the two countries largely measure permanent moves rather than shorter periods of migration.
- EU2 migrants within the EU are young; most are under 35 years. The gender balance was initially male-dominated but is now roughly equal. Within the EU, EU2 migrants are concentrated in a relatively small number of sectors: construction, private household employment (e.g. care and cleaning) and accommodation and catering activities.
- EU2 migration is principally economic, to find work and achieve a higher standard of living. Significant differences exist between wages and living standards in Bulgaria and Romania and Western European countries. Education and career considerations are further factors and, for Roma people, discrimination and poverty.
- Although many EU2 nationals already work abroad, available surveys suggest that there may still be potential for further migration. However, surveys of intentions to migrate show varying levels of interest in moving abroad and may not be reliable.

2.1 Background to future migration from Bulgaria and Romania

Phases of migration from Bulgaria and Romania

Research on patterns of outward migration from Bulgaria and Romania identifies at least four distinct, but overlapping, periods of migration since 1989, (Sandu et al, 2006; Nazarska et al, 2011):

- the break-up of the Eastern Block in 1989 and subsequent migration between 1990-1995
- the collapse of the Bulgarian economy in 1996
- placing of Bulgaria and Romania on the Schengen 'White List' in 2001
- membership of the European Union in 2007

The first two of these stages were believed to result in increased irregular migration from Bulgaria and Romania, as well as under work permit arrangements. Joining the Schengen 'White List' meant that citizens could travel more freely, without visas, within the EEA. Joining the EU in 2007 led to migration to countries which did not impose interim restrictions, and also to those which did but

where Bulgarians and Romanians could work under certain arrangements (see Chapter 1). This fourth stage of migration led to the highest rate of migration in the history of the two countries.

In relation to Romanian migration, Sandu et al (2006) attach percentage rates of migration to particular phases in the country's migration history: in the first stage between 1990 and 1995, the migration rate was 0.5 per cent; while between 1996 and 2001, the temporary emigration rate reached between 0.6 and 0.7 per cent. The third stage, following the access of Romania to the Schengen area, began in 2002 and signaled significant outward migration, reaching 2.8 per cent between 2002 and 2005.

More recent research identifies a further wave of Romanian migration (Alexe, 2011), which is characterised by labour mobility of professionals in the context of the economic downturn and financial crisis. It has been argued that this migration is not circular, as in the case of at least some of the migration in previous waves and that migration of doctors is particularly likely to turn into permanent migration.

Where have Bulgarians and Romanians migrated to?

In 2008 the EU27 member states received nearly two million migrants from other EU countries (European Commission, 2012). Most of this migration was East-West migration from EU8+2 countries to EU15 countries (see Holland et al, 2011). Bulgarian and Romanian nationals are among the most mobile in Europe. Table 2.1 shows the top five citizenships of immigrants to EU27 member states. Romanians are ranked first, followed by Poles and Bulgarians.

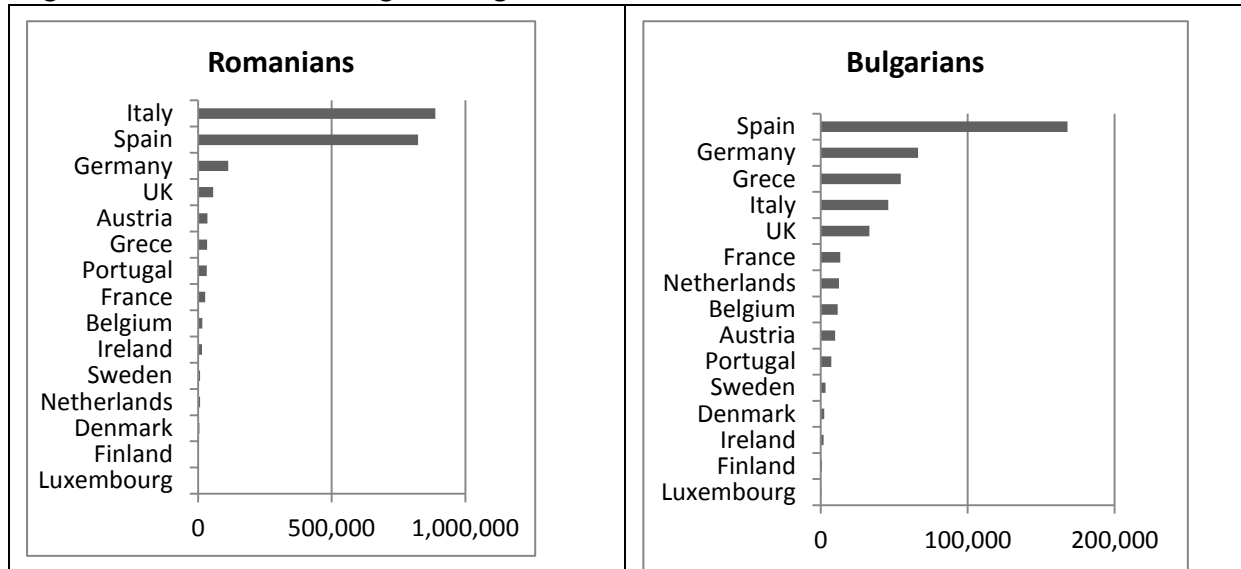
Table 2.1. Top 5 citizenships of immigrants to EU27 member states, 2008

Country of citizenship	Per 1000
Romania	384
Poland	266
Bulgaria	91
Germany	88
Italy	67

Source: European Commission, 2012

The main destination countries of Bulgarian and Romanian migration are Southern European countries, and to a lesser extent Germany (see figure 2.2) Countries favoured by Romanians are Italy and Spain which in 2009 attracted about 40 and 43 per cent of mobile Romanians respectively. With regard to migration from Bulgaria, Spain is a clear favourite, with around 38 per cent of Bulgarians choosing to migrate there. Other choices of Bulgarian migrants include Germany (15 per cent), Greece (13 per cent) and Italy (11 per cent). The UK ranks fourth as a destination country for Romanian movers - in 2009 about 4 per cent of mobile Romanians were living in UK. It ranks fifth for Bulgarians, attracting around 6 per cent of mobile Bulgarians in 2009.

Figure 2.2. Romanian and Bulgarian migrants in EU countries



Source: Holland et al., 2011

Spain has been the destination of choice for many EU2 migrants, particularly from Bulgaria and this has been the focus of a small number of studies. Researchers have noted that Spain has undergone major economic growth since joining EU in 1986, leading to increased labour demand which has not been possible to meet from native population. Spain has experienced migration from both EU2 countries, but levels of migration have been lower from Romania than from Bulgaria (Stanek, 2009).

Several factors may explain why Spain and Italy are the preferred destination countries for Bulgarian and Romanian migrants. These include their geographic accessibility and similarities in language and the presence of existing migration networks (Drew and Sriskandarajah, 2006, Markova and Black, 2007). Several sources point out the circular character of migration, particularly from Romania to Italy, because of both geographical proximity and large amount of seasonal work available to migrants (Stanek, 2009; Iara, 2010; Mara, 2012). There is also evidence of longer-term settlement and family reunification among Bulgarian and Romanian migrants in Spain, with the profile of migrants changing from predominantly single male migrants to female migrants and a wider age range. (Stanek, 2009).

How many Bulgarians and Romanians have migrated?

It has been argued that migration from Bulgaria and Romania should not be treated as a single entity, principally because the potential inflow of Bulgarian immigrants is significantly lower in volume than that from Romania and is therefore less likely to have an impact on the labour markets of receiving countries. The main reason for this is the difference in size between the two countries, with Romania having roughly three times the population of Bulgaria (22 million and 7 million inhabitants respectively). In relation to the migrant populations of Spain and Italy therefore, there are approximately 1.7 million Romanian migrants in these two countries, while the number of Bulgarian immigrants is a fraction of this, at 200,000 (Vankova, 2012). The discrepancy in population size was also a factor in the imposition of restrictions on the free movement of workers from Romania to Spain in 2011 but not on Bulgaria. This decision represented a change in approach since Spain had initially opened its labour market to both Bulgaria and Romania (Angelov and Vankova, 2011).

First, in relation to migration from Bulgaria, methodological differences between studies in measuring migration, use of different data sources and discrepancies in the data make it difficult to produce a coherent picture. Data from the National Statistics Institute in Bulgaria show that between 1992 and 2001 (prior to EU accession), 217, 809 Bulgarians emigrated while the number of

emigrants between 2001 and 2011 was approximately 175,244. Therefore, recent migration, which in theory has been enabled by relaxations on restrictions such as visa requirements, has been at a higher rate than previously. This suggests that labour market restrictions are not the sole factor limiting emigration. In recent years, emigration from Bulgaria has decreased significantly, while immigration into the country has increased. Net migration is still negative (i.e. emigration prevails), but its volume is fairly low. The relatively slow rate of migration from Bulgaria in recent years has been explained with reference to stabilisation of the labour market and rising income levels: the unemployment rate in Bulgaria has reached levels comparable to levels recorded in Western European countries and differences in income have decreased to some extent (Belcheva, 2011).

There has been some speculation, particularly within the Bulgarian press, about the effect of the economic downturn on migration, and particularly on return migration. Data from official sources, do not contain clear cut evidence of large scale return of Bulgarian emigrants back to the country (Krasteva et al, 2010).

In relation to Romanian migration flows after 1989, researchers have observed that large differences exist between statistics available through various sources, both at the national and international levels. According to Iara (2010) the most comprehensive dataset on emigration of Romanian citizens, both in terms of consistency and country coverage, is available from the National Institute of Statistics (INS). The limitations of this dataset are in its ability to measure migration only with reference to termination of residence status in Romania. Therefore the data captures only permanent migration rather than temporary or circular migration. The advantage of the INS data is in being able to measure long term or permanent migration and in providing data on different destination countries. According to the INS data, in 1990 emigration from Romania more than doubled as compared to the previous years, and reached around 100,000. In the following years migration recorded by the Romanian authorities substantially declined. After a small peak of 25,000 in 1995, annual net migration outflows constantly diminished to just 8,000 in 2002. The most recent years showed a slight increase in the number of individuals who settled abroad to around 9,000-13,000 (Iara, 2010). Other researchers using the same data reach similar conclusions, with the number of Romanian migrants registered by the INS in 2010 being 7900 (Roman et al, 2012).

Analysts of Romanian migration statistics agree that the data underestimates the extent of migration from the country. One researcher compares the figure of 386,827 people leaving the country between 1990 and 2006, recorded in INS data, with data from Italian sources: the Italian non-governmental organization Caritas gives a figure of 555,997 Romanian migrants in Italy for the year 2007. At the same time, the Italian National Statistic Institute reports 342,200 Romanian migrants for the same year (Siar, 2008).

Data on the outward flow of migration from Romania is also available from SOPEMI data which looks at the number of Romanian residents in OECD countries². The inflow of Romanian nationals to the countries covered amounted to around 80,000 in 2000, and this figure rose to 192,000 in 2006. According to the OECD the total sum of inflows of Romanians to all OECD countries amounted to 89,000 and 205,000 respectively in 2000 and 2006. The scale of the inflows increased especially sharply in 2002 against the previous year, by 63 per cent, to 149,000. The annual inflows of Romanian nationals to the OECD countries peaked in 2004 at 202,000, thereafter they diminished slightly. The author concludes that over the period considered, inflows of Romanian nationals increased steadily for almost all countries. Iara notes, that this contrasts with a declining trend in migration until 2002 as shown by the INSSE data. According to the author, this shows that non-permanent (but still longer-term) forms of migration gained importance. This reflects stays for the purpose of study, and the fact that more and more migrants do not consider their migration as definite and keep their legal residence as Romania.

² OECD countries include the US, Canada, New Zealand and many, but not all, EU member states.

To conclude, the trends in migration from Bulgaria and Romanian migration after 1989 show various trends, depending on the source of data and the type of migration. While permanent migration as reflected, for example, in the data of the Romanian National Institute of Statistics, shows a decreasing trend, other sources (such as the OECD data) suggest a sharp increase, mainly after 2000. Increases have been identified in temporary migration from Romania, mainly after 2002.

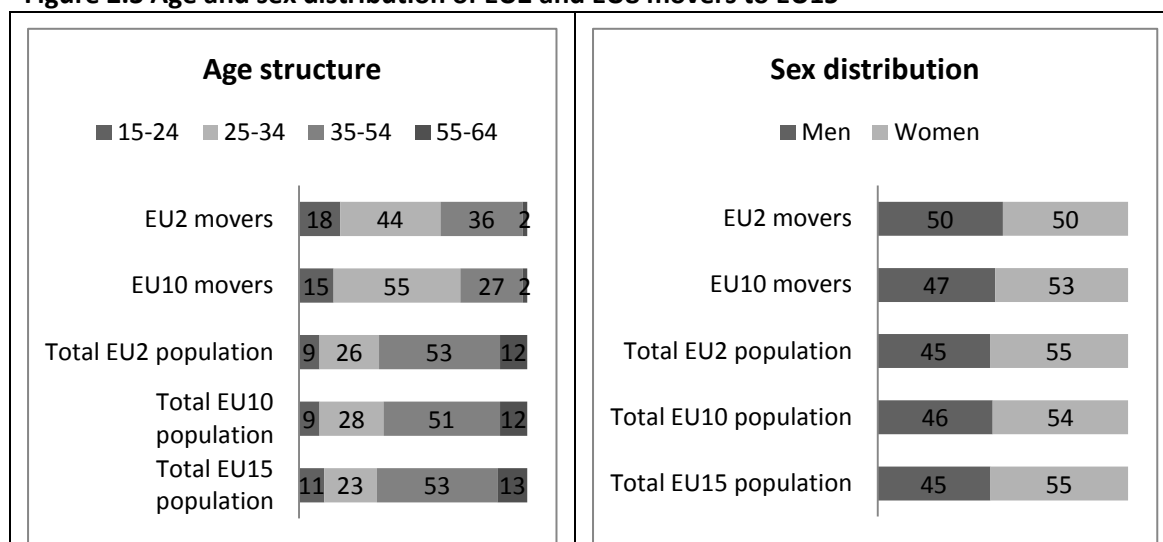
Characteristics of Bulgarian and Romanian migrants in the EU

Information about migrants' profiles is useful for developing migration policies both in sending and receiving countries, and particularly necessary for estimating the potential impact of existing and future migration. Data on migrants' personal characteristics is available both from general EU wide sources and also data and research within Bulgaria and Romania.

Analyses of data on migration all lead to the same general conclusion on the characteristics of migrants from Bulgaria and Romania in relation to age and gender distribution. As figure 3.5 shows, the average European migrant is young and below 35 years old, a description which applies to movers from Bulgaria and Romania (Drew and Sriskandarajah, 2006, Kausar, 2011, EC, 2012). These migrants are on average younger than the overall labour force both in their countries of origin, as well as in the UK and other EU15 receiving countries. About 62 per cent of workers who had moved recently are younger than 35 years old. Migrating Bulgarians and Romanians are somewhat older than workers from Central and Eastern Europe: 38 per cent of movers from Bulgaria and Romania are above the age of 35 years old, as compared to 29 per cent of arrivals of that age from EU10 countries. This suggests that the profile of a migrant from an EU8 country and that of a migrant from an EU2 country differs slightly. As we explain below, they are also employed in different sectors and choose different countries to which to migrate.

There are slightly more women among those emigrating (see figure 2.3). The EU LFS statistics suggest that, in recent years, women have been evenly represented among mobile workers from Bulgaria and Romania, although this is slightly different in the case of migration to the UK.

Figure 2.3 Age and sex distribution of EU2 and EU8 movers to EU15



Source: EU LFS, after European Commission, 2012

There is a sizeable body of research covering the characteristics of migrants from Romania, both in general and specifically in relation to recent migration to Spain and Italy. There is also evidence from surveys of Bulgarian migrants living in the UK, Greece and Italy in 2005 and 2009 (Markova, 2005; Markova, 2009). These show various characteristics of migrants, and changes in profile over time: first, in relation to Bulgarian migrants, surveys in 2005 and 2009 show that women are a small majority and that family migration is common. The age of migrants increased slightly over the time

of the two surveys, with the average age of arrival for the 2009 at 32 years old. However, both surveys have small sample sizes and may not be reliable.

Romanian research on migration between 1980 and 2000 identifies changing patterns in relation to its gender composition. One study notes that the number of male migrants from Romania exceeded the number of women during the first years of transition after 1989 (Zaman and Sandu, 2003). The increasing feminization of Romanian emigration has become a key characteristic of Romanian migration and at the end of the 1990s the shares of males and females were balanced. More recent research on the structure of permanent emigration in 2007 (using INS data described above) describes a number of features of permanent, as opposed to temporary migrants: women are in the majority, at 65 per cent, as are aged between 26 and 40 years old (over 57 per cent) and those with high school and post high school education (53 per cent in 2005) (Pehoiu and Costache, 2010).

Studies of the Romanian migration profile in Spain and Italy are a useful source of information on the characteristics of those who migrate. These are clear about the general profile of migrants, as relatively young and fairly evenly balanced in terms of gender. For example, analysis of the profile of Romanian migrants in Spain found men and women in roughly even proportions, while with respect to age, Romanian migrants were younger than the native population with an average age of just under 32 years old (Barbulescu, 2009).

Migration of Romanians to Spain has been characterised, to some extent, by family migration. One large piece of research on migration which predated entry to the EU, identifies two stages of temporary migration, starting first with migration of married men, with vocational or high school education, from urban areas. This was then followed by diversification in the flows of migrants, following relaxation in visa requirements, with an increase in women, those from rural areas, single migrants, and those with secondary school education (Sandu et al, 2006). More recent research, following entry to the EU found that one third of Romanians living in Madrid came alone, while two-thirds came with their whole families or family members (Marcu, 2011). Similarly, research on Romanian migration to Italy has found that migration following visa liberalisation and immediately after EU accession, migration of Romanian migrants to Italy was dominated by women, while more recent data shows increasing numbers of men coming to Italy. (Mara, 2012) In terms of family status, 87 per cent of early comers live with their partners and more than 50 per cent have children who live with them in Italy. As in the case of Romanian migrants in Spain, these figures indicate that the first comers live with their families or family members. More recent arrivals, in contrast, are less likely to be married; less than half of them are married and one-third of them are single.

Other research also examines the socio-economic and demographic profiles of Romanian immigrants to Spain, using data from the Spanish survey Encuesta Nacional de Inmigrantes (ENI) (2007), (Barbulescu, 2009). This research finds that, in relation to educational attainment, the attainment of immigrants differs to that of the Spanish population: a higher proportion of migrants have primary or secondary education, but very few Romanian migrants had tertiary education. Research on Romanian migrants in Italy found that more than 45 per cent of early comers and those who arrived immediately after the EU accession had achieved a secondary level of education, compared to one-third of the most recent arrivals. Those with a vocational level of education or degree level qualification remained roughly stable at around 25-30 per cent (Mara, 2012).

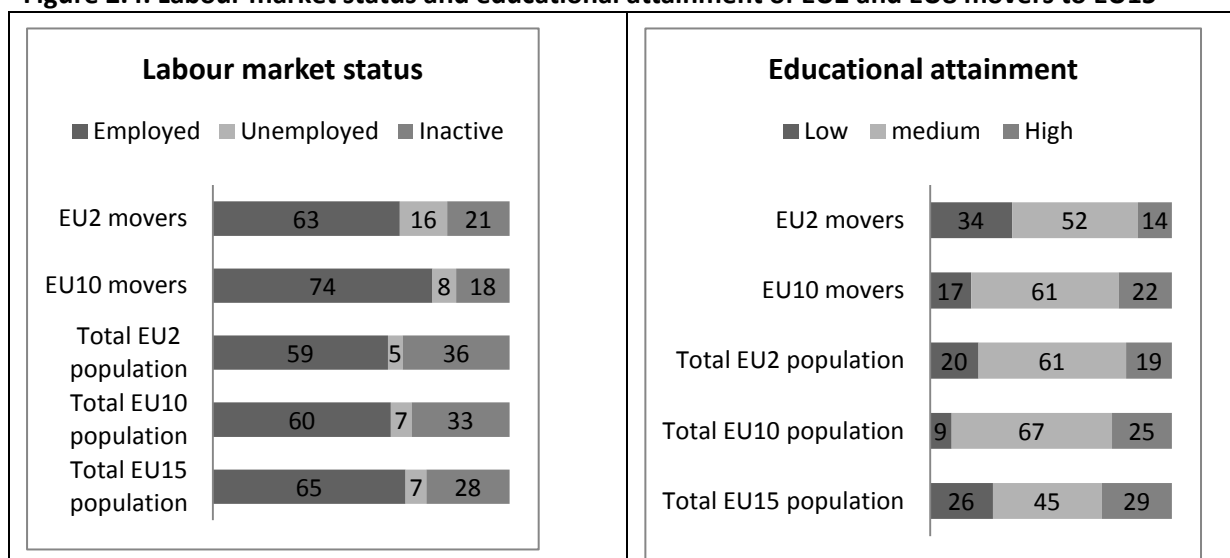
A very clear message from research on the profile of Romanian migrants in Spain and Italy is that characteristics vary considerably according to the stage of migration, with the profile of early arrivals different from those who come later. This is likely to reflect the different conditions under which Romanians were permitted to live and work within the EU and the particular labour market opportunities in the countries to which they migrated. A further factor is the various 'push' factors present in Romania during these periods of outward migration. Therefore, while findings relating to the characteristics of Romanian migrants may have implications for potential migration to the UK,

they may also reflect factors in Romania and elsewhere in the EU which either no longer apply or are not relevant to migration to the UK.

Employment characteristics of EU2 migrants within the EU

It is usual for mobile workers to have a high employment rate because their main reason to move abroad is to find work. European Commission data shows that, over the period 2005-2009, a majority of Bulgarian and Romanian citizens, close to 70 per cent were employed. The 2009 recession limited employment opportunities for all workers in the EU15 including migrants (see figure 2.4).

Figure 2.4. Labour market status and educational attainment of EU2 and EU8 movers to EU15



Source: EU LFS, after European Commission, 2011

In 2010 the rates of employment of migrants from Bulgaria and Romania, as well as mobile workers from EU10 countries, were higher than those of the total population of Bulgaria and Romania, as well as the EU10 total population. They were comparable with the rates of employment recorded in the countries of the EU15. It should be noted that the employment rates of Bulgarian and Romanian workers declined in 2009 as a result of the crisis which hit Spain and Italy, the main destination countries for Bulgarian and Romanian migrants, particularly hard. This led to increases in unemployment among EU2 movers which, as the European Commission (2012) notes, was mainly due to their concentration in Spain where 62 per cent of all unemployed E2 movers live. The rise in the number of unemployed is also explained by their socio-economic characteristics (EU2 movers within the EU as a whole are young and low skilled and their concentration in sectors which have been most affected by economic recession, in particular the construction sector.

Mobile workers from Bulgaria and Romania are concentrated in a relatively small number of sectors: construction, activities of households, and accommodation and food service activities. These sectors represent more than half of all recent EU2 migrants in employment, while the total share of these sectors in local employment in EU15 countries is only about 14 per cent. In comparison, EU8 nationals are predominantly employed in manufacturing, wholesale and retail trade, and accommodation and food service activities (Holland et al, 2011).

Analysis of the Spanish ENI data (see earlier) has found that the majority of Romanian migrants are employed in elementary occupations (42 per cent) followed by qualified workers in manufacturing (35 per cent) and in the services sector (11 per cent) (Barbulescu, 2009). Earnings were found to be

highly concentrated at the lower end of the income distribution. In addition, educational attainment of Romanian migrants was found not to correspond to their position in the labour market or level of income. Other research on the occupations of Romanian migrants abroad finds that they are concentrated in construction (36 per cent), agriculture (28 per cent), private households (house cleaning and caring services 15 per cent), and hotels and restaurants (12 per cent) (Siar, 2008).

Research on Romanian migrants in Italy shows similar patterns but also highlights gender differences in occupational distribution: almost 40 per cent of male Romanian migrants work in craft and related trade workers, a quarter in manufacturing and less than one-fifth work in unskilled manufacturing and service roles. Women, in contrast, are concentrated in care work and in private household employment, as they are in Spain. The expansion of working quotas for in care and in home/domestic services is believed to have been a particular factor behind migration to Italy from Romania (Mara, 2012).

2.2 Drivers of migration

Migration behaviour is commonly characterised in terms of a push-pull approach, which consists of factors which attract immigration and factors that stimulate emigration. The former are pull factors that determine the choice of the destination country, while push factors determine the decision to migrate (Lee, 1966). Push and pull factors include income levels and employment opportunities both at a macro, and sectoral level. Significant income gaps between new and old members have been a cause of concern for some EU15 governments, potentially leading to an excessive influx of workers. Therefore, in considering migration from Bulgaria and Romania, much of the focus has been on economic push and pull factors.

A number of studies of migration from Bulgaria point to economic factors as the most significant drivers of migration. Research finds consistently that Bulgarians emigrate principally for employment purposes with a small percentage also emigrating for educational purposes (Angelov and Vankova, 2011; Belcheva, 2011; Belcheva, 2011; Vankova, 2012). Economic factors motivating the decision to emigrate play a much greater role than existing labour market restrictions in target countries, according to research by Angelov and Vankova. The authors state that for most Bulgarians labour market restrictions in recipient countries imply that they would be working illegally for a longer period of time and that transitional arrangements merely keep a greater number of Bulgarians in the irregular labour market.

A recent survey of push and pull factors compares the attitudes towards migration among the Bulgarian population, including members of the Roma community. The main migration driver is to find work, with 73 per cent of all Romanian migrants reporting this motivation, and 84 per cent of the Roma Community. For the latter group, discrimination is a further factor in motivations to migrate. Educational opportunities are also a factor in considerations to migrate, although less so for the Roma community. Pull factors were friends and relatives in potential destination countries to emigrate to, better educational opportunities and better living standards (Vankova, 2012) A wider review of surveys of migration intentions also notes that the main factor behind migration for Bulgarians are to find employment and to achieve a better quality of life are the top reasons for Bulgarian mobility (Krasteva, 2010)

Economic factors are by no means static and recent research from Bulgaria suggests that the strength of some push factors for emigration maybe in gradual decline, with the unemployment rate in Bulgaria is now comparable to Western Europe and income differences have decreased (Vankova, 2012). Therefore, while in the 1990s per capita income in Western Europe was four times higher than in Bulgaria, a decade later the ratio is 2.5, measured by purchasing power parity (Angelov and Vankova, 2011).

Romanian literature provides an indication of factors behind migration decisions, in terms of push and pull factors but does not provide an in-depth analysis of the factors that drive the migration

process. As with Bulgarian research, evidence in relation to Romania suggests that economic factors, particularly employment opportunities, are the most significant push factors. Therefore, in relation to labour migration from Romania to Spain, Sandu and colleagues refer to significant gap between wages and living standards in Romania and Western European countries (Sandu et al. 2004). A further factor is the decreasing cost of migration, reflected by lower costs of travel and communication. These factors are believed to have been significant in enabling Romanians to travel abroad for work (Silasi and Simina, 2008).

Research evidence also points to the importance of personal development, career prospects and recognition as factors influencing the decision to migrate for some groups, particularly highly qualified professionals. Studies have identified this as an important factor for some professionals migrating to the EU, particularly to Italy and Spain (Zaman and Sandu, 2003; Silasi and Simina, 2008). This was also found in other research which found those who had migrated expressing their satisfaction with being respected at their work place (Sandu et al, 2006).

While there is a consensus that the strongest and most relevant push and pull factors are economic (Sandu et al, 2006; Rotila, 2008; Silasi and Simina, 2008; Iara, 2010), these factors largely apply to labour migration. This is the most significant type of migration in recent years. However, earlier periods of migration have been influenced by political factors, as has been driven by ethnic and religious considerations. The National Strategy of Bulgaria on migration identifies several groups of factors affecting Bulgarians' decisions to migrate, in addition to the main economic drivers (Council of Ministers, 2008). These include political factors and specifically instability in the 1990s. It is argued that lack of trust in democratic institutions contributed to migration, especially among the younger population. Deficits in public services have been cited as a further factor encouraging migration from Bulgaria (Vankova, 2012).

The presence of family and friends, including a partner, living abroad has also been identified as a factor influencing migration of some individuals, (Markova and Black, 2007; Sikora et al, 2010). At the same time, it has been noted that, a strong family culture within Bulgaria and Romania is a factor discouraging migration (Council of Ministers, 2008)

2.3 Migration intention & behaviour

Intentions to migrate

The focus of literature on Romanian migration, especially dating from before 2007, explores migration intentions in the context of the prospect of EU enlargement, which was an issue of considerable interest within the country at the time. The intentions of Romanians to migrate are described in Sandu et al (2006). In their complex research on temporary living abroad, based on data collected through a national survey, the authors found almost 11 per cent of Romanians aged 18 to 59 years expressing a desire to leave the country to work abroad within the following year. The study also found that previous work experience abroad is one of the strongest incentives to migrate again, with almost 40 per cent of those who have already worked abroad wanting to migrate.

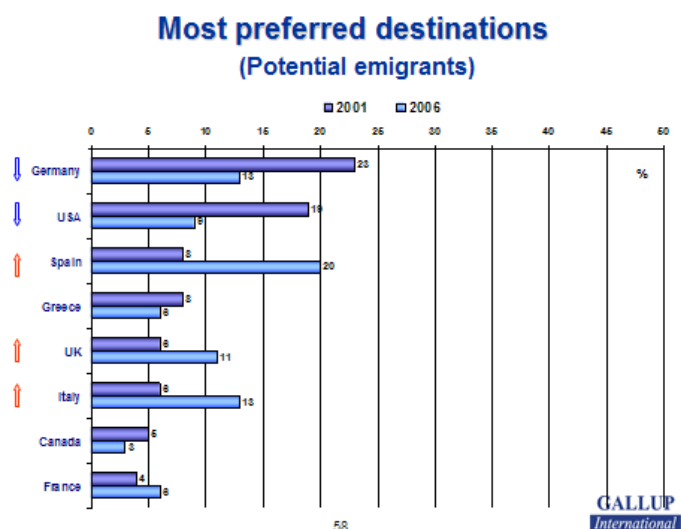
A number of recent surveys have explored attitudes towards migration of Bulgarians. A survey by the Open Society Institute in 2011 found that 13 per cent of respondents intending to go abroad within the next 12 months. The majority (52 per cent) intended to go abroad to look for a job and 14 per cent had already found a job. Over 70 per cent had already chosen a destination country to emigrate to, with 11 per cent wanting to go to the UK (Belcheva, 2011). The same survey found that around 5 per cent of Bulgarians have specific plans to move abroad for more than three months but that they intend to return to their family in Bulgaria. However, in view of the current economic situation and relatively low standard of living, some respondents were inclined to migrate for a longer period of time: around one in ten respondents (11 per cent) have specific plans to leave home and settle elsewhere, with more men than women considering such a move (62 per cent, compared to 38 per cent).

Similarly, a survey conducted in November 2010 found that 13 per cent of adult Bulgarians would like to live and work abroad but many are interested in temporary, rather than permanent migration (Grigorova, 2010). Therefore, the research found only three per cent of surveyed Bulgarians had definite plans to emigrate. Other Bulgarian research has found very high rates of interest in working abroad, for example as high as two-thirds. However, the sample for one such survey was biased, drawn from users of a job search website (Intelligence Group, 2011).

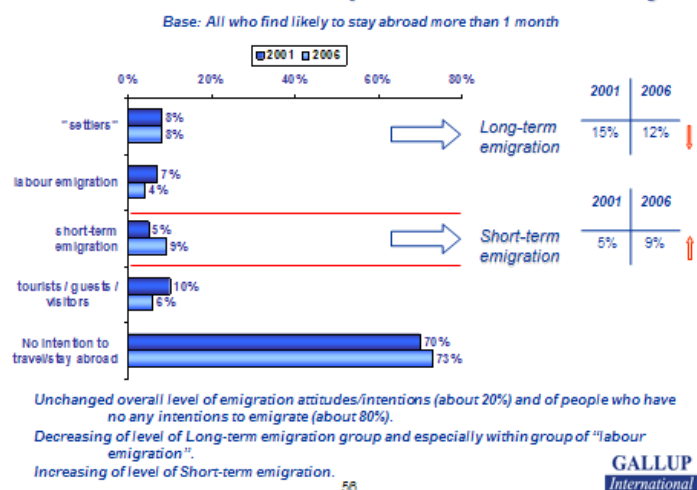
Recent research by the Bulgarian National Public Opinion Centre reports that 36 per cent of parents would encourage their children to settle abroad, an increase from 30 per cent in 2009 (NPOC, 2012). An even higher proportion, 67 per cent would encourage their children to study abroad. With regard to their own intentions, 14 per cent of respondents said that they intended to leave Bulgaria permanently, slightly higher than an earlier survey in 2009. Intentions to migrate were higher among unemployed and university graduates. Survey respondents expressed more interest in temporary moves than in permanent migration, with 28 per cent expressing an interest in working or studying abroad without permanently leaving.

An earlier survey provides a comparison of emigration attitudes between 2001 and 2006 (BBSS Gallup International, 2006). Figure 2.5 shows the results. The table shows that around 34 000 people stated their intention to work and live in a European Union member country for more than one year. The most preferred destinations were Spain and Germany. Some destinations such as North America (the US and Canada) and Germany became less attractive over the period 2001-2006, while Spain, the UK, and Italy became more attractive.

Figure 2.5 Emigration attitudes among Bulgarians



Overall situation – comparison 2001 – 2006 year



The overall level of emigration attitudes and intentions remained unchanged over the period 2001-2006, but there is change in the internal structure of emigration. There was a decrease in the share of long-term emigrants and a significant, almost double increase in the share of short-term emigrants (see earlier). The research also found some changes in the characteristics of potential migrants, with an increase in the proportion of women interested in migrating. The research also found that most of the potential emigrants were young (up to 40 years old) and with intermediate qualifications (BBSS Gallup International, 2006).

Intentions to return to Bulgaria and Romania

Whether migrants from Bulgaria and Romania practice temporary migration has important implications for assessing the future impact of any potential migration to the UK. The intentions of migrants to stay in the countries to which they had moved or to return home, has been explored by some research studies, particularly within Romania. This has become of particular interest following the economic recession across Europe, which has been experienced particularly strongly in Spain and Italy, which have been top destinations for EU2 migrants. Research on intentions to return has used a variety of methods.

Research on Romanian migrants living in Madrid has come up with varying results in response to questions about intentions to return. A survey on intentions of Romanians to return, ENI (the National Immigrants Survey of Spain) found that at the end of 2006 and the beginning of 2007 only 7 per cent of Romanian migrants living in the Madrid region wished to return to Romania. A later survey, conducted in 2008 found in contrast that a large share of Romanian migrants, 71 per cent, living in the region of Madrid had the intention to return, while the remaining 29 per cent wished to remain in Spain. However, intentions to return become less certain as questions get more precise, so that only 42 per cent of Romanian migrants in the Madrid region declared they intended to return 'very surely' and 13 per cent 'surely', while 14 per cent were 'uncertain' and 2 per cent 'very uncertain'. On the other hand, 14 per cent of Romanian migrants in the Madrid region declared they wish to return to Romania within a year, 33 per cent within 2 to 5 years, and 15 per cent after 5 years, while 29 per cent of them wished to stay in Spain (Sandu, 2009). The difference in findings between the two surveys may be attributable to features of survey design, but also by the deteriorating economic climate within Spain, discussed in more detail below.

Marcu (2011) analyses return intentions of Romanian migrants, using a combination of qualitative and quantitative methods, based on data from the ENI and municipal population registries (*Padron Municipal*) for the years 1996–2008, and 75 in-depth interviews. She distinguishes between migrants who are definitely planning to return (32 per cent), the undecided, those who come and go (29 per cent) and those whose return is uncertain (15 per cent). The author concludes that the likelihood of returning to Romania is greatest among immigrants who have families in Romania, 46 per cent of whom say that they will certainly return to their home country.

Other research has used a model-based analysis, using data from World Bank surveys (Shima, 2010). This concludes that labour market upgrading among Romanian returnees is positively correlated with intentions to return permanently. She finds that a higher educational level and intentions to become an entrepreneur upon return are correlated with the decision of Romanians to return. The research finds that, among women, upgrade in employment is positively related to the duration of stay abroad and intentions to return, whereas for men, the duration of stay has no impact on upgrading. A decision to return permanently in the case of men is positively related to an intention to start one's own business.

The effect of the recent economic crisis

The Europe-wide economic recession has not led to a wave of mass returns of Romanians working abroad, and those who returned to the country are most likely to stay for a short period of time. An analysis of mobility patterns of Romanian migrants returning from Spain, concludes that although some Romanians have recently returned home, there is no clear evidence that the crisis has resulted in significant numbers of returnees (Barbulescu, 2009). A possible explanation of this is that opportunities available to migrants in the labour markets of other EU member states are more attractive than those available in Romania. One study suggests that, rather than return home, many Romanian migrants in Italy and other EU member state have opted to live, somewhat precariously, in the destination country. The prospects of a lower wage, fewer opportunities to find a better paid occupation and greater difficulties in setting up an entrepreneurial activity limit the choices for return (Ferri and Rainero 2010). Other recent research on the impact of the recent economic crisis concludes that, in relation to Romanian migration, the main impact has been a slow-down in migration and a growth in the rate of the return that would have happened later anyway. The research also identifies an increase in circular migration resulting from economic recession.

Research findings suggest that, both in Italy and Spain, migrant women have been less affected by unemployment resulting from economic recession than men. This is a consequence of concentration of women in sectors less prone to economic fluctuations, while men were employed mostly in the construction sector, which in Spain has been particularly affected by the recession (Staciulescu et al, 2011). At the same time, 2009 saw 15 per cent more companies registered by Romanian citizens as

compared to the preceding year, reaching 32.452. This corresponds to higher levels of self-employment which we discuss later.

2.4 Roma migration patterns

The migration behaviour of the Roma communities of Bulgaria and Romania follow particular patterns. Evidence on the particular patterns of Roma migration is available from Bulgarian research which identifies similarities and differences between the push factors for Roma and the wider Bulgarian population. (Angelov and Vankova, 2011) Both groups identified employment as the main reason for choosing to work abroad. However, unlike the wider Bulgarian population, the Roma community did not identify education as a push factor marking a key distinction between the two groups. In addition, migration among the Roma community is mostly temporary and circular with two thirds of Roma migrants returning to Bulgaria within less than six months. Target destinations also differed with Greece as the main destination for Roma migrants. This is explained with reference to its proximity to Bulgaria, low travel costs and for opportunities for seasonal employment in tourism and agriculture. In contrast, Germany was found to be the most desired destination for non-Roma Bulgarian migrant workers followed closely by Spain (Angelov and Vankova, 2011).

Discrimination and poor living standards are also key drivers of migration among the Roma communities in Bulgaria and Romania. A survey by the European Union Agency for Fundamental Rights FRA (2009) finds that poverty and racism are the major factors behind outward migration of individuals from the Roma community. Specifically, unemployment and segregation were found to be key push factors. The prospect of finding work and achieving a higher standard of living were among the key factors attracting members of the Roma community to certain host countries are expectations and prospects of finding work and improving the standard of living. Therefore, some research has found a stronger interest in migration among those who identify themselves as Roma (Belcheva, 2011). At the same time, recent Bulgarian research has found similar levels of interest in permanent migration among the Roma community as Bulgarians as a whole, with 12 per cent wishing to leave the country for good (NPOC, 2012).

3. Bulgarian and Romanian Migration to the UK

Key points

- GDP, earnings and employment levels are likely to have some bearing on the future scale of migration from EU2 countries to the UK. A comparison of these shows level of GDP in Bulgaria and Romania several times lower than the UK. Earnings are considerably below UK levels and both Bulgaria and Romania have lower employment rates than the UK.
- Both Bulgaria and Romania have a declining population, while that of the UK is increasing. All three countries have an ageing population but the trend in Bulgaria is more marked. Levels of education are lower in both Bulgaria and Romania than in the UK.
- Levels of migration from Bulgaria and Romania to the UK are currently relatively low, compared both to levels of EU8 citizens in the UK and EU2 citizens in Spain and Italy. Current migrants from Bulgaria and Romania are concentrated in London and the South East.
- The great majority of migrants from Bulgaria and Romania in the UK are aged between 18 and 34 years old, which is similar to that of workers from the EU8 countries which joined the EU in 2004. Men are slightly over-represented among EU2 migrants to the UK.
- The skill levels of current EU2 migrants to the UK are higher than those of EU8 migrants, with almost twice as many in skilled occupations. Levels of self employment are also relatively high. These features of the EU2 migrant population may change following removal of restrictions.
- Some characteristics of EU2 migrants currently in the UK are typical of a new migrant group and of economic migrants: their relatively young age, small numbers of children and older people, concentration in London and South East England.
- Survey evidence suggests that the UK is not a strongly favoured location for those interested in migrating. There is little firm evidence to suggest that flows will therefore increase substantially once transitional controls are lifted.

3.1 The wider economic context

In this chapter we describe the profile of Bulgarian and Romanian migrants to the UK. We start with illustrating recent trends in migration from Bulgaria and Romania to the UK in the wider European context. We compare the pattern of migration from the EU2 countries to that of migration from EU8 countries. We then turn to analysing socio-economic characteristics of migrants from Bulgaria and Romania and their demographic, skills and labour market status profiles. The literature refers to several sources of data: compiled by international organisations (such as Eurostat (data on Population Statistics, International Migration Flows, Labour Force Surveys) and OECD), as well as by national bodies (national statistical offices ONS, Bulgarian and Romanian Statistical offices; in the UK data on migrants is also available through the WRS and the records of National Insurance Number allocations). Unfortunately none of these data sources provides a full picture of Bulgarian and Romanian migration to the UK.

Before examining the profile of current migration to the UK, it is useful to consider a few features of the economies of the UK, Bulgaria and Romania, since these may be important factors in encouraging migration once interim restrictions are lifted.

Table 3.1 shows Gross Domestic Product (GDP) of the EU27 member states, Bulgaria, Romania and the UK. Table 3.1 shows that the level of GDP in Bulgaria and Romania, both in terms of Euro per inhabitant, as well as in terms of Purchasing Power Standard per inhabitant is several times lower than the EU average. The discrepancy between Romania and Bulgaria and the UK is even higher. The gap has diminished significantly over the last decade, although the differences remain.

Table 3.1 Gross Domestic Product (GDP) of the EU27 member states, Bulgaria, Romania and the UK

	Gross domestic product at market prices (Millions of Euro)		Gross domestic product at market prices (Millions of national currency)	
	2000	2010	2000	2010
EU27	9,200,905.0	12,278,344.4	9,200,905.0	12,278,344.4
Bulgaria	14,035.1	36,052.4	27,398.7	70,511.2
Romania	40,651.3	124,058.9	80,984.6	522,561.1
UK	1,600,206.7	1,709,606.7	975,294.0	1,466,569.0

	Gross domestic product at market prices (Euro per inhabitant)		Gross domestic product at market prices (PPS per inhabitant)	
	2000	2010	2000	2010
EU27	19,000	24,500	19,000	24,500
Bulgaria	1,700	4,800	5,400	10,700
Romania	1,800	5,800	5,000	11,400
UK	27,200	27,500	22,600	27,400

A comparison of earnings in the three countries is presented in Table 3.2. The level of nominal earnings in Bulgaria and Romania has increased over time, although it still remains much below the UK level.

Table 3.2 Average annual earnings in the UK, Bulgaria and Romania

Earnings	Average annual earnings, All NACE Rev. 1 activities (except agriculture; fishing; activities of households and extra-territorial organizations) (in Euro)		Average annual earnings, NACE Rev. 2, Business economy (in Euro)	
	2000	2007	2008	2010
Bulgaria	1,411.2	2,699.7	3,328	4,058
Romania	:	5,069.4	5,457	5,420
UK	36,728.0	44,457.6	41,714	38,925

Source: Eurostat

Although Bulgaria and Romania are catching up, they remain among the poorest countries in the EU. Above we present real and nominal difference in GDP per capita and earnings between Bulgaria and Romania and the UK. Differences in real GDP per capita between Bulgaria and Romania and other EU countries are indicative of how attractive migrating to another EU country might be to citizens of Bulgaria and Romania. Nominal differences in earnings may also indicate how likely Bulgarian and Romanian workers in other EU countries are to send remittances to their home countries. One could speculate that absolute, that is nominal, differences in earnings may matter for temporary migrants who intend to return to their home countries in the medium term. Real differences are more likely to be taken into account by long term migrants wishing to stay in their countries of destination in the longer term.

Table 3.3 shows the rates of employment and unemployment in the UK, Bulgaria and Romania. This shows the UK to have a considerably higher employment rate than both Bulgaria and Romania and to have a considerably lower unemployment rate than Bulgaria. A comparison of both employment and unemployment rates between 2000 and 2010 shows, however, that Bulgaria increased its

employment rate over this time, and reduced its unemployment rate. The trend in Romania was in the opposite direction, but both the fall in the employment rate and rise in unemployment rate were not large.

Table 3.3 Rates of employment and unemployment in the UK, Bulgaria and Romania

Employment rate (15 to 64 years)	2000	2010
Bulgaria	50.4	59.7
Romania	63.0	58.8
United Kingdom	71.2	69.5

Unemployment rate	2000	2010
Bulgaria	16.4	10.3
Romania	6.8	7.3
United Kingdom	5.4	7.8

There has been no research looking at the particular pull factors for migration from the EU2 countries to the UK in particular. However, it may also be useful to look at the evidence on push and pull factors from the EU8 countries to the UK and to consider their relevance to potential EU2 migration. A number of studies have found that the main motivation of EU8 migrants to come to the UK is the desire to enter the UK labour market. Higher relative levels of pay have been a key factor behind EU8 migration. As one study concludes, ‘This pre-eminence of economic motivation appears to have been largely driven by the favourable disparity in earning potential between countries of origin and the UK’ (Cook et al, 2008). Another study involving interviews with migrants in Sussex found that the majority of migrants came to UK and, also to the local area for economic reasons, which included the difficult economic situation in their countries of origin, high unemployment rates, loss of jobs and loss of their own business (Sikora et al, 2010).

Decisions of EU8 migrants have been found to be based on personal and social grounds as well as purely economic considerations. Some research has also found migrants to be motivated by joining a partner who previously migrated to the UK (Sikora et al, 2010). The choice of the UK as a destination, rather than other countries open to EU8 migrants has also been explained with reference to presence of family and friends (Markova and Black, 2007).

3.2 Demographic, Geographic & socio-economic profile of EU2 migrants to the UK

A comparison of the population profiles of Bulgarian, Romania and the UK

The relative sizes of the populations of Bulgaria, Romania and the UK are presented in Table 3.4. This shows that the UK, with 62 million inhabitants, is more than three times the size of Romania, at just under 21.5 million inhabitants, and more than eight times the size of Bulgaria, which has a population of around 7.5 million. The table also shows the change in population between 2000 and 2010 in the three countries. While the UK’s population grew 5.6 by per cent during this period, the population of Romania declined by 4.5 per cent, and that of Bulgaria by as much as 8 per cent.

Table 3.4 Population sizes of Bulgaria, Romania and the UK 2000 and 2010

Population	2000	2010
Bulgaria	8190876	7563710
Romania	22455485	21462186

UK	58785246	62026962
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The age profile of the populations of the three countries is shown in Table 3.5. This shows all three countries as having a tendency towards an ageing population. However, the population of Romania shows more marked ageing, with the population aged under 15 years old falling from 19 per cent to 15 per cent between 2000 and 2010

Table 3.5 Age profile of the populations of Bulgaria, Romania and the UK 2000 and 2010

Age structure	2000			2010		
	Under 15	15 to 64	65 and over	Under 15	15 to 64	65 and over
Bulgaria	16%	68%	16%	14%	69%	18%
Romania	19%	68%	13%	15%	70%	15%
UK	19%	65%	16%	17%	66%	16%

The three countries also vary in the educational attainment of their populations. As Table 3.6 shows, 35 per cent of the UK population is education to the first and secondary stage of tertiary education, which in the UK corresponds to post-secondary school study. In Bulgaria, 23 per cent of people attain this level of education, while in Romania it is considerably lower at 14 per cent. In all three countries the proportion of people attaining this level of education grew between 2003 and 2010

Table 3.6 Educational attainment in Bulgaria, Romania and the UK 2003 and 2010

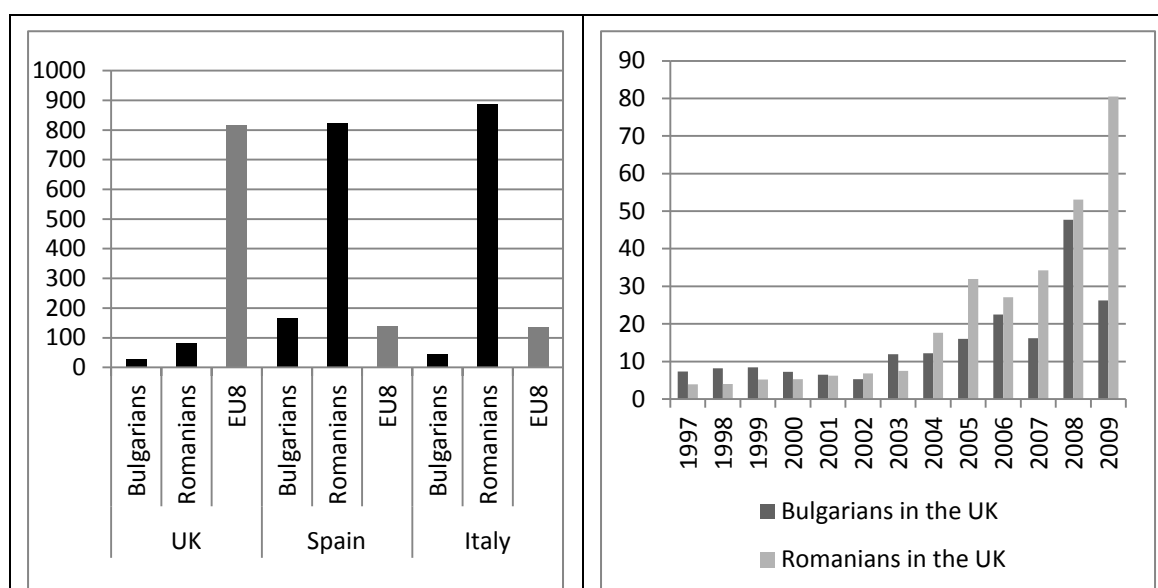
Educational attainment	2003			2010		
	Pre-primary, primary and lower secondary education	Upper secondary and post-secondary non-tertiary education	First and second stage of tertiary education	Pre-primary, primary and lower secondary education	Upper secondary and post-secondary non-tertiary education	First and second stage of tertiary education
Bulgaria	29%	50%	21%	21%	56%	23%
Romania	30%	60%	10%	26%	61%	14%
UK	33%	36%	31%	24%	41%	35%

Numbers of migrants from Bulgaria and Romania to the UK

In absolute terms the number of Bulgarian and Romanian migrants currently living in the UK location is relatively low (26,000 and 80,000, respectively). This compares with 168,000 Bulgarians and 823,000 Romanians settling in Spain, and 46,000 Bulgarians and 888,000 settling in Italy. It is also low compared to the number of EU8 nationals settling in the UK (815,000).

Figure 3.7 shows the number of Bulgarian and Romanian nationals residing in Spain and Italy as compared to the UK, as of 2009, as well as the number of Bulgarian and Romanian nationals residing in the UK over 1997-2009.

Figure 3.7. Bulgarian and Romanian migrants in the UK



Source: Holland et al., 2011

Location of Bulgarian and Romanian migrants in the UK

We have compared the above international data with the data on the number of NINO allocations published by the DWP. According to the NINO data, the numbers of NINO allocated to Bulgarian and Romanian nationals from 2002 to the first quarter of 2012 amounted to 89,000 and 125,000, respectively. This is slightly more than the European data presented above suggests (note the latest data is as of 2009). This is explained by the fact that there is no requirement to de-register or to re-register following movement out and back in to the UK. NINO registers do not account for those who stay only temporarily. Other limitations of NINO data relate to their recording the year of registration, rather than arrival in the UK, and absence of data on migrants' internal movements within the UK.

With regard to temporary migration, rather than longer term settlement, the recent crisis may have induced some return migration or relocation of mobile workers within the EU. This is what the European data would suggest, at least in the case of Bulgarian workers: there was a drop in the number of Bulgarians in the UK between 2008 and 2009 (from about 50,000 to 26,000, shown in figure 3.7).

As Table 3.8 shows, most migrants from Central-Southern Europe settle in London. About 50 per cent of Romanians, and about 35 per cent of Bulgarians residing in the UK in 2009 chose London in which to live. Although London continues to attract the greatest proportion of new migrants arriving in the UK, its share has decreased over time as migration to other regions has increased (Rincon-Aznar and Stokes, 2011). However, the onset of economic recession has increased the concentration of migrants in London (Boden and Rees, 2010) Prior to the economic crisis, the share of Bulgarian and Romanian nationals settling in London was somewhat higher, as shown by table 3.8. Datta (2011), drawing upon research carried out with low-paid Bulgarian migrants in London, documents that the recession had exacerbated their economic insecurity (which related to the fear of a job loss, or experiences of unemployment).

Table 3.8. Regional distribution of EU-2 nationals allocated a NINo, 2007-2009 in %

	Bulgaria			Romania		
	2007	2008	2009	2007	2008	2009
Scotland	4.6	7.6	8.7	2.6	3.7	5.2
North East	0.6	0.4	0.6	0.7	1.0	1.0
North West	3.0	3.8	3.6	2.2	2.8	3.9
Yorkshire and the Humber	1.6	2.2	2.2	1.9	2.2	2.2
Wales	0.8	0.8	1.3	0.8	1.1	1.4
West Midlands	9.4	11.1	12.9	3.2	5.4	7.3
East Midlands	3.4	2.9	2.8	4.2	3.6	3.8
East of England	7.7	9.5	9.0	4.0	5.9	8.9
South East	13.4	13.5	17.9	8.0	9.0	11.9
London	51.7	42.9	35.1	69.1	61.2	49.0
South West	3.0	3.7	3.9	2.6	3.6	4.4
Northern Ireland	0.9	1.6	2.0	0.7	0.5	1.1

Source: Department for Work and Pensions, after Holland et al. (2011)

While discussing the size of migration from Bulgaria and Romania to the UK we should mention the issue of comparability of the data. As pointed out in the methodology section, the literature reviewed in this report refers to various sources of data. The datasets compiled by international and national organisations differ not only because they measure different groups of migrants, or apply different definitions of a migrant. The data may refer to flows or stocks, and these are not always directly comparable. The Labour Force Survey data collected by national statistical offices in the sending countries provides a slightly different picture of migration from the one obtained on the basis of LFS data collected in the receiving countries. While the quality of data will improve over time, it should currently be treated with caution.

Characteristics of Bulgarian and Romanian migrants in the UK

We have already identified some characteristics of EU8 migrants across with EU. In this section, we look at their current profile in the UK, which as we explain is slightly different. Stokes, (2011) using data from NINO allocations shows that the vast majority of migrants from Bulgaria and Romania were aged between 18 and 34 years old at the time of registration. As figure 3.10 shows, Bulgarian nationals were on average slightly younger than the Romanians. The age distribution of workers from Bulgaria and Romania is broadly similar to that of workers from the EU8 countries which entered the EU in 2004.

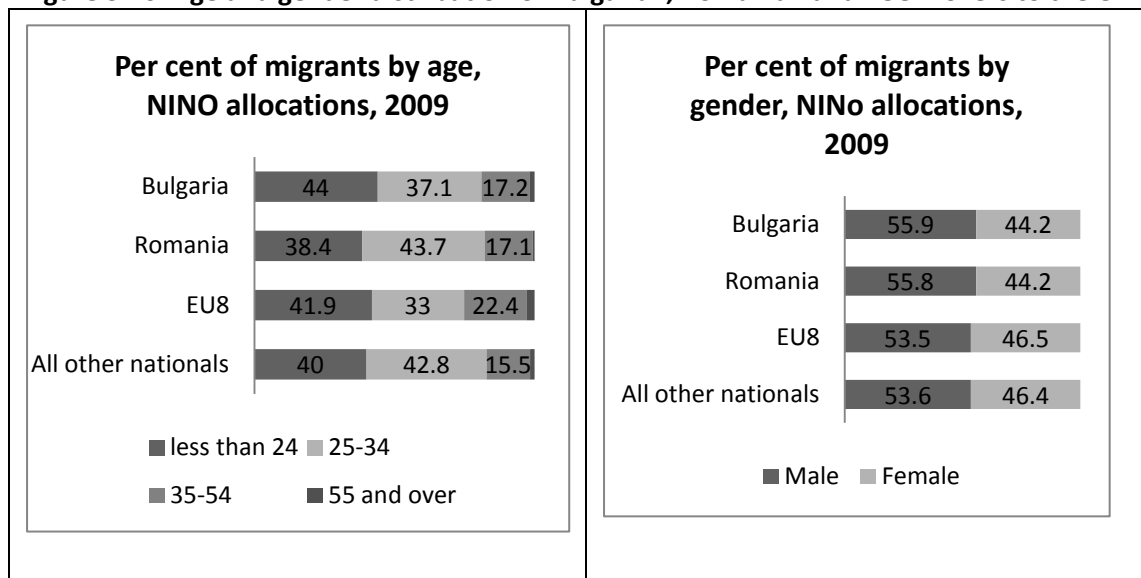
Gillingham (2010) using data from both NINO allocations and the WRS, shows there has been some change in the age profile of EU-8 migrants arriving in the UK since 2004. Both sources indicate a decrease in the proportion of those aged under 35, and an increase in the proportion aged 35 and above. This same pattern is found in EU LFS data shows as for the stock of Bulgarian and Romanian workers residing in EU15 countries (Fic, 2011). Over the period 2004-2010, the share of those aged under 35 decreased and of those aged 35 and above increased. It can be expected that the same pattern will apply to Bulgarian and Romanian citizens residing in the UK.

The gender distribution is shown in figure 3.10. There are slightly more men arriving in the UK than women.

With regard to the family profile of migrants, Kausar (2011) reports that both EU2 and EU8 migrants were more likely to be married than migrants from other countries; 50 per cent of EU2 migrants and

60 per cent of EU8 migrants were married as compared to 42 per cent of all other migrants. Both EU2 and EU8 migrants were less likely to have dependent children than other migrants (63 per cent and 54 per cent, respectively). Matheson (2009) documents the increase in the number of children within the EU8 population as a result of both children born in EU8 countries migrating with their families and the number of babies born to mothers from the EU8 residing in the UK.

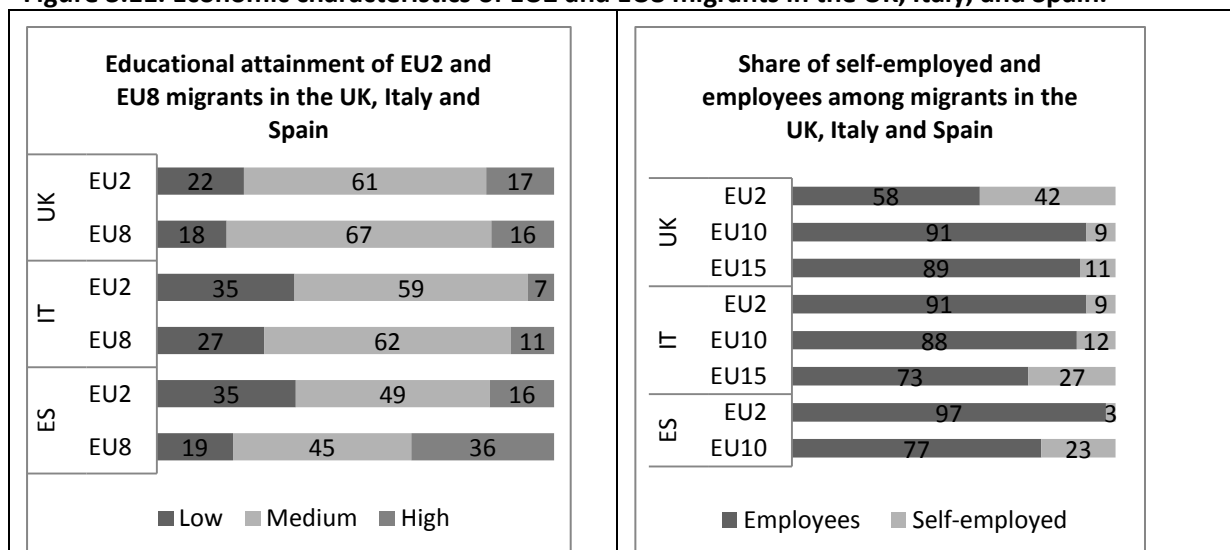
Figure 3.10. Age and gender distribution of Bulgarian, Romanian and EU8 movers to the UK

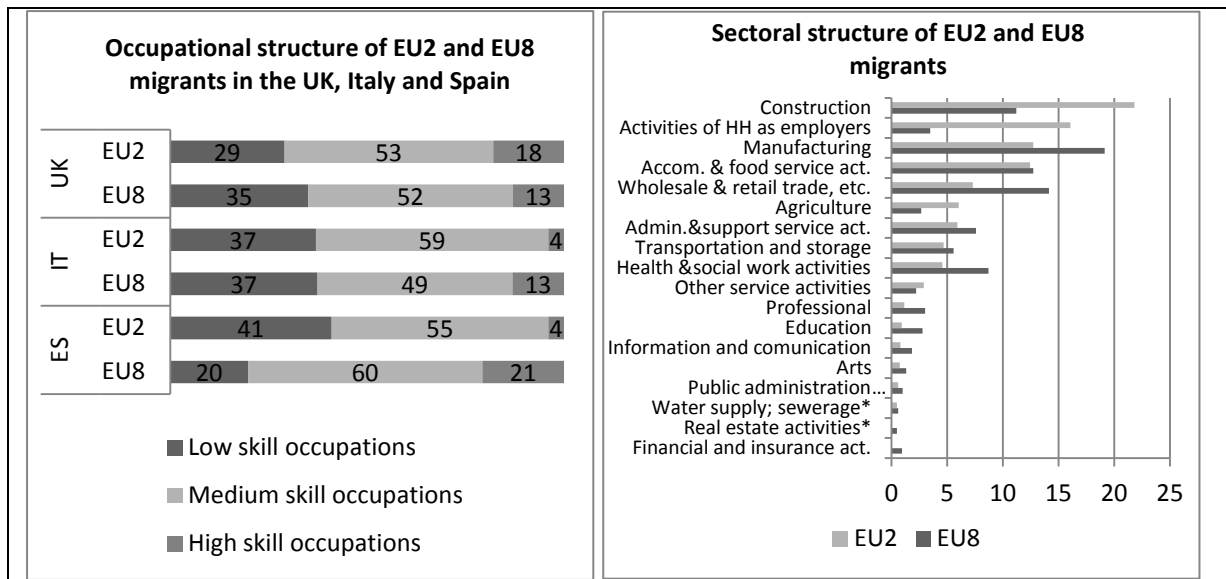


Source: DWP, after Holland et al

Qualifications held by migrants are not well reported in the UK LFS with a large proportion reporting 'other' qualifications (Migration Advisory Committee, 2008). Data from the European Labour Force Survey suggests that the majority (60 per cent) of Bulgarian and Romanian workers coming to the UK have intermediate qualifications. The proportion of those with higher educational attainment is greater than among movers settling in Italy; and comparable with migrants residing in Spain.

Figure 3.11. Economic characteristics of EU2 and EU8 migrants in the UK, Italy, and Spain.





Source: European Commission, 2012 and Holland et al, 2011

Employment status and sectoral patterns

Movers from the EU2 predominantly work in occupations requiring low or intermediate qualifications such as elementary occupations and as craft and related trades workers. Across the EU these include construction, manufacturing, accommodation, food and service activities, wholesale and retail trade.

The European Commission (2012) estimates that, on average, about 30 per cent of EU2 and EU8 mobile workers work below their qualifications. The incidence of down-skilling in the UK is higher in the case of EU8 migrants than in the case of EU2 movers (Holland et al, 2011) which may be related to the size of their population in the UK. The incidence of down-skilling in the case of EU2 mobile workers is higher in Spain than in the UK. Quoting results of a survey conducted in 2008, Iara (2010) documents that virtually all Romanians (93 per cent) with a high level of education, working in Italy, were overqualified for the job they did. This is probably a consequence of current restrictions on the right of Bulgarians and Romanians to work in the UK, which confines them to particular sectors and occupations.

Restrictions on workers under transitional arrangements only apply to employees, and not to the self-employed. Several sources suggest that there has been a relatively disproportionate share of self-employed among mobile workers to circumvent current restrictions. It has been argued that a proportion of those registered as self-employed workers are not genuinely self-employed but have adopted, or been given this status, because of current restrictions on employment. (EC, 2012). The share of self-employed differs significantly across countries and it appears that the share of self-employed is correlated with restrictions on the free movement of workers (EC, 2012). In the case of the UK the share of the self-employed among movers from Central and Eastern Europe is very low, while it is significantly higher among arrivals from Bulgaria and Romania (Kausar, 2011). Spain, which granted free access to its labour market for movers from EU2 countries in 2009, in 2010 recorded a very low share of self-employed at 3 per cent, as compared to the 8 per cent share recorded in 2008.

Surveys of Bulgarian workers in countries including the UK have found that they are concentrated in four sectors: hospitality, cleaning services, construction and trade. For those interviewed in 2009 in the UK, agriculture was also a significant sector for employment of Bulgarian migrants. Bulgarians in the three countries surveyed, the UK, Greece and Italy, also work as self-employed. This research has also looked at employment prior to coming to the UK. Previous jobs of migrants were found to include doctors, accountants, midwives, nurses, tennis coaches, fitness instructors, shop-owners, taxi

drivers and locksmiths. Just under a quarter had worked in another foreign country before (Germany, Greece, Libya) and most of the migrants interviewed were first time emigrants. As for their first employment in the UK, the main sectors were construction (men); personal services (women); hotel and restaurant services (both men and women) (Krasteva et al, 2010).

The UK as a potential destination for migrants from Bulgaria and Romania

There is little firm evidence to suggest that the UK is favoured as a potential destination for migration from Bulgaria and Romania and that flows will therefore increase substantially once transitional controls are lifted. The media in Romania suggested some time ago that the UK will be chosen as a destination after 2007, because of the scale of migration from Poland after 2004. Some researchers have rejected this as speculation and conclude that language and network effects will influence the decision of Romanians to choose Italy and Spain (Silasi and Simina, 2008)

There is some evidence from Bulgaria that there is more interest in the UK as a destination than in the past, but levels of interest are still relatively low: 15 per cent of those wishing to leave Bulgaria said they were planning to go the UK (Belcheva, 2011). Other research has found that England is seen as a destination by around 10 per cent of respondents wishing to migrate (Pamporov, 2011) This interest has been explained with reference to the teaching of English as the main foreign language in Bulgarian schools.

There is evidence of some support organisations for Bulgarians and Romanians within the UK. These include cultural associations, supplementary schools and churches (See Annex 5). Existence of this type of support is likely to reflect, rather than encourage migration, although it may assist longer term settlement.

3.3 A Comparison of EU2 and EU8 migration to the UK

A number of studies have compared the social and demographic characteristics of current EU2 and EU8 migrants to the UK. They have been found to be similar in a number of respects, which may be helpful when considering the potential impact of EU2 migration.

Similarities have been noted in the age profile of EU8 and EU2 migrants as well as in education levels (Sumption and Somerville, 2009). Both groups also have low unemployment rates and high labour force participation (Migration Advisory Committee, 2008). The main differences found in the profiles of current EU2 and EU8 migrants are in their occupational skill levels and in the proportion with children.

First, with regard to skills differences, the majority of current EU2 migrants in the UK perform jobs in the top two (of four) occupational skill groups (MAC, 2008). Using Labour Force Survey data, Kauser (2011) found that 26 per cent of EU2 migrants are in skilled occupations, compared to only 15 per cent of EU8 migrants. Sumption and Somerville (2010) argue that this skills difference is most likely due to the labour market restrictions that EU2 migrants currently face. They are limited primarily to intermediate and skilled occupations and to self-employment, although lower skilled work is possible through the Sectors Based Scheme and the Seasonal Agricultural Workers Scheme.

Secondly, EU8 migrants are more likely to be living in family groups than EU2 migrants (Kauser, 2011). This may also be explained by tighter restrictions on EU2 migrants' employment which may deter family migration and settlement.

Some characteristics of EU2 migrants might be seen as both typical of a new migrant group, most notably in terms of age and small numbers of children and older people. Other characteristics, particularly their concentration in particular sectors and in self-employment, are likely to reflect current employment restrictions. It has therefore been argued that the population of new EU2 migrants is likely to resemble the EU8 migrant population more closely once the labour market restrictions are lifted (MAC, 2008). We believe that this is likely to be the case and that, in the

absence of reliable evidence on either current or future migration intentions, evidence in relation to EU8 migration is of potential value in assessing potential impacts. This has informed our approach to assessing the potential social impacts of EU2 migration, explored in the next chapter.

4. Social impact of Bulgarian and Romanian Migration on the UK

Key points

- Our review of the impact of migration on UK services found very little literature specifically relating to migration from Bulgaria and Romania. We have focused on literature on the impact of EU8 migration and have interpreted its findings to account for ways in which EU2 migration may differ.
- Many services in the UK were not well-prepared for EU8 migration and found it difficult to cope with the increased demand. Impacts were also greater where services were already stretched. However, a feature of EU8 migration was its wide geographical spread across the UK. EU2 migration may not be so widely dispersed.
- Significant family migration from the EU2 countries may increase pressure on school places at primary level in some areas. However, there is less pressure on secondary school places.
- Any impact of EU2 migration on housing will depend on the existing housing supply as well as the buoyancy of the local housing market.
- Future EU2 migration is unlikely to have a significant impact on health services as a whole because of the age profile of economic migrants.
- Our review identified a limited evidence base on the impact of migrants on the welfare system. However, current research has found that EU2 and EU8 migrants are less likely to claim benefits than other migrant groups and that of those EU10 migrants who claim benefits, the majority claim child benefits.

4.1 Our approach to assessing the potential social impact of EU2 migration

The focus of this chapter is to identify research which could be used to assess the potential impact of migration to the UK from Bulgaria and Romania once restrictions are lifted. The scope of the literature review is wide, and here we focus on the impacts of EU2 migration experienced in the UK with particular reference to the impacts on services, including health, education and housing and services in general. As we explain, a range of factors are likely to affect the degree of impact of any future migration from Bulgaria and Romania. While the scale of migration is obviously a key factor, these include the personal characteristics of migrants, including their age and if they come alone or with families, the extent to which they settle and where they live within the UK.

One possible approach to assessing the potential impact of EU2 migration would be to look at exiting migration from EU2 countries and the implications of this for migration once restrictions are removed. Unfortunately, this approach has two drawbacks. The first of these is the very limited research evidence in relation to the social impacts of existing EU2 migration to the UK. The second drawback is that Bulgarian and Romanian nationals have entered the UK under arrangements which have restricted their employment in a number of ways. These are likely to have encouraged short term stays of eligible individuals rather than longer term settlement of families. With the lifting of restrictions, this is likely to change. Therefore the demographic composition and demands that EU2 migrants are likely to place on UK services will be very different.

Our proposed approach is based on an assessment of similarities between current EU8 migration to the UK and prospective EU2 migration. We compared some of the key features of EU2 and EU8 migration in Chapter 3, and how these reflect their status as economic migrants. While the social and demographic characteristics of current EU2 and EU8 migrants differ somewhat it is expected the

population of new EU2 migrants is likely to resemble the EU8 migrant population more closely once the labour market restrictions are lifted (MAC, 2008).

The body of evidence on EU8 migration impacts on the demand for UK services is now considerable, although more in some areas of service provision than others. Our review has covered a large number of studies and also incorporated evidence from larger reviews which have included studies which are too small and localised to be considered separately in this review of evidence. These larger reviews include NIESR's review of the impact of migration into Scotland (Rolfe and Metcalf, 2009) and on the impact of migration on demand for health and education (George et al, 2012), although this particular review was of the impact of non-EU migration.

4.2 Literature on current EU2 migration to the UK

As stated above, only limited consideration has been given to the potential impact of migration to the UK from Bulgaria and Romania once restrictions on employment are lifted in 2014.

A small number of studies have either looked at current migration from the EU2 countries or have attempted to predict its impact using a combination of data on EU2 migration and existing evidence on EU8 migration. The obvious drawback of predicting the impact of future EU2 migration from analyses based on current EU2 migration is that Bulgarian and Romanian nationals enter the UK under interim restrictions and their stay is more likely to be temporary. These may encourage short term stays of eligible individuals rather than longer term settlement of families. Indeed, a recent study of Bulgarian migrant workers in London found that nearly 65 per cent of the interview sample did not have any dependents (Datta, 2011).

Research by the Department for Communities and Local Government (CLG) on the potential impact of EU2 migration on demand for services and other social impacts found evidence of EU2 accession migration since 2007 too limited to use reliably and therefore drew on evidence from EU8 migration into the UK (Department for Communities and Local Government, 2007). Other Government investigations have used a range of sources to predict the likely flow of new migrants following removal of restrictions. In particular, a report on Bulgarian and Romanian accession to the EU by the House of Commons Home Affairs Committee looked at evidence including unemployment rates in Bulgaria and Romania (House of Commons Home Affairs Committee, 2008). The Committee considered evidence on the low unemployment rate in Romania and the long term trend for economic growth. Other research, for the Department for Communities and Local Government, also remarks that the EU2 (and EU8) countries have experienced falling unemployment rates since 2004, possibly due to a declining population, so that unemployment may not be a strong push factor (Kaiser, 2011). Oral evidence from both Bulgaria and Romania referred to the preferred destinations of potential migrants, which were considered to be Italy, Spain and Germany for Romanian nationals and Spain, Portugal, Italy, France and Greece for Bulgarians. Although, these preferences may have now changed in the light of the economic situation in some of these member states, this corresponds with other evidence that the UK may not be the first choice of EU2 migrants (House of Commons Home Affairs Committee 2008).

4.3 Migrants' use of services: general issues affecting demand and impact

In this chapter of the report we look at the impact of migration on a range of services, focusing on the key services of housing, health and education and social security. In addition to studies which have focused on migration impacts on specific services, a number have looked more broadly at the impact of migration on public services or have identified issues which are relevant to migrants' use of services more generally. Before turning to particular areas of service provision, we provide an overview of these more general findings.

As previous research by NIESR has found, there is very little research which looks directly at the impact of migration on public services (Rolfe and Metcalf, 2009). The focus of much of research is on

migrants' access to service and on their levels of awareness of entitlements, rather than on the impact on services they may access. This is found particularly in relation to health, where there have been concerns that some groups of migrants may not be accessing the services they need (Medicins du Monde, 2007; Raphaely and O'Moore, 2010).

Another feature of some published research on migrants' use of services is its broad focus on migrants and lack of distinction between groups of migrants. This is important because migrants do not have the same level of need for services and therefore will have different levels of impact according to their personal characteristics and background. While some research has focused specifically on refugees and asylum seekers and on their particular service needs, others do not distinguish between groups of migrants, for example EU and non-EU, and some include migrants who have been resident in the UK for many years. Therefore, this research makes it difficult to assess the actual and potential impact of particular migrants, including potential migration from Bulgaria and Romania.

The problem of lack of distinction between migrants in some of the literature stems in part from lack of information about migrants who are accessing services. As an earlier NIESR review for the Scottish Government found, the record systems of many service providers do not allow for analysis of use by nationality or migrant/non-migrant status. In some cases this is because the characteristics of service users are not adequately recorded. However, some studies have found some service providers carry out no monitoring of enquiries and are therefore only able to provide estimates of migrant use, based on providers' personal impressions (Orchard *et al*, 2007). These estimates may not accurately reflect characteristics of service users. Therefore, as the NIESR report concluded, record keeping needs to be improved in some service areas if the impact of migration is to be properly assessed. These systems could be put in place in advance of the lifting of restrictions on migration from Bulgaria and Romania in 2013.

As a number of evidence reviews have concluded (Arai, 2005; Rolfe and Metcalf 2009), many studies of the impact of migration on demand for services are small scale, conducted within UK localities, commissioned by local authorities. These studies have considered migrants' needs for service provision, changing levels of demand for services, the capacity of organisations and staff to deal with this demand and the experiences and needs of migrants themselves. Rolfe and Metcalf (2009) point to a number of limitations of these studies, including their small sample sizes, low response rates and lack of clarity in research methods. However, they also note that despite these shortcomings, these smaller studies present a fairly consistent picture in relation to demand for services from EU8 migrants which is supported by larger studies. There are three main messages from studies of general demand for services resulting from EU8 migration:

- Many services were not well prepared for EU8 migration and response has not been well-coordinated nationally
- Services often do not record the personal characteristics of users in order for the impact of migration to be assessed
- Migration impacts are felt most where services are already stretched
- The greatest impact has been on demand for translation and interpretation services

Many services were not prepared for the level of EU8 migration because it was more widely distributed than earlier migration to the UK and included areas which had previously experienced low levels of migration (Andrews *et al*, 2011). Many local service providers have not been aware of migrants' rights in relation to access to services (Rolfe and Metcalf, 2009). Local authorities have responded in a piecemeal way (Cook *et al*, 2008) with some better able to assist migrants, and to deal with any increased demand than others. A review of the performance of English councils, matched with migration data, found that significant levels of EU8 migration did affect service performance. However, local authorities with previous experience of migration were able to maintain service standards better than others and able to cancel out any negative impact of EU8

migration on service performance (Andrews et al, 2011). Other studies refer more generally to the impact that migration can have where services are already stretched by lack of resources (Green et al, 2008). The House of Lords Select Committee enquiry refers to this problem, where increases in demand are not budgeted for (House of Lords, 2008).

Studies have consistently found that the greatest impact on services has been in the demand for translation and interpretation services. This area of service provision has not been well-funded and migration from EU8 countries has put additional pressure on budgets and existing services (Audit Commission, 2007; Cook et al, 2008). However, there is also evidence from local studies that lack of English language skills among migrants reduces services use and increases reliance on friends and family (Rolfe and Metcalf, 2009; Scullion and Morris, 2009a&b; Scullion et al, 2009). More generally, there is evidence of 'self-sufficiency' among EU8 migrants (Rolfe and Metcalf, 2009). However, while this may reduce pressure on services, it may also result in exploitation of migrants where they are not aware of their rights and of available support (Sumption and Somerville, 2010).

The implications of these findings for EU2 migration following removal of barriers depend on both its scale and distribution. Research evidence suggests that the effects on service demand were felt most in areas of the UK which had little experience of previous migration and were not prepared for or experienced in providing services to migrants. It might be expected that, more than eight years after initial EU8 migration, this situation has now changed and that many local authorities and other service providers are better equipped to address the needs of migrants, both in terms of knowledge of migrants' rights and entitlement and skills for working with migrants. However, the budgets of UK local authorities and other service providers have been reduced following Government spending cuts and this may affect their ability to deal with any increased demand for services, and particularly for language support. The implications of potential EU2 migration for particular service areas are considered in the following sections.

4.4 Health services & Public Health

Evidence about the impact of migration on health focuses on three main areas which are reviewed in turn:

- Levels of demand for health services
- Migrants' access to and usage of health services
- Public health impacts of migration

Levels of demand for health services

The impact of migration on health services has been assessed primarily within reviews of service impacts more widely, and through evidence gathering, either from literature reviews or from consultation with service providers at health authority or local authority level. As a previous report by NIESR indicates, much of this research has focused on EU migrants or on migrants as a whole and has tended to be region-specific (George et al, 2012).

George et al (2012) found that, overall, migrants in general are unlikely to pose a disproportionate burden on health services (i.e. one that is greater than would be expected, given their proportion of the population). Other reviews with a regional focus came to similar conclusions. For example, a review of evidence by the Scottish Parliament found little evidence of increased demand for health services resulting from migration into Scotland (Scottish Parliament, 2010). Similarly, an enquiry by the Welsh Assembly Government revealed that migrants were making little impact on health services. This was largely believed to be because economic migrants tend to be young and healthy, aged between 18 and 34, return to their countries of origin for treatment and are not aware of services available to them (National Assembly for Wales, 2008). Such a finding is in keeping with other research looking at the impact of migration across the UK which has shown that new economic migrants are generally young and healthy (CLG, 2006; ICOCO, 2007) and as such do not make major

demands on health services. Such findings demonstrate that future migration from Bulgaria and Romania is unlikely to have a significant impact on health services as a whole.

Some studies have indicated that that levels of demand for health care may change in the future. However, this is based on observations of increased settlement among migrant workers in local areas rather than forecasting based on existing data or research on migrants' intentions (National Assembly for Wales, 2008; Collis et al, 2010). Collis and colleagues also note that GP registration rates among EU2 and EU8 workers are lower than among Portuguese workers and believe this may be due to the fact that the Portuguese community has been resident in the area for longer.

Disproportionate demand

The studies cited above have looked at the impact of migration on the overall demand for health services. Other studies have focused on disproportionate demand of particular health services such as maternity services (Klodawski and Fitzpatrick, 2008). Analysis for the London Health Observatory found that the majority of 'additional' births in London have involved mothers born in England and Wales and in the rest of the world but not recent migrants from EU8 countries (Klodawski and Fitzpatrick, 2008). Given the similarities in social and demographic characteristics between EU8 and EU2 migrants, it thus seems unlikely that future migration from Bulgaria and Romania will lead to a disproportionate increase in demand for maternity services.

The issue of 'health tourism' and whether migrants enter the UK to access state health care provision is also considered in some literature (Kelly et al, 2005; Mediciens du Monde, 2007). Research by Mediciens du Monde (a London-based non-governmental organisation) found no evidence of health tourism among more than 600 migrants who had accessed their services. These migrants had been living in the UK for an average of three years before seeking healthcare. The health conditions seen in the service users were broadly reflective of the health conditions found among the general population in general practice; the majority needed help to access primary care or antenatal services rather than specialist treatment (Mediciens du Monde, 2007). Further, some research on EU8 migration has shown that migrants prefer to return home for healthcare (Scullion and Morris, 2009a&b; Green et al, 2008). This seems likely to be linked to the frequency with which EU8 migrants travel to and from the UK and the temporary nature of some such migration. Green et al (2008) argue that as migrant workers settle more permanently in the UK, their usage of health services will become similar to the wider UK population. Such a finding clearly has implications for future migration of EU2 nationals and will depend on the length and purpose of migration.

As previous research by NIESR has identified, disproportionate demand may derive from other issues, such as language difficulties (George et al, 2012). A study of migrant workers in Peterborough identified interpreting costs as a key additional cost associated with providing healthcare to migrants (Scullion and Morris, 2009a). Johnson (2006) also found that the availability of a universal language support service through NHS Direct is not well understood or used by medical and nursing staff. This could have implications for efficiency and time spent with migrant users of health care services. However, as of yet, such impacts have not been measured.

Migrants' access to and usage of health services

Within the existing literature on health service impacts of migration, there is a particular focus on migrants' access to and use of health services. A number of studies have looked at migrants' levels of registration with GP practices and dentists and their use of hospitals, particularly Accident and Emergency facilities (Collis et al, 2010; Green et al, 2010; Raphaely and O'Moore, 2010; Scullion and Morris, 2009a&b; Green et al, 2008; Zaronaitė and Tirzite, 2006).

Such studies have generally found low rates of GP registration among EU8 migrant workers. For example, a survey focusing on EU8 migrant workers in the South East of England found that 55 per cent of the 726 respondents were registered with a GP (Green et al, 2008). Similarly, a survey of 697 migrants (the majority of whom were EU8 migrants) in South Lincolnshire found that 53 per cent

were registered with a GP (Zaronaite and Tirzite, 2006). Those migrants with families or dependants were found to be more likely to register with a GP (Green et al, 2008). Collis et al (2010) noted that even when registered with a GP, levels of usage of this service remained low with 66 per cent of respondents indicating that they had only used their GP once or twice in the past year and a further 14 per cent indicating that they had not made any appointments.

As George et al (2012) note, the explanations put forward for low rates of GP registration include language barriers, difficulties in taking time off for appointments, opening hours, and a lack of knowledge and understanding of primary and secondary health care services in the UK. Indeed, Zaronaite and Tirzite (2006) state that the UK has different rules than other countries for GP registration and that lack of information and poor English language skills prevent migrant workers accessing healthcare services. Language difficulties are also identified as a barrier to accessing healthcare in other studies focusing on EU8 and EU2 migrants (Schneider and Holman, 2009; Uscreates, 2008). Lack of trust in NHS services has also been identified as an issue for some EU8 migrants (Uscreates, 2008).

A number of reports have noted that some migrant workers go directly to hospital Accident and Emergency departments for primary health care needs (ICOCO, 2007; Raphaely and O'Moore, 2010; Scullion and Morris, 2009a&b; Scottish Parliament, 2010). Such a phenomenon is attributed to the fact that some migrants are not registered with a GP and do not understand their entitlement to care under the NHS (Raphaely and O'Moore, 2010) or because migrants lack an understanding of the health care system in the UK (Scullion and Morris, 2009a&b). Green et al (2008) and Raphaely and O'Moore (2010) point to the need for more guidance for service providers and migrant workers about access and entitlement to health care as well as the purpose of different health care services. Such recommendations are clearly pertinent for future migrants from Bulgaria and Romania.

Public health impacts of migration

Research on immunisation coverage rates, rates of disease, health-related behaviours and conditions of migrants can inform understandings of migrants' impact on consumption of health services. However, there is currently a dearth of readily accessible data on migrants' health. Jayaweera (2010) and (2011) indicate that this is due to the fact that existing data tends to focus on ethnic minorities rather than specifically on migrants and does not include migration variables such as country of birth, immigration status and length of residence in the UK.

The limited published research available on the health of EU8 migrants indicates that they are generally healthy, because they tend to be young and in employment. A study of EU8 and Portuguese migrants in Peterborough which included a survey of 278 migrant workers found that only 9 per cent of respondents indicated that they or a family member had a particular health problem (Scullion and Morris, 2009a). Similarly, research by the Department for Communities and Local Government showed that EU8 migrants were less likely to have serious health problems (lasting more than a year) than the UK born. This was largely explained by the fact that migrants tend to be younger and would find it difficult to migrate while suffering from a serious health condition (CLG, 2007). Interestingly, a longitudinal study of EU8 and EU2 migrants found that ill health led to a shorter length of stay in the UK for some (Schneider and Holman, 2010).

Some research has also identified higher rates of smoking among recent migrants compared with non-migrants, particularly from EU8 and EU2 countries (Collis et al, 2010). Data from the World Health Organization (WHO) indicates that 44 per cent of Bulgarian adult males and 23 per cent of Bulgarian adult females are smokers while 33 per cent of Romanian adult males and 10 per cent of Romanian adult females are smokers. This compares to 26 per cent of adult males and 23 per cent of adult females in the UK. Although the impacts of these higher rates are not known, such statistics could lead to a higher demand for health services if Bulgarians and Romanians settle more permanently in the UK since smoking-related diseases often onset later in life. In contrast, WHO data on total alcohol consumption in 2008 shows that Bulgaria and Romania have lower rates of alcohol

consumption than the UK (Health Protection Agency, 2008). Similarly, the impacts of these consumption rates are not known. Prediction is also complicated by the fact that migrants tend to change their lifestyle as they become settled and adopt behaviours closer to the host population.

Epidemiological research comparing rates of disease and health conditions between populations has relevance for understanding the impact of migration and can be useful in terms of service provision planning. Research on immunisation coverage rates has reported very high coverage in most of the accession countries, although some countries have higher rates of infection than the UK. Data from the WHO shows that despite vaccine coverage rates of 95 per cent or above, Romania has the highest rates of measles and mumps among the accession countries and the second highest rate of rubella. Romania's tuberculosis notification rate is also the highest amongst the accession countries although the HIV notification rate is lower than in the UK. A similar situation applies to Bulgaria: immunisation coverage rates are generally higher than in the UK, yet rates of mumps, pertussis (whooping cough) and rubella are slightly higher than in the UK. The TB notification rate in Bulgaria is three times higher than in the UK while the HIV notification rate is much lower than in the UK (Health Protection Agency, 2008). Such findings have implications in terms of service planning, with higher TB notification rates among Bulgarians and Romanians having particular importance given the current level of houses in multiple occupation (HMOs) identified among recent migrants.

A survey of 2648 Central and Eastern European migrants (CEE) living in London found that CEE migrants in London report high rates of behaviours associated with increased risk of HIV and sexually transmitted infections (STI) acquisition and transmission. Risk behaviours varied by region and sex. For example, EU8 respondents were more likely to report recreational drug use in the past year than EU2 migrants. EU2 males were more likely to have paid for sex than EU8 males, although this was widely reported by males from both groups. Both groups reported more consistent condom use and lower reported diagnoses of STIs than the general population. Such findings should inform service planning and identify where HIV and STI interventions need to be targeted (Burns et al, 2012).

4.5 Housing

The impact of migration on housing has received considerable media attention in recent years. A widespread public perception persists that migrants pose a disproportionate burden on the social housing market in particular, yet evidence to date does not substantiate this claim. As the research examined below indicates, any consideration of the impacts of migration must be contextualised within a broader picture of the UK housing market, and particularly the affordable housing market, which is currently under considerable strain for reasons relating to the ongoing recession and a dramatic decline in the number of new-builds.

Research on the impact of migration on housing covers four main areas which are examined below:

- Migrants' access to and use of private rented accommodation
- Impact of migration on the housing market
- Social housing
- Homelessness

Migrants' access to and use of private rented accommodation

Several studies identified that the majority of migrants find low-cost accommodation in the private rental sector (PRS) (Diacon et al, 2008; Green et al, 2008; Phillimore et al, 2008; Rolfe and Metcalf, 2009; Scullion and Morris, 2009a&b; Perry, 2012). A recent analysis of Labour Force Survey data shows that three quarters of recent migrants (defined as being those who have been in the UK for five years or less) are living in the PRS (Migration Observatory, 2012). Similarly, a study focusing on EU8 migrants in the East Midlands found that the vast majority were housed in the PRS (Phillimore et al, 2008) while a study focusing on EU8 and EU2 migrants in Liverpool found that 73 per cent of respondents were housed in the PRS (Scullion and Morris, 2009b).

Some studies have also found evidence of migrants living in 'tied' accommodation where accommodation is provided by the employer. Such practices are identified as being more common within the hospitality and agriculture industry (Diacon et al, 2008) and in rural areas (Phillimore et al, 2008). Although this can work well in some instances, there are concerns about overcrowding, high rents and poor conditions (Diacon et al, 2008) particularly where migrants are placed in houses in multiple occupation (HMOs) (Perry, 2012). Further, tied accommodation can make individuals vulnerable as complaints can render migrants homeless and out of work (Audit Commission, 2007). In some cases, tied accommodation can also be indicative of forced labour (Wilkinson et al, 2010).

Pathways to finding private accommodation can vary among EU8 migrants. For example, Rolfe and Metcalf (2009) identified that EU8 migrants in Scotland initially tend to stay with friends and family and then move into private rented accommodation. Meanwhile, a study of EU8 migrants in a northern city found that many EU8 migrants initially live in housing provided by employment agencies but move into privately rented accommodation shortly afterwards (Cook et al, 2012). A study on migrant workers in Peterborough also cites the key role that social networks play in helping people to find accommodation: 48 per cent of 278 respondents (the majority of whom were EU8 migrants) indicated that they had found their current accommodation through friends or family (Scullion and Morris, 2009a).

Frequent changes of accommodation appear to be common among some migrants (Spencer et al, 2007; Scullion and Morris, 2009a; Radu, Hudson and Philips, 2010). Spencer et al (2007) found that almost a third of respondents had moved at least once since arriving in the UK up to eight months ago, with a few having moved three or more times in that period. Of those who had moved, 38 per cent had moved due to the cost or poor condition of their housing, while 30 per cent had moved because of a job with the remainder citing 'other reasons' for doing so. The poor quality or sub-standard accommodation of migrants was also identified in other studies, with local stakeholders fearing this could have implications for health and safety (Green et al, 2008; Phillimore et al, 2008). This has been attributed to the fact that recent migrants are often unable to access mainstream housing because they lack sufficient funds for a deposit and do not have the necessary references and forms of identification required by many letting agents and landlords (Phillimore et al, 2008; Nicholson and Romaszko, 2008; Diacon et al, 2008). As such, new migrants often end up in the least desirable accommodation, where demand is lowest (Robinson, 2007). However, Spencer et al (2007) also found that some overcrowding occurred within migrants' accommodation due to the fact that migrants were 'choosing' to sub-let in order to reduce the rent they were paying.

Impact of migration on the housing market

Before examining the impact of migration on the housing market, it is important to first contextualise demand from migrants within the broader issues affecting the UK housing market. The PRS is currently under immense pressure and demand within this sector has continued to grow as a result of the continued increase in the number of single person households, the large numbers of young couples who are unable to buy, the large student population and recent changes to government policy around housing (Perry, 2012). As such, migrants are competing for housing in the PRS at a time when demand, including from other migrants, is growing faster than supply and rents are rising. Indeed, the backlog of housing need was estimated to be around two million households overall in 2010 and is projected to remain 'at higher than recent levels' for the next decade (Perry, 2012).

As mentioned above, changes to government policy have also affected demand in the PRS. Local authorities have been 'encouraged to prevent homelessness by securing offers of PRS properties for potentially homeless families to avoid them being formally accepted as homeless and given a social letting'. A reported 55,000 households were assisted in this way between 2010 and 2011 (Perry, 2012). Competition within the PRS is also set to worsen in high-demand areas as a result of changes to the Local Housing Allowance in the 2010 budget. Wilcox (2010) notes that many existing

claimants in inner London and other high-value areas will be required to move to areas with lower property values, thus putting further pressure on demand for affordable housing.

Migrants from EU8 and EU2 countries have tended to compete with others at the lower end of the market for accommodation in the PRS. Perry (2012) argues that migrants can sometimes displace others because they offer certain advantages to landlords. For example, migrants may be willing to tolerate lower standards of accommodation and overcrowding and will also pay rent directly to the landlord rather than via housing benefit (Rugg and Rhodes, 2008). Some migrants may also sub-let in order to reduce housing costs (Spencer et al, 2007).

Concentrations of migrants in the PRS can have an impact on local housing markets, through higher rents and possibly through higher property prices which can reduce access for prospective first-time buyers (ICC, 2007). However, a study focusing on the East Midlands found that the impact of migration on housing varied according to the housing supply across the region (Phillimore et al, 2008). In rural areas, for example, migration to the local area had led to an increase in rental prices with some locals being priced out of the housing market. In contrast, in urban areas within the region, migrants were thought to have had an insulating effect on the local housing market and had prevented a downward trend in prices (Phillimore et al, 2008).

Similarly, Pemberton (2009) found that EU8 migration in general was positively impacting on low-demand housing areas, such as Housing Market Renewal Pathfinder (HMRP) areas in England. Two case studies of HMRP areas revealed that migrants had stabilised demand for private rented accommodation. Such a trend does not appear to have been at the expense of existing residents who (in both case study areas) were on average more likely to be owner-occupiers or local authority/registered social landlord tenants. Nevertheless, interviews with existing residents and migrants revealed that individuals were facing higher rental prices and that this in turn was creating affordability problems (Pemberton, 2009).

In conclusion, future migration to the UK, including from Bulgaria and Romania is likely to place added pressure on the lower-end of the PRS. However, the impacts of such migration at a local level will depend on the existing housing supply as well as the buoyancy of the local market.

Social housing

Current demand for social housing outweighs supply, due to a combination of a decline in new-build activity and a reduction in the size of the sector resulting from the sale of some social housing to existing tenants. In such a context, migrants are mistakenly perceived to gain access to social housing at the expense of other 'more deserving' groups (Robinson, 2010). Indeed, research to date shows no evidence that social housing allocation favours migrants over UK citizens (Rutter and Latorre, 2009; Robinson, 2007). In fact, 90 per cent of those living in social housing are British born and new migrants to the UK make up less than 2 per cent of the total of those in social housing (Rutter and Latorre, 2009). In 2006-7, EU8 migrants comprised less than 1 per cent of social rented lettings and that three quarters of the EU8 households in social rented accommodation were in employment compared to just one third of all households who have moved into a new social rented tenancy in 2006-7 (Robinson, 2007).

Research by Dustmann and colleagues found that EU8 migrants with at least one year of residence in the UK (and who were therefore legally eligible for social housing) were 58 per cent less likely to live in social housing than natives. This is partly explained by the different demographic characteristics of migrants but, when these are controlled for, migrants were found to still be 28 per cent less likely to live in social housing (Dustmann et al, 2010).

Some research has, however, identified the possibility of increased pressure on the social rented sector as migrants become more settled in the UK and gain entitlement to social housing (Green et al, 2008). For example, Green and colleagues note that there has been a large increase in the number of EU8 nationals on council waiting lists in the South East. Other studies show that some

EU8 migrants have aspirations of finding accommodation within the social rented sector. A study focusing on EU8 migrant workers in Peterborough found that approximately half of the 278 workers interviewed had a future preference for living in socially rented accommodation (Scullion and Morris, 2009a). A similar study focusing on Liverpool found that the majority of the 235 respondents wanted to either live in socially rented accommodation or purchase their own home in the future (Scullion and Morris, 2009b). A third study of EU8 and EU2 migrants in Nottingham found that a quarter of the 235 respondents wanted to live in socially rented accommodation in the future (Scullion et al, 2009). These findings indicate that future migration from Bulgaria and Romania may in time place added pressure on the social housing market. However, further research into this area is needed before firm conclusions can be drawn. The impact of the recent changes to EU8 migrants benefit eligibility on demand for social housing would be a useful starting point.

Homelessness

The overwhelming majority of Central and Eastern European migrants in the UK successfully obtain employment and accommodation. However, homelessness has been identified as an emerging problem faced by some migrant workers, particularly EU8 migrants (CLG, 2007; Diacon et al, 2008; Spatial Strategy and Research, 2010). The causes of such homelessness vary but are certainly linked to earlier restrictions on EU8 migrants' access to benefits. Indeed, prior to May 2011, those EU8 workers who were not registered on the Workers Registration Scheme, or who lost their employment during the initial 12 month period were unable to access state support.

A national survey conducted by Homeless Link in 2008 found that 70 per cent of the day centres for homeless had encountered service users from Eastern European countries (Homeless Link, 2008). In 2009, the same organisation published a survey indicating that rough sleeping by EU10 nationals is increasing with this group comprising 25 per cent of London rough sleepers compared to 18 per cent in 2008. It is thought that fewer than half of enumerated rough sleepers in London in 2010-11 were UK nationals, with CEE migrants comprising 28 per cent of the visible homeless population and the remainder comprising 'other' migrant groups (CHAIN database, maintained by Broadway and quoted by DCLG, 2012). Such findings clearly have implications for future migration from Bulgaria and Romania, particularly since it is understood that their access to benefits will initially be restricted.

4.6 Education

Of all services potentially accessed by migrants, education is one in which rights of access are the most clear and where impacts may therefore be felt. As Reynolds (2008) notes, unlike other areas of service provision, the rights and entitlement of migrant children to education is clear, covered by Article 28 of the UN Convention on the Rights of The Child (UN, 1989) and Article 2 of the first protocol of the European Convention on Human Rights (EU, 1998). However, whether migrants access education services does, of course, depend on whether they arrive with children, or settle in the UK and form families. In relation to potential EU2 migration, this factor is particularly unclear.

Because of its status as a universal and key service, education along with health and housing services, is the area of service provision which has received most attention in debates on migration impacts in the UK. This has been particularly true of media coverage. Despite much speculation on the impact of migration on schools and education, research-based evidence is not strong. One of the difficulties of establishing stronger estimates is in identifying migrant children from education databases. The school census, which forms the National Pupil Database, is the main source of information on pupil characteristics. This is a count of all children of all school ages enrolled in local authority schools in the UK. The census collects data on pupils' age, ethnicity, first language and home postcode. This data can be used to identify migrants, on the basis that entry to school after age 5, of pupils for whom English is not first language, identifies likely immigrants. However, this is problematic for a number of reasons: firstly, migrant children may arrive before they reach compulsory school age; secondly, children's country of birth is not recorded, so that the impact of

migration from particular countries cannot be measured. Thirdly, ethnic group, which is recorded for all children, cannot be used as a measure since this gives no indication of whether a pupil is a migrant, UK first generation, second generation or more (Rolfe and Metcalf, 2009). Another drawback, although not relevant for the purposes of this review is that the data source does not help in identifying migrant children with English as a first language.

Despite problems with the data, some research has used the National Pupil Database to identify particular groups of migrant children, for example Polish children who can be identified as pupils who speak Polish as their first language (Geay et al, 2012). With the aim of focusing on this particular group of migrants, this research looked at performance data for Catholic Primary Schools. It would be possible for future research to identify pupils with Romanian or Bulgarian as their first language, although these might include children who were born in the UK rather than those who arrived with their families following the removal of barriers in 2013.

Evidence of the impact on migration on education and schools falls into four main areas which we review in turn:

- The increase in pupil numbers resulting from migration
- Impacts of migration on school and pupil performance
- Additional demands on schools arising from the needs of some migrant pupils
- Pupil mobility and churn

Increase in pupil numbers

One of the more basic ways in which migration can impact on schools and education services is through an increase in pupil numbers. The impact of migration on demand for school places has therefore been a central theme of research looking on migration and education services in the UK, although there has been relatively little primary research. As a review by NIESR for the Migration Advisory Committee concluded, much of this has focused on the recent migration, particularly from Eastern Europe (George et al, 2012). A review by the Audit Commission found that some schools have found difficulty in coping with the number of new arrivals resulting from recent migration into the UK (Audit Commission, 2007) and other local studies have reported similar difficulties, at least initially (see George et al, 2012). Data on pupil numbers in shows that overall pupil numbers are increasing, but this has been only since 2011. This is accounted for by increased numbers of children at State funded nursery and primary school level since 2010. At the same time, there has been a decline in pupil numbers at secondary school level, since 2004, which is predicted to continue until around 2016 when increases at primary level will begin to impact on secondary schools. The number of pupils at secondary level is expected to decline by 5 per cent between 2011 and 2015 (DfE, 2012). Therefore, where pressure on places exists, it applies largely at primary school level.

However, data on pupil numbers and school capacity are aggregate and do not reflect different patterns of demand for places across the UK. As well as differences at primary and secondary level, demand for places in rural areas may be lower than in larger towns and cities for example. The impact of further migration, including from Bulgaria and Romania, on demand for school places will therefore depend to a large extent on where migrants choose to live as well as the age of children in families moving to the UK.

The potential impact of migration from Bulgaria and Romania on schools and education also depends on the characteristics of migrants, particularly whether they are young, single and childless or whether families with children of school age migrate to the UK. The predominance of young, single people among initial migrants from the EU8 countries undoubtedly limited the impact on schools and education services initially (Audit Commission, 2007). Similarly, NIESR concluded that the children of non-EEA migrants who enter the UK on work permits have a relatively small impact because, where they have children, these are under school age (George et al, 2012).

Another key factor determining the impact of potential migration from Bulgaria and Romania on schools and education services is the settlement rate of migrants and whether some migrants who initially migrate alone and on a temporary basis are later joined by their families (ICOCO, 2007).

A further consideration is whether Bulgarian and Romanian communities in the UK are establishing their own schools and will therefore make fewer demands on the state education sector because of these independent arrangements. While both Bulgarian and Romanian schools have been established in the UK, these are open after normal school hours and provide supplementary education in native language and culture. They are located largely in London, although Bulgarian schools have been set up in Essex, Surrey and Kent, and a Romanian school has been established in Nottingham. While of educational and social value to Bulgarian and Romanian migrant children, they do not affect demand for school places.

Impact on pupil and school performance

A number of studies have looked at the impact of migration on the pupil performance, as measured by standard assessment tests carried out in schools. Measurement is problematic because identifying migrant children from education databases is not straightforward, as explained earlier. The closest measure of the impact of migration on school performance is attainment of pupils for whom English is an additional language. While this group does not correspond directly to migrant pupils, since some will be native English speakers and some children of migrants may have English language needs, this group does include pupils from Eastern Europe and may be of some use in measuring the potential impact of migration on pupil and school performance from Bulgaria and Romania.

A recent evidence review by NIESR for the Migration Advisory Committee examined the statistical evidence on attainment of pupils for whom English is an additional language. Using recent data on pupil test and examination results from the Department for Education, the review found that these pupils perform almost as well as pupils whose first language is English (George et al, 2012). Other, more detailed research, on the performance of migrant children in Catholic primary schools, attended by many EU8 children, found a small negative association between the percentage of non-native speakers and the educational attainment of native English speakers. However, once factors associated with deprivation were taken into account, any negative effects disappeared (Geay et al, 2012). Other research suggests that the stronger performance of schools in London results at least in part from the achievements of migrant pupils (George et al, 2012). There has been no equivalent research on the performance of migrant pupils in secondary schools.

Additional demands on schools

Aside from demand for places, research has been conducted on the additional requirements on schools which may result from migration. The most obvious additional requirement for pupils from non-English speaking countries is for translation and interpreting services. In the past, schools were allocated additional funding from the Ethnic Minority Achievement (EMA) Grant and, later, the Migration Impacts Fund to assist migrant pupils with English language needs. These resources enabled them to fund bi-lingual teaching assistants and other forms of language support. These resources have been found to be insufficient with some schools reporting assisting pupils with English language needs (Scullion et al, 2009). Funding arrangements have now changed so that schools now have to fund this support from within their own budgets. Although studies consistently find that language support represents a cost to schools, these are rarely quantified, possibly because schools resource this support through various budgets and staffing arrangements.

Migration from countries where access to formal education is later than in the UK has also placed additional demands on schools to fill gaps in early numeracy and literacy (Gordon et al, 2007). This particular demand may arise in relation to migration from Bulgaria and Romania because compulsory schooling in both countries begins at age 7 (with mandatory preparatory year from age 6

in Romania). In the UK school is compulsory for children from age 5. Particular issues may also arise in relation to the education of children from Roma communities in the two countries, where participation rates are considerably lower than for the population as a whole. However, recent research has found that Roma children do well in UK schools, performing only slightly below average, which is to be expected given that they arrive in the UK with limited English (Equality UK, 2011). Other needs identified as placing additional demands on schools include complex special needs which may be initially hidden by language needs and attendance patterns among some migrant groups (ICOCO, 2007; Scullion et al, 2009).

Other demands on schools and teachers, identified by research, include the need to understand cultural differences and lack of records and assessments (Wales Rural Observatory, 2006; Gordon et al, 2007). These are reported to have affected schools' abilities to work effectively with migrant pupils (ICOCO, 2007). Some studies find that migrant parents have little involvement with their children's schools, compared to non-migrant parents (Audit Commission, 2007; Sikora et al, 2010). Factors responsible for lower levels of engagement are thought to include weak English language skills and shift working.

It has also been suggested that teachers in parts of the UK have lacked expertise in meeting the needs of migrant children (Audit Commission, 2007). Lack of expertise and understanding of migrant children's requirements may lead to additional costs, for example of teacher time. Research in Wales, involving consultation with 22 local authorities, found that migrant children's language needs are sometimes misunderstood as special educational needs, leading to unnecessary allocation of additional resources (Welsh Local Government Association, 2008). Many such impacts have been found in areas of the UK with little experience of migration and have arisen from the dispersed nature of migration from Eastern Europe. It might reasonably be expected that schools and teachers in areas without experience of receiving migrant children may have gained this. Moreover, migration from Bulgaria and Romania may not follow this dispersed pattern, but may take a more traditional route to larger towns and cities.

Mobility and churn among migrant pupils

The school year in England and Wales runs from September to July and in Scotland from August to June. Migrants may arrive in the UK at any time and therefore may be seeking school places part way through the school year. This has been reported to cause difficulties for schools, particularly in relation to costs: the school funding formula, which includes funding for pupils with English as an Additional Language, is based on numbers at the time of the annual schools census in, and additional numbers do not result in additional payments. The former Association of London Government is reported as estimating the cost of registering new pupils at non-standard times at in 2005 as £400 for primary school children and £800 for children enrolling in a secondary school (ICOCO, 2007). These estimates do not include any additional costs which may be required by migrant children, for example additional support staff and liaison with other services, for example health and social services. These needs are more difficult to meet where pupils arrive mid-term (Woods and Watkin, 2008).

Mobility among pupils has been identified more generally as a problem for schools and a small number of studies have looked at its effects in some depth. Some studies have a particular focus on the impact of migration on mobility and 'churn' (where pupils then leave a school) while others have a wider focus, looking at mobile families and the effects of mobility on schools more widely. One study found that schools with high levels of pupil mobility and churn experience difficulty in meeting the learning needs of all pupils because these change with the changing composition of pupils. The intensive help required by older, teenage, pupils was found to be particularly resource-intensive (Dobson and Pooley, 2004). However, two important factors must be taken into consideration: first that migration is not the only cause of pupil mobility, with resident groups showing high levels of mobility, particularly Gypsy, Roma and Traveller families native to the UK (Wilkin et al, 2010).

The second factor to consider is that schools receiving the highest numbers of migrant children are in some of the most deprived areas and also experience high levels of churn because they are less desirable to parents (Dobson and Pooley, 2004; Cook *et al.*, 2008). Migrants who arrive in the UK with children of school age may find they have initially little choice of school and therefore may wish to move once they have identified and found a place at an alternative school. Some research suggests that some of the mobility among EU8 migrant children is accounted for by parents' preference for Catholic schools which may be over-subscribed and operate waiting lists (Scullion *et al.*, 2009). Bulgaria and Romania have small Catholic populations, so that this particular form of mobility is unlikely to be replicated by prospective EU2 migrants.

4.7 Social security, welfare and benefits

The rights of Bulgarian and Romanian migrants to social security and welfare benefits are currently very limited. Those who are authorised to work in the UK can claim housing benefit to help pay their rent while working, and also may have access to tax credits and child benefit.

Romanian and Bulgarian national workers who become unemployed only acquire the same rights to non-contributory benefits, such as income-based Jobseeker's Allowance, as other EEA nationals if they have been continuously employed in accordance with the Home Office Worker Authorisation Scheme for 12 months or more. Romanian and Bulgarian nationals may also come to the UK if they are self-employed. If they stop working as a self-employed person they will generally only have a right to reside if they are self-sufficient, they cannot claim income-related benefits such as income-based Jobseeker's Allowance. Both Romanian and Bulgarian self employed people and those employed in accordance with the Home Office Worker Authorisation scheme are entitled to claim housing benefit and council tax benefit while they are in work.

Data on EU2 migrants accessing these benefits is not available and more generally, the current evidence base around the impact of migrants as a whole on the welfare system is limited and somewhat mixed in terms of messages. For example, Barrett and McCarthy (2008) use the British Household Panel Survey (BHPS) to examine differences in the receipt of benefits between migrants and natives. Their main conclusion is that migrants are less likely to receive welfare payments. However, Drinkwater and Robinson (2011) point out that the nature of the BHPS data means that it only contains a relatively small number of migrants within the sample. Their research takes a different approach and uses the Labour Force Survey (LFS) to analyse the incidence of welfare claims by immigrants and what determines these claims. They argue that it is hard to generalise on the welfare participation of migrants since claims vary considerably by immigrant group as well as by the type of benefit being claimed. As such, they focused their analysis on specific migrant groups, including EU8 migrants.

A number of studies of EU2 and EU8 migrants indicate that they are less likely to claim benefits than other migrant groups. Research by Dustmann and colleagues found that EU8 migrants with at least one year of residence in the UK (and who were therefore legally eligible to claim benefits) were 60 per cent less likely than natives to receive state benefits or tax credits and 58 per cent less likely to live in social housing. This is partly explained by the different demographic characteristics of migrants but, when these are controlled for, migrants were found to still be 13 per cent less likely to receive benefits and 28 per cent less likely to live in social housing (Dustmann *et al.*, 2010).

Other recent research sheds some light on the types of benefits which EU2 and EU8 migrants are likely to claim. This research found that of the relatively small pool of EU2 and EU8 migrants who claim benefits, the majority claim child benefits. However, the authors note that such results should be treated with caution due to the low sample size (CLG, 2011). Descriptive analysis of the LFS indicates that EU8 nationals and Australians are the least likely migrant groups to claim welfare benefits, a finding linked to the younger age observed among both groups as well as the fact that they tend to migrate for the purpose of employment (Drinkwater and Robinson, 2011). Econometric

analysis of LFS data revealed that EU8 migrants, especially males, are significantly less likely to claim unemployment related and sickness benefits but far more likely than the UK born to claim child benefit and working tax credits, even if their children do not actually reside with them in the UK (Drinkwater and Robinson, 2011). Similarly, a study on EU8 and EU2 migrant workers in Peterborough found that child-benefit, child tax credit and working tax credits were the most commonly claimed benefits. For example, 35 per cent of respondents claimed child benefit, 25 per cent claimed working tax credits while only 6 per cent of respondents had claimed Job Seekers Allowance and only 2 per cent of respondents were claiming sickness and incapacity benefits (Scullion and Morris, 2009a&b).

Migrants access to and understanding of the welfare system must also be considered in any examination of the impacts of migration on social security. Radu, Hudson and Philips (2010) found that family and community networks played a role in sharing information about the welfare system and application procedures. They identified poor English language skills as a barrier to migrants' successful interaction with the welfare system. They also noted that frequent changes in migrants' employment status (for example from full time to part time), changes of employer and changes in address could make necessary updates to the HMRC more difficult when working tax credit claims are made soon after arrival.

Drinkwater and Robinson (2011) warn that the relationship between immigrants and welfare participation is not static and that the recent recession is likely to have had an impact on benefit claims as seen by a higher social assistance benefit complaints in 2009 by EU8 migrants compared to previous years. Further, the evidence cited in this chapter relates to analysis conducted before the changes to EU8 welfare eligibility requirements which took effect on 1 May 2011. EU8 workers now enjoy the same rights as other EU nationals living in the UK and are able to access benefits without needing to remain compliant with the conditions of the Workers Registration Scheme. The impact of such changes should be explored in any consideration of the impact of future migration from Bulgaria and Romania on the UK welfare system.

5. Assessing the evidence base on impact of EU2 migration on the UK

Key points

- It is not possible to predict the scale of migration from Bulgaria and Romania to the UK with any degree of certainty because of the lack of accurate data on current migration and because of the many factors which determine migration decisions and patterns.
- Available evidence suggests that the UK is not a favoured destination for Bulgarians and Romanians who are considering migration as a future option. However, the economic climate within the EU may change this.
- It is possible that much migration from Bulgaria and Romania to the UK has already happened, but is confined to particular sectors. As well as to employment through legitimate visa arrangements and sector programmes, this may also include spurious 'self employment' and employment in the grey economy.
- Much migration is currently temporary, but there is evidence of settlement of EU8 migrants and a similar pattern may develop for EU2 migration. The profile of current EU2 migrants to the UK is typically young and without children but, as the case of EU8 migration suggests, this may change if longer term settlement develops and will have implications for the demand on services.
- Assessment of the potential impact of EU2 migration is made difficult by gaps in evidence, or which we have identified a number. These relate to evidence of migration behaviour and intentions and the employment patterns of EU2 migrants in the countries to which they move. They also concern gaps in evidence on the costs of providing services to migrants.

5.1 Predicting future migration

The objective of this report was to provide an evidence base from which the UK Government can assess the potential impacts of migration from EU2 countries following the lifting of transitional controls.

The evidence we have gathered can be used to help inform planning and policy making by national and local governments.

We have looked at three groups of factors:

- the drivers of migration from the EU2 countries to the UK including push and pull factors and future intentions to migrate
- the profile of the current UK diaspora population in terms of demography, location, skills and family profiles
- the impact of migration from the EU2 countries on the UK, with a particular focus on the social impact such as the impact of migration on health care, education services, and housing.

Why no numbers?

While we have reviewed a wide range of evidence, it is not possible to predict the scale of migration from Bulgaria and Romania to the UK with any degree of certainty. There are two main reasons for this: first the lack of accurate data on current migration, particularly on the number of migrants who have settled, by country of birth, either in the UK or elsewhere within the EU, or who have been temporary or 'circular' migrants. The second problem concerns the inherent unpredictability of migration. Future migration from Bulgaria and Romania to the UK will depend on a number of

factors. These include the propensity to migrate, linked to economic factors in Bulgaria, Romania, UK, other EU countries and even outside of the EU. It will also depend on political and social factors, which are arguably more difficult to predict than economic effects.

Consequently, any numerical estimates of potential migration to the UK are likely to be inaccurate and misleading. Therefore, our report includes no numerical estimates of the scale of migration from Bulgaria and Romania to the UK once interim restrictions are lifted. What our report does is consider both the factors which will encourage and discourage migration, the potential impact of the migration which may occur and what preparations can be put in place. We have assessed these using existing evidence of the impact of EU8 migration on the demand for services in the UK.

5.2 What are the main factors likely to influence the short-term & long-term impact of labour migration post 2014?

Will migration from Bulgaria and Romania increase once restrictions are lifted?

On the first of the factors outlined above, whether migrants will come to the UK from Bulgaria and Romania, a number of factors must be considered:

Firstly, looking at current migration from Bulgaria and Romania within the European Union, a large share has economic causes, with income levels and employment opportunities the predominant push and pull factors: the level of income in the EU2 countries as compared to the EU15 average is much lower, both as measured in terms of GDP per capita, as well as wages). The level of GDP per capita and the scale of emigration are relatively strongly correlated (Srisandarajah et al, 2005, EC, 2012). Although they are catching up, Bulgaria and Romania, remain the poorest countries in the EU, with gross national income at about 40 per cent of the EU level. However, as past migration from Bulgaria and Romania demonstrates, factors driving migration are not solely economic: political and social factors also play a part in migration decisions and behaviour. For some groups, for example the Roma Community, factors such as discrimination are also important. Therefore, whether Bulgarians and Romanians decide to migrate within the EU will depend on the economic, political and social climate in those countries in the coming years.

An important question is whether the UK will be a favoured destination for future migrants from Bulgaria and Romania, either currently living in their home countries, or elsewhere in the EU. Here, the evidence is equally unclear and predictions inherently unreliable. In recent years, since joining the EU, Bulgarian and Romanian nationals have been, along with Polish nationals, the most mobile in Europe, and Romanians have been particularly mobile. The main destination countries of Bulgarian and Romanian migration are Southern European countries, and to a lesser extent Germany. In 2009 Italy and Spain 2009 attracted about 83 per cent of mobile Romanians, and 49 per cent of Bulgarians. At this time, only 4 per cent of Romanian migrants, and 6 per cent of Bulgarians were living in the UK. While their relatively low presence in the UK may be explained with reference to restrictions on the right to work, literature gives several reasons why for Spain and Italy are the preferred destinations for Bulgarians and Romanians. These include geographic and linguistic accessibility and the presence of existing migration networks. However, given the predominance of economic factors in migration decisions, the economic crisis, which has hit Spain and Italy more than many EU states, makes the scale and direction of future migration flows from EU2 highly uncertain.

It is also useful to look at other examples of EU member states which have removed barriers to employment of EU10 citizens. For example the lifting of restrictions on Polish migration by Germany in 2011 did not lead to an increased migration from Poland despite the fact that Germany has always been a traditional destination country for Polish migration. Similarly, the UK has not been a traditional destination country for Bulgarian and Romanian migration. There are also likely to be differences in the number of migrants arriving in the UK from Bulgaria and Romania, with the

potential scale of migration from Bulgaria considerably smaller, reflecting its population size and lower levels of unemployment.

A further, but highly important factor, is whether much migration from Bulgaria and Romania to the UK has already happened, but is confined to particular sectors. As well as to employment through legitimate visa arrangements and sector programmes, this may also include spurious 'self employment' and employment in the grey economy. Some research on migration patterns, particularly from Bulgaria, suggests that the relaxation of restrictions are not the key factor in increasing levels of migration. Therefore, once these are lifted, post 2013, actual numbers of EU2 citizens working in the UK may not increase substantially.

Will migration be temporary or permanent?

The extent to which current EU8 and EU2 migrants have settled permanently in the UK is not entirely clear and the extent to which they will do so in the future is impossible to predict. Studies involving research with migrants have concluded that there is considerable uncertainty around intentions to stay or leave (Green et al, 2008). Studies of EU8 migration also indicate the intentions to settle change over time and that, while initially, migrants may not intend to stay permanently, this changes and that there is a tendency for migrants to stay longer than they originally intended (Spencer et al, 2007; Cook et al, 2008; Green et al, 2008). Research findings suggest that decisions of EU8 and EU2 migrants are influenced by perceptions of the health of economies in migrants' countries of origin. Schneider and colleagues found that EU8 and EU2 migrants have an increasingly negative view of economic and political situation in countries of origin, and that this influences a longer stay in the UK.

As with decisions to migrate, economic considerations are not, however, the only factor influencing decisions to stay or leave. In relation to EU8 and EU2 migrants, Schneider and colleagues (2010) found that personal reasons played an important role. These include migrants' perception of the social situation in the UK. As one study concludes,

‘...it appears as if migrants’ decisions to change their intentions to settle are not based on a single factor but on a variety of factors, of which time spent in the UK, the location of partner and family members and the acquisition of the right to legally settle in the UK appear to be important’ (Spencer et al, 2007:79).

Spencer and colleagues also found, not surprisingly, that legal status affects decisions to stay. Therefore, EU2 migrants who may be currently working undocumented in the UK may feel encouraged to stay following the removal of barriers in 2013.

Who will migrate from Bulgaria and Romania to the UK?

As we explained in Chapter 3, current Bulgarian and Romanian migrants in the UK are generally young, with the majority aged between 18 and 34 years old, which is similar to that of workers from the EU8 countries which joined the EU in 2004. Men are slightly over-represented. With regard to skill levels, the majority of EU2 migrants have ‘intermediate’ level qualifications, although data on skills is not reliable. They are currently concentrated in occupations requiring low or intermediate qualifications such as trades and crafts. Surveys of Bulgarian workers in countries including the UK has found them to be concentrated in four sectors: hospitality, cleaning services, construction and trade.

Some features of the EU2 migrant group: their high levels of self employment, and representation in sectors such as construction and agriculture reflect current restrictions and therefore may change over time. Other features, such as their young age and settlement in London and the South East, may be more stable.

Spain or Italy might be considered to be appropriate reference points from which to predict the profile of future Romanian and Bulgarian migrants to the UK. However, Spain and Italy were destinations of earlier migration from Bulgaria and Romania and there has been considerable family migration to these countries. Another feature of migration to Spain has been the relatively high levels of employment of migrants in private households. Although this is likely to be a source of employment for Bulgarians and Romanians, the case of migration from EU8 countries indicates that other sectors may also be significant.

Despite current differences between current EU2 migration and EU8 migration, a number of characteristics of EU2 migrants are likely to be similar to earlier migration from EU8 countries, principally in terms of age and gender balance. A key factor, which cannot be easily predicted, is whether migrants will come alone, or with families and whether they settle. This has a key bearing on whether the demands they are likely to make on services. As we have explained, family migration, family formation and long term settlement are crucial in whether migrants make demands on services such as education, housing and health. Some services, such as social security, are only likely to feel an impact of migration if it is longer-term, while others, for example health, may feel some impact in the short term, but considerably more if migrants settle.

5.3 What can local authorities and service providers do to prepare?

There is no doubt that some local authorities in England, Scotland and Wales, were not prepared for the scale of migration from the EU8 countries from 2004 onwards and that some services were put under pressure as a result. This was, to some extent at least, because they were not used to meeting the needs of migrants and did not have infrastructure, for example language services, in place. Some years down the line, this is likely to have changed, and local authorities may be better equipped to meet the needs of migrants. However, expenditure cuts may now be placing particular pressure on services.

While all local authorities may wish to ensure they are able to meet the needs of new arrivals in their areas through services such as translation and interpreting, it is unlikely to be necessary for particular preparations to be in place for arrivals from Bulgaria and Romania. We would expect future EU2 migration to be to London and the South East rather than to follow the previous pattern of EU8 migration, which resulted from labour shortages across the UK and the role of employment agencies in sourcing and placing EU8 workers.

The need for local authorities to prepare for a growth in their migrant communities resulting from EU2 migration will depend, to a great extent, on the degree to which they settle in the UK, rather than engage in temporary migration. As we have explained above, this is dependent on a complex interaction of factors and cannot be predicted.

5.4 Gaps in evidence

There are a number of areas where evidence is weak or non-existent in relation to current and future migration from Bulgaria and Romania to the UK. The four key gaps in evidence are as follows:

Data on migration from Bulgaria and Romania largely measures permanent moves rather than shorter periods of migration, which characterises much current migration with the EU. The extent to which migrants make frequent moves, including to work in several European countries, is not currently known. More research is needed on the actual patterns of migrants from Bulgaria, Romania and other EU countries with mobile populations.

There are a number of surveys of intentions to migrate among Bulgarians and Romanians, but this is an inherently unreliable way of predicting migration, particularly because questions are often general and are poor at distinguishing between a general desire and specific plans to migrate. Research is needed which links intentions with actual migration behaviour so that future migration levels can be more accurately predicted.

The extent to which migrants use and make demands on services, particularly health and housing, is currently unclear because of inadequacies in the data collected on use of these services. Similarly, it is difficult to accurately identify migrant children from schools data. More uniform and consistent collection of data on users across all services would help to assess the impact that migrants have on services, and any particular demands they make.

The costs of providing services to migrants, where they require additional assistance, are rarely quantified. While research frequently identifies language services as a particular cost of migration, data is almost non-existent.

Research is therefore needed to answer the following questions:

Why does much migration appear to be temporary and circular. Is it principally in response to push factors such as employment and, in the case of Roma people in particular discrimination and poverty? Do some individuals see migration as a means to improving their longer-term employment prospects on Romania and Bulgaria? What effect does economic recession have on migration decisions? Do individuals weigh up opportunities at home and in host countries or are decisions related more strongly to personal circumstances and social factors? And what are the factors which influence longer-term stays and permanent settlement in the UK. To what extent are these economic or do they include social factors such as family and social networks and a sense of attachment to the UK?

For Roma people, if one reason for migration is to escape discrimination and poverty, why does migration for Roma appear to be temporary and circular? Is it because they also experience discrimination in destination countries, including the UK, and how can this form of discrimination be addressed within the UK? Are UK institutions, including schools and local authorities, meeting the needs of the European Roma community?

Why do migrants work in particular sectors, for example in construction and, in Spain, in private households? Do their employment patterns reflect restrictions, employer practices, their skill profile, vacancies and easy entry jobs?

Why do migrants work at a level below their own qualifications and skills levels? Is this because of lack of recognition of qualifications, because they intend to stay temporarily and go for easy entry jobs requiring no formal qualifications and limited English language skills?

What are the barriers which migrants face to moving out of the low paid sectors in which they are concentrated and to obtaining more skilled work which matches their education and skill levels? This has very important implications for policy, given current concerns in the UK about 'crowding out' of native workers from jobs in industries such as construction, hospitality and care.

Many Bulgarian and Romanian migrants work in the UK as 'self employed', reflecting employment opportunities in sectors such as construction and trade. Can the current pattern of high levels of self-employment be expected to continue once restrictions on EU2 employment are lifted?

What additional demands do migrants from Bulgaria and Romania (and from elsewhere in the EU) make on services, and what in particular are the costs of translation and interpreting services? Are there also costs of not meeting the needs of migrants because of inadequate service provision or lack of awareness of migrants' rights to services, among migrants and service providers, for example in poor health and housing conditions.

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