

## EU migration

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- London is a magnet for foreign nationals who come to the capital to live, work, study and visit. No other UK region compares.
- Unsurprisingly, London's share of EU<sup>1</sup> nationals is considerably higher than any other region in the UK.
- For this reason, EU nationals living and working in London need urgent assurances now they can stay in the UK, and should not be used as a bargaining chip in the government's EU exit negotiations.
- A significant number of jobs in London – some 600,000 – are carried out by EU-born workers.
- Certain sectors in the capital are especially reliant on EU-born workers, hospitality in particular.
- There is a significant risk to the London and the UK economy if these sectors lose access to EU labour immediately after the UK leaves the EU.
- A transitional period is needed in those sectors vulnerable to the short-term risk of losing access to EU labour.
- EU exit will create a further spur for government to encourage businesses to recruit more UK workers, but this will require significant long-term investment.
- Investment in labour-saving technology could compensate for the potential loss of EU workers in low-skilled employment (e.g. greater automation in factories).
- But there are limits to how far automation and technological change can replace the thousands of jobs that are carried out in London every day.
- Any new immigration policy for EU migrants cannot simply be an extension of the system used for non-EU migrants.
- However the government chooses to reconfigure immigration policy, a fast-track visa system for skilled EU workers is critical for London.
- There are competing arguments for devolving immigration policy to city regions, but the Government must recognise London is a unique case and should be afforded maximum flexibility.

London's diversity is unparalleled. More immigrants come to live and work in London than any other city in the UK and Europe. This openness has brought the capital many benefits, not least a strong and productive economy creating thousands of new jobs every year. But when the UK leaves the EU, London will have to adapt to a new immigration regime which will place restrictions on EU migrants.

The London Assembly Economy Committee has taken evidence from a range of immigration experts and representatives from key sectors in London to understand the risks and opportunities that might come from changes to immigration policy.

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<sup>1</sup> Any reference to the EU includes EEA countries not part of the EU (Iceland, Liechtenstein and Norway) and Switzerland (neither an EU nor EEA member but part of the single market) as citizens from these countries have the same rights to live and work in the UK as other EU nationals.

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This report sets out these challenges, explores what the future might hold for London, and considers what the Mayor could do to mitigate any risks, and exploit any opportunities from changes to immigration policy.

### International migration into London and the UK

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**Long-term international migration to the UK has increased in recent years.** Total long-term net migration (i.e. inflows minus outflows<sup>1</sup>) into the UK has risen from 299,000 in the year ending September 2010 to 331,000 in the year ending September 2016.<sup>2</sup> This is considerably higher than the government's net migration target of "tens of thousands."

**EU net migration accounts for much of the overall increase.** EU net migration was 165,000 in the year to September 2016 (up from 81,000 in the year to September 2010) compared with non-EU net migration which has fallen from 218,000 in the year to September 2010 to 165,000 in the year to September 2016 (the first time non-EU net migration was not higher than EU net migration). The recent rise in immigration from the EU is partly a result of increasing numbers of migrants from Romania and Bulgaria.<sup>3</sup>

**Work is the main reason for EU migration.** Around two-thirds of immigrants coming to the UK for work are EU citizens, compared to around a quarter of non-EU nationals. EU citizens are also more likely to have a job offer: around 40 per cent of EU nationals migrating to the UK, compared to one in five non-EU nationals.<sup>4</sup>

**Short-term migration<sup>5</sup> has also been increasing.** According to estimates by the ONS, there were 1.2 million short-term immigrants<sup>6</sup> arriving in

England and Wales for a minimum of one month in the year ending June 2014: an increase of 110,000 compared with the previous year.<sup>7</sup> The majority of short-term immigrants do not travel for work but for other reasons such as holidays and visiting family and friends. And almost three quarters leave within three months, with the remaining leaving within 12 months. Of those short-term immigrants that do travel for work, almost all (91 per cent) arrive from the EU (125,000). In the year ending June 2014, there was a 33,000 increase on the previous year which was largely a result of immigration from Romania and Bulgaria (29,000 in 2014 compared with 12,000 in 2013).

**By any measure, London's short-term and long-term migration is higher than any other region in the UK.** Excluding figures for the South East, London's net migration of EU and non-EU nationals in 2014-15 (130,000) was larger than all other English regions combined. London's short-term migration was also considerably higher: 60,000 in 2013-14.<sup>8</sup>

**There is often confusion about how short-term and long-term migration is defined.** While students are generally considered short-term migrants, they are included in long-term migration statistics as the majority stay in the UK for more than 12 months. In 2016, the number of people immigrating for more than 12 months to study was 134,000;<sup>9</sup> around two-thirds of which were non-EU nationals. And while this figure was the lowest estimate since 2002, it still represents a sizeable share of migration inflows (around 20 per cent).

**Separating students out from any net migration target would provide a clearer picture of migration trends.** As the majority of students are temporary, excluding them from any future target would help to

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identify those immigrants intending to stay in the UK permanently. Sunder Katwala, Director of British Future, told the Committee that reporting students separately would create a more informed debate about immigration as many people do not consider students as migrants. Excluding students from a net migration target would also mitigate potential harm to the UK economy as education is one of the UK's biggest exports.

### EU migrants living in London

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**London's share of foreign nationals is considerably higher than any other UK region.**<sup>2</sup> In 2015, almost a quarter of London's population was non-UK born compared to one in ten across the rest of the UK. London's share of EU nationals is also higher: 12 per cent of London's population compared to four per cent in the UK in 2015.<sup>10</sup>

**EU nationals living and working in London should be guaranteed the right to stay in the UK now, and should not be used as a bargaining chip in the government's EU exit negotiations.** The Government said it would not guarantee the rights of EU nationals to stay in the UK until the status of British EU expatriates was confirmed. And while it is too early to tell what effect the EU referendum will have on EU migration, this lack of certainty could have a detrimental effect on the London and UK economy if businesses delay hiring and investment plans.

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<sup>2</sup> Nationality has been used as a measure rather than country of birth to identify those potentially vulnerable to changes to immigration laws

**The process of identifying and registering EU nationals must be made as simple as possible.** There is already evidence of EU nationals applying for permanent residency being rejected because of incorrect paperwork. The London and UK economy cannot afford for this process to be onerous. There are many EU nationals who will have lived and worked in London for many years but will not have proof they were exercising their treaty rights – possibly because they were self-employed. The government needs to establish as quickly as possible a clear definition of proof of residence, which is not overly restrictive.

**The cost to EU nationals to register to stay in the UK should also be proportionate.** As Sunder Katwala told the Committee, asking a family to “shell out thousands of pounds to regularise a status when they were here legally under free movement would be wrong.” He suggests capping the cost to the same amount as a British passport for a UK national.

“Asking a family of four to shell out thousands and thousands of pounds to regularise a status when they were here legally would be wrong.”

Sunder Katwala, Director, British Future

**The Mayor's office will need to play a major role in advising EU nationals on their options to stay in London.** Given the large number of EU nationals living in the capital, it is vital they understand their options for staying once the UK leaves the EU. The Mayor's office should play a coordinating role in bringing together community groups, and

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employment and immigration experts to ensure there is consistent advice available for EU nationals to help them evaluate their options after EU exit.

### EU migrants working in London

**A significant number of jobs in London are carried out by EU-born workers.**<sup>11</sup> In 2015, around 13 per cent of the five million jobs in London – some 600,000 jobs – were held by workers born in EU countries.<sup>12</sup> In comparison, five per cent of the jobs in the rest of the UK (excluding London) were carried out by EU-born workers.

### EU-born workers are employed in a wide range of jobs in London.

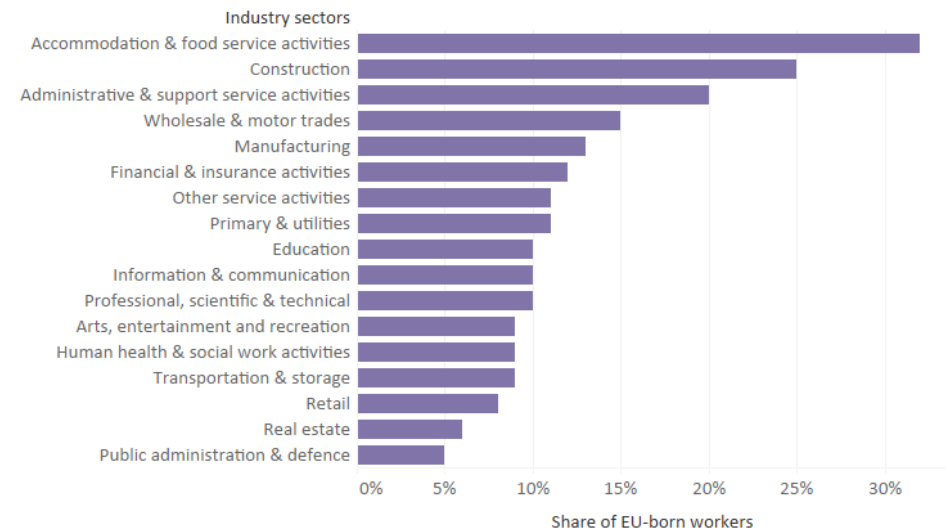
While a sizeable proportion of EU-born workers (roughly a quarter in 2015) are employed in elementary occupations (e.g. manual labour), many are also employed in professional occupations and senior-level positions (one in five in 2015).<sup>13</sup> This balance is in contrast to the rest of the UK where EU-born workers are mainly employed in low-skilled occupations.

### Certain sectors in the capital are especially reliant on EU-born workers.

Roughly a third of employees in the accommodation and food service activities sector (79,000 jobs) in 2015 were born in EU countries. Similarly, around a quarter (25 per cent, 88,000) of all workers in construction in London are EU-born workers.<sup>14</sup> The NHS and the tech sector also employ a sizeable number of EU nationals. Roughly one in ten NHS workers in London are from the EU,<sup>15</sup> and according to data from Tech London Advocates, a lobby group, around a third of those

working in London's tech industry are EU nationals.<sup>16</sup> Dr David Lutton, Director of Policy, London First, told the Committee “50 per cent of the top tech start-ups were founded by non-British nationals, people from the EU.”<sup>17</sup>

### Certain sectors in the capital are especially reliant on EU-born workers



Source: Annual Population Survey, 2015

**London is comparatively more reliant on EU workers across all sectors than other regions in the UK.** While a quarter of jobs in construction in London are filled by EU workers, only four per cent of construction workers in the rest of the UK are EU-born. London also has a higher share of EU workers in accommodation and food service activities (32 per cent versus nine per cent) and administrative and support service

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activities (20 per cent versus seven per cent) compared to other UK regions.<sup>18</sup>

### Focussing on key sectors in London

#### Hospitality

The UK's hospitality sector<sup>19</sup> has grown significantly in recent years. Between 2010 and 2014, the number of jobs has increased from 2.6 million to 2.9 million; only the business services sector has seen larger employment growth in the same period.<sup>20</sup> London has the highest share of UK hospitality employment, representing almost a fifth of total employment in the sector (520,000 jobs). London also represents almost a quarter of the total gross value added (GVA) of the industry.

**The hospitality sector in London relies heavily on foreign-born workers.** Almost three quarters of all foreign-born workers in hospitality are employed in London.<sup>21</sup> While migrants from outside the EU make up the largest share of foreign workers, eastern European migrants have seen the largest recent increase, making up seven per cent of the total UK hospitality workforce in 2014.<sup>22</sup>

**There is a debate about how far the sector's reliance on EU workers is because of labour shortages rather than flexibility or pay.** Ufi Ibrahim, Chief Executive of the British Hospitality Association, told the Committee the sector's reliance on EU migrants was one of "availability of people" and that pay didn't have anything to do with the industry's ability to access UK-born workers instead. But there is also evidence that

flexibility is important. Research suggests EU workers are more likely to take temporary work with flexible or 'zero hours' contracts, which is less attractive to UK workers and problematic for those coming off benefits.<sup>23</sup> However, there is little evidence EU migration has put downward pressure on the wages of low-skilled workers.<sup>24</sup>

**Restrictions on the free movement of people from the EU would have a detrimental effect on the sector.** Ufi Ibrahim told the Committee that many small and medium-sized businesses (SMEs) in the sector would "probably not survive." She said luxury hotels and restaurants would be able to command higher prices to compensate, and budget hotels and restaurants would be able to pursue higher volumes, but businesses in the "middle sector", which are mainly SMEs, would be squeezed out. She said this was because of a lack of capacity to invest in technology, but also the immediate need for labour as the sector expands. She added: "the types of jobs that are being created in hospitality businesses are jobs that need to be filled now."

"Rather than pushing the industry to the cliff edge...we are asking for a period of time to be able to ensure a transition."

Ufi Ibrahim, Chief Executive, British Hospitality Association

**A transitional period is needed to protect SMEs vulnerable to restrictions on EU labour.** Ufi Ibrahim said the hospitality industry was asking the Government for "a period of time to be able to ensure a transition" rather than "pushing the industry to the cliff edge." She said the sector had an obligation to build better relationships with schools

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and colleges, and for hospitality to be seen more as a profession as it is in other EU countries, but this could only be achieved over a period of time.

### *NHS and social care*

**Foreign-born workers represent a significant proportion of NHS staff in London.** Around a quarter of London's NHS workforce is non-UK born. EU nationals make up approximately ten per cent of London's NHS workforce, compared to five per cent in the rest of England. The breakdown of EU-born doctors and nurses is broadly the same: 13 per cent in London compared to around 4 per cent in England.<sup>25</sup>

**Numbers of EU-born nurses have risen at a time when the numbers of UK-trained nurses has fallen.** According to NHS data, the number of EU nationals working as nurses and midwives has increased at a historically rapid rate, while the number of nurses trained in the UK has dropped. In July 2016, the Government announced that it would be replacing nursing bursaries with student loans from August 2017.<sup>26</sup> The Mayor of London and the London Assembly wrote to the Department of Health to ask for the plans to be stopped because of the impact it would have on nursing students studying in London.<sup>27</sup> Without the increase in the number of nurses and midwives from the EU to the UK, overall nursing numbers would have fallen rather than remaining relatively flat in recent years.<sup>28</sup>

**Restrictions on free movement of people from the EU could exacerbate staffing pressures in the NHS and the social care sector.** In 2014, there was a six per cent shortfall (around 50,000 full-time

equivalents) between the number of staff providers of health care services needed and the number in post, with large gaps in nursing, midwifery and health visitors in the UK. Similar problems exist in the social care sector, which has an estimated vacancy rate of five per cent. High turnover is also an issue, with an overall turnover rate of 25 per cent (which equates to around 300,000 workers leaving their role each year).<sup>29</sup>

**The social care sector is particularly vulnerable to the short-term risk of losing access to EU labour.** Danny Mortimer said the social care sector faced similar risks to the hospitality sector where the majority of care homes operate as SMEs, employing much smaller numbers of people than the NHS. The sector also has a higher share of workers drawn from EU countries making the sector more vulnerable in the short-term.

**Restrictions on free movement could also erode links between the NHS and universities and the life sciences sector in London.** Danny Mortimer, Chief Executive, NHS Employers, said there was a particular concentration of EU national doctors working in research institutions in London, and that restrictions on free movement could erode the important links developed between the NHS and these institutions. He also said the UK's role in the various medical research networks operating across the EU could diminish.

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### Identifying opportunities for UK workers

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**EU exit will create a further spur for government to encourage businesses to recruit more UK workers.** David Goodhart, Head of Demography, Immigration and Integration at Policy Exchange, referred to the example of Singapore, which offered grants and loans to labour intensive business to smooth the process of reducing its dependence on foreign labour. He told the Committee the Government and the Mayor could do something similar over a transitional period “to help employers with automation and with finding it easier to find and train local staff.”

**There are schemes targeted at helping UK citizens access London’s labour market.** Ufi Ibrahim referred to programmes the Hospitality industry has run in conjunction with the Department for Works and Pensions to attract young people not in employment, education, or training (NEETs) which have created 67,000 apprenticeships. She also referred to an event which the British Hospitality Association ran with Tottenham Hotspur Football Club to help young unemployed people in London. Of the 2,500 that attended, 958 “walked out with an actual job and an apprenticeship in their hand.” Other industries are also trying to make themselves more attractive to UK school leavers. For example, the road haulage industry, which has seen a decline in the number of Polish drivers<sup>30</sup> because of the weaker exchange rate, is trying to rebrand the image of lorry driving as an IT-driven service.<sup>31</sup>

**However, there remains a skills deficit among UK workers.** David Goodhart in his paper for Policy Exchange refers to the decline in employer training in recent years. The number of people taking Higher

National Certificates or Higher National Diplomas has fallen sharply in the last ten years. He argues the private sector has failed to invest in STEM (science, technology, engineering and mathematics) and IT skills because it is too easy to bring in trained people from outside the EU. The UK is currently ranked sixteenth for technical skills out of 20 OECD countries.<sup>32</sup> The Economy Committee has previously called on the Mayor to invest in a skills strategy to support London’s growing fintech sector. The Mayor recently announced £7m funding for a Digital Talent programme. While this investment is welcome, sustained investment in STEM and IT skills is going to be needed to bridge the skills gap.

**And London’s labour supply is constrained.** The unemployment rate in London was 5.6 per cent (some 260,000 workers unemployed) in the three months to November 2016, down 0.6 percentage points on the previous year, which is close to full employment. However, despite London’s high employment rate, youth unemployment is around 15 per cent.<sup>33</sup> And initiatives to improve the affordability of childcare could help those with childcare responsibilities back into work. Similarly, more could be done to enable the elderly and disabled to join London’s workforce, as could work to tackle the number of NEETs in London (around 8,700 16-18 year-olds in 2014).<sup>34</sup>

**Investment in labour-saving technology could compensate for the potential loss of EU workers in low-skilled employment.** It has been argued inexpensive foreign labour has led to underinvestment in certain industries, which could partly explain the UK’s low productivity rates (the UK has ranked in the lowest 25 per cent of all developed countries for capital investment in 48 of the past 55 years<sup>35</sup>). And while London is

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an outlier in terms of regional productivity rates (London's gross value added per worker is 32 per cent above the UK average), there may be opportunities for certain sectors to investigate the potential for greater automation.

**But there are limits to how far automation and technological change can replace the thousands of jobs that are carried out in London every day.** As Ufi Ibrahim told the Committee, there may be opportunities for high-end hospitality businesses to invest in technology that improves processes – for example, automated minibars – but the majority of SMEs are labour reliant. The same is true of many other businesses in London which will struggle to cope when restrictions on EU labour are imposed.

### Options for future immigration policy

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**Any new immigration policy for EU migrants cannot simply be an extension of the system used for non-EU migrants.** Research by the Social Market Foundation, a think-tank, suggests three quarters of jobs carried out by EU workers in London (approximately 470,000) would not meet the Tier 2 visa conditions (see Box 1) for non-EU workers. Part-time workers would also lose out, as only one per cent of part-time EU workers would meet the salary requirements compared to around 14 per cent of full-time EU workers.<sup>36</sup> Analysis by Centre for Economics and Business Research (Cebr) estimates that if London's EU workforce had been subject to Tier 2 restrictions from 2010 to 2016, it would be 145,000 lower.<sup>37</sup> A uniform immigration policy could also have a

negative effect on London's GVA and tax receipts. According to analysis by Cebr, if immigration policy followed current Tier 2 visa targets, the GVA loss to London of restricted access to foreign labour would be an estimated £6.9 billion per year. And the loss of taxation receipts to the UK exchequer could be over £2 billion by 2020.<sup>38</sup>

#### Box 1: The current Tier 2 (General) visa system for non-EU workers

The majority of non-EU workers in the UK are recruited by employers under the Tier 2 (General) Visa. Under the scheme, workers can either be recruited through the Resident Labour Market Test (RLMT) or the Shortage Occupation List. Under the RLMT, employers can bring a worker in from outside the EU if there is no suitably qualified worker within the UK or EU. Employers must advertise the vacancy in the UK for 28 days. This is the most common route, accounting for 92 per cent of Certificates of Sponsorship in 2015.<sup>39</sup> However, if the occupation is on the Shortage Occupation List, employers do not have to go down the RLMT route. Examples of occupations on the list include scientists, engineers and medical practitioners.

Under Tier 2 (General), migrants must earn at least £20,800 per annum and be in a graduate-level role, as defined in the Code of Practice for Skilled Workers. Tier 2 visas are usually valid for a maximum of six years. After this, to apply for permanent residency the worker must earn at least £35,000 per annum.



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**There are many possible ways immigration policy could be reconfigured.** The occupational or earnings criteria currently used for non-EU migrants could be revised to limit the potential loss of skilled (but low paid) EU migrants, or an overall quota for EU nationals could be set with no restrictions on occupations or earnings. Alternatively, sector-specific quotas could be developed, which would only be open to EU migrants. Another option would be for the Government to relax controls on skilled non-EU migration, while reducing EU migration.

**However the Government chooses to reconfigure immigration policy, a fast-track visa system for high-skilled EU workers is critical.** There is a growing consensus for a system which protects high-skilled migration. Sunder Katwala said research by British Future found the public's preference for reductions in migration was nuanced and selective and there was no appetite for a reduction in skilled migration. British Future in its report, *Britain's immigration offer to Europe*, proposes a preferential migration system for EU nationals comprised of three tiers, with the first tier operating as a "global talent route" for the "brightest and best" from any country to move to the UK.<sup>3</sup>

**Any new immigration system should not automatically exclude people without job offers.** The Committee has previously heard about the importance of a skills-focused system that recognised the value of human capital. For example, many talented coders from the EU are

coming to the UK and setting up in Silicon Roundabout or Shoreditch where they are developing apps or algorithms that can help create or grow businesses. Some of these start-ups will succeed and some will fail, but this kind of entrepreneurship is not easily captured by a points-based immigration system. A skills-based immigration system will be more successful in the long-term as opposed to one that is, according to Miles Celic, CEO, TheCityUK, "simply about moving people around into individual jobs that already exist."<sup>40</sup>

**There will have to be a trade-off between a system that is politically responsive and a system that is easy to manage.** It is widely recognised there will be difficult decisions to make in terms of how the inflow of migrants to low-skilled and middle-skilled jobs will be managed in the future. Many sectors will demand protection, and how this will be organised will be particularly relevant to London where all sectors are comparatively more reliant on EU workers than other regions in the UK. But while an immigration system that responds to the different characteristics of social care and hospitality is desirable, as Madeleine Sumption, Director, Migration Observatory, Oxford University, points out, this will introduce complexity to the system. She said: "It is often very difficult to identify what the actual need is in a particular industry. There is going to be a trade-off between the feeling of political responsiveness and having a system that is simple and manageable."

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<sup>3</sup> The second tier would consist of a reciprocal free movement route with an income or skills threshold, which would enable EU nationals to move to the UK without a visa providing the jobs they took met certain criteria. The third tier would comprise sector-based quotas to fill low-skilled and semi-skilled jobs.

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“It is often very difficult to identify what the actual need is in a particular industry. There is going to be a trade-off between the feeling of political responsiveness and having a system that is simple and manageable.”

Madeleine Sumption, Director, Migration Observatory, Oxford University

### The case for a “London visa”

**There are competing arguments for devolving immigration policy to local areas.** The City of London Corporation and the London Chamber of Commerce and Industry (LCCI) have both recently published reports advocating the introduction of regional visas, and in the case of the LCCI, a specific visa for London. The Mayor has been supportive of the proposals. He said both reports did some “crucial early thinking about options but we need to go further and faster to make the case to the Government and develop a new system.”<sup>41</sup> The main argument for regional visas is that local areas have a better understanding of their migration needs than national government. But weighing against the proposal are the many practical challenges in implementing it.

**Drawbacks to devolving immigration policy to regions are largely practical.** As Madeleine Sumption explained to the Committee, it is already difficult to identify at national-level shortages in particular sectors. Trying to do the same at regional-level where less data is

available would be “a very challenging task.” Similarly, regional visas would pose difficulties for business. As Ufi Ibrahim told the Committee, a regional visa could be “hugely burdensome” for business operating in different parts of the country. She said a sector-specific visa rather than a regional would be preferable. British Future’s report, *Britain’s immigration offer to Europe* also argues a regional immigration system would be difficult to enforce and could lead to a rise in illegal working.

**If not regional visas then something else.** One thing is clear: a new immigration policy incorporating visas for EU migrants will have to be introduced. How responsive this new system will be to London’s needs is critical. London’s businesses and universities cannot be pushed to a cliff edge. The strength of the financial services industry – the lifeblood of London’s and the UK’s economy – comes from its access to a deep pool of skilled labour. Similarly, low-skilled and medium-skilled occupations must be able to continue to recruit EU migrants in the short-term to protect London’s businesses. **Without a transitional period the risk to London’s and the UK’s economic dynamism will be severe.**

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### Endnotes

<sup>1</sup> ONS data uses the [United Nations definition](#) of an international long-term migrant, where a long-term international migrant is a person who moves to a country other than that of his or her usual residence for a period of at least 12 months.

<sup>2</sup> [Migration Statistics Quarterly Report](#) ONS (February 2016)

<sup>3</sup> [Migration Statistics Quarterly Report](#) ONS (February 2016)

<sup>4</sup> [Migration Statistics Quarterly Report](#) ONS (February 2016)

<sup>5</sup> The ONS publishes short-term migration figures for England and Wales, using three definitions of a short-term migrant: those staying for a minimum of one month, three months, and the narrower UN definition of those that migrate for 3 to 12 months for work and study

<sup>6</sup> 45 per cent (516,000) were visits by non-EU citizens, 41 per cent (475,000) by EU citizens and 14 per cent (167,000) by British citizens

<sup>7</sup> [Short-term international migration annual report: mid-2014 estimates](#) ONS (May 2016)

<sup>8</sup> [Short-term international migration annual report: mid-2014 estimates](#) ONS (May 2016)

<sup>9</sup> [Migration Statistics Quarterly Report](#) ONS (February 2016)

<sup>10</sup> Population in the UK by nationality, Annual Population Survey 2015, ONS

<sup>11</sup> This data uses country of birth rather than nationality as a measure and so also includes foreign-born individuals who have become UK citizens

<sup>12</sup> Number of jobs by country of birth of job holder, Annual Population Survey 2015, ONS

<sup>13</sup> Annual Population Survey 2015, ONS

<sup>14</sup> Annual Population Survey 2015, ONS

<sup>15</sup> [English Health Service's Electronic Staff Record](#)

<sup>16</sup> [London tech heavyweights call for European talent to remain in the capital following Brexit vote, City AM \(1 July 2016\)](#)

<sup>17</sup> [Economy Committee 13 December 2016](#)

<sup>18</sup> Annual Population Survey 2015, ONS

<sup>19</sup> The hospitality industry includes enterprises that provide accommodation, meals and drinks in venues outside of the home

<sup>20</sup> [The economic contribution of the hospitality industry](#) Oxford Economics (2015)

<sup>21</sup> [The economic contribution of the hospitality industry](#) Oxford Economics (2015)

<sup>22</sup> [The economic contribution of the hospitality industry](#) Oxford Economics (2015)

<sup>23</sup> [Migrants in low-skilled work](#), Migrant Advisory Committee, 2014

<sup>24</sup> A comprehensive literature review by the UK Government found little evidence of a "statistically significant impact from EU migration on native employment outcomes." [Impacts of migration on UK native employment: An analytical review of the evidence](#), Home Office and BIS, 2014

<sup>25</sup> [English Health Service's Electronic Staff Record](#)

<sup>26</sup> <https://www.rcn.org.uk/nursingcounts/student-bursaries>

<sup>27</sup> <https://www.rcn.org.uk/news-and-events/news/mayor-of-london-backs-bursary-campaign>

<sup>28</sup> [The labour market for nurses in the UK and its relationship to the demand for, and supply of international nurses in the NHS](#) Institute of Employment Studies (2016)

<sup>29</sup> [Five big issues for health and social care after the Brexit vote](#) The Kings Fund (30 June 2016)

<sup>30</sup> [Foreign drivers return home as cost pressures build in road haulage, says RHA](#)

<sup>31</sup> [Skills and workforce planning in the road haulage sector: government responses to the Committee's fourth report of session 2016-17](#) House of Commons Transport Committee (October 2016)

<sup>32</sup> [Building our Industrial Strategy - green paper](#) (January 2017)

<sup>33</sup> [Regional labour market: Estimates of unemployment by age](#) ONS, 2017

<sup>34</sup> [Young People Not in Employment, Education or Training](#) London Datastore (2015)

<sup>35</sup> [Building our Industrial Strategy - green paper](#) (January 2017)

<sup>36</sup> [Working Together? The impact of the EU referendum on UK employers](#) Social Market Foundation (2016)

<sup>37</sup> [Working Capital](#) Cebr (2016)

<sup>38</sup> [Working Capital](#) Cebr (2016)

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<sup>39</sup> Working Together? The impact of the EU referendum on UK employers Social  
Market Foundation (2016)

<sup>40</sup> Transcript of Economy Committee, 11 October 2016

<sup>41</sup> <https://www.london.gov.uk/press-releases/mayoral/sadiq-khan-calls-for-government-to-act-over-talent>