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Original Citation

Jones, Laura, Lever, John, Jones, Sophie-Wynne, Radcliffe, Jonathan and Woods, Michael (2014) Migrant Workers in Rural Wales and the South Wales Valleys. Research Report. Cardiff School of Planning and Geography.

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Arsyllfa **Wledig** Cymru
Wales **Rural** Observatory

Migrant Workers in Rural Wales and the South Wales Valleys

Laura Jones and John Lever

Final Report, February 2014

With contributions from Sophie-Wynne Jones, Jonathan Radcliffe and Michael Woods



Cronfa Amaethyddol Ewrop ar gyfer Datblygu
Gwledig; Ewrop yn Buddsoddi
mewn Ardaloedd Gwledig
The European Agricultural Fund for
Rural Development: Europe Investing in
Rural Areas



Llywodraeth Cymru
Welsh Government

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ABBREVIATIONS

A8	-	Accession Eight Countries (Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Slovakia and Slovenia)
A2	-	Accession Two Countries (Romania and Bulgaria)
CEE	-	Central and Eastern European
EAL	-	English as an Additional Language
GLA	-	Gangmasters Licensing Authority
LMCN	-	Llanelli Multicultural Network
LEA	-	Local Education Authority
MADF	-	Multi Agency Diversity Forum
MELAP	-	Minority Ethnic Language and Achievement Project
MWF	-	Migrant Workers Forum
NINo	-	National Insurance Number
NWREN	-	North Wales Race Equality Network
PCVA	-	Polish Community of the Valleys Association
PLASC	-	Pupil Level Annual School Census
PWMA	-	Polish-Welsh Mutual Association, Llanelli
SAWS	-	Seasonal Agricultural Workers Scheme
SBS	-	Sectors Based Scheme
SEAL	-	Social and Emotional Aspect of Learning programme
WAL	-	Welsh as an Additional Language
WRS	-	Workers Registration Scheme

EXECUTIVE SUMMARY

This executive summary provides an overview of research carried out by the WRO between May 2012 and October 2013 to investigate international economic migration to rural Wales and the South Wales Valleys.

Background

The Wales Rural Observatory (WRO) was commissioned by the Welsh Government in 2012 to undertake a study into the situation and experiences of international migrant workers in Wales. This report builds on previous research into A8 migration to rural Wales (see WRO, 2008); expanding the focus of inquiry to include A2 migrant workers from Bulgaria and Romania who joined the EU in January 2007, and extending the geographical scope to include the South Wales Valleys.

This research has the following seven objectives:

- i. To quantify international migration to rural Wales and the South Wales valleys, identify temporal patterns of arrivals and departures, and geographical patterns of domestic movement/ residence.
- ii. To update the 2008 survey of migrant workers, identifying changes in the characteristics and intentions of migrant workers, their social and economic situation, and community interactions.
- iii. To position recent labour migration from new EU member states in the wider context of international migration, including longer-established migrant groups.
- iv. To analyse the pressures and implications from international migration on public services, including schools, health services and social services, and how responsible authorities are addressing these issues.
- v. To analyse the economic contribution of international migrants in rural Wales, including positive and negative impacts on local labour markets, and contributions to socioeconomic development through entrepreneurship.
- vi. To analyse the interaction and integration of international migrants with local communities in rural Wales, including formal and informal mechanisms to address cultural tensions and differences, the development of new cultural activities, and the development of language skills.
- vii. To identify examples of good practice and make recommendations for initiatives to support migrant entrepreneurship and promote community integration through the Rural Development Plan.

Research Methods:

A mixed methods approach was applied to data collection. Secondary statistical data was drawn from the Workers Registration Scheme (WRS), National Insurance Number (NINo) registrations, and the 2011 Census. Primary data collection involved three main phases. First, interviews were conducted with key stakeholders, including national and local government agencies, voluntary sector organisations, health boards, Trade Unions, and representatives of migrant groups. The first phase also involved a literature review of reports on international migration. Second, a questionnaire survey was conducted with 109 migrant workers across four case study localities:

- 1) South Wales Valleys - Merthyr Tydfil;
- 2) North Wales - Conwy, Anglesey and Gwynedd;
- 3) Carmarthenshire - Llanelli and Llanybydder/Lampeter; and
- 4) Mid Wales – Welshpool.

Recruitment took place through third sector organisations and local schools within the case studies. This phase of fieldwork included the recruitment of several migrant entrepreneurs to participate in semi-structured interviews. The third phase of fieldwork involved a small number of repeat interviews with prominent migrant support organisations to reflect on key findings.

Key Findings and Recommendations:

Trends in international migration to rural Wales and the South Wales valleys:

- A8 migration has been a substantially rural phenomenon; since EU enlargement, comparable numbers of A8 migrants have registered to work in rural and urban counties of Wales.¹
- There are geographical variations in the distribution of A8 migrant workers across rural Wales based on employment in rural-linked sectors, such as food processing and tourism.
- Migration from Poland has continued to dominate new EU migration to rural Wales and the South Wales Valleys, accounting for over three-quarters of A8 registrations in both areas.
- The onset of recession coincided with a slow-down in migration from the A8 countries. Likely numbers of arrivals from Romania and Bulgaria ('A2') to Wales from 2014 remains uncertain.

Updating the 2008 survey of migrant workers:

- 'Settlers' have become a more visible trend since 2008: a large proportion of A8 migrants surveyed in Welshpool and North Wales have been resident in Wales for over five years.
- The migration intention of Poles in Merthyr and Carmarthenshire are also increasingly changing, from a short-term economic decision ('guestworkers') towards longer-term family settlement.

¹ In contrast, NINo registrations made by all migrants (non-British nationals from EU and non-EU countries) to Wales from 2002-2011 have been more concentrated in urban areas. Approximately 52% (14,640) of all NINo registrations over this period were in urban local authorities, compared to 24% (6,850) in rural authorities.

- Language was identified in 2008 as the main obstacle to migrant workers integrating with local communities. This obstacle has persisted across all case studies areas and aspects of life in Wales, including occupational mobility, service usage, education and community cohesion.

Labour migration from new EU member states in the wider context of international migration:

- Whilst Merthyr is part of longer-standing migration pathways, the scale and intensity of new EU migration has been unprecedented; Portuguese and Filipino communities are now three-tenths and two-tenths the size of the Polish population, respectively (2011 Census).
- New EU migration has brought challenges for other migrant groups. For Portuguese migrants, this has been in the form of direct competition for jobs and resources. For Filipino migrants, wider immigration policy changes have resulted in fewer nursing vacancies for non-EU workers.
- Research has revealed common experiences across all of the migrant groups included in this study, in terms of motivations for and experiences of migration to Wales.

Pressures and implications from international migration on public services:

- Local health boards have improved access to general health services for migrants. However, the provision of specialist support for conditions including mental health problems is deficient, with a lack of funding to support dedicated translation services.
- Education is a key service area where some of the pressures and implications from international migration are being felt. Rural Wales experienced a 50% increase in pupils requiring English as an Additional Language (EAL) supported learning from 2009-2012; from 2,007 pupils to 3,020.
- Schools and Local Education Authorities (LEAs) have been required to respond to local demand and locality-specific issues related to language, attendance, attainment and integration. This can be problematic for rural schools with often limited experience of minority ethnic pupils.

The economic contribution of international migrants:

- Most A8 and Portuguese migrant workers remain in lower-grade and lower-paid manual employment. Filipino migrants follow more specialist occupational pathways in nursing.
- Many migrants are over-qualified for their current positions, holding professional and vocational skills, yet career progression and occupational mobility are limited by language barriers.
- The role of agencies in migrant recruitment has lessened in the decade since EU enlargement, leading to improvements in working conditions. New challenges shared with low-income British workers such as zero-hour contracts have emerged in the context of recession.
- An entrepreneurial culture has developed amongst Polish and Portuguese migrants in Merthyr, facilitated by support networks and the critical mass of population; with both lacking in many rural areas. Language and start-up costs continue as barriers to wider migrant entrepreneurship.

Integration of international migrants with local communities:

- Most migrants look within their own communities for friendship and support as languages, shift patterns, work-place segregation and discrimination can remain as barriers to wider interaction.
- At the same time, processes associated with settlement such as putting children into schools and starting businesses encourages the greater integration of migrants with local communities.
- Migrant advice and advocacy organisations such as the Polish-Welsh Mutual Association in Llanelli and Polish Community of the Valleys Association in Merthyr promote social integration; around which forms of social entrepreneurship and community networks have begun to develop.
- A lack of similar initiatives across parts of rural Wales (e.g. Llanybydder) has necessitated migrant communities being more self-reliant. Rural schools can provide important multifunctional spaces for social interaction, but can be a site of cultural tensions as seen in Welshpool.

Report Recommendations:

- *Recommendation 1:* Greater provision of language learning options tailored to particular needs, to overcome persistent barriers to social integration, occupational mobility and service usage.
- *Recommendation 2:* Continue to promote the integration of migrant workers with local communities and enhance community cohesion between all groups.
- *Recommendation 3:* Continue to support the work of specialist advice and advocacy organisations, including the expansion of satellite services to rural areas lacking in support.
- *Recommendation 4:* More effectively recognise and harness the professional and vocational skills of migrant workers.
- *Recommendation 5:* Encourage entrepreneurial potential by reducing barriers to information and start-up finance.
- *Recommendation 6:* Encourage sharing of knowledge, experience and good practice between schools in regards to the provision of English / Welsh as an Additional Language (EAL / WAL) supported learning.

SECTION 1: INTRODUCTION AND METHODOLOGY

1.1 Introduction

The aim of this report is to examine the situation and experiences of international migrant workers in rural Wales and the South Wales Valleys. This builds on previous work by the Wales Rural Observatory (Woods and Watkin, 2008) examining the arrival of migrant workers from A8 countries in rural Wales after European Union (EU) enlargement in 2004. It does so by expanding the focus of inquiry to include A2 migrants from Bulgaria and Romania who joined the EU in 2007, and through extending the geographical focus beyond the boundaries of rural Wales to the South Wales Valleys.

Over 30,000 A8 migrants registered with the Workers Registration Scheme (WRS) across Wales during its operational period between May 2004 and end-of-April 2011. However, this figure is likely substantially lower than the actual number of A8 migrants who worked in Wales during this period. Despite the WRS being compulsory for A8 nationals planning to work in the UK for more than a month (excluding the self-employed), a sizeable number did not register due to the lack of enforcement. It was found that over 40% of migrant workers returning to Poland from the UK never registered with the WRS (Pollard et al., 2008). Thirty-two per cent of all WRS registrations were made in the rural counties and thirteen per cent were made in the South Wales Valleys.

This report adopts a case study based approach to the analysis of labour migration, in order to examine the experiences and impacts of international migration between regions of Wales with different socio-economic and environmental contexts. Whilst the dominant focus remains on rural Wales, with three rural case studies based in Carmarthenshire, Powys and North Wales (Gwynedd, Conwy and Anglesey), respectively, a comparative element has been introduced with the inclusion of a fourth case study in Merthyr Tydfil in the South Wales Valleys. The Valleys case study allows new EU migration from A8 and A2 countries to be positioned within the wider context of international migration to Wales. Here, trends and interactions amongst longer-established migrant groups from Portugal and the Philippines are examined in Merthyr Tydfil.

International migration brings both similar and different challenges to these regions, including impacts on local labour markets, pressures and implications for public services, contributions to socioeconomic development, and community integration and cohesion. The case study approach adopted in this report will further provide insights into the integration of urban and rural areas, by examining the role of towns within predominantly rural counties for the provision of employment opportunities, public services and support networks for migrant workers. The inclusion of Llanelli in Carmarthenshire and coastal towns in North Wales will be used to analyse these processes.

Following this introductory section detailing research objectives and methods, section two will establish the broad statistical context of the study. Sections three to six are then structured according to key themes: family and community, employment, entrepreneurship, and education and services. These sections provide a comparative discussion of key processes across the case study localities. Section seven will present conclusions and policy recommendations.

1.2 Research Objectives

The aim of this report is to analyse the ongoing impacts of post-EU enlargement labour migration on rural Wales and the South Wales Valleys, and the experiences of international migrant workers within these localities. This aim will be addressed through the following series of objectives:

- i. To quantify international migration to rural Wales and the South Wales valleys, identify temporal patterns of arrivals and departures and geographical patterns of domestic movement/ residence.
- ii. To update the 2008 survey of migrant workers, by identifying changes in the characteristics and intentions of migrant workers, their social and economic situation, and community interactions.
- iii. To position recent labour migration from new EU member states in the wider context of international migration, including longer-established migrant groups
- iv. To analyse the pressures and implications from international migration on public services, including schools, health services and social services, and how responsible authorities are addressing these issues.
- v. To analyse the economic contribution of international migrants in rural Wales, including positive and negative impacts on local labour markets, and contributions to socioeconomic development through entrepreneurship.
- vi. To analyse the interaction and integration of international migrants with local communities in rural Wales, including formal and informal mechanisms to address cultural tensions and differences, the development of new cultural activities, and the development of language skills.
- vii. To identify examples of good practice and make recommendations for initiatives to support migrant entrepreneurship and promote community integration through the Rural Development Plan.

1.3 Policy and Legal Context

In 2004, the European Union (EU) enlarged to include ten new Members States. In relation to eight of these (the so-called 'A8 countries' of the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Slovakia and Slovenia), the Accession Treaties allowed existing member states to place temporary restrictions on the ability of A8 citizens to access national labour markets. The UK government was one of three EU members who decided against using this restriction from the outset. Instead, the UK introduced a registration requirement (the Workers Registration Scheme), and placed restrictions on the ability of A8 migrants to access public funds ('no recourse to public funds') until they had worked in registered employment in the UK for 12 months.²

Bulgaria and Romania (the 'A2') joined the EU in January 2007. Transitional provisions permitted the UK and nine other member states to restrict the free movement of workers from these countries. For example, the Sectors Based Scheme (SBS) arrangements allow UK based employers to recruit Bulgarian and Romanian Nationals to fill certain, specified posts within the food manufacturing sector. All restrictive measures are due to expire on 1st January 2014 (Costello, 2011).

The UK decision to open its labour market to A8 nationals resulted in larger than anticipated numbers of economic migrants coming to the UK. Patterns of post enlargement migration proved to be different from previous waves of migration to the UK in two notable ways: firstly, greater mobility has allowed migrants to come to the UK on a temporary or seasonal basis, and to make regular visits home (see Pollard et al., 2008); and second, A8 migrants have been dispersed throughout urban and rural areas of the UK based on employment opportunities across different sectors.

The specific issues this generated in rural areas of Wales with little previous immigration history from outside the UK were documented by the WRO (Woods and Watkin, 2008). The WRO's recommendation to 'support the integration of migrant workers with local communities' chimed with the launch of *Getting On Together - a Community Cohesion Strategy for Wales* (2009) and its foregrounding of community cohesion as a strategic aim of the Welsh Government. In addition to developments in Welsh policy, a number of noteworthy changes have occurred in the legislative context governing immigration to the UK more broadly. The introduction of a points-based immigration system by the UK government in 2007 made it increasingly difficult for migrant workers from outside the EU to work in the UK (Bach, 2008). This has had specific impacts for the Filipino migrant community in Wales; to be further examined in this report.

With the UK economy entering a period of recession in 2008, there was a recorded decline in numbers of new A8 migrants entering the UK labour market. However, this decline has been

² During periods of registered employment, A8 nationals are eligible for some working related benefits such as housing benefit, council tax benefit and income support, as well as homelessness support and access to social housing allocations (No Recourse to Public Funds Network, 2011)

sectorally and spatially uneven, with the biggest reductions in migrant numbers observed in the construction and real estate sectors and the smallest drops in the agricultural and food processing sectors (McCollum and Findlay, 2011). The squeeze on profit margins during the recession led to concerns regarding work intensification and increased levels of exploitation for migrants and other precarious workers in insecure jobs (Rogers, 2009). Steps have subsequently been taken by the UK Government towards improving employment conditions for these at-risk groups. In October 2011, the Agency Workers Regulations came into force in the UK. These regulations improve the position of agency workers (many of whom are migrants) and strengthen their job security across a number of sectors. Furthermore, there have been calls for extending the remit of the Gangmasters Licensing Authority (GLA) to assist exploited workers and prosecute forced labour (JRF 2010, 2012).

1.4 Literature Review

This report has been informed by a range of academic and policy literature. This includes a number of relevant reports that have been published since the WRO undertook its previous study on 'Central and Eastern European Migrant Workers in rural Wales' in 2007/08. These key reports are summarised in Appendix 1 and variously reflect key issues and challenges surrounding international migration both to the UK in general, and to Wales and/or rural contexts specifically. Important themes to take from these reports that will be further investigated in this current study include:

- The impact of A8 migration on rural economies and societies;
- The lives and experiences of migrant workers outside of the workplace;
- Patterns of mobility and settlement in post enlargement migration;
- Migrant children in the education system;
- Impacts of the recent recession on vulnerable or precarious workers; and
- Changing employment practices in the meat processing sector.

1.5 Research Methods

This research on which this report is based was collected using mixed methods. In the initial scoping phase we conducted in-depth stakeholder interviews with key individuals involved in the support or regulation of migrant workers at local, regional and national levels. This included Government agencies, local authorities, voluntary sector organisations, health boards and Trade Unions, as well as representatives of migrant groups and migrant support organisations (see Appendix 2 for details). This was complimented by a questionnaire survey (Appendix 3) with migrant workers in the four case study localities outlined below in section 1.6. Recruitment took place through local organisations from the third sector and through local schools; with purposive sampling used to target specific migrant groups across the case study areas (see Table 1.1 for details). The dominance of Polish migrant workers in specific areas of rural Wales (i.e. Carmarthenshire) meant that Polish support organisations were approached as gatekeepers to this wider population.

Similarly, gatekeepers were used to gain access to Portuguese and Filipino migrant workers in Merthyr. In North Wales, organisations providing more generic migrant support and advice were contracted to complete questionnaires with a mixed group of A8 and A2 migrants across the region.

The WRO's 2008 report identified three broad categories of migrant experience: *gap year students*, *guestworkers* and *settlers*. Settlers — migrants intending to stay in Britain long-term — were an emergent trend in rural areas such as Welshpool (Woods and Watkin, 2008). For some workers this represented a shift in their plans, from migration as a short-term economic decision ('guestworking'). As such, it was anticipated that settlers would become a key feature of this current report; with purposive sampling methods used to explore the experiences of this group in greater depth. For instance, survey recruitment in Welshpool took place through a local school in order to explore the challenges arising from increasing numbers of Polish pupils entering the education system.³

The survey was refined in an ongoing manner throughout the fieldwork period and was used to collect both qualitative and quantitative data. The period of fieldwork was also complimented by ethnographic observations at multi-agency meetings and forums. This period of fieldwork further allowed for the recruitment of migrant entrepreneurs, who were interviewed through the use of a semi-structured interview schedule developed to address the specific issues that were emerging in different case study localities. Towards the end of the fieldwork, a small number of repeat interviews were conducted with key migrant support organisations to reflect on emerging findings.

1.6 Case Study Areas

The initial analysis of statistical data guided the choice of our case study locations. Final choices were also based on insights from initial scoping interviews and anecdotal evidence. Milford Haven, for example, provided one of the case studies for the WRO's 2008 migration study. Scoping interviews suggested that the subsequent collapse of the engineering construction industry during the recession meant that the majority of non-UK workers (mostly from Poland, Portugal and Italy) have now left that area. The project's four chosen case study areas have retained notable concentrations of A8 migrant workers at the close of the Workers Registration Scheme in 2011 and longer-term settlement amongst some of these workers is evident. The case studies provide different socio-economic contexts to consider the impacts and contribution of international migration. Three of the case studies were in rural Wales; the other is in the South Wales Valleys:

³ As a result of this focus on the 'settlers' group, gap-year students have not been picked-up to the same extent in this report as they were in 2008, when Betws-y-Coed and Llanrwst formed one of the case study localities examined by the WRO. It was in this case study that the trend of 'gap year' migration appeared most prevalent; connected with the area's tourism and hospitality sector. Whilst it is possible that 'gap-year' migration (young people taking short-term employment in the UK around studying in their home country) is still occurring in parts of Wales such as Betws-y-Coed, anecdotal evidence has also indicated changes in the cycle of replacement of short-term workers linked to the recession, with jobs now being filled by young local people instead.

1. South Wales Valleys – Merthyr Tydfil;
2. North Wales – Conwy, Anglesey and Gwynedd;
3. Carmarthenshire – Llanelli and Llanybydder/Lampeter;⁴ and
4. Mid Wales – Welshpool in Powys.

Key characteristics of the case study regions are summarised in Table 1.1 below:

Table 1.1: Case Study Profiles

Case Study (Geographical coverage)	Key trends	Main migrant groups (2011 Census)	Migrant employment sectors (WRS registrations)	Organisations / research gatekeepers
South Wales Valleys – Merthyr Tydfil (Borough and town of Merthyr Tydfil)	<p>Pre-2004: major destination for Portuguese migrant workers. Established population of Filipino migrants working in health sector.</p> <p>Post-2004: principle destinations for A8 (largely Polish) migrants in the South Wales Valleys. Small pockets of workers from other A8/A2 countries.</p> <p>Despite competition, high numbers of migrants with a mix of Portuguese and/or Brazilian nationality remain.</p>	<p>1,016 Polish residents: 30% of total Poles in the Valleys total, 6% of Wales total.</p> <p>194 Filipino residents: 17% of Valleys total, 4% of Wales total.</p> <p>293 Portuguese residents (highest number of a Welsh LA); over 50% of Valleys total, 13% of Wales total.</p>	<p>Portuguese and Polish are predominantly employed in food and meat processing factories e.g. St Merryn foods.</p> <p>From 2007-2011, over 90% of WRS registrations by A8/A2 migrants in Merthyr were for factory-based occupations.⁵</p> <p>Small numbers of WRS in Merthyr for health related jobs including doctors and consultants, and for teaching assistants, sales assistants, cleaners and domestic staff</p> <p>Prince Charles Hospital is major employer of Filipino migrants.</p>	<p>Polish Community of the Valleys Association</p> <p>Local Portuguese speaking social entrepreneur</p> <p>Gatekeepers in Filipino community in Cardiff</p>
North Wales - Conwy, Anglesey and North Gwynedd (Bangor, Llandudno, Penmaenmawr, and Blaenau Ffestiniog, into South Gwynedd)	<p>Outside major population centres e.g. Bangor, the migrant population is spread very thinly across a large rural area in small towns and villages.</p> <p>New EU migration is less monocultural</p>	<p>984 Polish residents of North Wales: 18% of rural Wales total, 5% of Wales total</p> <p>558 other A8/A2 residents (excl. Romanian): 27% rural Wales total, 7% Wales total.</p>	<p>A8/A2 mainly in manual and service sector occupations, linked to hospitality and catering roles in tourist industry.</p> <p>Conwy: over 50% of WRS registrations (2007-2011) were in hospitality and catering occupations e.g. maid/room attendant and</p>	<p>North Wales Race Equality Network (NWREN)</p> <p>Avalon Advice</p>

⁴ The Llanybydder case study includes Lampeter, lying five miles north into southern Ceredigion, due to the considerable movement and interconnection between the Polish population in both settlements for work, school and services.

⁵ In 2008, one meat-processing factory in Merthyr had 600 workers from Poland and Portugal, out of a workforce of 1000.

and the Llŷn Peninsular)	(Polish) than elsewhere in rural Wales: 2011 census indicates a larger proportion of migrants from other A8 and A2 countries (see Table 2.7)	195 Portuguese residents in North Wales region: over 50% of rural Wales total. 658 Filipino residents in North Wales: over 40% of rural Wales total.	kitchen assistants. Approx. 10% were for cleaners, care assistants and home carers. Anglesey: two-thirds of WRS registrations in manual occupations in food processing factories, with smaller numbers in hospitality and catering, agriculture and shipping. Gwynedd: greater occupational spread of WRS registrations; most linked to hospitality and catering. 10% of WRS were for factory, labouring and laundry jobs. Filipino workers employed in care homes prior to immigration changes. Portuguese mostly in food processing (numbers may be declining)	
Carmarthenshire – Llanelli and Llanbydder/Lampeter	Pre 2004: longer-standing migrant groups (incl. Filipino, South Asian) in main towns of Llanelli and Carmarthen linked to health and social care sectors Post-2004: one of the principle destinations for Polish migration to Wales (85% of new EU migrants in the county are from Poland) Dispersed settlement pattern; concentrations of workers in large towns as well as close to work in rural parts including Llanbydder.	2,003 Polish residents: 37% Rural Wales total, 11% Wales total. a) 48% of county Poles reside in Llanelli town (4% resident population); b) 98 Poles resident in Llanbydder (6%), 115 in Lampeter (4%) 343 other A8/A2 residents: 14% rural Wales total. 329 Filipino residents: 21% rural Wales total.	The majority of Polish migrants in C'shire are employed in food and meat processing factories. Major employers include Dawn Pac Meat Processing at Cross Hands Food Park and Dunbia Meat Processing, Llanbydder. 88% of over 2,000 WRS registrations (2007-2011) were for factory based occupations, with the largest proportion classed as 'process operatives'. Small numbers of registrations in other occupations, including care assistants and home carers, cleaners and domestic staff, kitchen and catering assistants, agricultural workers, and several hospital doctors. ⁶	Polish-Welsh Mutual Association (PWMA), Llanelli Polish Shop in Llanbydder Catholic Church in Lampeter ESOL class at Lampeter University

⁶ Figures for WRS agricultural registrations are likely lower than actual numbers employed in the sector, due to the seasonal and cash-in-hand nature of some farm work. One stakeholder interviewee had briefly run a recruitment agency in Carmarthenshire sourcing agricultural workers from Eastern Europe. He described the difficulties he had encountered due

<p>Mid Wales - Welshpool, Powys</p>	<p>Pre-2004: small pockets of longer-standing migrant groups (incl. Filipino) dispersed throughout rural Powys linked to health and social care sectors.</p> <p>Post-2004: concentrations of Polish and other A8/A2 workers around the larger market towns including Newtown, Llandrindod Wells and Welshpool.</p>	<p>835 Polish residents of Powys: 15% rural Wales total, 5% of Wales total.</p> <p>414 other A8/A2 migrants (excl. Romanians): 21% rural Wales total.</p> <p>Largest cluster of 338 Poles reside in Welshpool; 5% of the resident population.</p> <p>305 Filipino residents: 20% rural Wales total.</p>	<p>In Powys, the majority of CEE migrant workers have been employed in factory based occupations in the manufacturing sector, including food processing (e.g. Sidoli frozen foods, Welshpool) and car parts manufacture</p> <p>45% of approx. 470 WRS registrations (2007-2011) in the county were for the occupation of process operative (factory worker). Smaller numbers of registrations in service sector occupations including care assistants and home carers, cleaners and domestic staff, and kitchen and catering assistants.</p>	<p>Siawns Teg (Social Inclusion organisation), Newtown</p> <p>Oldford Infant School, Welshpool</p>
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1.7 Case Study Groups

As well as focusing on the arrival of migrant workers from A8 and A2 countries, previous research highlighted concentrations of longer-established Portuguese and Filipino migrant workers across parts of rural Wales and the South Wales Valleys (Threadgold et al., 2008; Woods and Watkin, 2008). Preliminary data analysis confirmed the movement of migrant workers within these groups and regions from 2010 onwards (see Figures 2.3 and 2.4). These by no means constituted the largest groups of migrant workers in Wales when we started the research. However, it was thought likely that further analysis of Portuguese and Filipino groups would allow us to position new EU labour migration in the wider context of international migration as per objective three.

Recruitment from these groups proved difficult in rural Wales due to a lack of gatekeeper organisations and limited timescale to develop trust. This is reflected in the minimal attention given to Portuguese and Filipino migrants in the individual case study localities; it is only in the South Wales Valleys that we get a clear sense of the interactions between migrant communities. We attempted to overcome these limitations by also studying a group of recent Filipino migrants across a wider area of South Wales, which helped to contextualise recent and on-going changes. Migrant entrepreneurs also provide a distinct case study group, in line with research suggesting they are an important but overlooked aspect of the migrant population (Pollard et al., 2008; Harris et al., 2012).

to the low wage economy in Wales, whereby farmers were unprepared to pay a sufficient hourly rate to provide workers with a decent (and legal) level of income, as well as a sustainable profit margin for the company.

Table 1.2 summarises demographic characteristics of survey respondents across the case studies. In sum, the majority were Polish (81%) and the largest proportion were aged 25-35 (41%). Sixty-one per cent of respondents were female; with all-female survey groups in Welshpool and the Filipinos in Merthyr. This sample is broadly reflective of the statistical profile of migrant workers in Section Two, with over three-quarters of A8 registrations (WRS) in rural Wales made by Polish nationals. Female A8 migrants in Wales outnumber males; three-quarters of A8 migrants were aged under 35.

Table 1.2: Characteristics of survey respondents in the case study localities

Case study	Nationality	Gender	Age				
			18-22	25-34	35-44	45-54	55+
Llanelli	Polish (20)	55% M 45% F	25%	30%	10%	25%	10%
Llanybydder/ Lampeter	Polish (28)	54% M 46% F	14%	32%	18%	29%	7%
Welshpool	Polish (14)	100% F	7%	64%	21%	0	7%
North Wales	Polish (11) Bulgarian (1) Czech (3) German (1) Lithuanian(1) Latvian (1) Slovakian (1)	26% M 74% F	0	37%	21%	21%	21%
Merthyr	Filipino (5)*	100% F	0	100%	0	0	0
	Portuguese (8)	62% M 38% F	0	13%	50%	0	37%
	Polish (15)	47% M 53% F	7%	53%	7%	33%	0

*Work with the Filipino community in Merthyr facilitated further surveys with a recent group of Filipino migrants from Rhondda Cynon Taff who arrived on student visas. These survey responses are not discussed as part of the Merthyr case study, but drawn on as part of the broader discussion of Filipino migration.

1.8 Summary

This report adopts a case study based approach to the analysis of post-EU enlargement labour migration to rural Wales and the South Wales Valleys, in order to examine regional dynamics in the composition and experiences of migrant groups. This is set in relation to the economic recession that manifested in 2008 and its impact on the migration processes being witnessed. Whilst the dominant focus remains on rural Wales, a comparative element has been introduced with the inclusion of a South Wales Valleys case study in Merthyr Tydfil where interactions between different migrant groups are examined. Whilst exhibiting many overlapping themes, the rural case studies provide distinctive contexts and sets of issues for investigation: the Carmarthenshire case study allows for the comparison of migratory processes across rural (Llanybydder) and urban (Llanelli) parts of the county; North Wales incorporates temporary and seasonal working in the tourism sector; and Welshpool highlights migrant family settlement and impacts on education services.

SECTION 2: STATISTICAL PROFILE OF MIGRANT WORKERS

2.1 Introduction

This chapter provides an analysis of statistical data on the inflow, number and geographical distribution of migrant workers across rural Wales and the South Wales Valleys. The data is drawn from the Worker Registration Scheme (WRS), National Insurance Number (NINo) registrations to overseas nationals and the 2011 Census. There are some inconsistencies between these data sets, but combined they provide the best available data on the arrival of migrant workers in Wales and the number of migrant workers residing in the case study localities.

From May 2004 to end-of-April 2011, the WRS was compulsory for A8 nationals planning to work in the UK for more than a month. Collected quarterly by the Home Office, this data set provides insights into the inflow of migrant workers over time. In addition to the low registration levels noted in Section 1, the WRS recorded workers by workplace not residential location, with a new registration required if an individual changes employment. The lack of requirement to deregister from the scheme means that the WRS dataset does not yield any information on the actual length of stay or number of A8 migrants working in the UK at a given time; recording new registrations only.

All non-UK nationals are required to register for a National Insurance number (NINo) in order to work in the UK. Migrants can, however, seek and take up employment prior to applying for a NINo. Registrations data is collected by the Department for Work and Pensions and relates to place of registration rather than to place of employment or residential location. Much like WRS data, NINo data provides useful information on the inflow of migrants into Wales over time. However, it fails to account for the number of non-UK nationals working without a NI number.

The 2011 Census provides data on the nationality of migrants based on an analysis of country of birth and passports held. It provides information on the situation of migrants one year prior to the census date, but provides no information about their arrival into the UK. It complements WRS and NINo data by providing insight into the number of migrants in residence at specific locations at a fixed moment in time. Data from other sources, including the Seasonal Agricultural Workers Scheme (SAWS)⁷, are considered where appropriate.

⁷ SAWS allows small numbers of migrants to work in the UK for short periods of time in the horticulture and food processing sectors. The annual quota of 21,250 Bulgarian and Romanian workers accounts for around one-third of Britain's seasonal agricultural labour. Migrant workers on the scheme must take a break of three months after every six; the scheme will close at the end of 2013 when A2 nationals gain free access of movement to the European labour market.

2.2 Inflow and Number of A8 Migrant Workers

Following EU enlargement, the number of migrant workers arriving in Wales from A8 countries increased substantially during 2005–2006. This is evidenced by an increase in the rate of WRS registrations per month across Wales: from 344.3 during the first twenty months of the scheme (May 2004 to December 2005), to 601.7 registrations per month during 2006. As table 2.1 indicates, the first sign of a slow-down in arrivals occurred in 2007, with this slowing rate of registrations more pronounced in rural Wales than in Wales as a whole:

Table 2.1: WRS Registrations by year 2004-2011

	May 2004 to Dec 2005		2006		2007		2008	
Rural	2,770	38.3%	2,800	36.8%	1,935	29.6%	1,045	27.9%
Semi-Rural	1,455	20.1%	1,930	25.4%	1,945	29.7%	1,130	30.2%
Valley	535	7.4%	970	12.8%	900	13.8%	620	16.6%
Urban	2,470	34.2%	1900	25.0%	1,765	27.0%	950	25.4%
Wales	7,230	100%	7,600	100%	6,545	100%	3,745	100%
	2009		2010		2011		2004-2011	
Rural	845	29.5%	920	29.6%	200	28.2%	10,140	32.3%
Semi-Rural	870	30.4%	930	30.0%	240	33.8%	8,500	27.1%
Valley	455	15.9%	525	16.9%	75	10.6%	4,080	13.0%
Urban	690	24.1%	730	23.5%	195	27.5%	8,690	27.7%
Wales	2,860	100%	3,105	100%	710	100%	31,410	100%

This slow-down corresponds with the global economic downturn, leading to the UK entering into recession in 2008 with declining output across manufacturing, construction and retailing sectors. Reports indicate that temporary and agency workers were more vulnerable to job losses during this period, in addition to increased direct competition within the labour market from UK-nationals in sectors historically reliant on migrant labour e.g. meat processing/packing (Rogers, 2009). The latter point was confirmed by stakeholders within the Merthyr and Llanelli case studies. These factors may

have discouraged new A8 migration to the UK, whilst a reported fall in unemployment and improving wages in countries such as Poland gave migrants incentives to go back or remain in their home country (Pollard et al., 2008). New WRS registrations reached a low point in 2009 before increasing again in 2010, which may be related to the UK coming out of recession in late 2009. By the time the WRS closed in April 2011, there had been 31,410 registrations across Wales. Approximately 32% (10,140) were made in rural counties, with 13% (4,080) being made in the South Wales Valleys.

NINo registrations also illustrate the sharp increase in migrant in-flows from A8 countries post-2004. Prior to EU enlargement, there were only 10 NINo registrations made by A8 nationals across rural Wales during 2002-3 (Woods and Watkin, 2008). By the end of 2011, there had been over 46,000 NINo registrations by A8 nationals across Wales. Over 34% (15,970) of total registrations were made in rural counties, with 15% occurring in the South Wales Valleys (Table 2.2).

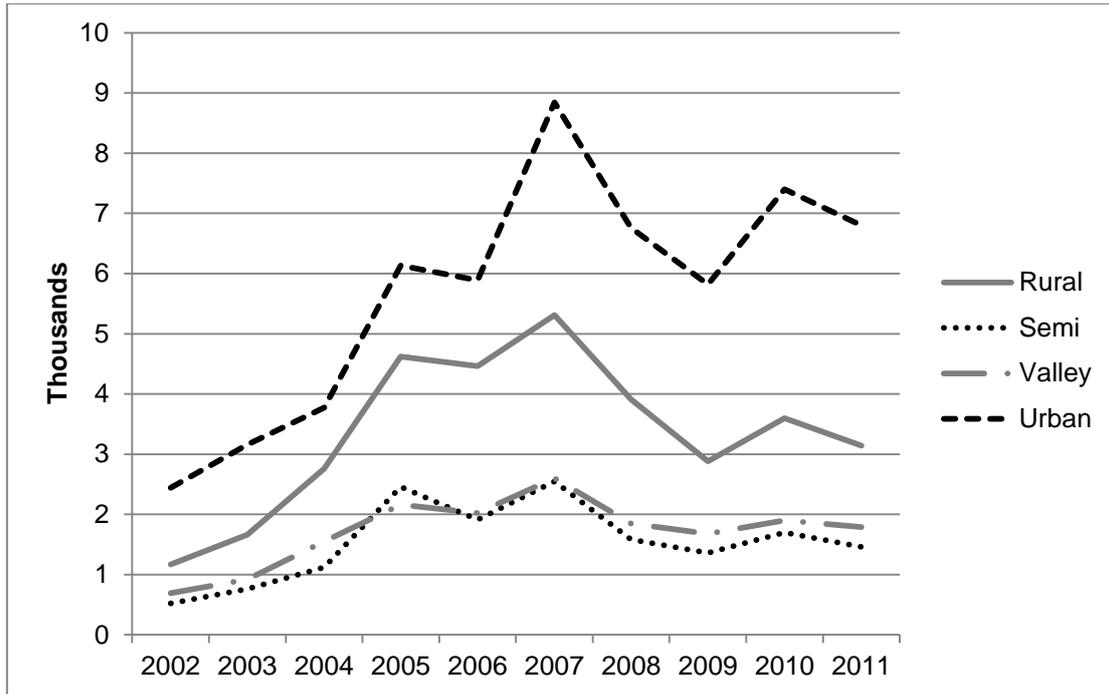
Table 2.2: Cumulative A8 WRS and NINo registrations Wales 2004 – 2011

	WRS		NINo	
Rural	10,140	32%	15,970	34%
Semi-rural	8,500	27%	8,440	18%
Valleys	4,080	13%	6,920	15%
Urban	8,690	28%	15,260	33%
Wales	31,410	100%	46,590	100%

Figure 2.1 illustrates NINo registrations made by all migrants (non-British nationals from EU and non-EU countries) to Wales from 2002-2011. Set within this broader context, we can observe how migration in general has largely been concentrated in urban areas: approximately 52% of all NINo registrations over this period were in urban local authorities, compared to 24% in rural and 12% in both valley and semi-rural authorities, respectively. Whereas NINo registrations by A8 migrants specifically (see Table 2.2) are roughly equal between urban and rural areas; highlighting how A8 migration is a more substantial rural phenomenon.

Cumulative WRS (32%) and NINo (34%) registrations suggest that approximately one third of all A8 migrants have worked and/or lived in rural counties at some point since 2004. This is comparable to A8 migrants working/living in urban areas of Wales, although cumulative WRS registrations are slightly lower at 28% in urban counties. Using the same data, we can see that 13% of WRS (4,080) and 15% of A8 NINo (6,920) registrations worked and/or lived in the South Wales Valleys at some point since 2004.

Figure 2.1: Nino registrations for all non-British nationals 2002-2011



Both the WRS (78%) and NINo (76%) data sets indicate that from 2004-2011, over 75% of A8 registrations in rural Wales were made by Polish nationals; no other national group constituted more than 7% of total registrations (Table 2.3). The next biggest group is Slovakian nationals, who account for 7% of registrations on both counts, followed by Lithuanian and Hungarian nationals, who account for 4% of WRS and 5% of NINo registrations respectively.

Table 2.3: Nationality of A8 Cumulative WRS & Nino registration in rural Wales 2004-2011

Nationality	Cumulative WRS		Cumulative NINo	
	Count	Percentage	Count	Percentage
Poland	8,093	78%	11,140	76%
Slovakia	683	7%	1,070	7%
Hungary	435	4%	730	5%
Lithuania	422	4%	720	5%
Latvia	357	3%	500	3%
Czech Republic	273	3%	380	3%
Estonia	80	1%	90	1%
Slovenia	12	0%	0	0%
Total	10,353	100%	14,630	100%

In the South Wales Valleys the proportion of Polish migrants is higher still. Both the WRS (82%) and NINo (83%) data sets indicate that from 2004-2011, Polish migrants made more than 80% of all A8 registrations in the Valleys. As in rural Wales, no other national group constitutes more than 7% of the total registrations; the next biggest group is Lithuanian nationals.

2.3 Inflow and Number of A2 Migrant Workers

Inflows of A2 migrant workers across Wales have been minimal. SAWS data indicates that from 2007-2011 there were 105 registrations, which included five from the Ukraine (Table 2.4).

Table 2.4: Seasonal Agricultural Workers Scheme (SAWS) Registrations in Wales

SAWS	2007	2008	2009	2010	2011	Total
Bulgaria	10	25	20	5	5	65
Romania	5	5	10	5	10	35
Ukraine	5	0	0	0	0	5
Total	20	30	30	10	15	105

The 2011 Census indicates that just 1,495 Romanians reside in Wales. Around 28% (425) of this total live in rural counties and 17% (257) in the South Wales Valleys, respectively. The Census does not provide specific figures for Bulgarian nationals, who were counted amongst 'other new EU' migrants together with the A8 countries minus Poland; there are 2,087 'other new EU' migrants in rural counties and 1,098 in the South Wales Valleys (see Tables 2.6 and 2.8).

2.4 Inflows and Number of Portuguese and Filipino Migrant Workers

As one of the last member states to join the EU15 in 1986, Portugal has been a major source of EU migrant labour into the UK. Portuguese migrants started arriving in Wales in during the late 1990s. NINo registrations of Portuguese nationals across Wales peaked prior to EU enlargement in 2003 and have fallen steadily since, despite a slight upsurge and levelling out between 2007 and 2010 (Figure 2.2). Of 90,000 Portuguese nationals resident in the UK, the 2011 Census indicates that just over 2.5% (2,313) reside in Wales. Nearly 17% (386) of this total resides in rural Wales, with 23% (540) resident in the South Wales Valleys.

The Philippines is one of the major global exporters of migrant labour; specifically health personnel (Rodriguez, 2010). In 1998, there were 198 nursing schools in the Philippines, producing 300,000 registered nurses annually; around 70 per cent work overseas (Winckler, 2008). In the UK, the number of work permits issued to Filipinos rose from less than 100 in 1995 to almost 7,000 in 2000, with registrations with the Nursing and Midwifery Council reaching a highpoint in 2002 (Figure 2.3).

Figure 2.2: Portuguese NINo registrations (in thousands) in Wales 2002-2012

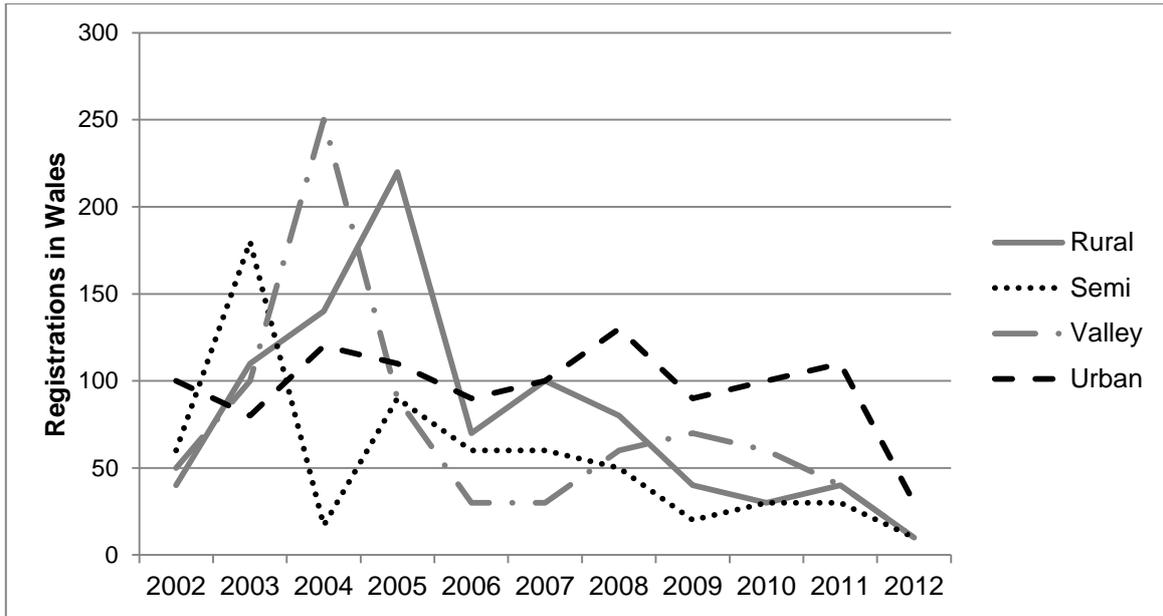
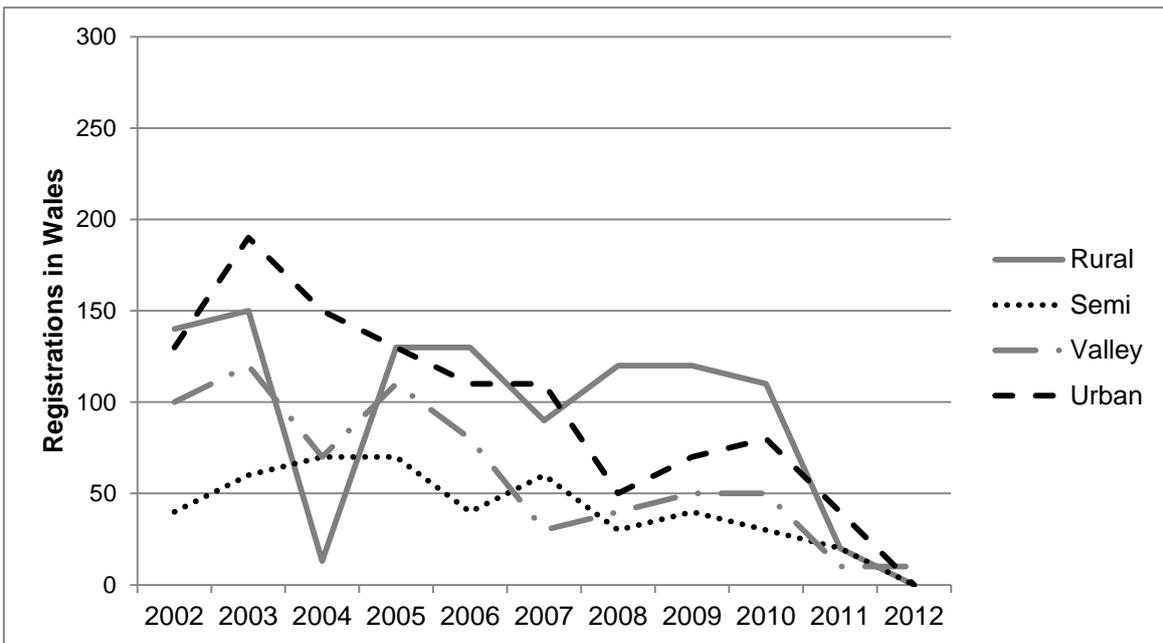


Figure 2.3: Filipino NINo registrations (in thousands) in Wales 2002-2012



Migration from the Philippines to Wales peaked prior to EU enlargement in 2003, though numbers have been maintained by the ongoing arrival of Filipino migrants on student visas. This is supported by data on Nino registrations, which indicate that, despite a slight upward trend between 2007 and 2010, numbers have fallen steadily since in line with the introduction of a points-based immigration system by the UK Government in 2007 (Bach, 2008). Financial cuts, coupled with EU expansion, mean that there are fewer nursing vacancies available for workers from outside Europe. The 2011 Census indicates that 5,158 Filipinos reside in Wales; over 33% (1,541) are resident in rural counties, with 22% (1,147) in the South Wales Valleys.

2.5 Geographical Distribution of Migrants

There are notable geographical variations in the distribution of migrant workers of different nationalities across the case studies in rural Wales and the South Wales Valleys

Rural Wales

Table 2.5 indicates that around 44% (2,340) of all WRS registrations in rural Wales were made in Carmarthenshire. The next most sizeable counties in terms of registrations were jointly Pembrokeshire (10%), Powys (10%) and Gwynedd (10%). Figures for Carmarthenshire are inflated by the large Polish population in Llanelli town. In general, across rural Wales WRS registrations started to decline from 2007 onwards, increasing slightly in 2010 before the scheme closed in 2011.

Table 2.5: Cumulative Geographical WRS Registrations 2004-2011 Rural Wales

	Prior 2007	2007	2008	2009	2010	Up to June 2011	Total	%
Carmarthenshire	2,340	910	390	360	420	80	4,500	44%
Pembrokeshire	495	235	125	85	85	25	1,050	10%
Gwynedd	475	180	105	105	125	30	1,020	10%
Powys	495	190	90	100	120	10	1,005	10%
Conwy	470	155	65	55	45	10	800	8%
Ceredigion	265	80	75	50	55	25	550	5%
Denbighshire	340	100	60	20	15	10	545	5%
Monmouthshire	225	60	70	45	55	10	465	5%
Anglesey	90	25	65	25	-	-	205	2%
Rural Wales	5,195	1,935	1,405	845	920	200	10,140	100%

This geographical distribution is confirmed to some extent by 2011 census data (Table 2.6). Of a total population of 5,411 Poles in rural counties, Carmarthenshire again has the highest number of Polish residents at 2,003 (37%). However, Powys had the second highest number (835), followed by Ceredigion (711), Conwy (455) and Gwynedd (427). The discrepancy between WRS and Census data is perhaps illustrative of the static nature of WRS registrations noted in the introduction as well as differences between recording place of work (WRS) or residency (Census).

Table 2.6: Geographical 2011 Census Data for Rural Wales

Rural Wales	Portugal		Poland		Romania		'Other New EU'		Philippines	
Isle of Anglesey	62	16.1%	102	1.9%	12	2.8%	97	4.6%	44	2.5%
Gwynedd	48	12.4%	427	7.9%	36	8.5%	236	11.3%	110	6.3%
Conwy	77	19.9%	455	8.4%	36	8.5%	225	10.8%	132	7.6%
Denbighshire	8	2.1%	310	5.7%	24	5.6%	208	10.0%	372	21.4%
Powys	15	3.9%	835	15.4%	67	15.8%	441	21.1%	305	17.6%
Ceredigion	44	11.4%	711	13.1%	34	8.0%	294	14.1%	30	1.7%
Pembrokeshire	43	11.1%	350	6.5%	76	17.9%	257	12.3%	215	12.4%
Carmarthenshire	77	19.9%	2,003	37.0%	77	18.1%	266	12.7%	329	19.0%
Monmouthshire	12	3.1%	218	4.0%	63	14.8%	63	3.0%	199	11.5%
RURAL	386	100%	5,411	100%	425	100%	2,087	100%	1,736	100%
WALES	2,316		18,023		1,495		8,146		5,168	

Around 25% (2,087) of all 'other new EU' migrants (8,146) recorded in the 2011 Census reside in rural counties (Table 2.6). The highest concentrations are in Ceredigion (14%), Carmarthenshire (13%) and Pembrokeshire (12%). From A2 countries, this includes Bulgarians but not Romanians, who were counted separately. The data indicates that Carmarthenshire (77) has the highest number of Romanians, very closely followed by Pembrokeshire (76), Powys (67) and Monmouthshire (63).

South Wales Valleys

Table 2.7 indicates that around 34% (1,375) of all WRS registrations in the South Wales Valleys were made in Merthyr Tydfil, followed by 27% (1,100) in Bridgend. To some extent, this geographical distribution is confirmed by 2011 Census data (Table 2.8). Out of a total population of 3,662 Polish migrants in the South Wales Valleys, around 28% (1,016) were resident in Merthyr, followed by Bridgend at around 21% (777). The discrepancy between WRS and Census data is again likely to be illustrative of the different residential and employment locations of migrant workers across the Valleys and surrounding areas. Around 16% (1,297) of all 'new EU' migrants recorded as living in Wales in the Census reside in the Valleys. However, only 4.8% (62) of this total reside in Merthyr. Across the Valleys there were 320 migrant workers from Romania, with 5% resident in Merthyr compared to 24% in Caerphilly.

The 2011 Census also records the spatial distribution of the longer-established Filipino and Portuguese communities across the Valleys region (Table 2.8). The largest proportion of Filipino residents are located in Rhondda Cynon Taf (21%) closely followed by Bridgend (20%), then Monmouthshire (15%) and Merthyr (14%), whereas Merthyr is home to the most Portuguese residents (53%) followed by Rhondda Cynon Taf (18%).

Table 2.7: Cumulative Geographical WRS Registrations 2004-2011 South Wales Valleys

	Prior to 2007	2007	2008	2009	2010	Up to June 2011	Total	%
Blaenau Gwent	70	50	15	30	80	10	255	6.3%
Bridgend	540	210	125	45	145	35	1,100	27%
Caerphilly	155	90	65	50	45	5	410	10%
Merthyr Tydfil	240	340	300	280	195	20	1,375	34%
Neath Port Talbot	145	45	20	10	10	-	230	5.5%
Rhondda Cynon Taff	285	105	55	15	25	5	490	12%
Torfaen	70	60	40	25	25	-	220	5.3%
Valleys	1,505	900	620	455	525	75	4,080	100%

Table 2.8: Geographical 2011 Census Data for South Wales Valleys

Valleys	Portugal		Poland		Romania		'Other New EU'		Philippines	
Neath Port Talbot	17	3.1%	287	7.8%	38	11.9%	135	10.4%	136	10.1%
Bridgend	30	5.4%	777	21.2%	52	16.3%	248	19.1%	275	20.4%
Rhondda Cynon Taf	100	18.1%	531	14.5%	37	11.6%	302	23.3%	279	20.7%
Merthyr Tydfil	293	53.1%	1,016	27.7%	16	5.0%	62	4.8%	194	14.4%
Caerphilly	55	10.0%	376	10.3%	77	24.1%	215	16.6%	142	10.5%
Blaenau Gwent	35	6.3%	330	9.0%	28	8.8%	63	4.9%	37	2.7%
Torfaen	10	1.8%	127	3.5%	9	2.8%	73	5.6%	84	6.2%
Monmouthshire	12	2.2%	218	6.0%	63	19.7%	199	15.3%	199	14.8%
Valleys	552	100%	3,662	100%	320	100%	1,297	100%	1,346	100%
Wales	2,316		18,023		1,495		8,146		5,168	

2.6. Gender and Age

In the period up to 2007, there were more male A8 nationals in rural Wales than female (Watkin and Woods, 2008). By 2011 WRS data indicates that this trend had been reversed, with more female migrant workers now in all parts of Wales than males. As Table 2.9 indicates, the ratio of males to females is highest in Semi-Rural followed by Valleys authorities at more than 60–40 for both.

Table 2.9: Cumulative WRS Registrations 2004-2011 by Gender

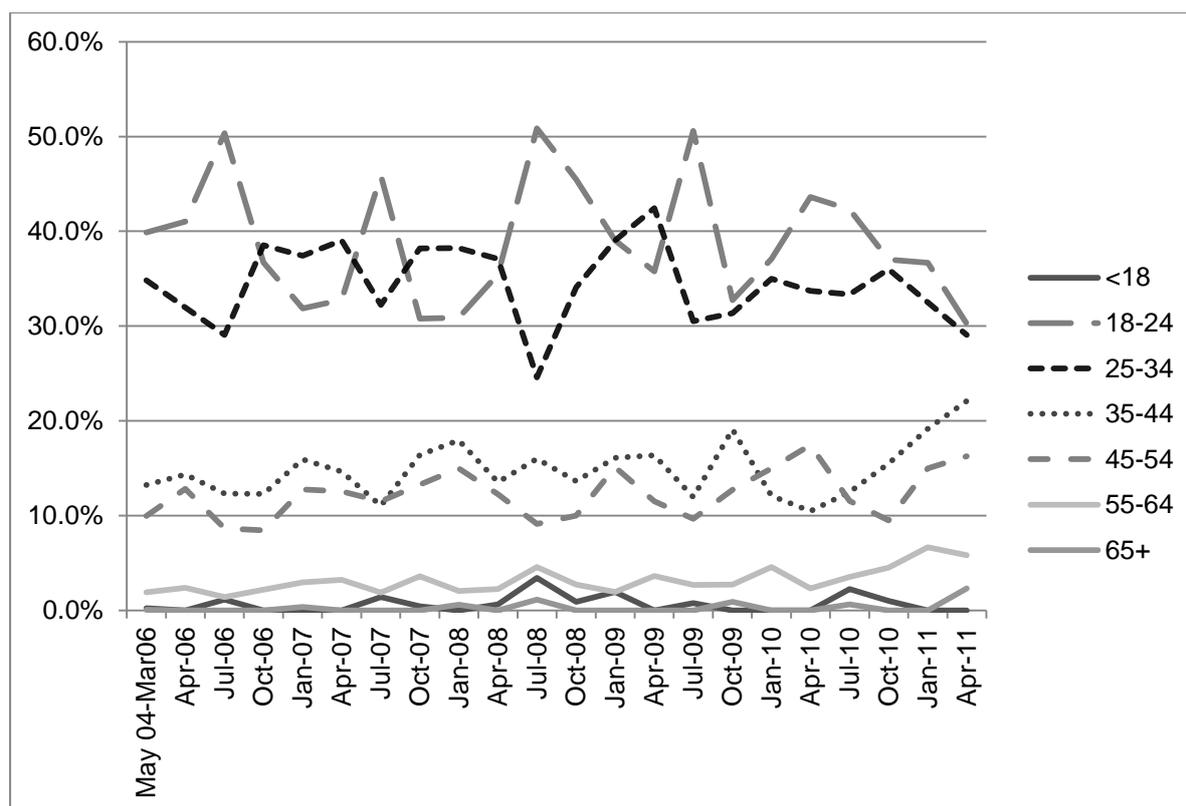
	Rural	Semi	Valley	Urban	Wales
Male	44%	38%	39%	43%	42%
Female	56%	62%	61%	57%	58%

This trend is supported by the anecdotal observations of stakeholders in the case studies of more women migrating over the last five years both as economic migrants in their own right and to join husbands/partners working in the UK. With the latter, it is assumed that a proportion of women would not have registered with the WRS as stay-at-home mothers (UKBA, 2008, 2009). Data collected through the Pupil Level Annual School Census (PLASC; discussed in Section Six) records increasing numbers of pupils from A8 migrant families entering the Welsh education system.

WRS data on age is also illustrative of the changing composition of migrant groups across Wales (see Figure 2.4 below), with WRS registrants in older age categories increasing in rural Wales towards the end of the scheme in 2011. In the immediate post-enlargement period, large numbers of A8 migrant workers to rural Wales were young single males (Woods and Watkin, 2008). As Figure 2.4 shows, since 2004 this trend has been reversed, with the number of younger migrants (<18 and 18-24) and older migrants (25-34 and 35-44) starting to equalise; the proportion of applicants in the 35-44 range peaked at 22% prior to the closure of the WRS in mid-2011. Similarly, the proportion of 55-64 year olds was steadily increasing during the latter stages of the scheme.

The data also indicates some seasonal variation in the age of WRS applicants. Between 2004 and 2011, the median age of WRS applicants lay within the 25-34 range except for during the quarterly period of July-September in the years 2006, 2008 and 2009 when it dipped to 18-24. This corresponds to the visible peaks in the 18-24 line on Figure 2.4 as a proportion of all applicants during that period. This is suggestive of younger workers being employed on short-term seasonal contracts during the summer months in tourism and hospitality sectors; a trend that was evident in the North Wales case study. This group may include some student 'gap-year' workers, although this trend was not picked up to the same extent as in the WRO's 2008 report (see footnote 2).

Figure 2.4: Proportion of WRS Applicants in Rural Wales by Age Category, 2004-2011



2.7 Employment

Migrant workers in rural Wales are less concentrated in service sector occupations (specifically, administration, business & managerial services) than in the Valleys and in Wales as a whole (Table 2.10 below). Overall, 67% of all WRS registrations in rural Wales between 2004 and 2011 were in the service sector, with 24.0% within administrative services followed by 20.9% in hospitality and catering, and 7.1% in health and medical services. Aside from the service industries, 18.8% of rural WRS registrations were in manufacturing and 4.6% in agricultural activities. There are notable geographical variations across the rural case study localities in the distribution of migrant workers employed in different sectors as outlined in Table 1.1. The Sectors Based Scheme (SBS) for Bulgarian and Romanian Nationals accounted for 9.6% of WRS registrations in rural Wales, where it was a more notable feature of migrant employment than in Wales as a whole or in the Valleys; only 3.8% of WRS registrations for the latter were within SBS sectors.

In comparison to rural areas, over 80% of WRS registrations in the South Wales Valleys were in service sector occupations and over two-thirds of these were concentrated in administration, business & managerial services (Table 2.10). Manufacturing accounted for a smaller proportion of A8 employment in the Valleys at 13.4%, but this figure was higher than for all-Wales (12.0%).

Table 2.10: Cumulative WRS registrations 2004-2011 by Employment Sector

	RURAL		VALLEY		WALES	
ADMINISTRATION, BUSINESS & MANAGERIAL SERVICES	2,599	24.0%	2,546	57.2%	15,725	50.1%
AGRICULTURE ACTIVITIES	500	4.6%	22	0.5%	815	2.6%
COMPUTER SERVICES	14	0.1%	8	0.2%	30	0.1%
CONSTRUCTION & LAND SERVICES	397	3.7%	149	3.3%	756	2.4%
EDUCATION & CULTURAL ACTIVITIES.	176	1.6%	16	0.4%	216	0.7%
ENTERTAINMENT & LEISURE SERVICES	461	4.3%	120	2.7%	630	2.0%
EXTRACTION INDUSTRIES	20	0.2%	32	0.7%	77	0.2%
FINANCIAL SERVICES	4	0.0%	12	0.3%	39	0.1%
GOVERNMENT	26	0.2%	12	0.3%	72	0.2%
HEALTH & MEDICAL SERVICES	770	7.1%	119	2.7%	1,365	4.3%
HOSPITALITY & CATERING	2,265	20.9%	284	6.4%	4,510	14.4%
LAW RELATED SERVICES	-	0.0%	-	-	2	0.0%
MANUFACTURING	2,039	18.8%	598	13.4%	3,765	12.0%
REAL ESTATE & PROPERTY SERVICES	40	0.4%	16	0.4%	135	0.4%
RETAIL & RELATED SERVICES	279	2.6%	148	3.3%	892	2.8%
SECTORS BASED SCHEME (SBS)	1,037	9.6%	170	3.8%	1,907	6.1%
SECURITY & PROTECTION SERVICES	10	0.1%	10	0.2%	38	0.1%
SPORTING ACTIVITIES	20	0.2%	-	-	19	0.1%
TELECOMMS	2	-	-	-	8	0.0%
TRANSPORT	149	1.4%	142	3.2%	419	1.3%
UTILITIES – GAS, ELECTRIC, WATER	16	0.1%	34	0.8%	53	0.2%
Unknown	6	0.1%	13	0.3%	51	0.2%
TOTAL	10,830	100 %	4,451	100%	31,524	100 %

2.8 Summary

This chapter has provided an overall picture of the inflow, number and geographical distribution of migrant workers across rural Wales and the South Wales Valleys. Whilst focusing on new EU migration from the A8 and A2 countries, this analysis has been set within the wider context of longer-standing international migration by Portuguese and Filipino groups.

The data analysis shows that:

- Two-thirds of A8 migration to Wales occurred prior to 2007
- A8 migration has been dispersed throughout rural, urban and valley areas of Wales
- Polish migration has continued to dominate A8 migration in rural Wales and the Valleys
- Migration from the A2 countries has had limited noted impact prior to 2014
- Substantial numbers of A8 migrants have returned to Poland
- Gender trends have reversed since 2007, with female A8 migrants now outnumbering males
- Younger migrants dominate; three-quarters of A8 migrants in rural Wales are aged under 35
- A8 (and Portuguese) migrants continue to be employed in elementary occupations
- New migration from Portugal and the Philippines has declined since EU enlargement.

The WRO's 2008 migration report struggled to provide an accurate figure on A8 migration to rural Wales based on shortcomings in the available WRS data. The release of 2011 Census data has supplemented other sources to build a clearer picture of the arrival of migrant workers in Wales and geographical patterns of residency and return; for instance, less than half the number of Poles who registered for a national insurance number in rural Wales were still living there in 2011. This appears indicative of the short-term, seasonal work undertaken by some migrants in rural sectors.

SECTION 3: FAMILY AND COMMUNITY

3.1 Introduction

This chapter starts by examining the motivations for migration to Wales amongst migrant groups across the case study localities. It considers patterns of settlement and return amongst the migrant groups, in terms of length of residency in Wales and future plans, and the impact of these decisions for community cohesion and integration. This includes the relationships and interactions between migrant workers and local communities. Here the growth and function of migrant social and support networks is examined in relation to the changing economic and policy context in Wales.

3.2 Motivations for Migration

Across the case study areas, financial factors had been important in the decisions of most of the migrant workers surveyed to migrate: pushed by a lack of employment opportunities in their home country and/or pulled by the prospect of earning more money and a better quality of life in the UK. Motivations have evolved over the decade since EU enlargement as members of this first wave of migrant workers have become settled, with joining family and friends in Wales becoming a strong pull factor for subsequent migrants (in addition to economic concerns). The opportunity to learn English was also cited by younger migrants in particular.

Family and Friends

The degree of influence family and friends exerted on the decision to migrate varied across the case studies. Two-thirds of Poles and Portuguese in Merthyr, and Poles in Welshpool, identified this as a key factor and were living with respective family members in Wales. In Welshpool, 70 per cent of the female respondents were married, with many having migrated to join their husbands; all but one had school-aged children. The initial motivation for many Polish migrants in the Llanybydder/Lampeter case study was economic; to earn money in the UK as temporary guestworkers for several years. However, over 80% were now living with family in Wales. This is particularly evident in the Lampeter area, where Polish families are choosing to settle close to the school.

In contrast, Poles surveyed in Llanelli were the least settled group, with fewer family ties. These can be younger single migrants or older individuals/couples; with both groups more mobile due to their lack of immediate dependents. A mixed picture emerges across the larger North Wales region, with a settled Polish community in one part of Gwynedd who emphasized the influence of family and/or friends. This is in comparison with a more dispersed mix of A8 and A2 migrants who display fluid connections to Wales; willing to move within the UK in search of better job opportunities, as well as between their home country and the UK for shorter spells of work.

For Filipino migrants in Merthyr, these same processes have been occurring over a longer period and without the same intensity witnessed with A8 migration. Filipino migrants first started arriving in Merthyr during the 1980s; to find work and send remittances home to extended family in the Philippines. As Filipinos have become settled in Merthyr, later migrants (including several survey respondents) have been motivated to move to the area due to pre-existing family ties. All Filipinos surveyed in Merthyr were married with children and most had dual Filipino/ British nationality.

3.3 Time in Wales and Future Plans

The Filipino community is well established in the Valleys and this is reflected in the survey findings with all respondents having been resident for more than five years (Figure 3.1). Following changes to the UK immigration system in 2007, many Filipinos have continued to arrive in South Wales on short-term student visas, which allow them to work part-time.⁸ All but one of the Filipinos recruited in Rhondda Cynon Taff to explore these changes had been in Wales for less than three years; almost 90% were under 35 years of age. After Filipinos, migrant workers from Portugal have the greatest longevity in Merthyr with over 60% having lived there for five years plus. Welshpool were amongst the most settled of the new European migrant groups surveyed. Whilst Powys experienced a degree of population churn following EU enlargement,⁹ the trend over the past five years has been towards the settlement of family groups. Elsewhere there is more evidence of ongoing arrivals and departures amongst A8 migrants in Merthyr, Llanelli and parts of North Wales, which is consistent with the statistical analysis in Section Two. In North Wales, for instance, many Poles move away to Liverpool and Manchester where wages are higher.

Ties to their home country remained strong for the majority of migrants surveyed; two-thirds of the Welshpool and Llanybydder/Lampeter respondents still regarded their former residence in Poland as home. Many were uncertain how long they would stay in Wales; for some this was contingent on the continued availability of work, for others completing their children's education. One respondent noted the complexities migrants face when future plans involve multiple family members: *'It's really hard to say because my daughter's aspiration is to stay here. I would like to return but she wants to stay, my husband also wants to return – so we feel torn.'* Some older survey respondents (45+) were planning to work in the UK until retirement, earning enough money to go back in a relatively comfortable position or saving for specific purposes e.g. putting children through university.

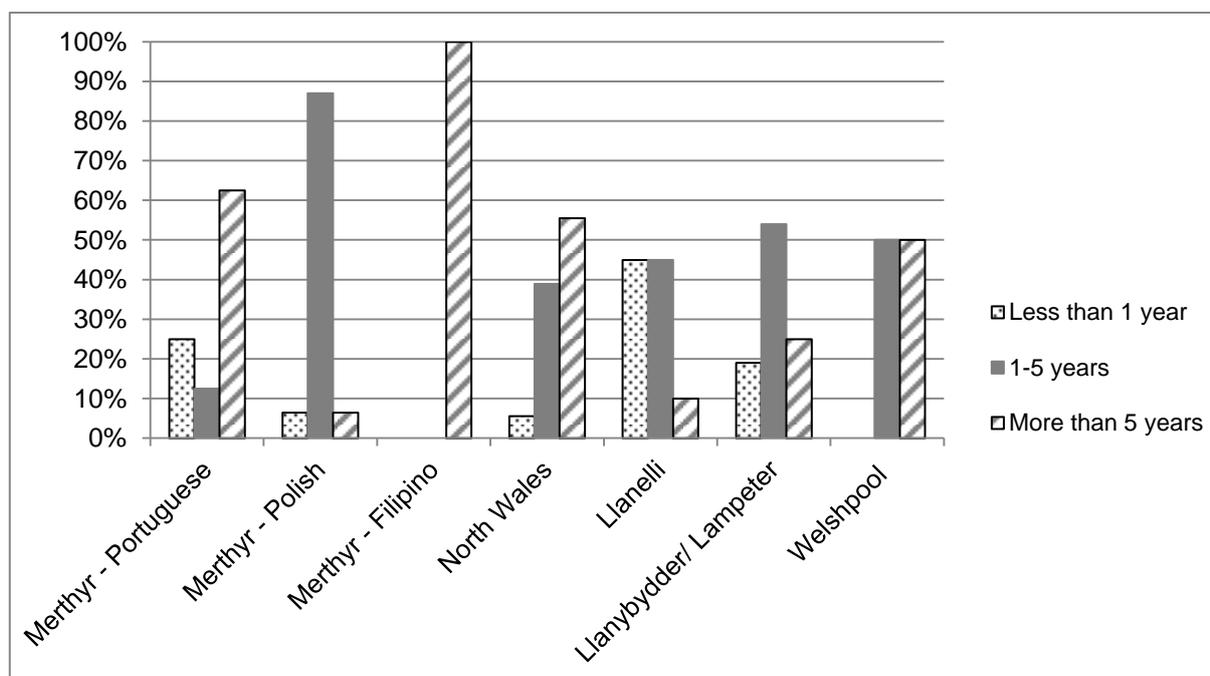
A small number of respondents expressed a desire to return to Poland, but only if/when the economic situation improved. This was similar to the situation facing some Portuguese migrants,

⁸ Filipino student visa restrictions allow 10 hours paid employment a week in term time and 37.5 outside term time (until 2011 they were allowed to work 20 hours during term time).

⁹ Powys experienced a net population gain from long-term international migration of just 300 people between 2003 and 2012 (Source: ONS Local Area Migration Indicators). However, this figure masks an estimated inflow of 1,600 and outflow of 1,300 between mid-2006 and mid-2010.

amongst whom there appeared to be less overall contentment with life in Merthyr than for Poles. Even amongst the more settled Filipinos it was not entirely clear that all would stay in Wales indefinitely. There were indications that some would return to the Philippines eventually when/if they were *'financially and emotionally secure'*. However, the majority of migrants surveyed appeared happy where they were living and expressed no immediate desire to move elsewhere. Approximately one-third of the A8/A2 migrants surveyed in North Wales, Carmarthenshire and Welshpool wished to remain in rural Wales permanently. Finding a better job was a common goal for those working in factory occupations for which they were overqualified. This was particularly the case amongst younger migrants, who were aiming to improve their situation and that of their family. In South Gwynedd, around half of those surveyed expressed the goal to develop better language skills as part of this process. Similarly in Merthyr, learning English was recognised by Polish and Portuguese migrants as a step towards getting a job that better matched their skills.

Figure 3.1: Length of residency in case study locality



3.4 Language Proficiency

Language proficiency, and the barriers encountered through an inability to communicate, is a key cross-cutting theme in this report that will also be mentioned in subsequent chapters in relation to specific areas. Some migrants who have been resident in the UK for a longer period had developed their English language skills to a functional level. As the longest established migrant group, all Filipinos surveyed claimed a good or fluent level of English. Similarly, around two-thirds of Polish respondents in Welshpool, Merthyr and North Gwynedd had good English skills, with many having attended English for Speakers of Other Languages (ESOL) classes. Respondents commented

positively on the ESOL provision offered through Coleg Harlech in Mid Wales and Coleg Menai in North-East Wales. Some large employers organised on-site ESOL provision for their workers.

However, many migrants struggled to attend weekly ESOL classes around irregular shift work patterns and childcare arrangements. This was particularly amongst factory workers in Llanybydder, Llanelli and also the Portuguese in Merthyr, where the majority reported having only 'basic' English. In some instances, different styles of language learning had been implemented as an alternative to the academic style of ESOL and to accommodate work demands. For example, the Polish-Welsh Mutual Association in Llanelli had organised informal 'survival English' classes for new migrants, whilst Powys local authority held conversational classes for Polish parents at a local school.

In line with WRS trends discussed in Section 2, ESOL providers noted a peak in demand for their services in 2007/08 with, for example, Coleg Menai catering for approximately 450 learners at this time; the largest proportion of whom were Polish, but also other EU (Portuguese) and non-EU (Chinese, Bangladeshi) migrants and/or students. Demand for ESOL classes subsequently declined as many A8 workers returned home during the recession. However, learner numbers have been maintained through providers now serving whole migrant families, rather than lone workers.

There is a need for migrants in North Wales to be able to speak Welsh in order to '*get a better job*' and for everyday interactions. Many were unaware of this requirement prior to moving to the region and none surveyed had developed good Welsh language skills. Similarly in Llanybydder/Lampeter, none of the respondents had more than a basic understanding of Welsh despite its prevalence in the local area. An education stakeholder noted how this could have implications for females who were more likely to seek work in occupations where Welsh is a necessity e.g. teaching, administration and social care: "*They don't speak Welsh, and that a massive problem around here.*"

For many migrants, developing language skills represents a progression from day-to-day survival, towards being able to live, work and participate in a broader sense within communities. These interrelated elements of migration – friends and family, time in Wales, future plans and language proficiency – all have consequences for community relations and cohesion.

3.5 Community Cohesion

Survey respondents were questioned about the strength of community feeling they held with a) other migrant workers and b) other local people living in their area (see Appendix 4). Responses indicated that feelings of community with other migrants are variable across the case studies, with particularly negative attitudes amongst the Polish and Portuguese groups in Merthyr linked to competition for jobs and resources, whereas in the rural case studies the migrant population is much more 'monocultural' i.e. predominantly Polish, without any other sizeable migrant groups.

The Polish migrant community has clear differences and divisions related to age, class and length of time in the UK. Some more settled migrants tend to distance themselves from newer arrivals and seek closer ties with local communities; this was observed in Carmarthenshire and North Wales. Similar trends were evident amongst Filipino migrants in South Wales, with a lack of connectivity between different groups and generations. An interviewee argued that once Filipino migrants become established in the UK, they often leave newcomers to fend for themselves, undermining the wider development of the Filipino community: *'Those groups, they are... earning, they have luxuries, they have good cars, nice houses, they don't really need to get involved because they want to work'*. This situation is not necessarily helped by a strong culture of self-sufficiency.

Elsewhere, the close proximity of other migrant families can provide a valued support network in the face of tensions with local communities, as on the Oldford Estate in Welshpool. Polish families have been moving into this longstanding Communities First area of Welshpool in recent years. This has been influenced by the availability of affordable Housing Association rental accommodation; whilst Oldford Infant School has developed a positive reputation for the support it provides to Polish pupils. Both in Welshpool, and Merthyr, underlying problems of economic marginalisation have coloured perceptions of migrant families as posing a threat; obscuring the common challenges low-income (migrant and local) families currently face in terms of employment and service provision.

Just under half of the respondents in Welshpool reported experiencing some form of discrimination since living in the area, including verbal abuse from young people and/or other parents at school. Similar experiences were noted in Merthyr, although some migrants see this as an attitude that emerges amongst certain groups in certain places at certain times, rather than as overt expressions of racism. Many of the migrants had good opinions of local people, commenting on their friendliness and hospitality. However, in Merthyr migrants were particularly wary of abuse and the threat of violence from young people in the town centre, especially at night. Many of the problems migrants encounter appear to be class and gender based, and/or generational. As a Polish migrant stated, *'people from my neighbourhood, mainly older people are very nice... but younger generation from my work or neighbourhood have a prejudice against people from different countries.'*

Persistent negative perceptions of Polish migrants were often similarly related to age, having been shaped during the immediate post-enlargement years when the demographic was skewed towards younger migrants and a perceived public drinking culture. This was noted by stakeholders in both Welshpool and Llanybydder (see also Kreft, 2009). Relations in these places were felt to have improved in the last five years due to the increasingly family-orientated nature of the Polish community; although perhaps less through integration than acceptance, as one Carmarthenshire local authority officer suggested: *'It's become part of the furniture of people's lives, having migrant workers about'*.

Survey respondents in Llanybydder/Lampeter and North Wales both expressed a stronger sense of community with local people than with other migrant workers. By contrast, in Llanelli a more uncertain and ambivalent attitude existed towards local people and life in Wales more generally. There continues to be a high turn-over of Polish workers in Llanelli compared to the rural case studies and attitudes may reflect this, with many Polish migrants continuing to live between two countries and cultures. The greater frequency of contact and interaction between migrant workers and local people in smaller rural towns is also a potential contributory factor.

Overall, very few survey respondents counted local people as close friends or participated in locally organised activities; the exception being migrants with children who attended school-based events. This is generally consistent with the findings from the WRO's 2008 report, which identified a picture of 'numerous yet weak ties between migrant workers and local communities in rural Wales' (p52). Language, working hours and work-place segregation continue to present barriers to integration; two-fifths of all respondents said language prevented them from making friends with locals and co-workers of different nationalities. The increasing self-reliance of migrant groups may also be a factor; it was notable in Llanelli that Poles who socialised with locals tend to be young (under 35) and single, whereas those living as a family group or couple can be more reliant on each other.

3.6 Support Services and Social Networks

In the context of public spending cuts and a changing policy environment, voluntary sector stakeholders commented upon how local authorities had streamlined their operations to 'essential services' whilst funding opportunities for the third sector were felt to have decreased. For example, the CAB, who previously provided substantial support to non-British nationals, have been forced to cut back to core services due to reductions in funding. Against this backdrop, the work of specialist advocacy organisations and social entrepreneurs has become increasingly crucial, as has the enhanced capacity for self-help provision within migrant communities. In a policy context driven by the need to develop resilient communities¹⁰, these new organisational forms provide rich sources of local knowledge and expertise to help foster positive change. In the following discussion, examples of existing **good practice** will be highlighted across the case studies in addition to gaps in provision.

Much of the work done with migrant workers in Merthyr is conducted by specialist migrant focussed organisations. The Polish Community of the Valleys Association (PCVA) has an influential role within the Polish community, as the organisation's Chair outlined: '*We help support people and give advice and information about living and working in Wales, but also we are trying to integrate people from Poland.*' This work was recognised by a number of survey respondents: '*I know if we have a problem... we can go there and find out some information about how we can sort it out.*'

¹⁰ See *Building Resilient Communities: Taking Forward the Tackling Poverty Action Plan*: <http://wales.gov.uk/topics/socialjustice/publications/taking-forward-tack-pov-plan/?lang=en>

Glamorgan GATES, a funded outreach project at the University of Glamorgan until 2012, was also widely recognised by survey respondents as a means of accessing different kinds of support and advice that was not readily available elsewhere; this was strongly evident amongst migrant entrepreneurs. The social entrepreneur who ran GATES has recently set up a new venture – Y Bont (the Bridge) Culture Hub – to provide a similar service and continuity of support. Y Bont aims to enable individuals from all cultural backgrounds in learning, training and work experience, through bringing together many sources of local support in one physical place (see Appendix 5).

The Polish-Welsh Mutual Association (PWMA) has become a vital hub of free advice and support for Central and Eastern European (CEE) migrants within and beyond Llanelli; receiving inquiries from rural areas of Wales as well as the wider UK. Since 2006, the Welsh Government has provided funding for the PWMA to employ a project manager and several advice counsellors. Premises provide computer terminals that migrants can use for job searches and staff assist with translation, form-filling and CVs, as well as intermediating with employers and landlords if required.

These organisations operate where there are large migrant communities to require and justify their services, and from which complimentary forms of social networks and entrepreneurship have started to develop; in Merthyr particularly. In the rural case studies the migrant population is frequently smaller and more dispersed, making it difficult to provide support. As an interviewee stated: *'We are dealing with invisible dispersal of minorities. We know they're here but we can't always find them. It can also be difficult to provide the data service providers need to make an assessment'*. In this context, non-specialist organisations with a broader focus on social inclusion such as the North Wales Race Equality Network (NWREN) and Avalon Advice in North Wales, and Siawns Teg in Powys, have become key nodes in the networks of available migrant support.

In North Wales, these organisations provide drop-in sessions for migrants at libraries and other local venues across the region. Social enterprise is also important within this context. One long-term migrant has set up a cooperative for self-employed community project developers who want to work under a single umbrella to attract funding and support each other. The cooperative brings together local skills and knowledge, and was seen to be particularly suited to the region, by providing a sustainable way of working in an area where little support is available

The WRO's 2008 report highlighted the role of the organisation Siawns Teg in providing advice and advocacy assistance to migrant workers in Mid Wales. This included establishing self-help groups and drop in centres. This strategy had proved effective leading to reductions in many of their services targeting migrant workers over the past two years, with an equivalent role now provided through self-help services run by migrant volunteers. This provides the close-knit Polish population in Welshpool with increasingly robust support mechanisms independent of the local authority.

The provision of voluntary sector support across rural Wales is uneven and in Llanybydder/Lampeter the Polish community has had to be more self-reliant from the outset. This capacity has developed over time as networks of family and friends have established in the area, with longer-term migrants able to help newer arrivals. Whilst similar community knowledge transfer was occurring across the case studies, it takes on particular import in the absence of organisational support.¹¹ Employers such as the meat processing plant in Llanybydder have also taken an active role in the orientation of new arrivals; assisting with housing, GP registration and bank accounts.

Social Networks

Voluntary sector organisations can provide social meeting spaces through which more informal types of knowledge sharing take place. In Merthyr, such spaces have become important for self-identity of the different migrant groups. For example, Polish migrants have tended to use the PCVA as a central focus for their activities; Portuguese migrants often congregate at the local tapas bar. Whilst not all community members will be utilising these spaces, they provide one way in which the fragmentation and disconnection associated with long working hours can be challenged.

Filipino community networks focus around the Catholic Church in Merthyr (which also figures in the lives of Polish and Portuguese migrants). Asked why church attendance is important, one Filipino migrant highlighted the mutual support gained: *'Because most of us work every day, we don't have much time to be together... with the service we can talk and socialise and know each other.'* The pressures of work and study experienced by Filipino migrants more generally, coupled with the said lack of connectivity between groups and generations, mean that there are few Filipino community venues in South Wales. To some extent this appears as a consequence of segregated working patterns in health care, but may also reflect the strong sense of cultural self-sufficiency that sees Filipinos turn to family first. There is little awareness within the Filipino community of the support available and support services often have little knowledge of local problems Filipino migrants face. This is a major concern for stakeholders; the Filipino community must be recognised and valued for the contribution it makes across Wales if the problems Filipino migrants face are to be addressed.

Issues of work/life balance tended to negatively impact on the social integration of migrant groups. In Llanelli, the work-focused nature of the Polish community contributed towards a lack of engagement with the community. As the PWMA described: *'They all know each other, but apart from visiting each other and socialising in the houses, they don't do anything. They don't take part in the community life in the town; most of the time they don't know what's going on.'* This had led the PWMA to become more active in organizing social events, as well as printing a regular Polish

¹¹ Consideration is being given to the PWMA beginning a satellite service in Llanybydder. PWMA had contacted several prominent figures in Llanybydder in regards to involving them in the delivery of this primarily volunteer-led service.

newsletter. This is complimented by the work of the Llanelli Multicultural Network (LMCN), which has a broader scope to raise awareness of cultural diversity in the town.¹²

In the rural case studies, migrants generally lived close to friends or family, and tended to socialise at each other's houses. In Welshpool, this helped to overcome the isolation sometimes felt by non-working mothers. Without the community focal point provided by organisations in Merthyr or Llanelli, there were limited cultural events or initiatives to bring the Polish migrant community together, or together with the local community, in rural areas of Wales. Here schools were identified by stakeholders as providing an important multifunctional space. In Welshpool the Polish parents surveyed actively supported school events and efforts were being made to further engage them in the life of the school through roles such as school governors. The Catholic Church also plays a vital role in migrant support and social networks in rural areas, with one-half of respondents in Llanybydder/Lampeter attending the monthly Polish Mass.¹³ The current organiser of the Polish Mass in Lampeter migrated from Poland in the 1970s and noted a reluctance amongst the current generation of migrants to become involved in the organisational side of the church. This was linked to long-working hours undertaken by the majority of both male and female migrants, which, in addition to care commitments for some, leaves little time or energy for community focused activities.

3.7 Summary

Whilst some CEE migrants returned home during the recession, those who remained are increasingly undergoing a transition in their migration intentions; from short-term guestwork towards longer-term patterns of family settlement. These trends are evident across all of the case studies to varying extents. The intensity of change brought by A8 migration over the past decade has led to some tensions with local recipient communities and, as witnessed in Merthyr, with other migrant groups. Language remains a persistent barrier to social integration. Despite widespread ESOL provision, many migrants struggle to attend due to irregular work patterns and care commitments.

The work of specialist advice and advocacy organisations in supporting migrants, and working to enhance community cohesion, has been highlighted alongside the rise of self-help provision through social and familial networks. Such networks, and the collective knowledge they provide, are crucial in rural areas where organisational forms of support are lacking. However, whilst increasing self-sufficiency can build resilience in migrant communities, it can also lead to the internalisation of problems as has been the case with Filipino migrants in South Wales; resulting in a lack of external recognition or policy support.

¹² The LMCN received three years of big lottery funding. With the end of this funding period approaching, a bid to establish a Carmarthenshire-wide Multicultural Network was submitted in 2013, which would see the expansion of their current activities across the county; with towns such as Llanybydder noted as currently lacking in support of this kind.

¹³ The Catholic Church in Lampeter is important in the area's migration history, with the Polish Catholic Parish established in Lampeter in 1948 to support the large number of Poles who bought farms and settled in the area after World War Two.

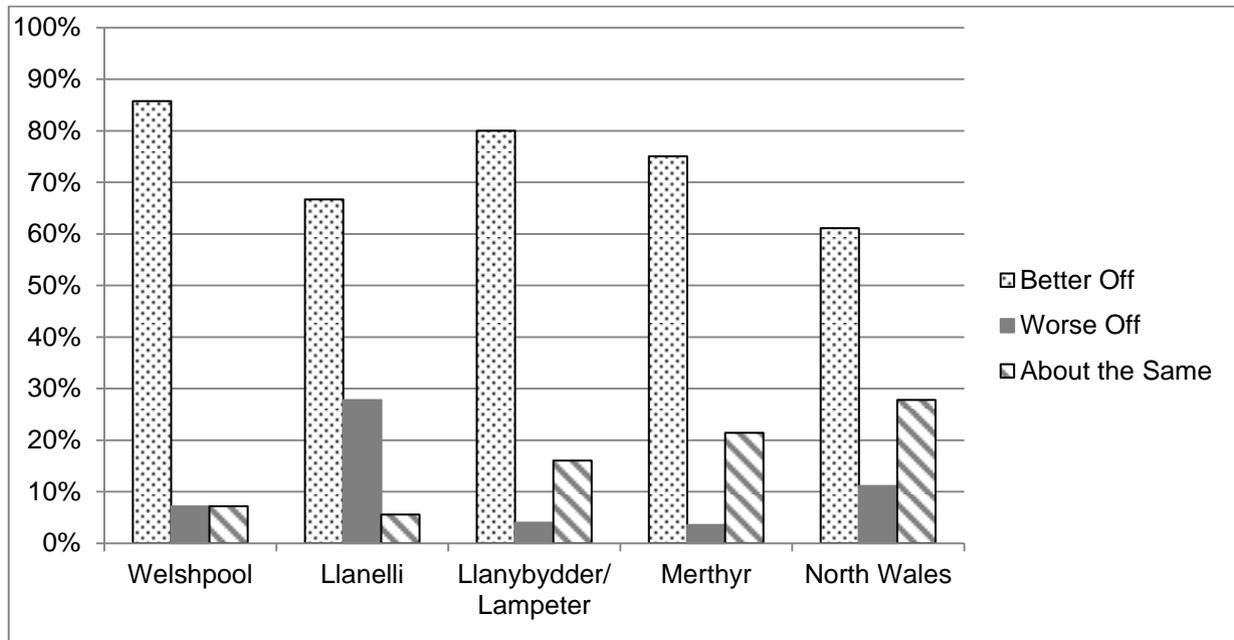
SECTION 4: EMPLOYMENT AND THE WORKPLACE

4.1 Introduction

This chapter examines employment practices and workplace conditions across the case studies. This takes in migrants' experiences of finding work, including mechanisms of recruitment and the relationship between qualifications and the types of occupations they are employed in. Finally, it explores working conditions and language issues, and how these impact upon occupational mobility amongst different migrant worker groups. This chapter draws primarily on the questionnaire surveys of migrant workers. It is supplemented by interviews with employers and key support agencies.

4.2 Financial Security

Figure 4.1: Comparing the financial situation in Wales to home country



Cumulatively across the case studies, 71% of respondents felt that they were financially better off living and working in Wales compared to their situation prior to migrating. There were regional variations within this figure (Figure 4.1), with the greatest feelings of financial security evident amongst migrants in Welshpool (85%), Llanybydder/Lampeter (80%) and Merthyr (75%); with the latter increasing to 80% amongst the Filipino migrants surveyed. Trends of family settlement have led to more dual income migrant households. The largest proportion of respondents who felt financially worse off since migrating was in Llanelli (25%). Llanelli had the highest rate of unemployment amongst survey respondents; although it was noted how new migrants from Poland continue to arrive, despite the availability of employment having reduced following the recession.

Whilst employment by large factories has remained relatively stable during this period, the situation is more precarious for migrants working in tourism and hospitality, and for smaller employers, where reductions in consumer spending have a more immediate impact. Only 60% of migrants surveyed across North Wales indicated that they were now better off; suggesting a mismatch with their expectations, given that economic pull factors were the overriding reason for migrating. Similarly, competition for jobs from the arrival of Polish migrants in Merthyr may have led to fewer Portuguese migrants feeling financially better-off (65%) in comparison with other migrant groups in the locality.

4.3 Finding Work

As evidenced in section three, the majority of migrants surveyed across the case studies had some form of prior connection with Wales in terms of family and/or friends already living here. In this way, they were able to find employment relatively easily either: a) whilst still in their home country, through connections their family/friends have with recruitment agencies or directly with employers; or b) by migrating to join family/friends and then searching for work after arriving. In the first instance, much of the prearranged employment was organized via recruitment agencies for the food/meat processing factories. Agencies were responsible for much of the initial Polish migration to Carmarthenshire and Merthyr from 2004 onwards; recruiting workers directly from Poland to fill local labour shortages in the food-processing sector. Approximately forty per cent of Poles surveyed in Llanelli and Merthyr had a prearranged job in the local area. The remainder had largely followed pathway b and migrated speculatively having heard that jobs were available.

This figure for prearranged employment rises to over fifty per cent in Welshpool and to a high of seventy-five per cent in Llanybydder/ Lampeter. In the latter, and to an extent also in Welshpool, rural employment is dominated by one large employer (meat processing in Llanybydder; frozen foods factory in Welshpool) with less scope for migrants to arrive in the area and find alternative employment. The factory in Llanybydder discussed that they discourage migrants from arriving without a prearranged job with the company, as this can lead to financial and welfare difficulties if no work is currently available. There was more variation within the North Wales case study, with sixty per cent of the Polish migrants surveyed in the north of the region having initially arrived for a prearranged job through an agency. Some of this employment was with food processing factories on Anglesey and the large industrial laundry in Pwllheli. Finding employment in south Gwynedd appears to be more difficult; only 20% had arrived for a prearranged job and employment in general is less stable for migrants in the absence of a dominant rural employer.

Whilst there are still opportunities for short-term guestworkers within the tourism sector in North Wales, and in areas such as Pembrokeshire and Ceredigion, opportunities for more skilled guestworkers have diminished since the previous WRO report. Since 2007/08, the recession has

reduced employment opportunities in sectors such as industrial construction according to the United Kingdom, with the ceasing of large-scale projects in Pembrokeshire's energy sector.

The new migratory pathways developed by A8 migrants can intercept and compete with older pathways; this is evident in Merthyr. Half of the Portuguese migrants surveyed came to Merthyr for a prearranged job and all were currently employed; however, in the immediate aftermath of EU enlargement, local stakeholders reported that employment agencies switched their focus from Portuguese to Polish workers. Although we were unable to confirm this directly with the agencies in question, tensions between Portuguese and Poles in Merthyr remain evidently strong. As one migrant from Portugal stated: *'Portuguese people, instead of helping and making it easier for the new ones, they feel like they are trying to steal their jobs so they just make everything more difficult.'*

Policy changes can also impact on established migration pathways: this has been the case for Filipino migrants. Whilst over half of the settled group in Merthyr had arrived for a pre-arranged nursing job, things have changed for newer arrivals. The introduction of the points-based system in 2007 made it more difficult for Filipino nurses to secure work in health care professions (Bach 2010). Filipinos still come to Wales to work, but most now arrive on student visas and their working hours are restricted during term time. Some will also have paid agencies in the Philippines for EU jobs that no longer exist; when they arrive in the UK they are encouraged to take out expensive loans to pay for tuition fees. Many of the Filipino students surveyed in Rhondda Cynon Taff had unexpectedly found themselves in this situation. There were complaints about the lack of jobs and the part-time hours restriction; most also work in jobs for which they are over-qualified.

4.4 Qualifications and Types of Employment

The majority of Polish and Portuguese survey respondents across the case studies are employed in low-grade factory or service sector occupations. In Merthyr, Anglesey, Llanybydder/Lampeter, Llanelli and Welshpool, employment at large food processing factories dominated, accounting for up to 80% of employment amongst the Portuguese and Polish respondents in Merthyr and Llanelli. A greater proportion of survey respondents in North Wales work in hospitality and catering occupations associated with the tourism industry. This is consistent with the broader picture of migrant occupations provided by WRS data in section two.

Self-employment was more common in Gwynedd than the other case studies, with respondents working in tourism as well as professional vocations such as architecture and consultancy. This is partly related to the rural character of the region, with dispersed settlements and long travelling distances encouraging patterns of home-based working. Interviewees also suggested that it is becoming increasingly common in North Wales for some tourist businesses to offer migrants work on a self-employed basis for work that until recently were offered on an employed basis (e.g. hotel

maintenance) in order to minimise costs and legal responsibilities. However, we are unable to comment on the wider use of such practices in the Welsh tourism sector.

In meat processing factories, wages generally range from minimum wage for production line work to around £9.50 per hour for skilled butchers. One-quarter of respondents (all male) in the Llanybydder/Lampeter case study were employed as butchers, holding the relevant vocational qualifications. A skills shortage had led to the recent establishment of an in-house butchery academy in Llanybydder, providing training and career progression opportunities to migrant and local workers. This was identified as a **good practice** model, in terms of up-skilling the workforce.

Filipino migrants in Merthyr were all in health-related occupations largely aligned with their undergraduate nursing degrees; one respondent worked as a health care assistant, the rest as nurses. In contrast, and despite isolated instances of respondents working in professional vocations (e.g. dentistry), many highly educated Polish and Portuguese migrants across the case studies had taken-up employment in minimum wage elementary occupations. For most this was intended as an initial migratory stepping-stone. However, it could often prove difficult to progress and find employment in their skilled vocation due to factors including language barriers; the transferability of qualifications to the UK; and a more general lack of job opportunities in the labour market.

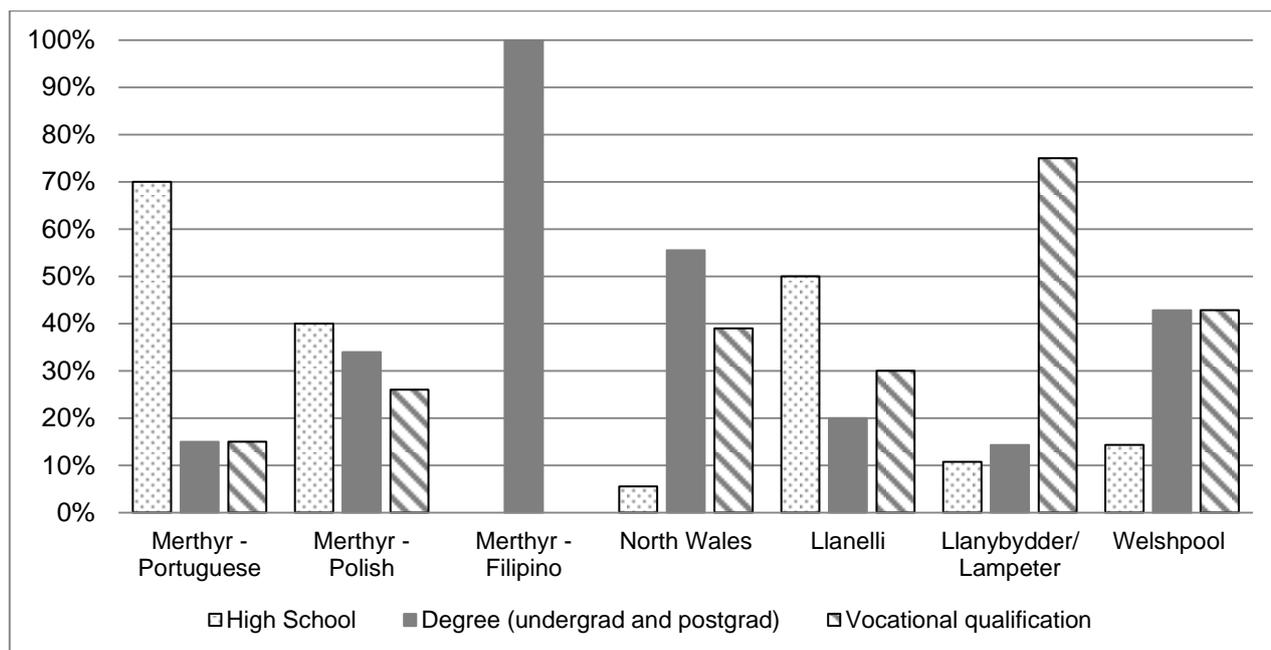
Some migrants are resigned to this situation in the current economic context; regarding any job as better than no job in their home country (a point emphasised by the Portuguese group in Merthyr). Others appeared more contented in their employment within the food-processing sector; particularly older survey respondents who tended to hold vocational qualifications. The presence of older Polish workers is a noted demographic trend in Llanelli (one-third of respondents here were over 45) and is potentially a contributory factor towards a lack of occupational mobility amongst the workforce, with many lacking higher level educational, language and transferable skills (Thompson et al., 2010).

The over-qualified nature of the migrant workforce was particularly evident in the rural case studies in North Wales and Welshpool (see Figure 4.2), where around half of survey respondents were university graduates yet unable to compete for a limited pool of higher-paid jobs. This trend was recognised in the Welshpool area by a local authority officer: *'I am aware that some of the parents that come in have got professional qualifications, they are teachers, accountants, engineers and so on, but they are not necessarily working in that sort of job sector'*. Educated migrant women can also face particular difficulties when moving to join their partners in rural areas such as Llanybydder, with limited jobs available beyond factory-based occupations. This issue was not noted to the same extent in the other case studies but may warrant further investigation.

Some new avenues of employment have opened up as a result of the concentration of migrant worker groups in certain parts of Wales. For instance, several female respondents were working as Polish classroom assistants in local schools, whilst others were working for migrant support

organisations such as NWREN. In Llanelli some employers were beginning to recognise the untapped skills within the town's Polish population as a potential resource for the local economy across different sectors (e.g. IT, medical and construction industries). However, clearer channels through which skilled migrants could register their qualifications and receive appropriate language support would be required in order to develop this more fully. The PWMA in Llanelli provides an example of **good practice**; having helped Polish health professionals find employment in the UK.

Figure 4.2: Highest level of qualification



4.5 Working Conditions

Across the majority of case study areas there has been a noted increase in the direct employment of migrant workers in factory-based occupations; moving away from the previous reliance on recruitment agencies. Some processing firms such as the factory in Llanybydder were only now using agency workers only during the peak season. Direct employment ensures migrant workers the same rights as other employees and works towards negating many of the problems associated with agencies related to salary deductions, tied housing, and zero-hour contracts. The PWMA in Llanelli described how, in the years following EU-enlargement, Polish migrants would often sign an agency contract in English without realising that this committed them to large deductions for accommodation and transport (see Thompson et al, 2010). Survey respondents in Welshpool similarly noted encountering problems related to agency-employment, in terms of taking leave, holiday and overtime pay: *'Before I had a contract of employment I worked through agency and I had problems with getting paid if I was on holiday or when I worked overtime'*. Language is clearly a factor, in terms of access to information about employment rights. Organisations such as the PWMA, Avalon

Advice in North Wales and Siawns Teg in Newtown have worked successfully towards educating migrants in this regard.

Whilst direct employment has largely become the norm for established workers, many new arrivals in Llanelli remain agency employees: this was the case for over fifty per cent of Poles surveyed in the town. However, none of these current agency workers noted any salary deductions.¹⁴ The Gangmasters Licensing Authority has been important in beginning to regulate the activities of employment agencies; although a GLA representative suggested that 'rogue' agencies still operate across Wales: '*There will be a small number of hardcore individuals, who won't come forward to get a licence because they know if they did, they would not be granted one, because they are high in non-compliment and they will not comply*'.

Job insecurity remains a widespread problem for both agency and direct employees (see Equality and Human Rights Commission, 2012). Although most respondents in Llanybydder and Welshpool factories described themselves as having permanent or open-ended contracts, weekly hours and earnings could be highly variable due to seasonal demand. The economic downturn has also seen employment practises associated with agencies being adopted by local factories, with the increase of zero-hour contracts in Merthyr and Llanelli. When factories are working flat out, for example, migrants work long hours seven days a week or risk losing their job. At other times, when orders are scarce, workers are sent home with no pay and no knowledge of when they will work again. These new contract arrangements give employers greater flexibility at the expense of workers, illustrating the changing nature of the problems economic migrants face in Wales. If a worker is put on limited hours at short notice they are often unable to claim benefits, even if they have recourse to public funds, because they need to be unemployed for a longer period. In this situation, money often gets stretched too far, resulting in the non-payment of bills and recourse to doorstep lenders. This economic instability can be particularly problematic when workers have family to support in Wales.

The ready availability of migrant labour since EU enlargement has reduced the bargaining position of existing workers. This was evident in North Wales in terms of employer practices around Union membership, as a stakeholder pointed out: '*There were in the food industry quite a lot of Portuguese workers and they got themselves Unionised, at which point they were all got rid of and Polish workers were brought in.*' Food processing factories in the rural case study areas (North Wales, Welshpool, and Llanybydder/Lampeter) have therefore remained largely non-unionised workplaces. A Unite representative suggested that rather than being discriminated against on the

¹⁴ The introduction of the The Agency Workers Regulations (AWR) in October 2011 represents an important legislative development for improving the position of agency workers. The legislation had only been in place for several months prior to field research and it was therefore difficult to assess its impact. However, an example of employer feedback came from the HR manager of a large meat processing factory who predicted that, whilst they already offered the majority of entitlements outlined in the AWR to their agency staff, there would be a bigger impact on competitors in the sector who undercut prices by operating unlawfully and/or unethically.

grounds of race, migrant workers are now facing many of the same problems as local Welsh and English workers with employers providing the legal minimum in terms of pay and benefits.

A high number (one-third) of Polish respondents in Llanybydder/Lampeter reported experiencing a form of work-related problem or discrimination, with communication issues cited by several respondents including verbal abuse by co-workers. This led one respondent to be off work with depression, whilst others experienced physical health problems as a result of the sub-zero working environment. A female respondent described in detail the *'culture of use and abuse of Polish workers as a cheap labour'* she had experienced working in a meat processing factory, including bullying by her supervisor. Several other respondents noted problems with the behaviour of shift supervisors; an issue similarly highlighted by the Equality and Human Rights Commission (2012).

The younger group of A8 and A2 migrants in south Gwynedd also experienced a higher incidence of workplace problems relating to language, a lack of training for difficult and dangerous jobs, and not being paid for sickness absence. Jobs in the region's hospitality and catering sector have dropped off greatly over recent years and the threat of migrants losing their job or being put on short time is constant. As a stakeholder noted: *'As a result of the economic downturn many employers have cut back on staffing; hours have been reduced within the hotel and catering industries'*.

4.6 Language

Language proficiency is one of the major factors structuring and determining the types of employment migrant workers enter into when moving to Wales, and remains a noted barrier to occupational progression and mobility. Although many educated migrants have a good level of English, this still may not be sufficient to converse in the technical language of their skilled vocation e.g. accountancy, architecture, medicine or teaching, in order to secure a job. Furthermore, it was noted by Job Centre staff that vocational qualifications held by migrants for certain occupations (e.g. electrician) do not straightforwardly translate to the UK and re-training is necessary. Some funding is available through Working Links to support this requirement.

Efforts by large employers to accommodate their migrant workforce through translating signage and documentations are appreciated by workers, but can also be detrimental to the development of language skills and social integration. For example, the meat processing plant in Llanybydder had translated all induction paperwork, signage and health and safety information into Polish, as well as having Polish speaking supervisors with each shift. These measures can conversely have the effect of discouraging people from learning English and being able to communicate with co-workers of various other nationalities. Elsewhere, there were reports of food processing factories in Merthyr segregating workers on production lines by nationality, which similarly lessens the likelihood of migrants learning another language and integrating. Language issues also create potentially more

dangerous problems in the workplace related to health and safety, and hygiene. Some local factories have recognised these problems and started to employ interpreters and translators.

In Gwynedd particularly, but also Llanybydder/Lampeter, the Welsh language could further restrict opportunities for migrant workers in certain occupations such as teaching, care work and self-employment. Those working on the latter basis suggested that it is difficult for migrants to get clients in small communities: *'Welsh is basically the first language and if you don't speak it, you don't exist.'* Many migrants have moved on from North Wales to England looking for work where English language skills are more useful, but also in some cases because they reportedly, *'don't want their children to learn Welsh, or they see the children will have a better future in England'* (North Wales stakeholder).

4.7 Summary

This chapter has highlighted issues surrounding language as a persistent barrier to occupational mobility. Many migrants will have taken on low grade work in manufacturing or service sector occupations as an initial migratory stepping-stone to the UK. However, their progression to higher-status / better-paid work often stalls. This has resulted in a sizeable skills miss-match, in terms of the qualifications held by many migrant workers and the job roles they fulfil in Wales.

There have been some noted improvements in employment conditions for migrant workers, related to changes in legislation but also a shift towards longer-term migrants ('settlers') being taken on as permanent staff. Nonetheless, instances of work-place discrimination do still occur and employment remains precarious for many, due to fluctuating demand in the fresh food sector and the adoption of cost-saving practices such as zero-hour contracts during the recession. This can be particularly problematic and unsettling for migrants who have family to support in Wales. The lack of state provision for economically vulnerable migrants during the first year of employment, and difficulties with accessing benefit entitlements for others, can lead migrants into serious problems with debt.

SECTION 5: MIGRANT BUSINESSES AND ENTREPRENEURSHIP

5.1 Introduction

This chapter explores the growth of migrant businesses and entrepreneurship as an emergent trend since the previous WRO migration report in 2008. It explores the socioeconomic contribution migrant businesses make to their respective case study localities. Migrant entrepreneurs were interviewed in three case study areas: Merthyr, North Wales and Llanybydder/Lampeter.¹⁵ The motivations of business owners and any challenges they have encountered are examined.

5.2 Migrant Business and Entrepreneurs

Merthyr: Over the past decade there has been sizeable investment in and around Merthyr town centre, with a new retail park and leisure centre opening, and a number of new businesses run by British Asian entrepreneurs. The number of Polish and Portuguese businesses has also increased including shops, restaurants and a Polish radio station, alongside other examples of change in the town, including new music festivals and cultural events. The competition for the Polish pound is strong in Merthyr. Tesco stocks an increasing range of Polish products and migrant entrepreneurs have to adapt their product ranges regularly if they are to retain customers and stay in business.

North Wales: Despite the diverse migrant population in the university town of Bangor, until relatively recently there were few signs of this cosmopolitan diversity in the streets of Bangor. Although the economic situation has made it very difficult for local business, particularly migrant businesses, it appears that things are starting to change. Outside major population centres it is more difficult for migrant entrepreneurs to set up business. Across North Wales, migrants are generally spread out very thinly across the region in small communities and villages. This makes it difficult for migrant entrepreneurs to establish shops and other high street businesses.

Llanybydder / Lampeter: As a rural village with relatively few shops and enterprises, the most prominent migrant-run business in Llanybydder is the Polish food shop 'Majka'. This was opened in December 2007 by a female Polish migrant who had been working at the meat processing plant. She has since opened a second Polish food shop in Aberystwyth. In general, there appeared to be more evidence of entrepreneurial activity (mainly mobile businesses) occurring in Lampeter than Llanybydder; potentially as a result of the broader customer base and also away from the structured employment provided by the Llanybydder meat processing plant.

¹⁵ In the Welshpool case study there was limited evidence of entrepreneurial activity, with the only high-street business being a Polish food shop opened during 2012 by a young Polish couple. However, language issues and time constraints proved obstacles to arranging an interview.

5.3 Business Start-Up

Across the case study localities, the majority of Portuguese and Polish entrepreneurs interviewed had been motivated to go into businesses because of the nature of their work in local food processing factories. With limited opportunities to progress into employment more suited to their skills, they largely decided to create their own career paths. However, with many of those interviewed working long hours, in two or three jobs, over many months to save the money to go into business this is not a pathway easily open to those with family and caring commitments.

Some local stakeholders suggested that migrant entrepreneurship was the logical outcome of an increase in demand for products from their home countries by migrant workers. However, the motivations of migrants tended to be more complex. For example, some migrants in North Wales set up mobile businesses such as hairdressers, translation services, builders and plasterers. In general, however, the specialist markets for these types of business are very competitive, with migrants often going into this type of venture to supplement income from a number of other jobs. As an interviewee stated: *'You are not a mobile hairdresser because you want to be a mobile hairdresser, you are a mobile hairdresser because you don't have any other options.'*

Starting a business in Wales represents a major undertaking for non-English or Welsh first language speakers, who can encounter substantial barriers in terms of access to information, complying with legal requirements and raising finance. The start-up costs required for a business are potentially prohibitive for many migrants who are faced with different forms of financial exclusion (e.g. inability to provide credit histories; three years proven residency required for a bank loan). Some of the entrepreneurs had accessed different forms of advice and support across the case studies, including social enterprise in North Wales and Merthyr, the Credit Union in Llanelli, and Menter a Busnes in Llanybydder/Lampeter. Migrant entrepreneurs in Merthyr singled out the Y Bont social enterprise initiative as a particular example of **good practice** (see Appendix 5). However, awareness of these forms of support appeared to be variable.

One prominent community activist in Merthyr summed up the practical help provided to migrant entrepreneurs: *'I would signpost them to where they could get business advice. But then the practical everyday kind of 'I haven't got a photocopier', 'I need to do a menu', 'I haven't got the computer skills'... I mean those kinds of things we could help them with'*. This organisational support was less readily available in the Llanybydder/Lampeter case study. Here the Polish Shop owner was able to overcome initial problems with sourcing equipment through talking to locals due to her good level of English. In addition to financial investment, the ability to communicate effectively is crucial for migrant entrepreneurs in accessing information and for business administration.

5.4 Socio-economic Contribution

Despite occasional problems with local people, there is a clear perception amongst local stakeholders that migrant businesses are making a positive contribution to the socioeconomic redevelopment and regeneration of Merthyr. As one stakeholder described, *'It's more multicultural... people are excited to see changes you know in the foods they can taste and the dining experiences they can have.'* Some successful migrant entrepreneurs have featured in local business awards over recent years and are now being drawn into local business and government networks.¹⁶ The migrant entrepreneurs interviewed in Merthyr were nonetheless aware of the problems of integrating different cultural groups, and they work hard to find solutions. However, as the economic crisis has deepened latent tensions between different groups can quickly surface, with interviewees noting how a small dispute between local people and a migrant business can escalate into a bigger issue.

Entrepreneurial activity has been more limited in the rural case studies. Different dynamics are evident in different rural places, with a broader customer base amongst the 'cosmopolitan' clientele of the university towns of Bangor and Aberystwyth, whereas Polish shops in Llanybydder and Welshpool remain relatively niche enterprises targeting the migrant community. At the same time, they are highly valued for the commodities they provide and as social spaces. The shop owner in Llanybydder has become a prominent local figure in the absence of other Polish community leaders.

The North Wales tourist trade is highly reliant on migrant labour, including outdoor industries (e.g. guided activity holidays) where local knowledge is essential. While some migrants were surprised by such practices, others spoke about developing North Wales in new and innovative ways; viewing the area very differently to local people in regards to land use and amenity value. Similarly to Merthyr, social entrepreneurs are important in this context and **good practice** included the setting up of a marketing cooperative, where self-employed community project developers could share costs and support each other. Although not all members of the cooperative are migrants, it brings together skills and knowledge to help facilitate local resilience and sustainable ways of working.

5.5 Summary

This chapter has identified examples of successful migrant businesses and good practice initiatives to support them. The conditions and support mechanisms for nurturing entrepreneurial activity are variable across the case studies, with social enterprise playing a greater role in Merthyr compared to rural areas. Rural areas can also lack the critical mass of population to support a proliferation of new business ventures. Language, legal requirements and start-up costs have been identified as consequential barriers to entrepreneurship for many migrants, in addition to the time commitment required on top of family/care commitments.

¹⁶See: www.merthyrbusinessclub.co.uk/index.php/business-awards

SECTION 6: SERVICES AND EDUCATION

6.1 Introduction

This chapter examines the pressures and implications from international migration on public services, and how responsible authorities are addressing these issues. With some migrant workers choosing to settle in Wales, education is a key area where some of these challenges have manifested. This chapter will begin with a brief discussion of the interactions of migrant families with health and housing, before focusing more extensively on education services

This discussion will be contextualised with data on Non-English or Welsh first language pupils collected through the Pupil Level Annual School Census (PLASC). This records pupils from a range of different ethnic backgrounds who require English as an Additional Language (EAL) support teaching. Some EAL learners may also be in Welsh medium learner settings where they will have Welsh as an Additional Language (WAL).¹⁷ The key issues resulting from increasing migrant pupil numbers will then be examined; drawing on stakeholder interviews with LEA officers and teachers in the case studies, as well as information provided by survey respondents with school-aged children.

6.2 Health

90% of all the migrants surveyed were registered with a local GP; those who hadn't were largely recent arrivals during the past six months. This follows efforts by local authorities to encourage this practice (with it not being a requirement in Poland). For instance, the Hywel Dda LHB worked with the PWMA in Llanelli to produce bilingual Polish-English leaflets and a bilingual language-line for remote consultations. Across the case studies, 100% registration rates were recorded amongst the Filipinos surveyed in Merthyr and Poles in both Welshpool and Llanybydder/Lampeter; with the meat processing plant in the latter playing an active role in encouraging its workers to register.

Finding a dentist, NHS or otherwise, appeared to be more problematic. This was particularly noted in the North Gwynedd region, where respondents had waited several years for an initial appointment. The contribution of skilled Polish migrants—GP practitioners and Dentists—was recognised by stakeholders as important both in terms of filling skills shortages in the NHS and for engaging the wider Polish community with those services.

Opinion varied as to the value of NHS services, with negative perceptions often resulting from misunderstandings fostered by language barriers. There were reports of incidents in Merthyr where migrants were prescribed drugs, treatment and even operations for conditions they don't fully understand. Conversely, there were reports of migrants not getting the treatment they need

¹⁷ The term 'WAL' differentiates these learners from English first language speakers in Welsh medium settings.

because of effective translation. Health boards do not generally have designated translation budgets and individual departments would therefore have to pay for these services.

The resultant reliance on children or, less frequently, untrained migrant staff (e.g. hospital cleaners) to assist with translations is a dangerous trend across the case studies, particularly when dealing with sensitive and complex medical conditions including mental health. Accessing appropriate support for the latter was commented upon by stakeholders including NWREN in North Wales as a serious challenge facing migrant workers, who encounter many psychological pressures associated with living away from home. It was reported that some Poles return to Poland regularly to get check-ups, or use on-line counselling services in Poland via Skype.

As the demographic profile of A8 migrants has shifted towards more women and families, ensuring access to safe and appropriate health services has been highlighted by stakeholders across Wales (and rural Wales particularly) as an ongoing requirement. A Hywel Dda LHB officer noted how this requirement became evident several years ago: '*we had areas with women coming in about to give birth and we knew nothing about their medical history*'. Several Welshpool respondents had given birth since living in the UK and highlighted the provision of language support during pregnancy as crucial. In addition to primary and secondary care, socio-economic factors such as poor housing and diet related to low-incomes can contribute to high levels of ill health amongst migrant families.

6.3 Housing

Housing had been a problem during the initial wave of A8 migration to Wales, with employment agencies arranging poor quality multi-occupation housing for new arrivals (Spencer, 2007). Some recent arrivals surveyed in Llanelli and North Wales were living in accommodation provided by employers; however, most migrants quickly move on to private rented accommodation once settled. Issues with agency-linked accommodation have declined considerably in recent years as knowledge and experience is passed-on within migrant communities. In general, finding better quality accommodation becomes easier the longer resident in Wales, as migrants are able to provide employer references and develop stronger support networks.

The majority of survey respondents across the case studies were living in rented houses or flats. Housing requirements of A8 migrants have changed in recent years in areas such as Welshpool and Llanybydder/Lampeter; with the shift from single male workers living in multiple occupancy houses towards the private rental of family-sized houses (preferably close to school facilities). Very few respondents lived in social housing as the majority were working. Some longer-established migrants owned their own houses, with this most common amongst Filipinos in Merthyr. However, newer Filipino arrivals can encounter serious housing problems due to their difficulties in securing full-time work. A small number arriving on student visas are fortunate to stay with family members; others live in poor quality private sector housing or expensive accommodation provided by

educational institutions. Lack of jobs, combined with lack of entitlement to benefits, means that Filipinos can easily end up in debt and/or on the streets if things go wrong (*The Guardian*, 2011). CAB statistics confirm that many Filipino migrants in Wales struggle to cope (CAB, 2011).

The increased demand for rental housing amongst migrants created new challenges, with inflated rental prices and unscrupulous landlords noted in Merthyr and Llanelli. In the North Wales and Llanybydder/Lampeter case studies, survey respondents had encountered problems finding good quality and affordable rented accommodation due to the age of available rural stock. Several respondents noted problems with damp yet high rental prices: '*The standard of the accommodation is low in relation to the high rent the landlords are asking for*'. Only one respondent (in Llanelli) reported being homeless since arriving in the UK; this is markedly lower than the one-third of CEE migrants found to have experienced some form of homelessness by Shelter Cymru (2010).

6.4 Education: Pupil Numbers and Local Schools

Merthyr

PLASC data indicates that the number of pupils requiring EAL support in Merthyr increased from 248 in 2008/09 (2.6% of total pupil population) to 441 (4.8%) in 2011/2012; including 69 Polish, 44 Portuguese and 25 Filipino pupils. Using this data, Merthyr has the fifth highest proportion of EAL learners across all Welsh local authorities. Most recent figures from the local authority in Merthyr recorded 274 migrant pupils in local primary schools, 155 in secondary schools and four in special schools; with 26 different languages spoken.

Many migrants attempt to get their children into the school with the highest number of pupils from their home country; generally the local Catholic school. St Mary's Catholic Primary School provides a clear example of the challenges this presents, having experienced substantial changes to its ethnic and first language profile over recent years. The school currently has two-hundred pupils in total. Eighty-three (the majority Portuguese, with some Polish) have EAL learning needs.

North Wales

PLASC data for Gwynedd local authority records 475 pupils receiving EAL support in 2012.¹⁸ This includes a substantial number of pupils (69) from the South Asian community who account for 16.7% of county EAL learners in 2012. Pupils from A8 countries represent 8.2% of EAL learners in 2012, with the majority (28 out of 34) from Polish families. There are smaller numbers of Filipino and Portuguese pupils. Of further note is the relatively high number of EAL learners from Arab backgrounds – related to recent trends in hospital recruitment in Bangor.

¹⁸ PLASC data records 175 EAL learners in Gwynedd in 2008/09. However, with the county-wide EAL service only established in 2009 the accuracy of this data is questionable. The current EAL coordinator for Gwynedd estimated that there are around 450-500 pupils who now need EAL support, compared to 350 in 2008/09.

A number of migrant communities have sprung up around schools across North Wales over the last decade, increasing pressures on local education services to provide appropriate resources for teaching and support; this is more complex in North Wales by the wider demand for Welsh. The Welsh-Medium Education Strategy requires local authorities to demonstrate that they are planning Welsh-medium education in response to parental demand. In Gwynedd and Anglesey, Welsh is the language of the classroom and any child requiring EAL support also requires WAL support.

Carmarthenshire

Pupils receiving EAL support in Carmarthenshire increased from 570 in 2009/10, to 814 by 2011/12. Data from Carmarthenshire County Council going back to 2005 indicates that part of this increase is from within longer-established migrant communities: EAL pupils from South Asian countries increased from 25 in 2005 to 128 in 2012, and Filipinos from 49 to 106. Nonetheless, the most dramatic impact in recent years has come from Polish pupils, with a ten-fold increase from 30 Polish EAL learners beginning school in 2005 to just over 300 by 2012. Much of this increase has been concentrated at a number of Roman Catholic schools in the Llanelli area.

The majority of Polish children in the Llanybydder/Lampeter case study attend Ysgol Bro Pedr School in Lampeter, Ceredigion. This is a mixed three – nineteen school with over 1000 pupils. The support in place for EAL / WAL learners (with all primary aged children learning Welsh) at Ysgol Bro Pedr is key to its popularity with Polish families, in comparison to the traditional village primary school in Llanybydder. Numbers of Polish pupils at the school have increased rapidly over the last five years, from single figures to around 70 in primary and 60 in secondary as of spring 2013.¹⁹

Powys

PLASC data indicates that EAL pupils in Powys increased from 306 in 2008/09 (1.6% of total pupil population) to 403 (2.2%) in 2011/12. A breakdown of EAL learners for 2012 records 91 Polish pupils in the county. Of these, two-thirds are at primary level; indicative of UK-born Polish children entering the schools system. There are few pupils from other new EU countries by comparison, with 11 pupils from A8 countries and four from the A2 in 2012. The other major group in Powys schools are Nepali pupils as a result of the Gurkha regiment in Brecon, with 88 EAL learners in 2012.

All of the survey respondents in Welshpool had children or, in one case, grandchildren attending Oldford Infant School where the number of Polish pupils has increased from two pupils five years ago to 20 in 2013, which equates to 41% of the school population. The support offered by Oldford School has attracted further Polish families. This has led to concerns of a 'ghettoization' effect developing in this area of Welshpool but has also led to positive changes in the school's profile.

¹⁹ Data provided by Ceredigion County Council education department indicates that 102 Polish pupils were enrolled at Ceredigion schools in September 2011, which represents a five-fold increase from the 21 in 2007. Of the other A8 and A2 nationalities, there were only six Hungarian pupils in Ceredigion schools in September 2011. However, recent increases in Hungarian employees in Llanybydder could see this figure increase.

6.5 Education: key issues and challenges

The data summarised above demonstrates a general trend of increasing numbers of pupils from migrant families requiring EAL and/or WAL supported learning across all case study areas. In the Valleys and urban Carmarthenshire, numbers of pupils from newer A8/A2 groups have increased alongside the on-going intake from longer-established migrant communities. However, the rate of increase in Polish pupils has placed new and additional demands on existing support services. In Carmarthenshire this has necessitated targeting support at schools in larger towns with the greatest numbers of EAL pupils; with little provision to outlying rural schools such as Llanybydder. In rural North and Mid Wales, there had been limited past experience of pupils with EAL / WAL needs on a large scale, with the LEA and individual schools required to respond and adapt to the situation as it has developed e.g. Gwynedd county-wide EAL service was established in 2009.

There are common issues and specific local challenges across the case studies. These include:

Low levels of attendance:

Attendance was a noted problem at infants and primary level in Merthyr and Welshpool, with pupils in this age cohort more reliant on parents for getting to/from school. In several cases, extended family had been brought to the UK to assist with childcare. Other contributory factors towards absenteeism include extended summer holidays in their home country (common amongst Polish and Portuguese families) and pupils being kept away from school to help parents with appointments. As a stakeholder noted: *“We have found is that if parents aren’t learning the language as quickly as the children they are using their children as translators, so for example, if they need to go to the doctor’s, the dentist’s or whatever, and that does cause an attendance issue.”* Attendance issues can also be a consequence of cultural differences; when a young person is unwell, for example, parents often keep them away from school longer than the recommended 48 hours. Children in Poland also do not attend school full-time until aged seven.

Variable attainment:

Educational attainment amongst migrant pupils was regarded by interviewees as being generally very good, with most pupils quickly exceeding the language capabilities of their parents. However, attainment can also be severely affected by factors including pre-existing level of English language ability; speed of language acquisition; availability of appropriate academic and pastoral support; and, importantly, the pupil’s age of first entry into a UK school. The latter is particularly an issue when migrant pupils enter at secondary level, in terms of getting their English to the level needed to fully access the curriculum; as noted by this teacher in Lampeter: *‘The range goes from fluent to doesn’t have two words... secondary is an issue because experience has taught me, and statistics have shown, that the later they come in, the less chance they have of becoming functional*

academic English before their exams.' At the same time, CEE pupils can be very advanced in maths compared to British children of the same age, yet are put into lower sets due to their weak English.

Oldford Infant School in Welshpool provides a **good practice** example, with the development of a language acquisition model to support its Polish pupils from an early age. Polish pupils entering the school aged three will develop a social and functional use of English very quickly; however, assessing and supporting the acquisition of cognitive English skills is more challenging. With limited experience within rural Powys, the school and LEA looked to examples from Swansea, Newport and particularly Wrexham.²⁰ Welsh medium education also applies similar principles, which could be drawn on to develop an approach based on language immersion and non-segregated learning. This is supplemented by small group learning (with a Polish teaching assistant) based on individual pupil needs. Whilst this approach is still being developed, the attainment of Polish pupils has generally been on par with, or better than, indigenous learners.

Overall, most Polish migrants in Merthyr, Welshpool, North Wales and Carmarthenshire found their child's education to be of a good standard. Portuguese migrants expressed some concerns about children not making progress as quickly in Wales; this could be a consequence of learning being spread over longer periods in Wales. None of the Filipinos surveyed in Merthyr voiced any concerns about school or the education system; although higher education is becoming more problematic.

Native language usage:

There are debates around the benefit of using languages other than English or Welsh in the school environment. Whilst Polish parents, for example, are keen for their children to be fully immersed in English at school, the head teacher at Oldford School questioned whether they should also support the development of the Polish language. In Merthyr, one interviewee highlighted tensions between schools and staff that think English or Welsh should be the only languages spoken in local schools, and those who argue for wider language provision. Usage can have consequences for integration, but there are also wider issues concerning declining higher-level ability for second generation migrants. As noted by a stakeholder in Welshpool, this is an issue that could have repercussions if families wish to return to Poland in the future for university or work.

English and Welsh language:

In North Wales particularly, but also Llanybydder / Lampeter, the strength and primacy of the Welsh language presents challenges for migrant children entering the education system. Again, a key factor is pupil age, with children at primary level demonstrating the ability to acquire English and Welsh simultaneously, whilst older children are more likely to struggle. There are still a number of

²⁰ Some similar process had been gone through by schools with large numbers of Nepali children in Brecon, although here a more developed support network of parents existed. Instead, Wrexham provided good practice examples as a semi-rural local authority with a substantial Polish migrant population. The 2011 Census records 3,166 residents of Wrexham as having been born in an EU Accession (A8/A2) countries.

Welsh Language Centres in Gwynedd, where some migrant children are sent for a term to prepare them for Welsh medium education. Although problematic in some respects, a stakeholder suggested that they had great value for helping new arrivals to initially differentiate between Welsh and English; a problem also noted by teachers in Lampeter.

All schools in Gwynedd are bilingual, yet many migrant families are unaware of the role of Welsh in the classroom prior to moving to these localities. Lack of information provided to migrants before they arrive in North Wales was identified as a major source of problems by stakeholders. Schools in Welshpool and Lampeter noted that communicating with Polish parents was one of their biggest challenges and had at times required using pupils as translators. A Polish classroom assistant was extremely valuable at Oldford School for meetings with parents and sending bilingual letters home.

Integration:

At primary level there are few issues with integration amongst pupils of different nationalities. However, racial tensions were observed to manifest when pupils moved up to larger school environments due to social pressures and increases in the numbers and visibility of migrant pupils. In Welshpool stakeholders noted that verbal abuse becomes more common when pupils moved from Oldford Infants to Maesydre Junior School. The dynamics of this infant to junior transition is specific to the Welshpool area, with pupils in other places with large Polish populations such as Llanybydder moving from primary to secondary school at the slightly more mature age of eleven.

Problems between pupils can reflect parental attitudes and circumstances, as evidenced in Welshpool where the changing profile of Oldford School had raised tensions with the local community. Oldford Estate is a long-standing Communities First area, where pre-existing socio-economic problems have negatively influenced perceptions of the economically active Polish families moving-in. However, the contribution of these families towards ensuring the sustainability of the school was keenly emphasised by the head teacher: *'I had to have a meeting and explain to parents that without the Polish community the school would be closed. It wouldn't exist.'*

Support and resources:

Across all case studies, resource issues in terms of numbers of dedicated EAL support staff employed both in schools and operating county-wide were noted. This is magnified by the time intensive nature of support required, as noted by an EAL teacher in Lampeter: *'You've got to pay such close attention to all the kids you're monitoring, all the results all the time, as well as teaching, as well as doing everything else. It's constant; it's a pastoral job as well.'* In Merthyr and Llanelli, the relative concentration of EAL pupils has made it easier to respond to an extent, in terms of justifying bringing in Portuguese or Polish-speaking teachers, teaching assistants and parental volunteers to

support a large number of pupils at one school.²¹ Whereas, rurality presents specific challenges in terms of providing adequate support to widely dispersed schools. This is the case in Powys where, in addition to clusters of pupils in towns such as Welshpool, an education stakeholder estimated that fifty per cent of county schools have at least one EAL pupil. Similar issues are evident across the North Wales region, with additional demands related to WAL provision. Here stakeholders noted how some EAL teachers will travel to numerous schools across a wide area on a weekly basis due to a lack of funding and support. The EAL service in Gwynedd often buys in Polish speaking EAL teachers from Conwy. Other EAL services in North Wales source help and support from England.

In contrast to larger urban education authorities, rural counties have been faced with a lack of pre-existing support mechanisms (with limited history of ethnic minority populations) or teams of local authority support staff when responding to rapid changes in their pupil populations over the past decade. It was recognised by stakeholders that solutions have to be 'local' and context specific: *'That's the rural picture isn't it... It has its challenges but the solutions have to be local, I have no doubt about that. We are too diverse as a county to offer anything central.'* The concentration of a singular migrant ethnic group (i.e. Polish) at schools in Welshpool and Lampeter, whilst problematic in other ways, has allowed for specific resources to be bought in that language.

6.6 Summary

Demands on services have changed along with the shifting migrant demographic towards family groups. The need for family-sized rental accommodation has highlighted shortcomings in the quality of existing rural housing stock, whilst ensuring linguistic support so that migrant families can safely access healthcare is an ongoing requirement. Supporting the mental health of migrant workers has also been recognised as a key issue requiring attention.

With increasing numbers of pupils from migrant backgrounds entering the education system in Wales, schools are facing a number of interrelated challenges related to language acquisition, attainment and integration. However, with the age and ability of pupils varying substantially, learning needs and the level of support required differs greatly between individual schools. Whilst responses therefore need to be context-specific, there is the potential for rural schools to learn from the experiences of LEAs with greater experience of supporting pupils from minority ethnic backgrounds.

²¹ Since early 2013, Merthyr Local Authority has been required by the Education Watchdog Estyn to improve the support provided to struggling schools more broadly. The LEA is addressing these concerns by translating attendance documentation into Polish and Portuguese; workshops for parents are also being developed through a Social and Emotional Aspect of Learning (SEAL) program. There is also more of a focus on understanding the culture of migrant pupils and of overcoming bullying more generally.

SECTION 7: CONCLUSIONS AND POLICY RECOMMENDATIONS

7.1 Conclusions

The aim of this report was to examine the situation and experiences of international migrant workers in rural Wales and the South Wales Valleys by utilising mixed methods of statistical, survey and interview analysis. This was approached through seven objectives focused on different aspects of migration including demographic trends, the economy and employment, public services and community cohesion. We now return to these objectives and summarise the main findings. We consider where change has occurred, where issues still need to be addressed and where new challenges have emerged since the WRO's previous migration study from 2008.

1) Key trends in international migration to rural Wales and the South Wales valleys

The data analysis confirmed the consequence of post-EU enlargement migration to rural areas of Wales. In comparison to other types of (EU and non-EU) international migration, A8 migrants have been much less concentrated in urban areas. This distribution has been structured by employment opportunities in rural-linked sectors, leading to the concentration of migrant workers in a number of relatively small rural communities. Here the migrant population, whilst less in number, can be much greater as a proportion of the resident population than in urban areas; placing particular pressures on rural services and communities. Larger towns such as Llanelli and Bangor are important through their integration with the surrounding rural areas; providing employment opportunities, public services and support networks to more dispersed migrant communities.

Migration from Poland has continued to dominate A8 migration in rural Wales and the Valleys. In rural Wales, this has led to the development of largely monocultural migrant communities, whereas in Merthyr the presence of other sizeable migrant groups presents different challenges for community cohesion (see point three). Three-quarters of A8 migrants were aged under 35 when they registered with the WRS; with subsequent trends towards settlement meaning a proportion are now ageing and having families in Wales. Related to this has been an increase in female A8 migrants, to the extent of reversing the male dominance that existed prior to 2007.

Across Wales, the onset of recession has impacted on employment opportunities and economic stability for overseas and domestic workers, with the first signs of a slow-down in new A8 migrants manifesting in 2007. In this context, there is uncertainty as to the numbers of A2 (Romanian and Bulgarian) nationals likely to arrive in the UK from 2014. However, with 50% of registrations by A2 migrants under the SBS scheme (2004-2011) occurring in rural areas, it is reasonable to hypothesise that rural Wales will again be impacted by this next phase of EU enlargement.

2) Updating the 2008 survey of migrant workers

In addition to longer-standing Filipino and Portuguese communities in Merthyr, a large proportion of migrants amongst the sample groups in Welshpool and parts of North Wales have been resident in Wales for over five years; motivated both by economic factors and the presence of family and friends. The majority are living with family members and have children enrolled at local schools, strengthening links to place and community. These migrants have been in Wales long enough in some cases to develop a good level of English and better standard of accommodation; although many still struggle to find employment in vocations for which they are (often highly) qualified.

Increasing trends towards settlement are also becoming evident amongst Polish migrants in Merthyr, Llanybydder/Lampeter and Llanelli, and for many this reflects a change from migration as a short-term economic decision ('guestworkers') towards something longer-term. Many (usually male) guestworkers had left family in their home country, with the intention to return after several years of work. Whilst some have since returned, others have remained in Wales and subsequently been joined by their partners, children and sometimes extended family. However, this transition towards settlement is not straightforward and many migrants remain uncertain about their future plans; retaining strong material and emotional connections to their home countries, and having to make complex decisions involving the sometimes differing aspirations of multiple family members.

3) New EU labour migration in the wider context of international migration to Wales

Merthyr Tydil provided a context for examining the experiences of A8 migrant workers in relation to other EU (Portuguese) and non-EU (Filipino) migrant groups. Whilst Merthyr was already embedded in these established migratory pathways, the scale and intensity of post-enlargement migration has been unprecedented; the Portuguese and Filipino communities are now three-tenths and two-tenths the size of the Polish population, respectively (2011 Census). New EU migration has therefore brought challenges for other migrant groups, as well as for recipient communities. For the Portuguese in Merthyr, this has been in the form of direct competition for jobs. For Filipino migrants, wider immigration policy changes in the UK have encouraged A8 migration whilst placing restrictions on nursing visas for workers from outside of Europe.

In addition to economic impacts, there is competition for the physical and visible occupation of space within the town itself between Portuguese and Polish groups, as the latter become a regular feature of life in Merthyr. The tensions between these two groups are indicative of the similarities between them, whereas the specialist occupational pathways and family-orientated culture of Filipino migrants brings them into less direct competition for jobs, resources and status in Merthyr. At the same time, research has revealed common experiences across all of the migrant groups included in this study in terms of motivations and aspirations for migration, social integration, language barriers, service usage and support networks. This would challenge the rationale for

treating new EU migration as a distinct case, other than in terms of scale, and point to how future research could engage with a greater range of migrant groups from EU and non-EU countries.²²

4) Pressures and implications from international migration on public services

Education services across Wales have experienced new and additional demands resulting from international migration, with increasing numbers of pupils from migrant families requiring EAL and/or WAL supported learning. Whilst additional funding is provided through The Ethnic Minority Language and Achievement Project (MELAP),²³ it has been the responsibility of schools in dialogue with local education authorities to respond appropriately to local demand. This has necessitated rural schools taking on a proactive role in developing their own coping strategies, with the language acquisition model being developed at Oldford Infant School providing a good practice in this regard. Challenges remain around issues of social integration, both at pupil and parent levels. However, a lack of staff time and resources often means that additional extra-curricular measures towards encouraging social integration remain beyond the current resource capacity.

In regards to other service areas, problems A8 migrants initially encountered with multiple occupancy housing have largely been overcome through shared knowledge and experience. However, increased demand means that the availability of rental accommodation of suitable size and quality for families is a problem in rural areas especially. Local health boards have made progress in ensuring access to general health services for migrants; bi-lingual language line schemes were highlighted as good practices in this capacity. However, some health needs remain unmet, with reports of migrants failing to receive the required treatment due to language barriers. The provision of specialist support for conditions including mental health is particularly problematic, with rural areas often lacking the critical mass to justify dedicated translation services.

Despite 'welcome pack' initiatives by some local authorities, very few of the migrants surveyed had received any official information about living and working in Wales. Instead, organisations such as the Polish Community of the Valleys Association in Merthyr and the Polish-Welsh Mutual Association in Llanelli are recognized good practices for the free information and advice they provide. Social enterprises have started to offer support and knowledge sharing to migrants in Merthyr and North Wales. However, in the context of public spending cuts, the growing capacity for self-help and self-reliance within migrant communities has become increasingly important.

²² The extension of full labour market mobility to A2 nationals could introduce greater competition with Polish migrants in areas of rural and non-rural Wales; here the experiences highlighted in Merthyr between migrant groups could provide a valuable point of reference.

²³ The Welsh Government ran a three year project (ending in August 2013) focusing on the particular educational needs of ethnic minority children. MELAP, part-financed by the European Social Fund, allows local education authorities in Convergence Funding areas of Wales to draw down additional funds to support for children with EAL needs.

5) *Economic contribution of international migrants, including through entrepreneurship*

The working conditions and experiences of migrant workers can vary substantially in relation to individual skill levels and language ability. Overall, however, the majority of A8 and Portuguese migrant workers surveyed remain in lower-grade and lower-paid manual employment, with limited evidence of occupational mobility. Migrants occupy positions that have traditionally been difficult to fill from within the local labour market (e.g. in meat processing) and have played a vital role in underpinning some Welsh businesses with their skills and productivity. Changes have come with the lessening role of employment agencies in migrant recruitment whilst new challenges have emerged during the recession, as employers seek to maximise profits. Migrant workers now face similar circumstances to many other low-income families in Wales related to economic marginalisation. However, these similarities can be obscured as a discourse of migrant as job takers has emerged in relation to labour market pressures in parts of Welshpool, Llanelli and Merthyr.

At the same time, a more positive discourse around Polish and Portuguese entrepreneurs as facilitators of redevelopment was evident in Merthyr. Merthyr has the critical mass of population in the town to support new business ventures and initiatives. This is largely absent in rural areas and entrepreneurship has thus been relatively limited. Social enterprise initiatives in Merthyr and North Wales have worked to encourage entrepreneurship through enabling access to information and advice; elsewhere individuals have been required to be more self-reliant in seeking out appropriate support. Migrants face substantial barriers to entrepreneurship, including language, start-up costs and legal requirements. Mobile business practices bypass some of these constraints, and are sometimes undertaken by migrants out of necessity to supplement other incomes. However, with many survey respondents expressing entrepreneurial ambitions, the recommendation from the WRO's 2008 report to more effectively harness the skills and potential of migrant workers remains pertinent. This includes better recognising the resource potential of the numerous over-qualified migrants with professional and vocational skills, who currently work below their ability in Wales.

6) *Integration of international migrants with local communities in rural Wales*

A common theme across the case studies remains the persistence of language barriers across all aspects of life in Wales including employment, access to services, educational attainment and social integration. Language development may not have been regarded as an immediate priority for all new economic migrants. However, as intentions have changed from 'guestworking' to 'settlement' the necessity for English and, in some cases, Welsh language skills have become apparent. Language is the difference between day-to-day coping and being able to live more fully beyond the migrant community including pursuing options such as entrepreneurship. Most migrants acknowledge this and some develop their skills accordingly, however, and despite widespread

ESOL provision, others encounter difficulties learning around shift-work and care commitments. This highlights the need for more flexible language learning, rather than simply more provision.

The majority of migrants surveyed continued to look within their own communities for friendship and support as language, working hours and instances of discrimination remain as social barriers. At the same time, processes of integration are slowly occurring as migrant families become settled in Wales. The transition from guestworker to settler involves establishing more of a commitment to and embeddedness within the locality of residence. For some this is through putting their children into local schools, attending school events and saving towards a house, for others starting a business and participating in local initiatives. Over time, organisations such as the PWMA in Llanelli have worked more towards social integration, as demands from new migrants have lessened. In the rural case studies, third sector organisations with a broader social inclusion focus have provided vital migrant support, but less of a role in community cohesion. Schools fulfil an important social function in rural communities, where migrant families can be isolated and/or public spaces for interaction are limited. They can, however, also be a site of cultural tensions as demonstrated in Welshpool.

7) Examples of Good Practice and Recommendations

Recommendation 1: Greater provision of language learning tailored to particular needs, in order to overcome persistent barriers to social integration, occupational mobility and service usage:

- A more flexible range of language learning options and styles (beyond ESOL) to encourage participation amongst migrant workers with variable shift-working and care responsibilities. Good practices include 'survival English' classes held by the PWMA and school-based classes for Polish parents. A similar range of options could be promoted for Welsh learning.
- Many migrant workers are unable to gain employment in their trained professions due to an inability to communicate in the higher-level technical language required. More specialised language sessions could assist with this next step in the labour market.
- There is a need for service providers to consider how costs for translation services can be more effectively shared across departments (e.g. health, education) to improve consistency of service and minimise the use of migrant children in this capacity.

Recommendation 2: Continue to promote the integration of migrant workers with local communities and enhance community cohesion between all groups:

- Cohesion initiatives need to effectively engage migrant and local populations to avoid heightening existing tensions around access to jobs and services. This issue is drawn into sharper focus by the recession and economic pressures faced by many residents regardless of nationality.

- Wrexham offers examples of good practice that have worked towards involving all members of the community in cohesion issues. 2009 saw the launch of the 'One Wrexham Charter of Belonging', which represents a public statement on values of equality and integration.
- Consideration needs to be given to the availability of physical spaces that allow different groups to interact. Schools can potentially play an important function in rural communities, but this can only come about through the allocation of *new funding*; teaching staff are already straining to meet the growing requirement for EAL/WAL supported learning.

Recommendation 3: Continue to support the work of specialist advice and advocacy organisations, including the expansion of satellite services to rural areas lacking in support:

- The Polish Community of the Valleys Association in Merthyr and the Polish-Welsh Mutual Association (PWMA) in Llanelli provide good practice examples of organisations that offer support to new arrivals and educate migrant workers about their legal rights; these organisations also play an important longer-term function in community cohesion.
- The effectiveness of the Siawns Teg initiative in Powys was demonstrated by increasing levels of self-reliance and resilience amongst the Polish migrant community.
- Similar models might be adopted in other areas, particularly rural areas lacking in support. The establishment of an outreach of the PWMA in Llanybydder should be encouraged.

Recommendation 4: More effectively recognise and harness the professional and vocational skills of migrant workers:

- Many migrant workers continue to be over-qualified in their current employment. This is an inefficient use of the labour resources they represent, particularly when many possess skills absent from local labour markets. Working Links has provided training opportunities for some migrants to convert their vocational qualifications into a form recognised in the UK.
- Employers have sought the assistance of the PWMA to fill specific vacancies. This good practice could be developed by encouraging migrants to register their skills with brokers who facilitate links with employers, including SMEs seeking to grow their business in rural areas.
- Migrant women can face particular challenges in rural areas, where many of the professions they are qualified in place a high value on the ability to speak Welsh. There is a need to raise early awareness of this requirement and encourage Welsh learning alongside English.

Recommendation 5: Encourage entrepreneurial potential by reducing barriers to information and start-up finance:

- Amongst the growing number of migrant entrepreneurs in Merthyr, many highlighted the positive influence of social enterprise such as the Y Bont initiative on their business success.
- This recognises the importance of physical spaces where migrants can seek advice, receive signposting to other appropriate forms of support and discuss experiences with others.

- Business start-up costs are prohibitive for many migrants facing various forms of financial exclusion. Consideration should be given to how Welsh Government schemes for new businesses take account of these issues. Credit Unions offer a valuable financial service and this model might be expanded to assist with elements of business start-up.

Recommendation 6: Encourage sharing of knowledge, experience and good practice between schools in regards to the provision of EAL / WAL supported learning

- In contrast to urban areas, large rural counties are less able to centralise EAL/WAL teaching resources due to the provision of support to dispersed schools with varying learner numbers. A greater rural weighting should be given to the allocation of funding for this purpose.
- Schools are required to be responsive to local context, issues and demand. Nonetheless, there are some common issues across rural and non-rural areas in regards to EAL supported learning such as assessing levels of cognitive language acquisition.
- Better mechanisms for the sharing of knowledge, experience and good practice between schools across Wales could be developed.

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APPENDIX 1: Literature Review

A review of relevant reports on International Migration to have been published since the WRO's previous migration study was undertaken in 2007/08:

2007

Anderson, B., Clark, N. & Parutis, V. '*New EU Members? Migrant Workers' Challenges and Opportunities to UK Trades Unions: a Polish and Lithuanian Case Study*'. COMPAS Report for the Trades Union Congress, 2007

Summary: Key conclusions are that many Eastern European migrant workers face exploitation in Britain; that migrant workers could easily be paid better and what is happening is exploitation, not economics; and that migrant workers need assistance to secure their rights.

Commission for Rural Communities (CCR) '*A8 migrant workers in Rural Areas: Briefing Paper*', January 2007

Summary: This paper provides an evidence base on current numbers of A8 migrant workers in rural areas and the impact this is having on rural economies and societies. Areas for rural service providers to address are identified as housing, services, economic dependence and community cohesion.

LANTRA '*A Study of the Business Needs of Those Employing Migrant Workers in the Welsh Agriculture and Production Horticulture Industries*', January 2007

Summary: From the analysis of data it can be seen that businesses and agencies need to have improved methods of assessing individuals' overseas qualifications, skills and experience against the requirements of vacancies in Wales. In addition, more multilingual training and/or support materials would benefit the migrant workers themselves.

North Wales Race Equality Network (NWREN) '*Migrant Workers in Flintshire*', January 2007

Summary: This report attempts to provide an insight into the experiences of migrant workers from a range of perspectives: migrant workers themselves, service providers and national bodies.

Recommendations centre on partnership working, stakeholder involvement, co-ordination of activities, sharing good practice and developing culturally competent practice.

Spencer, S., Ruhs, M., Anderson, B. and B. Rogaly '*Migrants' lives beyond the workplace: The experiences of Central and East Europeans in the UK*' Joseph Rowntree Foundation, October 2007

Summary: This study explores Central and Eastern European migrants access to information, advice and English classes, their accommodation, leisure time, social contact with British people and long-term intentions.

2008

Lemos, S. and Portes, J. '*The impact of migration from the new European Union Member States on native workers*' Department for Work and Pensions, June 2008

Summary: This paper examines the impact of migration from the new EU Member States on the labour market outcomes of natives in the UK. It finds no statistically significant impact of A8 migration on claimant unemployment, either overall or for any identifiable subgroup. In particular, it finds no adverse impacts on the young or low-skilled.

Pollard, N., Latorre, M. and D. Sriskandarajah, '*Floodgates or turnstiles? Post-EU enlargement migration flows to (and from) the UK*', Institute for Public Policy Research, April 2008.

Summary: Research finds that the patterns of post enlargement migration are very different from those of significant waves of migration to Britain in the past; migrants from the new EU member states come to the UK on a temporary or seasonal basis, and regularly visit home while living in

Britain. The fact that post-enlargement migrants are already moving back home supports the hypothesis frequently made in the migration literature that lower barriers to mobility lead to less permanent immigration in the long term.

Speaking Out *'Rural migrant children, families and young people'*, A Joint NCVCCO/NCVYS Policy Briefing, August 2008

Summary: this briefing focuses specifically on rural migrants and examines: the policy context for rural migrant children, families and young people; the legal context; relevant findings from research and practice; possible implications for voluntary and community sector children and youth organisations; and useful resources in relation to this issue.

Sales, R., Ryan, L., Rodriguez, M. L., and A. D'Angelo, *'Polish Pupils in London Schools: opportunities and challenges'* Project Report, December 2008

Summary: The research raised a number of issues and concerns and suggested policy responses for various levels, from classroom teachers to national. Recommendations concerned spreading good practice and knowledge; reflecting on practice; teaching resources; staffing; engagement with parents; and improving the information available to parents considering migration.

Threadgold, T., Clifford, S., Arwo, A., Powell, V., Harb, Z., Jiang, X. and Jewell, J. *'Immigration and inclusion in South Wales'*, Joseph Rowntree Foundation/ University of Cardiff, 2008

Summary: The research explored a range of ethnically diverse geographical areas and different kinds of migration, including the views and experiences of both settled communities and new migrants.

2009

Cangiano, A., Shutes, I., Spencer, S. and G. Leeson *'Migrant Care Workers in Ageing Societies: Research Findings in the United Kingdom'* COMPAS, June 2009

Summary: This report explores the potential impact of an ageing population on the demand for migrant care workers. Recommendations include: Increase the funding and status of care work; Retain a migration entry channel for senior care workers; Monitor the long-term need for a migration entry channel for lesser skilled care workers; Improve Government coordination and communication with employers; and ensure access to language and skills training and guidance on cultural norms.

Chappell, L., Latorre, M., Rutter, J. and J. Shah *'Migration and Rural Economies: Assessing and addressing risks'* IPPR, June 2009

Summary: Key recommendations for policy measures that could help rural economies maximise the benefits of migration are: continue to facilitate the movement of agricultural workers; develop affordable and high quality housing in rural areas; review the role of recruitment agencies; extend the remit of the Gangmasters Licensing Authority (GLA) to cover all sectors characterised by vulnerable employment; Ensure migration issues are on the agenda at high-profile rural events; Embed migration considerations in ongoing planning and policymaking processes.

ESTYN, *Local authority support for the education of children of migrant workers*, October 2009

Summary: This report presents Estyn's findings on the quality of provision for the children of migrant workers, particularly from the European Union (EU) Accession states, who attend maintained schools in Wales. The report also comments on the standards achieved by these children.

Home Office UK Border Agency *'Accession Monitoring Report, May 2004 – March 2009'*

Summary: joint publication between the UK Border Agency, Department for Work and Pensions, HM Revenue and Customs and Communities and Local Government providing data on A8 nationals who have registered in the UK between May 2004 and March 2009.

Rogers, A., '*Recession, Vulnerable Workers and Immigration: Background Report*'. COMPAS, April 2009.
Summary: The aim of this report is to provide background information and provisional analysis for understanding the impact of the current recession on vulnerable or precarious workers, including migrants. While most headlines concern unemployment, an equal or greater concern must be work intensification and increased levels of exploitation for those migrants in insecure jobs.

Welsh Government, '*Getting On Together - a Community Cohesion Strategy for Wales*', November 2009
Summary: This Strategy focuses on policy and service delivery areas that research has shown can have a significant impact on how well a community gets on together: housing; learning; communication; promoting equality and social inclusion; and preventing violent extremism and strengthening community cohesion.

2010

Radcliffe, J. and Campbell, J. '*Living in Wales - the housing and homelessness experiences of central and east European migrant workers*' Shelter Cymru / Cardiff University, 2010
Summary: This study provides an insight into the housing experiences and housing histories of migrant workers in Wales and offered an opportunity to explore homelessness (and support provision) with this population.

2011

Department for Communities and Local Government (DCLG) '*International Migration and Rural Economies*', March 2011
Summary: International migrants play an important role in some local rural economies; Gross inflows of migrants, particularly 'new' migrants to rural areas, as captured by WRS data, have declined by over 20 per cent between 2008 and 2009; should levels of migration continue to decline the agriculture sector and parts of the UK where the labour market is restricted are likely to be affected.

2012

McCollum, D. and Findlay, A. '*East-Central European migration to the UK: policy issues and employment circumstances from the perspective of employers and recruitment agencies*'. Centre for Population Change Working Paper, April 2012
Summary: This research draws on interviews with recruitment agencies and employers to shed light on the employment conditions of East-Central European migrants in the UK and the influence of policy and legislative issues on how this source of labour is recruited and employed.

Equality and Human Rights Commission, '*Meat and poultry processing inquiry review: Report of the findings and recommendations*', November 2012
Summary: This review has revealed that the meat and poultry processing sector have taken steps to improve recruitment and employment practices. It also identifies a number of significant problems that warrant further attention by the sector. Recommendations seek to reduce the causes of vulnerability for all workers; hold organisations to account in meeting equality and human rights standards; and promote equality, human rights and good relations.

Mann, R. and Tommis, Y. '*Public Sentiments towards Immigration in Wales*', WISERD / Welsh Government, March 2012.
Summary: Using the 2008 and 2010 waves of the European Social Survey, the report examines regional differences in the UK in people's attitudes towards a range of immigration questions. General attitudes are compared both for different 'types' of immigrants ; as well as attitudes toward the different impacts of immigration – on economy, cultural life and Britain as a place to live

APPENDIX 2: Stakeholder Interviews

National Scoping Interviews:

Name	Organisation
Naomi Alleyne	Welsh Local Government Association
Gladys Hinqco	Cardiff City Council
Anne Hubbard and Selina Moyo	Wales Migration Partnership
Luned Jones	Welsh Government
Aliya Mohammed	Race Equality First, Cardiff and Vale of Glamorgan
Stuart Neil	Welsh Government
Gill Saunders	FAN Charity
Fran Targett	Citizens Advice Bureau
Hugh De la Cruz	Filipino Community Representative
Regina Nash	Filipino Community Representative

Regional Stakeholder Interviews:

Case Study Region	Name	Organisation
<i>Welshpool, Powys</i>	Tony Blunden	Siawns Teg (social inclusion charity), Newtown
	Cecilia Forsyth	ESOL Tutor, Coleg Harlech (Newtown and Welshpool)
	Sheela Hughes	Schools Improvement Team, Powys County Council
	Brendan McWhinnie	Clwyd Alyn Housing Association, Welshpool
	Yvonne Naylor	Headmistress, Oldford Infant School, Welshpool
	Nigel Topley	Powys County Council - School Effectiveness Officer (EAL provision)
	Howard Wright	UNITE - Regional Officer (Newtown and Flintshire)
<i>North Wales</i>	Fatima Grzesiak (x2) and Professor Robert Moore	North Wales Race Equality Network (NWREN)
	Lyn Lording-Jones	English for Speakers of Other Language National Support Project Manager, Coleg Menai Bangor
	David Nix	Gangmasters Licensing Authority

	James Potter	NFU Legal Representative
	Dr Adrian Thomas (x2)	Avalon Advice, Bangor and Pwllheli
	Helen Wharton	EAL Support Coordinator, Gwynedd County Council
<i>Carmarthenshire and Ceredigion</i>	Halina Ashley and Jeff Hopkins	Polish-Welsh Mutual Association, Llanelli
	Allan Card	UNITE – Regional Officer (Pembrokeshire, Ceredigion and Carmarthenshire)
	Michael Goulbourne	Former managing director, Eurostaffing Recruitment, Carmarthen
	Rhian James	PCSO, Dyfed-Powys Police
	Helen Jones	Minority Language Support, Ceredigion County Council
	Peter Llewellyn	Assistant Director of Strategic Partnerships, Hywel Dda Health Board
	Paolo Piana	Director, Llanelli Multicultural Network
	Mike Shaw	Community Regeneration and European Group Manager, Ceredigion County Council
	Sarah Slade	Human Resources Manager, Dunbia, Llanybydder
	Michael Smith	Community Cohesion Regional Coordinator, Carmarthenshire and Pembrokeshire CCs.
	Anna Williams	EAL support teacher, Ysgol Bro Pedr, Lampeter
<i>Merthyr</i>	Matt Childs	Community Cohesion and Minority Ethnic Support Worker, Merthyr Tydfil County Borough Council
	Sarah Bowen (x2)	Education Inclusion Manager. Merthyr Tydfil County Borough Council
	Group Interview (with 3 front line workers)	Citizens Advice Bureau
	Lesley Hodgson (x2)	The Polish Community of the Valleys Association
	Father Ryan	Catholic Parish Priest
	Alison Harris	Partnership Development Officer at Voluntary Action Merthyr Tydfil
	Karen Dusgate	Merthyr Tydfil Housing Association
	Margaret Harris	Head Teacher Bishop Hedley High School

APPENDIX 3: Migrant Worker Questionnaire

A. PERSONAL DETAILS

A1. Gender:

Male

Female

A2. Age:

18-24 25-34 35-44 45-54 55+

A3. What is your highest level of qualification?

School

Vocational / job-related qualification

University degree

Post-graduate qualification

A4. What is your marital status?

Married

Divorced

Co-habiting

Single

A5. Are your family currently living with you here in Wales?

Yes... How many family members are living here with you?

- How old are your children?

No... Are you planning to bring your family here in the future?

A6. How would you describe your ability to communicate in English?

I know a few words

I can speak and understand basic sentences

I can communicate quite well

I am fluent

A7. Have you learnt any Welsh since you have been living here?

Yes...How much? a few words; basic sentences; can communicate quite well; fluent

No

B. COMING TO LIVE IN THE UK

B1. Where are you currently living?

Name of the town/village/postcode.....

B2. How long have you lived there?

Months/years.....

B3. When did you first arrive in the UK? Year.....

What were you doing during the 12 months prior to arriving in the UK? (E.g. student; working in another country).....

B4. Why did you choose to come to this part of Wales?

- Prearranged job
- Heard that jobs were available
- To join family or friends
- Local attractions
- Previously visited
- Other... (please specify)

I would like you to tell me a bit about where you used to live in your home country, and the ways in which you stay in touch with that place.

B6. Where were you living in your home country prior to leaving?

Name of town/village/city and region.....
 Do you still regard this place as your 'home'? Yes / No / Not sure

B7. What were the main reasons for deciding to leave your home country?

.....
.....

B8. Have you returned to your home country since living in the UK?

Yes... How many times? What for?
 No

B9. Are you supporting financially any family members back in your home country?

Yes / No

B10. In what ways do you maintain links with your home country? [Tick all that apply]

- Speak to friends / family by phone or Skype
- Use email, Facebook or other social media
- Read newspapers, watch TV or films from home country
- Follow sports team(s) in home country
- Access to food / drink from home country
- Other? (Please explain).....

Is this important to you?

C. WORKING IN WALES

C1. Are you currently in work?

Yes / No

- Do you have more than one job? How many?

C2. What is your occupation?

C3. Have you held previous jobs in the UK?

Yes... Were they in the same type of work?

No

C4. Did you find your first job in the UK when you were in:

Your home country? How?.....

In the UK? How?.....

[Ask the following Q's in relation to the main job; i.e. in which you earn the most money]:

C4. When did you start your current job?

Month/Year

C5. Who is your employer?

Employed through an agency (name).....

Employed directly by a business / organisation (name).....

Self-employed

C6. Where is your place of work? (Name of town/s)

C7. Do you have a fixed contract of employment?

Yes For how long: start and finish dates?

No

C8. How many hours per week do you work here on average?

Would you prefer more / less / different hours?

Do you feel your hours are normal for the work you do?.....

C9. Is your current employment the type of job in which you were skilled/ qualified in your home country?

Yes

No.... Would you be interested in finding work in your trained field?
Have you had any difficulties finding the kind of job you wanted around here?

C10. Are you currently a member of a trade union?

Yes... Which one?

No

C11. Do you know of people from your home country who have started their own business in Wales? (Type of business, location)

.....
.....
.....

C12. Have you experienced any work related problems in the UK, in your current or previous employment?

Possible prompts: problems with agencies/employers; language skills; health problems; holiday pay and taking leave; verbal abuse; understanding paperwork

.....
.....
.....

D. HOUSING

D1. How would you describe your current accommodation?

House/ Flat/ Bedsit/ Hostel/ Caravan/ Other

D2. How long have you lived there?

D3. Do you rent or own this accommodation?

D4. If renting, are you renting through:

A private landlord

A letting agency

Your employer

The local council

Other foreign workers

Other

D5. Who lives in your household? Please give the number of: Family members
Friends.....
Co-workers.....
Others

D6. Have you had any difficulties finding somewhere to live here in Wales, or with the quality of your accommodation?

No
Yes.....Explain difficulties?
Have friends/family encountered similar problems?

D7. Have you received any help or advice finding accommodation in Wales?

No
Yes... who from? Employer
Charity / advice centre (e.g. Citizens advice bureau)
Friends / family
Local people

D8. Do you have access to the Internet?

No
Yes...where?

E. SERVICES AND HEALTH

E1. Are you registered with a local doctor (GP)?

Yes / No (Why – any difficulties?)

E2. Are you registered with a local dentist?

Yes / No (Why – any difficulties?)

E3. Are you and your family in good health? Yes / no.....

E4. Have you sought support or advice from any organisation about living and working in Wales?

Yes...Which ones? What for? Was it useful?
.....
.....
No

E5. Were you made aware of local laws (e.g. driving, TV licences) when you arrived in the UK/ Wales?

No
Yes...By whom?

E6. Is there anything that would make living in this area easier for you and your family? (E.g. more language classes; more shops; better public transport...)
.....

F. SCHOOL AND EDUCATION

[Ask questions F1-F5 if they answered yes to having children in the UK]

F1. Are your children in a local school?

No
Yes...Name?

F2. Are you satisfied with the standard of education they are receiving?

.....

.....

F3. Have they experienced any difficulties at school?
No
Yes – what? (Language, making friends/integration, attainment)

F4. Are they involved in any out-of school activities / clubs?
No
Yes – what? Sports, social

F5. Have you attended any school-based events or activities?
Yes... Concerts / plays
Parent's evenings
Meetings of school governors
Social activities or classes for adults
Other
No... Any reason why not?

G. COMMUNITY AND SOCIAL LIFE

G1. What do you like/dislike about living around here?
Like:
Dislike:

G2. How many close friends / family do you have living within 10 miles (15 kilometres)?
.....

G3. What proportion (or numbers) of your friends who live close to you:
Are from your country?
Did you know these when you lived in your home country?
Are 'locals'?

G4. Have you been made to feel welcome living in Wales? Please give examples.
.....
.....

G5. Have you experienced discrimination of any kind since you have lived in Wales?
If yes, in what sense?
Is discrimination common?

G6. Do you feel there is a strong sense of community amongst other migrant workers and families in your area?

- Agree strongly
- Tend to agree
- Neither agree nor disagree
- Tend to disagree
- Disagree strongly
- Refused / don't know

G7. Do you feel a strong sense of community with other people who live in your area?

- Agree strongly
- Tend to agree
- Neither agree nor disagree
- Tend to disagree
- Disagree strongly
- Refused / don't know

G8. Do you practise a religion?

No

Yes...Which religion?

G9. If yes, do you practise your religion here in Wales?

Yes...Which service, where is it?

No...Explain the reasons why not

G10. Outside work, do you socialise with other people from your home country?

How often and in what types of places, i.e. Polish shops?

G11. And do you socialise with 'local' people here in Wales?

How often, what types of places / activities?

G13. Has anything prevented you from making friends since coming to live here? (Language, racism, money, working hours...)

G14. What would you say are the main contributions that people from your country make to life here in Wales?

(Prompt: economic, social, cultural)

H. FUTURE PLANS

H1. What would you say are the main benefits you are gaining by working in Wales?

H2. In financial terms, would you say that you are now better off, worse off or about the same compared with your situation when you were living in your home country?

Better off [] Worse off [] About the same []

H3. And would you say that your quality of life is better or worse than when you were living in your home country?

Better off [] Worse off [] About the same []

Why do you say that?

H4. For how long are you planning to stay in the UK?

H5. What are the main factors that influence the length of time you will stay living and working in the UK?

H6. Do you imagine you will remain living in the same place?

Yes...Why is that?

No...Why is that?

H7. What are your future aspirations? (For example, better job, improve language skills, buy a house, have a bigger family, move back to home country...)

Thank you for completing this questionnaire

APPENDIX 4: Sense of Community Data

Table A1: Sense of community with other migrant workers

Do you feel there is a strong sense of community amongst other migrant workers and families in your area?						
	Agree Strongly	Tend to Agree	Neither agree nor disagree	Tend to disagree	Disagree strongly	Refused / don't know
Merthyr - Polish	0%	0%	0%	73%	13%	13%
Merthyr - Portuguese	25%	0%	13%	38%	25%	0%
Merthyr - Filipino	40%	40%	20%	0%	0%	0%
North Wales	5%	26%	32%	16%	21%	0%
Llanelli	0%	20%	30%	20%	10%	20%
Llanybydder / Lampeter	7%	11%	43%	14%	14%	11%
Welshpool	21%	21%	21%	36%	0%	0%

Table A2: Sense of community with other people who live in your area

G7. Do you feel a strong sense of community with other people who live in your area?						
	Agree Strongly	Tend to Agree	Neither agree nor disagree	Tend to disagree	Disagree strongly	Refused / don't know
Merthyr - Polish	7%	33%	7%	53%	0%	0%
Merthyr - Portuguese	13%	50%	0%	13%	25%	0%
Merthyr - Filipino	20%	80%	0%	0%	0%	0%
North Wales	17%	61%	17%	6%	0%	0%
Llanelli	5%	10%	35%	30%	0%	20%
Llanybydder / Lampeter	7%	39%	25%	11%	11%	7%
Welshpool	14%	29%	29%	14%	14%	0%

APPENDIX 5: Y Bont Culture Hub

Good Practice Example:

Y Bont Culture Hub - Making Connections between Peoples, Organizations and Technologies

The overall aim of Y Bont is to develop a space which will enable members from a wide range of cultural backgrounds to integrate within the local society of Merthyr Tydfil and surrounding area and thus increase community cohesion through the development of a blended approach using art, culture and technology.

Project Overview:

- Y Bont aims to empower individuals and assist organisations with a view to engendering community cohesion, community participation and developing greater tolerance and understanding in the Heads of the Valleys area. Its mission is to develop a town centre space that can be used as a resource for families and individuals from differing cultural communities and the general public of the Merthyr Tydfil. To develop within that space a range of services and products that will empower all that use it. The name Y Bont – The Bridge, signifies the role both the space and the work will play in making connections between peoples, communities and organisations.
- Specifically, Y Bont will provide support and signposting for individuals from a wide range of cultural backgrounds, develop technologies that will support their integration into society and provide art based cultural learning. Y Bont will thus enable individuals to; be aware of their rights and responsibilities, to access services, and engage in learning, training, work experience and arts based activities. The longer-term aim is to create opportunities for volunteering, employment and work-experience.
- The project's geographical area of influence is in the first instance Merthyr Tydfil but it is hoped that it will grow to benefit individuals spread across four local authority areas, Wales and beyond. The project will assist not only individuals as beneficiaries, but also organisations both directly (e.g. Merthyr Valleys Homes (MVH) being a pilot for new technological developments) and indirectly (e.g. schools with EAL students having bilingual resources).

5 year Vision:

Five years from now Y Bont will be moving from being an embryonic social enterprise generating 15% of our income from trading, to an emerging social enterprise that generates 30% of our income from trading. That income will be generated through the development and sales of software and other technologies that will facilitate engagement between individuals and organisations. Five years from now we will have engaged with 2,000 project participants through art-based educational and cultural awareness raising activities. In addition, we will have provided training and work experience opportunities for 50 individuals. We will have sold the software to 10 organisations in the UK and internationally and have developed other technologies aimed at organisations and the general public.

Intended Outcomes:

- Beneficiaries will have improved knowledge of the services available to them and feel more confident in accessing these services- without using young people as interpreters.
- Organisations working to engage these communities will have new technological products to facilitate engagement and new data tools with which to engage with funders, internal and external stakeholders.
- Beneficiaries will feel more integrated; have better English language skills, increased knowledge of employment opportunities and the skills needed to fulfil those.
- The wider community will learn about differing cultures and thus community cohesion will be increased.

Example Activities (*dependent on achieving the necessary funding):

- Develop a dedicated space that can be used by individuals from a wide variety of cultural communities and the general public
- Use technologies to facilitate learning and engagement. For example, online classrooms will facilitate learning for shift workers and those not able to attend traditional ESOL classes.
- Host drop in surgeries, a telephone and email advice line and provide information in various languages
- ESOL and ESOL with citizenship classes via live and interactive services
- Volunteering opportunities alongside training and careers advice provision
- Art-based Cultural + Social events