



# The impact of potential Turkish accession to the European Union on migration to the UK

## Summary

1. The offer of concessions by the European Union to Turkey as part of a deal agreed in March 2016 to stem the flow of illegal crossings into Greece includes a promise to re-invigorate negotiations for Turkish membership of the EU. The UK government reportedly predicted in 2014 that Turkey could be ready for membership 'in a decade or so', as early as 2024. Should accession go ahead as envisaged, the EU's current free movement rules mean that, after a period of transition of possibly seven years, a population of what is currently 79 million Turks would gain full access to Britain's labour market. Researchers have found that large income disparities provide incentives for Turks to move to the EU.<sup>1</sup> On average, wages in Turkey are about a quarter of those of the UK. As a result, following Turkish accession and the end of any transitional controls, it is likely there would be considerable flows of migrant Turkish labour into Britain. There may also be substantial migration by members of the large Kurdish minority to other parts of the EU. Flows could be heightened by the fact that there already exists a substantial, and growing, Turkish community in the UK.

2. Annex A outlines our own estimate that the eventual net inflow from Turkey could, in the light of the UK's experience with migration from Eastern Europe, be well in excess of 100,000 a year. Thus, leaving aside the argument over the timing of her accession, it is clear that the prospect of another wave of migration from Turkey is one of the longer-term risks of the UK remaining a member of the EU. Annex B assesses the recent Vote Leave estimate.

## Turkey-EU summit and membership negotiations

3. As a result of the Syrian civil war that began in 2011, Turkey has seen an unprecedented influx of 2.2 million people seeking refuge in its territory.<sup>2</sup> In October 2015, EU leaders pledged at a Brussels summit to 're-energise' negotiations for Turkish accession, to provide £2.2 billion [3 billion Euros] in aid

1 Arjan Lejour, Ruud de Mooij and Clem Capel, 'Assessing the economic implications of Turkish accession to the EU', CPB Netherlands Bureau for Economic Policy Analysis, Document 56, 30 March 2004.

2 European Commission, 'European Neighbour Policy and Enlargement Negotiations: Turkey', URL: [http://ec.europa.eu/enlargement/countries/detailed-country-information/turkey/index\\_en.htm](http://ec.europa.eu/enlargement/countries/detailed-country-information/turkey/index_en.htm)

and to concede visa-free travel to the Schengen area for Turkish citizens.<sup>3</sup> These pledges were made on the understanding of Turkish help in stemming the irregular flow of refugees from the Turkish coastline to Greece. At a summit in Brussels in late March 2016, Turkey agreed to the return of all new irregular migrants. As part of the agreement, the EU restated its support for re-invigorating membership negotiations, with Chapter 33 [Financial and Budgetary Provisions] to be opened at some point between January and June 2016 while 'preparatory work' on the opening of other chapters would 'continue at an accelerated pace'.<sup>4</sup>

4. The relationship between Turkey and the EC dates back to 1959 and includes the Ankara Association Agreement (1963) for the progressive establishment of a customs Union (created in 1995).<sup>5</sup> Turkey initially applied for full membership of the European Union in 1987. However, she was not declared eligible to join until 1997 and not designated an official 'candidate' country until December 1999. Accession negotiations began in 2005.<sup>6</sup> In 2006 the EU suspended the opening of eight areas of negotiation and announced that no more would be completed. This was because Turkey had failed to develop the customs union sufficiently and had refused to open ports and airports to Greek or Cypriot traffic.<sup>7</sup> By mid-2015, only 14 of the 35 chapters of the *acquis*<sup>8</sup> had been opened, with one (Science and Research) provisionally closed. However, on 14<sup>th</sup> December 2015, negotiations were opened on Chapter 17 (Economic and monetary policy).<sup>9</sup> On 14<sup>th</sup> April 2016, the European Commissioner responsible for Enlargement, Johannes Hahn, voiced support for starting negotiations on chapters 23 (Judiciary and Fundamental Rights) and 24 (Justice, Freedom and Security).<sup>10</sup> In November 2015, the Turkish minister for EU affairs said his government's aim was to work towards opening five or six more chapters by the end of 2016.<sup>11</sup>

## Support for Turkish membership and expected joining date

5. British governments led by both Labour and Conservative Prime Ministers have long supported efforts to bring Turkey into the EU. In the House of Commons on 19<sup>th</sup> October, 2015, Prime Minister David Cameron reaffirmed what the Home Affairs Select Committee has described as his government's 'staunch' support for Turkish accession.<sup>12</sup> And speaking in Ankara in December 2014, Mr Cameron said in the presence of former Turkish Prime Minister Ahmet Davutoglu: "In terms of Turkish membership of the EU, I very much support that."<sup>13</sup> In March 2016, Mr Cameron agreed at the European Council in Brussels

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3 BBC News, 'EU leaders back Turkish action plan', October 16, 2015, URL: <http://www.bbc.co.uk/news/world-europe-34546482>

4 European Commission press release, 'EU-Turkey Agreement: Questions and Answers', 19<sup>th</sup> March, 2016, URL: [http://europa.eu/rapid/press-release\\_MEMO-16-963\\_en.htm](http://europa.eu/rapid/press-release_MEMO-16-963_en.htm)

5 European Commission, 'Enlargement: EU-Turkey Relations', URL: [http://ec.europa.eu/enlargement/candidate-countries/turkey/eu\\_turkey\\_relations\\_en.htm](http://ec.europa.eu/enlargement/candidate-countries/turkey/eu_turkey_relations_en.htm)

6 European Commission, 'European Neighbour Policy and Enlargement Negotiations: Turkey', URL: [http://ec.europa.eu/enlargement/countries/detailed-country-information/turkey/index\\_en.htm](http://ec.europa.eu/enlargement/countries/detailed-country-information/turkey/index_en.htm)

7 Civitas, 'EU Facts – Turkey', URL: <http://www.eu-facts.org.uk/what-does-the-eu-do/possible-future-members/turkey/>

8 European Neighbourhood and Enlargement Negotiations, 'Chapters of the *Acquis*', URL: [http://ec.europa.eu/enlargement/policy/conditions-membership/chapters-of-the-acquis/index\\_en.htm](http://ec.europa.eu/enlargement/policy/conditions-membership/chapters-of-the-acquis/index_en.htm)

9 European Council, 'Press release for Accession Conference with Turkey', URL: <http://www.consilium.europa.eu/en/press/press-releases/2015/12/14-accession-conference-turkey/>

10 BBC News, 13<sup>th</sup> April, 2016, URL: <http://www.bbc.co.uk/news/live/uk-politics-parliaments-36017672>

11 Reuters, 26<sup>th</sup> November 2015, URL: <http://uk.reuters.com/article/uk-mideast-crisis-turkey-russia-idUKKBN0TF0R620151126>

12 Hansard, 19<sup>th</sup> October 2015, URL: <http://www.publications.parliament.uk/pa/cm201516/cmhansrd/cm151019/debtext/151019-0001.htm#15101913000001>

13 Telegraph, 9<sup>th</sup> December 2014, URL: <http://www.telegraph.co.uk/news/politics/david-cameron/11283924/David-Cameron-I-still-want-Turkey-to-join-EU-despite-migrant-fears.html>

to 're-energise' accession talks as part of the deal with Turkey to stem flows resulting from the migrant crisis.<sup>14</sup> The position of basic support for Turkish accession has been endorsed by Foreign Secretary Philip Hammond,<sup>15</sup> and is the continuation of a policy pursued with even more enthusiasm by the Labour governments between 1997 and 2010, especially by Tony Blair and former foreign secretary Jack Straw.<sup>16</sup> It is also supported, in principle at least, by senior EU leaders including European Council President Donald Tusk<sup>17</sup> and European Parliament President Martin Schulz.<sup>18</sup> European Commission President Jean-Claude Juncker has voiced support for Turkish membership but this year said the country would not be ready for membership for at least a decade.<sup>19</sup>

6. The UK government can veto any new accession, as can all other EU member states.<sup>20</sup> However, the British public will not get a vote on the accession of Turkey to the EU. The 2011 Act allows the Government to ratify EU accession treaties without a referendum (s. 4(4)(c)).<sup>21</sup> There was no referendum on the accession of Croatia to the EU in 2013 (European Union (Croatian Accession and Irish Protocol) Act 2013 (s. 1(3)).<sup>22</sup>

7. In 2011 the House of Commons' Home Affairs Select Committee reported that Turkey was not generally expected to accede to the EU until 2020 at the earliest, and added that 'some commentators have cast doubt on whether Turkey will ever join'.<sup>23</sup> However, in 2014, the BBC reported that the Foreign and Commonwealth Office (FCO) expected Turkey to be ready for membership 'within a decade or so'.<sup>24</sup> This time estimate correlates with a prediction by Austrian Foreign Minister Michael Spindelegger that Turkey would not be ready for membership before 2024.<sup>25</sup>

8. More recently, Mr Cameron has said that Turkish membership of the EU was 'not remotely on the cards' and 'could take decades'.<sup>26</sup> However, the European Commission's own progress report on the negotiations highlighted only in November 2015 that 'with regards to ability to take on the obligations of membership, Turkey has continued to align with the *acquis*, albeit at a slower pace, and has achieved a good level of preparation in many areas', for instance in the realm of the free movement of goods, intellectual property law, enterprise and industrial policy, customs union and external relations. With regard to other chapters, the report adds that Turkey is 'moderately prepared' (public procurement,

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14 ITV News 18<sup>th</sup> March 2016, URL: <http://www.itv.com/news/story/2016-03-18/eu-leaders-agree-on-migrant-deal-with-turkey/> and the text of the deal specifically says the accession process will be 're-energised', EU Commission Fact Sheet, 19<sup>th</sup> March 2016, URL: [http://europa.eu/rapid/press-release\\_MEMO-16-963\\_en.htm](http://europa.eu/rapid/press-release_MEMO-16-963_en.htm)

15 Philip Hammond, Conservative Home, 20<sup>th</sup> November 2015, URL: <http://www.conservativehome.com/platform/2015/11/philip-hammond-the-chances-of-unifying-cyprus-are-stronger-than-ever.html>

16 Migration Watch UK, 14<sup>th</sup> April, 2016: URL: <http://news.migrationwatch.org.uk/2016/04/14/labour-and-conservative-led-government-support-for-turkeys-application-to-join-the-european-union>

17 Daily Sabah, 23<sup>rd</sup> December 2014, URL: <http://www.dailysabah.com/politics/2014/12/23/erdogan-to-junckereu-membership-strategic-for-turkey>

18 Euractiv, 21<sup>st</sup> May 2014, URL: <https://www.euractiv.com/section/global-europe/news/juncker-and-schulz-say-no-to-turkey-in-last-tv-duel/>

19 Politico, 17<sup>th</sup> March 2016, URL: <http://www.politico.eu/article/jean-claude-juncker-turkeys-not-ready-for-eu-membership/>

20 Written answer, House of Lords, 27<sup>th</sup> May 2016, URL: <http://www.parliament.uk/business/publications/written-questions-answers-statements/written-question/Lords/2016-05-19/HL121/>

21 European Union Act 2011, URL: <http://www.legislation.gov.uk/ukpga/2011/12/section/4>

22 European Union (Croatian Accession and Irish Protocol) Act 2013, URL: <http://www.legislation.gov.uk/ukpga/2013/5/section/1>

23 Home Affairs Select Committee Report, 'Implications for the Justice and Home Affairs area of the accession of Turkey to the European Union', August 1<sup>st</sup>, 2011.

24 BBC News, 2<sup>nd</sup> September 2014, URL: <http://www.bbc.co.uk/news/world-europe-11283616>

25 Baroness Hussein-Ece, Debate on Turkey, 13<sup>th</sup> January 2011, URL: <http://www.publications.parliament.uk/pa/ld201011/ldhansrd/text/110113-0001.htm>

26 BBC News, 4<sup>th</sup> May 2016, URL: <http://www.bbc.co.uk/news/uk-politics-eu-referendum-36205844>

competition policy, the free movement of capital), has achieved a 'good level of preparation' (enterprise and industrial policy) or is 'well-advanced' (company law). It is primarily in the area of the judiciary and fundamental rights (Chapter 23) that the EU suggests Turkey has much more progress to make although there has been 'some level of preparation'.<sup>27</sup>

9. President Erdogan recently confirmed that EU membership is Turkey's 'strategic goal'.<sup>28</sup> His government hopes to see more than half of 35 negotiation chapters opened or completed by the end of 2016.<sup>29</sup> This, along with the admission by Mr Schulz that the need for Turkey's help in the current migration crisis was linked to the 'fresh start' in EU-Turkey relations,<sup>30</sup> points to the importance of political circumstance in any decision on Turkish membership, alongside the meeting of accession criteria. The European Commission confirmation of plans to grant Turkish citizens visa-free access to the Schengen Zone by the end of June 2016,<sup>31</sup> despite not yet having complied with all of the 72 required conditions<sup>32</sup> in the agreed 2013 EU-Turkey roadmap<sup>33</sup>, does not bode well for the insulation of negotiations from the political considerations of the day.

## Free movement rules, transition controls and the Schengen Area

10. Free movement rules, which would apply to Turkey after accession and any possible transitional period, mean that all Turkish citizens would be free to come to the UK to look for work. If they had not found work in six months or had been out of work for that time after only a short period of work, they would, in theory, be supposed to leave. In 2011, the UK government stated its support for transitional controls similar to those imposed for seven years on Bulgaria and Romania after their accession in 2007 so as to avoid disturbance to the domestic labour market. The then-Immigration Minister Damian Green considered that the transitional controls applied to Romania and Bulgaria had been 'by and large pretty effective' and therefore the Government would want 'at least [to] replicate that' for future accessions.<sup>34</sup> Although she would be obliged by her accession treaty eventually to join the Schengen Zone, Turkey, like Bulgaria, Cyprus, Croatia and Romania which remain outside the zone years after accession, would need to have her borders, visas, police cooperation and personal data protection systems assessed before being admitted.<sup>35</sup>

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27 European Commission, 'Turkey – 2015 Report', 10<sup>th</sup> November, 2015, URL: [http://ec.europa.eu/enlargement/pdf/key\\_documents/2015/20151110\\_report\\_turkey.pdf](http://ec.europa.eu/enlargement/pdf/key_documents/2015/20151110_report_turkey.pdf)

28 Reuters, 9<sup>th</sup> May 2016, URL: <http://www.reuters.com/article/us-europe-migrants-turkey-eu-idUSKCN0Y01D4>

29 Reuters, 26<sup>th</sup> November 2015, URL: <http://uk.reuters.com/article/uk-mideast-crisis-turkey-russia-idUKKBN0TF0R620151126>

30 Speech by Mr Schulz to the European Parliament, 29<sup>th</sup> November 2011.

31 BBC News, 3<sup>rd</sup> May 2016, URL: <http://www.bbc.co.uk/news/world-europe-36188558>

32 In March 2016, the European Commission indicated Turkey had fulfilled only 19 of the 72 conditions. Commission Staff Working Document, 4<sup>th</sup> March 2016, URL: [http://ec.europa.eu/dgs/home-affairs/e-library/documents/policies/international-affairs/general/docs/turkey\\_second\\_progress\\_report\\_commission\\_staff\\_working\\_en.pdf](http://ec.europa.eu/dgs/home-affairs/e-library/documents/policies/international-affairs/general/docs/turkey_second_progress_report_commission_staff_working_en.pdf) In May 2016, it indicated Turkey had now fulfilled 67 of these, with 'further work needed' on meeting conditions 42, 47, 54, 56 and 65, European Commission, Report on visa liberalisation, 4<sup>th</sup> May 2016, URL: [http://ec.europa.eu/dgs/home-affairs/what-we-do/policies/european-agenda-migration/background-information/docs/20160504/turkey\\_progress\\_visa\\_liberalisation\\_roadmap\\_en.pdf](http://ec.europa.eu/dgs/home-affairs/what-we-do/policies/european-agenda-migration/background-information/docs/20160504/turkey_progress_visa_liberalisation_roadmap_en.pdf)

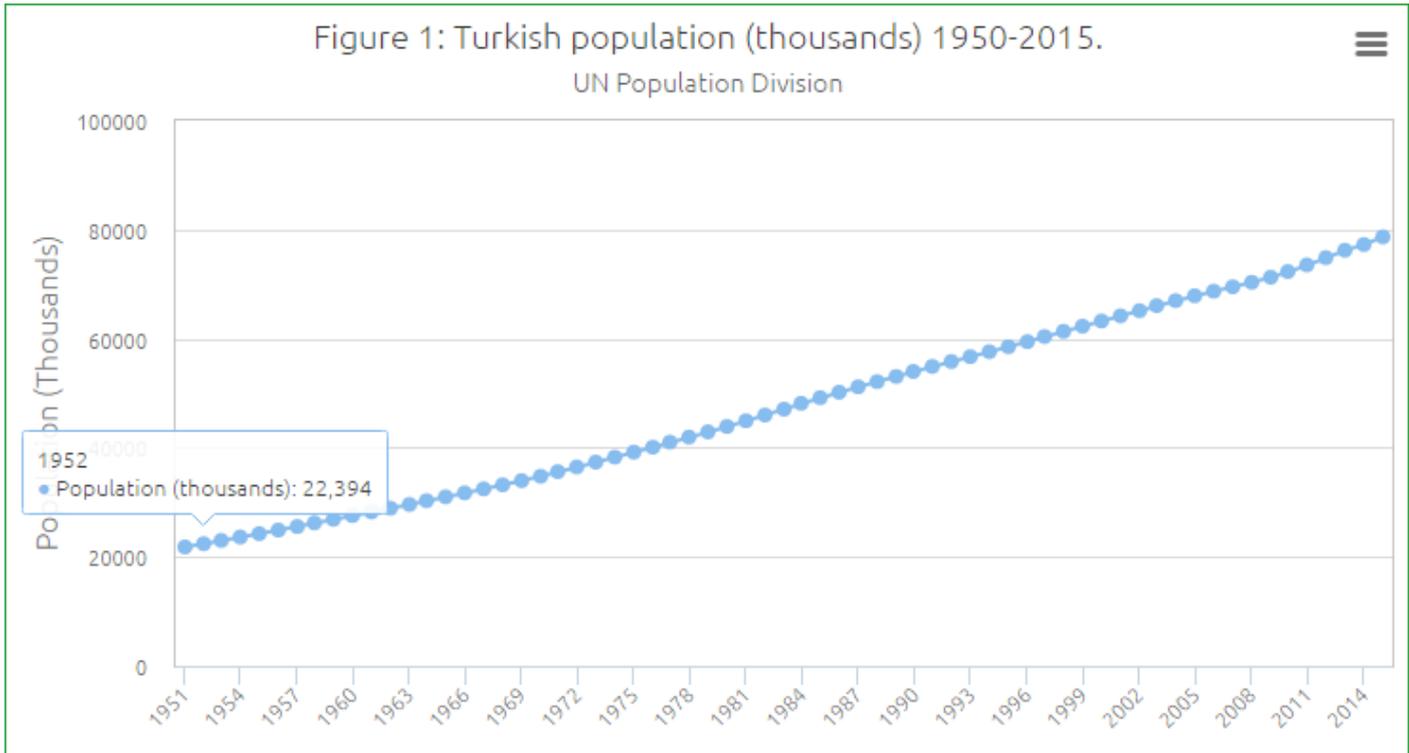
33 Roadmap towards a visa-free regime, December 2013, URL: [http://ec.europa.eu/dgs/home-affairs/what-is-new/news/news/docs/20131216-roadmap\\_towards\\_the\\_visa-free\\_regime\\_with\\_turkey\\_en.pdf](http://ec.europa.eu/dgs/home-affairs/what-is-new/news/news/docs/20131216-roadmap_towards_the_visa-free_regime_with_turkey_en.pdf)

34 HASC Report, August 2011.

35 Eur-Lex, 'The Schengen Area and Cooperation', 3<sup>rd</sup> August 2009, URL: <http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=URISERV:l33020>

# Relative weight in the European Council and Parliament

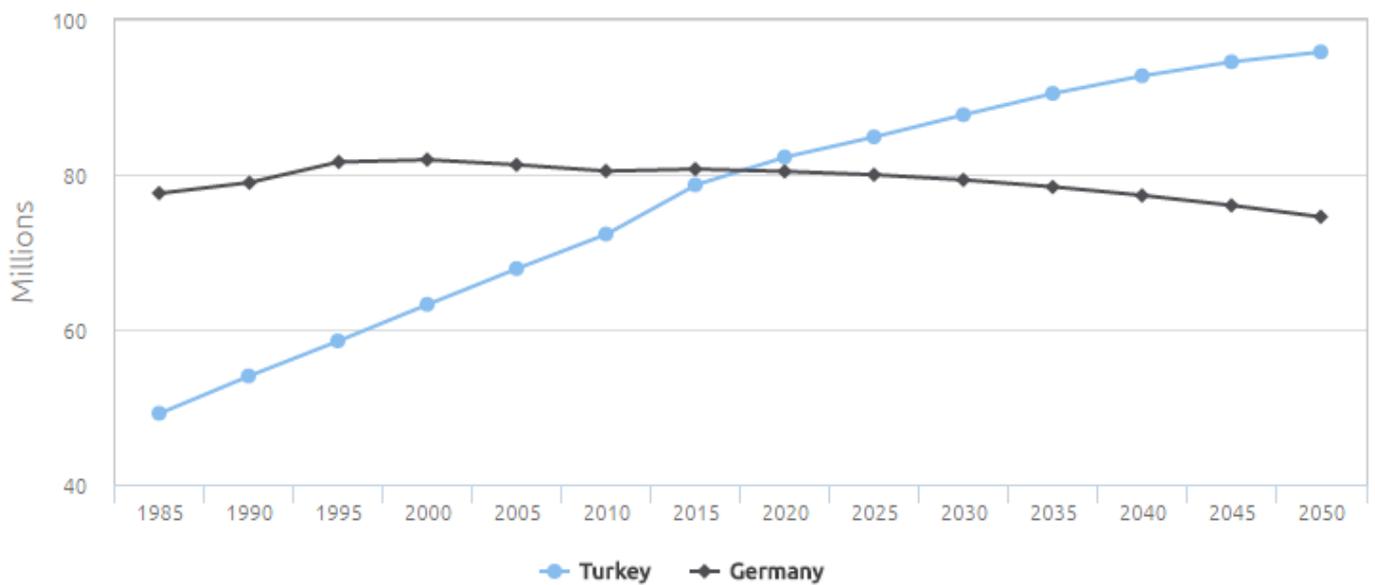
11. Turkey's population has grown rapidly and is projected to continue growing until mid-century. It grew from under 50 million in 1985 to 78.7 million in 2015 (Figure 1 below). Before the onset of the migration crisis, which saw the arrival of approximately one million migrants in Germany in 2015, Turkey's population was expected to overtake Germany's by 2018 and reach more than 90 million by mid-century<sup>36</sup>. Figure 2 below shows UN projections for both Turkish and German population growth before the onset of the 2015 migration crisis, which is likely to mean an increase for Germany's population in the short and medium term, although this is yet to be reflected in official projections.



36 UN population projections

Figure 2: Projected population of Turkey versus projected population of Germany until 2050 (millions)

UN Population Division



12. Turkey could have more weight than the UK under 'Qualified Majority Voting' in the European Council. Under the rules in force since November 2014, a majority requires 55% of states representing at least 65% of the EU population.<sup>37</sup> Although the number of MEPs granted to each state is not based directly on population size, parliamentary contingents must be 'degressively proportional' according to the Treaty of Lisbon. Article 14(2) of the Treaty on European Union gives disproportionate weight to smaller countries while providing a minimum threshold of six members for each state. In addition, no member state is allowed to be allocated more than 96 seats. But the treaty does not provide a specific formula for representation, and the exact composition is to be adopted by unanimous decision of the European Council. The latest apportionment decision was adopted on 28<sup>th</sup> June 2013 (European Council Decision 2013/312/EU), in the run-up to the accession of Croatia as the EU's 28th member state.<sup>38</sup> Currently, the largest countries in the EU - Germany (with the maximum number of 96 seats), France (74 seats), the UK (73 seats) and Italy (73 seats)<sup>39</sup> - have the largest parliamentary contingents. On the basis of past allocations, it is likely that Turkey, as one of the largest member states, would have one of the largest numbers of MEPs.<sup>40</sup> Upon accession, Turkey would, like all other member states, be allocated one EU Commissioner.

37 European Council, 'Qualified Majority Rules', URL: <http://www.consilium.europa.eu/en/council-eu/voting-system/qualified-majority/>

38 Bruegel, 19<sup>th</sup> May, 2013, URL: <http://bruegel.org/2014/05/how-unequal-is-the-european-parliaments-representation/>

39 European Parliament, 12<sup>th</sup> June 2013, URL: <http://www.europarl.europa.eu/news/en/news-room/20130610IPR11414/Elections-2014-share-out-of-MEPs-seats-among-28-EU-countries>

40 European Parliament, 13<sup>th</sup> March 2013, URL: <http://www.europarl.europa.eu/news/en/news-room/20130308STO06280/How-many-MEPs-will-each-country-get-after-European-Parliament-elections-in-2014>

# Potential Turkish migration to the EU upon accession

13. Migration from Turkey to the EU is likely to be driven by a number of interacting factors. To the pull factors of higher wages and job availability in certain parts of the EU, alongside the network effect of existing communities of Turks, will be added the push factors of the size, rapid growth and the relative youth of the Turkish population. Also important as push factors are Turkey's relative material deprivation and unemployment rates, civil strife relating to the Kurdish question, the effects of the Syrian refugee crisis on Turkey itself and the government's increasingly authoritarian nature.

## Push factors

### Rapidly growing and relatively youthful population

14. The current Turkish population (78.6 million) is greater than that of all ten member states that joined the EU in 2004 (at the time those eight member states had a combined population of 73.2 million).<sup>41</sup> The Turkish Statistical Institute projects that the population of Turkey will be 84.2 million in 2023 and will continue to increase to 93.4 million in 2050. After mid-century, the population will start to decline, and is expected to be 89.1 million by 2075.<sup>42</sup>

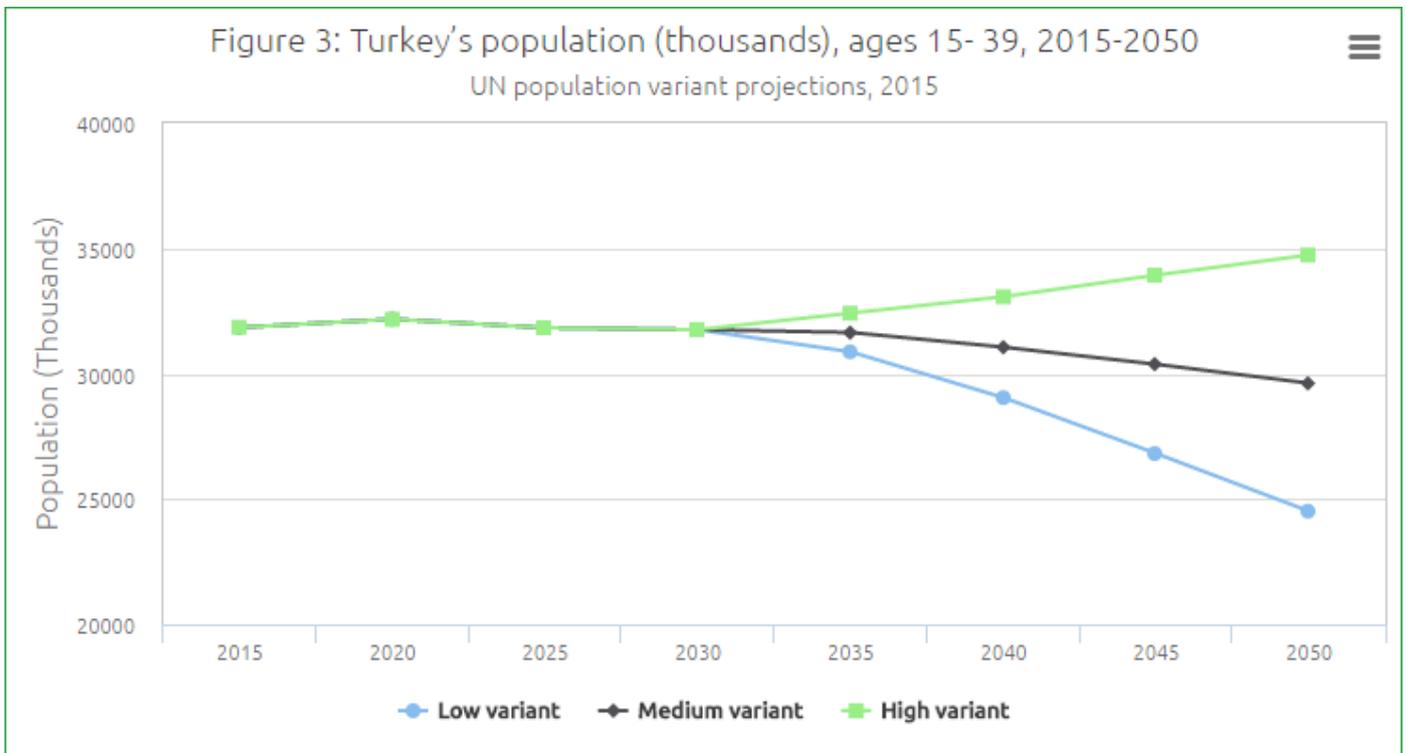
15. The Turkish population profile suggests that around a third of the population are between the ages of 15 to 39 and that it is currently slightly younger than Poland. Indeed, Turkey has a young population by median age, largely due to past fertility rates. According to Professor A. Banu Ergöçmen, the 'young population structure of Turkey presents potential challenges in every aspect of the country'.<sup>43</sup> Figure 3 below shows that this component of the Turkish population will remain steady at more than 31 million until 2030 and then either rise or decline according to the different projection variants.

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41 Civitas, 'Enlargement – Turkey', URL: <http://www.civitas.org.uk/eu-facts/eu-overview/enlargement-turkey/>

42 Turkish Statistical Institute, February 2013, URL: <http://www.turkstat.gov.tr/PreHaberBultenleri.do?id=15844>

43 A.Banu Ergöçmen, Hacettepe University Institute of Population Studies. 'Demographic picture of Turkey: What lies ahead', 11<sup>th</sup> May 2015.



16. Turkey's birth rate (technically its total fertility rate or TFR) increased from 2.16 in 2008 to 2.26 in 2013. However, the rural fertility rate was 2.73, and it ranged from 1.93 in western regions to 3.41 in eastern regions.<sup>44</sup> The province with the highest TFR was Şanlıurfa in Eastern Turkey (4.39).<sup>45</sup> Turkey's TFR is projected to fall to 1.8 by 2050.<sup>46</sup> The government is currently strongly pro-natalist, and President Erdogan recently called on Turkey's Muslim citizens to reject contraception and have more children.<sup>47</sup> While such appeals seldom work, they may be effective if accompanied by religious revival and restriction of access to means of birth control and legal abortion.

## Civil strife

17. There were just over 5,100 asylum applications by Turkish citizens across the EU between quarter four in 2013 and quarter four in 2014. The destination of six per cent of these was the UK, as against 35% to Germany and 31% to France.<sup>48</sup> Between 2008 and 2015 the total number of asylum applications by Turkish citizens in EU member states was 49,000, with the largest proportion of these in Germany (14,300) and France (17,000) with 1,670 in the UK.<sup>49</sup> Of just under 2.5 million Turkish passport holders in the EU in 2011, 146,000 (nearly 6%) were refugees.<sup>50</sup> Estimates for the size of the Kurdish population of

44 Ibid.

45 Turkish Statistical Institute, 30<sup>th</sup> April 2013, URL: <http://www.turkstat.gov.tr/PreHaberBultenleri.do?id=13618>

46 Turkish Statistical Institute, 11<sup>th</sup> July, 2012, URL: <http://www.turkstat.gov.tr/PreHaberBultenleri.do?id=13140>

47 BBC News, 30<sup>th</sup> May 2016, URL: <http://www.bbc.co.uk/news/world-europe-36413097>

48 Eurostat, 'Asylum applicants and first instance decisions on asylum applications: 2014'.

49 Eurostat, Asylum and first time asylum applicants by citizenship, age and sex, 2008-2015, URL: [http://ec.europa.eu/eurostat/web/products-datasets/-/migr\\_asyappctza](http://ec.europa.eu/eurostat/web/products-datasets/-/migr_asyappctza)

50 HASC Report, August 2011.

Turkey range between 14%<sup>51</sup> and 18%<sup>52</sup>, although some estimates suggest it is even higher.<sup>53</sup> Civil strife has the potential to act as a push factor for Kurds to seek refuge in Europe. The breakdown of a fragile ceasefire between the state and the Kurdistan Workers' Party has led to some of the worst violence since the 1990s.<sup>54</sup> As the European Commission noted in March 2016, the number of positive asylum decisions in EU member states with regard to applications by Turkish nationals increased from 11% in 2008 to 27% in 2014. The Commission also predicted that an offer of visa-free travel to Turkish citizens in 2016 could mean that 'the number of Turkish trying to migrate irregular[ly] in the EU would increase'.<sup>55</sup>

18. It is therefore likely that the onset of free movement rules would lead to a further increase in the number of asylum seekers with Turkish citizenship travelling to safer and freer parts of the European Union. However, given that the proportion of asylum applications to the UK between 2008 and 2015 was just over 3% of the EU total, compared to 29% for Germany and 35% for France, the numbers coming to the UK for this purpose alone is likely to be less than the number of people choosing to migrate for primarily economic reasons.

## High material deprivation and job insecurity

19. There are an increasing number of opportunities in the Turkish labour market. However, Turkey's is an economy plagued by inflation and high overseas debt.<sup>56</sup> Turkey also has a very uneven economic growth record and a higher share of workers are employed in agriculture than in other OECD countries. In most OECD countries, over 80% of those in the labour force are wage and salary employees. In Turkey the proportion is 54%.<sup>57</sup>

20. As academics Lejour, de Mooij and Capel argue, 'large income disparities between Turkey and the EU provide incentives for Turkish people to migrate to the EU'.<sup>58</sup> Workers in informal jobs and employed in agriculture may include potential migrants. In addition, under-employment rates are much higher.<sup>59</sup> There are still a great many poor farmers looking to make ends meet in the Black Sea regions and a high proportion might be expected to migrate. In 2014, the Turkish Statistics Authority estimated that 29.4% of the population suffered from material deprivation.<sup>60</sup> And the same year, Turkey's unemployment rate increased by 1.1 percentage points to an annual average of 9.9% (the current UK unemployment rate is

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51 Population Research and Policy Review 27(4), 447-457, February 2008.

52 Institute for Defence Studies and Analyses, August 2015.

53 Turkish News, 21<sup>st</sup> September 2012, URL: <http://www.turkishnews.com/en/content/2012/09/21/new-statistics-reveal-the-size-of-turkeys-kurdish-population/>

54 The Week, URL: <http://www.theweek.co.uk/24083/turkey-and-the-eu-the-pros-and-cons-of-membership>

55 European Commission, 'Staff Working Document, accompanying the second Report on progress by Turkey in fulfilling the requirements of its visa liberalisation roadmap', 4<sup>th</sup> March, 2016, URL: [http://ec.europa.eu/dgs/home-affairs/e-library/documents/policies/international-affairs/general/docs/turkey\\_second\\_progress\\_report\\_commission\\_staff\\_working\\_en.pdf](http://ec.europa.eu/dgs/home-affairs/e-library/documents/policies/international-affairs/general/docs/turkey_second_progress_report_commission_staff_working_en.pdf)

56 Financial Times, May 5, 2016, URL: <http://www.ft.com/cms/s/0/f7ac76e2-1294-11e6-839f-2922947098f0.html#axzz4Ai0p01UF>

57 Philip Martin, 'Turkey-EU Migration: The Road Ahead', May 2012, URL: [http://sam.gov.tr/wp-content/uploads/2012/05/philip\\_martin.pdf](http://sam.gov.tr/wp-content/uploads/2012/05/philip_martin.pdf)

58 Lejour, de Mooij and Capel, 'Assessing the economic implications of Turkish accession.'

59 Martin, 'Turkey-EU Migration'.

60 Turkish Statistical Institute, 'Income and living conditions survey 2014', 18<sup>th</sup> September 2015, URL: <http://www.turkstat.gov.tr/PreHaberBultenleri.do?id=18633>

5.1%<sup>61</sup>) as the labour force continued to grow faster than available jobs.<sup>62</sup>

21. Economic growth in Turkey may not necessarily be such as to keep Turkish workers at home. A situation could well arise in which young Turks migrated to Europe for wages several times higher than are available in Turkey, while workers from neighbouring countries replaced them in their previous occupations. This tallies with the evidence of Ukrainians moving into Poland to replace some of those who have gone to Western Europe. It is also worth noting recent evidence that the refugee crisis is causing tension in Turkey itself as Syrian refugees show a willingness to accept a daily wage one third that of an ordinary Turkish worker.<sup>63</sup> This factor could lead significant numbers of Turks to consider migrating to areas of Europe where there is more economic opportunity.

## High desire to migrate

22. There is some evidence that a significant number of Turks would like to migrate to the EU should the opportunity arise. Looking at measures of migration intention on the part of Turkish citizens revealed in a 2006 Eurobarometer opinion survey, academics Krieger and Maitre found that, of 13 countries, those surveyed in Turkey had the highest intention to migrate.<sup>64</sup> 6.2% of Turks surveyed had a general intention to migrate, compared with 5% from Romania and Bulgaria and 3.7% from Poland.<sup>65</sup> Moreover, Gallup World Poll data shows that 13% of the Turkish population have a desire to migrate and that for those who do wish to migrate 'Europe is the number one destination'.<sup>66</sup> More recently, a poll by Istanbul-based polling company Konda found that 16% of 2,685 Turkish adults surveyed would consider migrating to the UK if Turkey became an EU member.<sup>67</sup> Such numbers can only be an indication of how migration is perceived rather than an estimate of actual likely migration.

## Pull factors

### Income differences and availability of employment

23. Strielkowski, Glazar and Ducháč argue that 'migration flows are mostly influenced by employment rates and GDP in the destination country'.<sup>68</sup> The large gap in living standards between Turkey and the UK would make the UK an attractive destination for migrants. As noted earlier, Turkey's unemployment is nearly twice the UK's. Meanwhile, Turkey has a GDP per capita of \$10,500, less than one quarter of that

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61 Figure for Jan-March 2016, ONS Labour Force Survey, URL: <https://www.ons.gov.uk/employmentandlabourmarket/peoplenotinwork/unemployment>

62 European Commission, 'Turkey – 2015 Report', 10<sup>th</sup> November, 2015, URL: [http://ec.europa.eu/enlargement/pdf/key\\_documents/2015/20151110\\_report\\_turkey.pdf](http://ec.europa.eu/enlargement/pdf/key_documents/2015/20151110_report_turkey.pdf)

63 Middle East Eye, 22<sup>nd</sup> August 2014, URL: <http://www.middleeasteye.net/news/syrian-refugees-turkey-face-increasing-hardships-2055802649>

64 Secil Pacaci Elitok, 'Estimating the Potential Migration from Turkey to the European Union: A Literature Survey', Paper 3-11, May 2010, Hamburg Institute of International Economics.

65 Refik Erzan and Kemal Kirisci, Turkish Immigrants in the European Union: Determinants of Immigration and Integration, (Routledge, 2008).

66 Migrants' Rights Network, 13<sup>th</sup> March 2013, URL: <http://www.migrantsrights.org.uk/migration-pulse/2013/turkish-migration-eu-and-uk>

67 Survey conducted for the Daily Express, May 2016, URL: [http://cdn.images.express.co.uk/turkey-poll/RelocatingtoBritain\\_KONDA\\_Report.pdf?\\_ga=1.35101542.69944871.1449146637](http://cdn.images.express.co.uk/turkey-poll/RelocatingtoBritain_KONDA_Report.pdf?_ga=1.35101542.69944871.1449146637)

68 Strielkowski, Glazar and Ducháč, (2014), 'Economic Implications of Turkish Migration'.

of the UK and slightly higher than Romania and Bulgaria.<sup>69</sup> Gross average monthly wages in Turkey are about a quarter of those in the UK.<sup>70</sup>

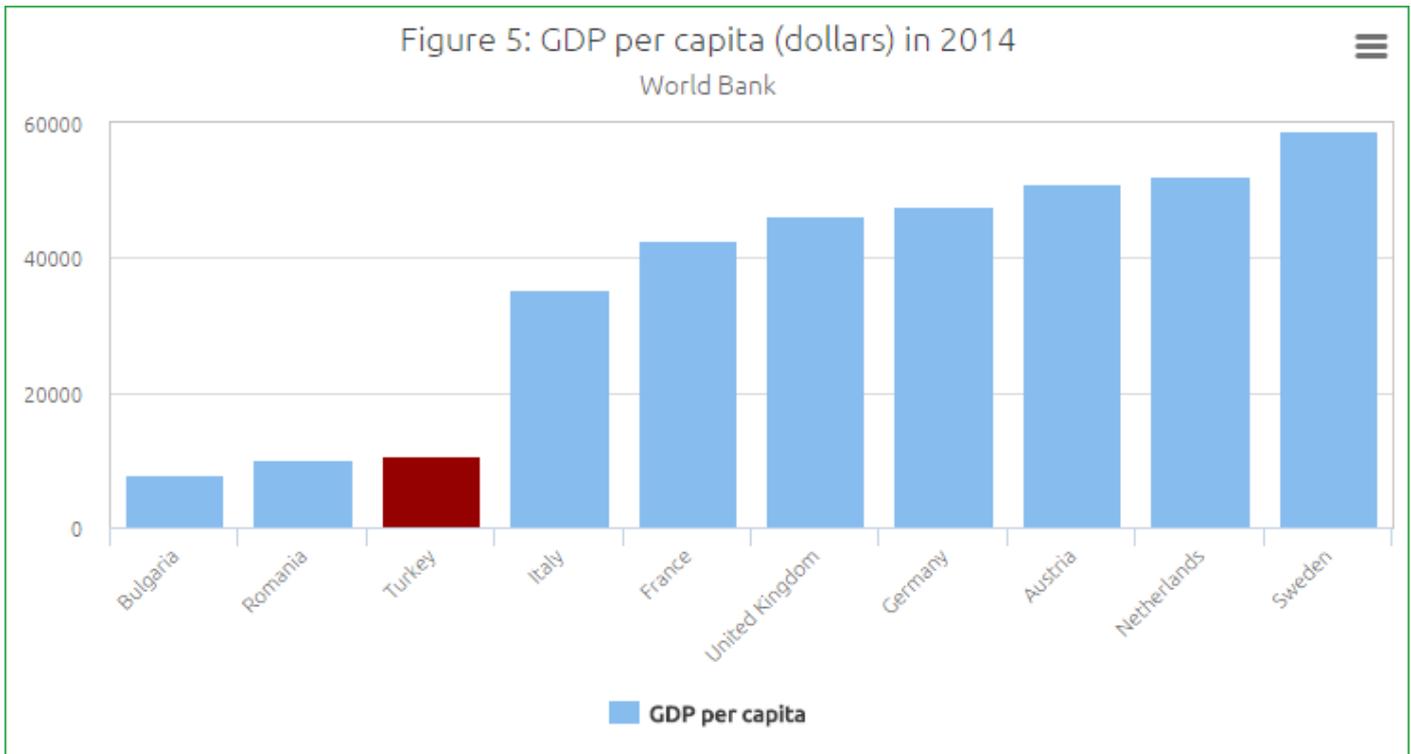
24. Analysis of migration from current EU members also suggests that availability of work in the UK is currently an important draw for migration and that this incentive may be considerably increased by the higher wage differential between the UK and some other Member States likely to result from the National Living Wage.<sup>71</sup>



69 World Bank data on GDP per capita for 2014, URL: [http://data.worldbank.org/indicator/NY.GDP.PCAP.CD?order=wbapi\\_data\\_value\\_2014+wbapi\\_data\\_value+wbapi\\_data\\_value-last&sort=asc](http://data.worldbank.org/indicator/NY.GDP.PCAP.CD?order=wbapi_data_value_2014+wbapi_data_value+wbapi_data_value-last&sort=asc)

70 United Nations Economic Commission for Europe data.

71 See Migration Watch UK, 24<sup>th</sup> February 2016, URL: <http://www.migrationwatchuk.org/briefing-paper/375>



## A safer and freer society

25. As the European Commission’s progress report for 2015 makes clear, freedom of expression in Turkey is frequently challenged, freedom of assembly is overly restricted and non-discrimination is not sufficiently enforced.<sup>72</sup> The existence of the rule of law, relative freedom of expression and protections for minorities in Britain would likely act as a pull factor for potential Turkish migrants, especially perhaps Kurds, in search of a better life.

## Current Turkish-born population in European Economic Area countries and Switzerland

26. In 2015, there were 2.75 million people who were born in Turkey (or 3.5% of the total Turkish population of 78.6 million) living in the 31 European Economic Area<sup>73</sup> (EEA) countries as well as Switzerland. The vast majority were living in Germany, Austria, the Netherlands and France, with just under 4% in the UK.<sup>74</sup> In 2011, Turkey’s then-Foreign Minister Ahmet Davutoglu said there were 400,000 Turkish citizens living in the UK.<sup>75</sup> As much as half of the Turkish community in Britain is believed to

72 European Commission, ‘Turkey Progress Report -2015’, 10<sup>th</sup> November 2015 URL: [http://ec.europa.eu/enlargement/pdf/key\\_documents/2015/20151110\\_report\\_turkey.pdf](http://ec.europa.eu/enlargement/pdf/key_documents/2015/20151110_report_turkey.pdf)

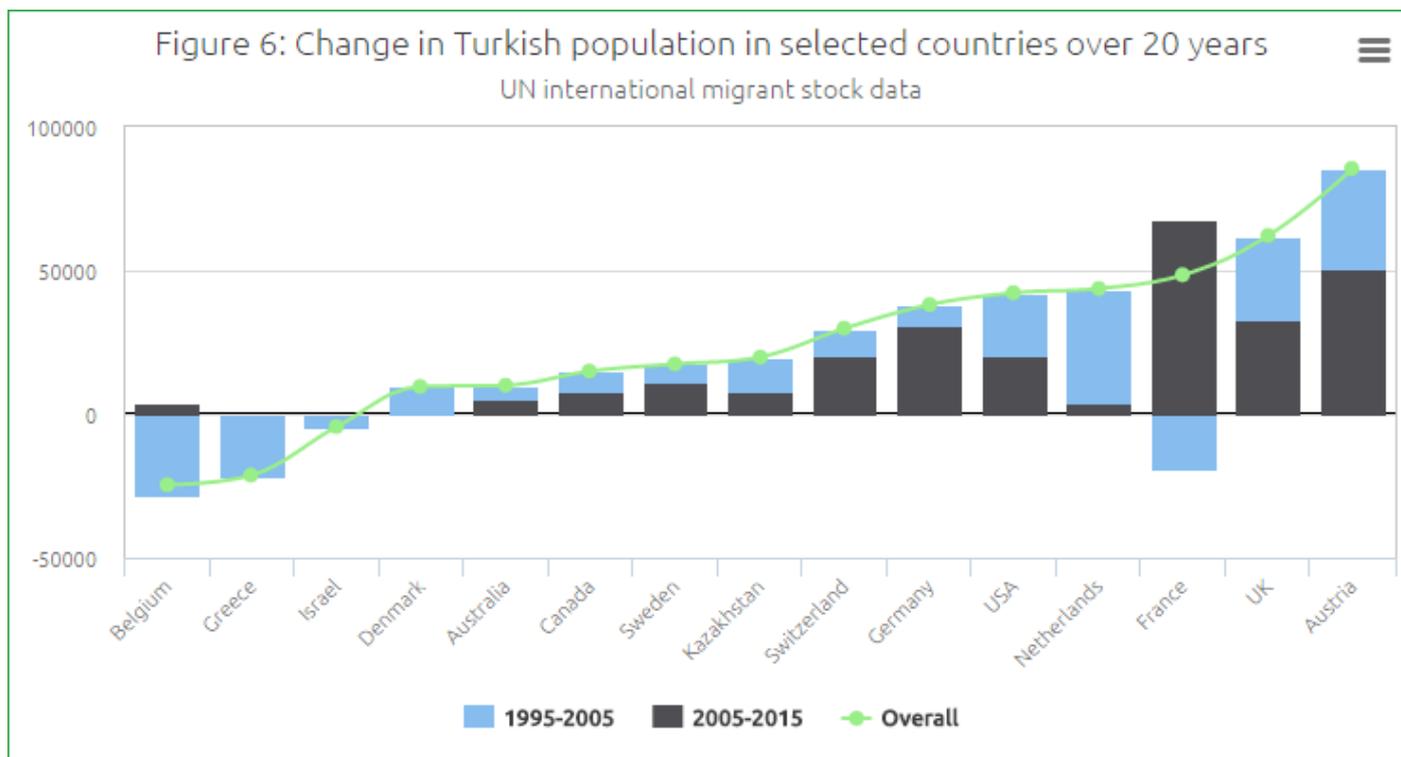
73 Free movement rules apply to all countries in the EEA (which comprise all 28 EU member states plus Iceland, Norway and Liechtenstein). Free movement applies to Switzerland although it is not a member of the EEA. URL: <https://www.gov.uk/eu-eea>

74 UN, International Migrant Stock Data, 2015 revision, URL: <http://www.un.org/en/development/desa/population/migration/data/estimates2/estimates15.shtml>

75 TurkishNY, 31<sup>st</sup> March 2011, URL: <http://www.turkishny.com/news/turkeys-foreign-minister-says-turkey-britain-have-bright-future#.V1USIFe7dk>

be of Turkish-Cypriot extraction.<sup>76</sup> As Kings College London points out, previous migration of Turks to the UK has been rooted in the search for jobs 'with the majority of migrant workers arriving (and their families then following) during the late 1970s'.<sup>77</sup> Similar motivations might apply for migration following potential Turkish accession to the EU.

27. The UK's Turkish community has seen more recent growth than the larger Turkish diasporas in Germany and France (see figure 6 below). Moreover, about half of roughly 100,000 Turkish departures to destinations overseas per year in the 1990s were motivated by family ties abroad, so the pull factor resulting from kinship and existing communities could be significant.<sup>78</sup>



## Previous predictions

28. The UK government has resisted estimating how many Turkish citizens might migrate to the EU in the event of accession.<sup>79</sup> In March 2016, FCO Minister Baroness Anelay told the House of Lords: "No worthwhile assessment could be made ahead of much greater clarity both about the potential timescale for Turkish accession and the rules that would apply to freedom of movement of people at that time."<sup>80</sup>

29. Social scientists have emphasised different pull factors in various predictions. Focusing on the effect of the size of current Turkish populations in EU countries, Lejour, de Mooij and Capel estimated that 2.7 million people would migrate to the EU in the first 15 years after accession. They predicted that 2% of

76 HASC Report 2011.

77 Kings College London.

78 Ahmet İçduygu, Zeynep Gülrü, Göker Lami Bertan, Tokuzlu Seçil and Paçacı Elitok, 'Turkey – Migration Profile', Migration Policy Centre, June 2013.

79 HASC Report 2011.

80 Response to written parliamentary question, March 2016, URL: <http://www.parliament.uk/business/publications/written-questions-answers-statements/written-question/Lords/2016-03-09/HL6867/>

this migration figure, or 53,000, would settle in the UK within 15 years of accession based on the number of Turks in the UK in 1999.<sup>81</sup> Quasier and Repegather estimated (in the absence of transition periods and with full application of free movement from 2013) the long-term potential for migration from Turkey to Germany at between 0.5 and 4.4 million on the basis of the existing number of Turkish migrant workers as well as economic differentials.<sup>82</sup>

## Estimate of Turkish migration based on previous migration experience following EU accession

30. Government-endorsed predictions of migration from newly acceded countries have often proved inaccurate. Before the accession of the A8 Eastern Europe countries in 2004, the British government published an academic report that predicted net migration to the UK would be a maximum of 13,000 a year. It has proved to be five times more than this and the population of Eastern Europeans has increased by nearly a million in ten years. It is therefore not sufficient to point to relatively low flows from Turkey in present conditions. This risks exactly the same error that occurred in the case of Poland, where there was a total failure to appreciate the impact on migration flows of a completely new situation. We could, once more, find that the private sector reacts very much more swiftly than the government. The availability of cheap labour in Poland led rapidly to the growth of employment agencies to recruit them and cheap travel to transport them.

## Historical comparisons

31. Of the 3.8 million-strong Turkish diaspora living outside Turkey in 2010, 80% were in Europe. Of more than 3 million Turks in EEA countries in 2010, the plurality, 1.6 million (or 43%), were in Germany.<sup>83</sup> However, according to the Migrants' Rights Network, the presence of existing Turkish immigrant communities and networks in Britain means the UK will remain as a popular destination for Turks and Kurds. The UK may also enjoy a disproportionate share of Turks with higher qualifications as English is the medium of instruction in many Turkish universities.<sup>84</sup>

32. Academic research has suggested that Poland and Romania can be seen as comparator countries for potential of Turkish migration to the EU. For example, a 2014 article in the Journal of Economic Cooperation and Development bases its research on simplified assumptions that 'Poland and Turkey are similar countries to the point that their migration flows would react similarly'. "There would be [an] increase in migration if Turkey was to accede" to the EU. It adds that this would be a short-term effect that would start to fade away quickly.<sup>85</sup> Academics Erzan and Kirisci argue: "All in all the structural patterns between Poland and Turkey are quite similar."<sup>86</sup> Meanwhile, arguing in favour of Turkish

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81 Lejour, de Mooij and Capel, 'Assessing the economic implications of Turkish accession.'

82 European Commission, 'Issues arising from Turkey's membership perspective', 10<sup>th</sup> October 2004, URL: [http://ec.europa.eu/enlargement/archives/pdf/key\\_documents/2004/issues\\_paper\\_en.pdf](http://ec.europa.eu/enlargement/archives/pdf/key_documents/2004/issues_paper_en.pdf)

83 Ahmet İçduygu Zeynep Gülrü Göker Lami Bertan Tokuzlu Seçil Paçacı Elitok, , 'Turkey – Migration Profile', Migration Policy Centre, June 2013.

84 Migrants' Rights Network, 'Turkish migration, EU and UK'.

85 Wadim Strielkowski, Ondřej Glazar and Tomáš Duchác, 'Economic Implications of Turkish Migration in Europe: Lessons Learned from Polish EU Accession', Journal of Economic Cooperation and Development, 35, 2 (2014).

86 Erzan and Kirisci, Turkish Immigrants in the European Union.

accession in 2006, scholar Åsa Lundgren noted: “Turkey presented western Europe with more or less the same risks as did Romania.” Lundgren suggested that potential migration by members of the Roma community in Romania could be similar to the likely movement of Turkish Kurds to other parts of the EU.<sup>87</sup>

33. Annex A describes how the experience of migration following the accessions of Poland and Romania can help in the calculation of likely Turkish migration. Poland and Romania were chosen as comparator countries because they are relatively large with similar economic indicators at the time of accession to those of Turkey, as well relatively similar levels of material deprivation.

34. Annex B assesses the Vote Leave estimates for possible Turkish migration to the UK.

## Conclusion

35. A rapidly growing and relatively youthful population, worsening civil strife, relatively high unemployment and material deprivation and a high proportion of informal and agricultural employment are likely to combine to ensure that a significant number of Turks take advantage of free movement rules following the end of prospective transitional controls after any prospective accession. The migration potential could also be heightened by desires among the Kurdish minority to seek refuge in freer and safer parts of the EU.

36. These variables could interact with pull factors, including the greater availability of jobs and higher relative incomes, to lead a segment of migrants from Turkey to choose the UK as a final destination. As Annex A explains, experience of previous accessions suggests the UK can expect an annual net inflow in excess of 100,000 a year. Finally, the dependence of the EU on Turkish co-operation to tackle the migration crisis at its southern border could well mean the fast-tracking of membership negotiations, despite persisting doubts in some member states.

7<sup>th</sup> June 2016

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87 Åsa Lundgren, ‘The Case of Turkey’, in Helen Sjursen (ed.), *Questioning EU Enlargement*, (Routledge, 2006).

## Annex A

# Estimating potential Turkish migration based on the experience of migration to the UK from Poland and Romania

1. This appendix uses two approaches to estimate Turkish migration to the UK in the first ten years following the end of transition controls. The first considers growth in the population of Polish-born in the EEA and UK since 2004 while the second considers the same with regards to Romanian citizens in 2014-2015.

2. Poland and Romania have been chosen as comparators with Turkey because:

(1) Turkey, Poland and Romania all have relatively large populations (38.4 million in Poland in 2004 versus 78.6 million in Turkey in 2015 and 19.7 million in Romania in 2014).

(2) In all three countries, high proportions of the population are materially deprived relative to the UK. 33.8% of the Polish population was materially deprived in 2005, as were 26.3% of Romania's population in 2014, (substantially more than the UK figure of 5.3% in 2005 and 7.3% in 2014).<sup>88</sup> This compares with a Turkish rate of material deprivation in 2014 of 29.4%.<sup>89</sup>

(3) All three countries have a GDP per capita only a fraction of that of the UK. (The UK's GDP per capita was 5.8 times that of Poland in 2004, while in 2014 it was 4.6 times that of Romania and 4.4 times that of Turkey).<sup>90</sup>

(4) There are large differences in average wages between those in the UK and in Romania, Poland and Turkey (in 2014, average UK wages were 5.6 those in Poland, 6.4 times those in Romania, while in 2010, UK wages were just under 4 times those in Turkey).<sup>91</sup>

(5) Poland, Romania and Turkey had or have substantial migrant communities already in the UK. There were 95,000 Poles in the UK in 2004 and 137,000 Romanians in 2014, while it is estimated that there are as many as 400,000 people of Turkish descent in the UK, although perhaps half are of Cypriot extraction.

3. It is relevant that the UK was one of only three EEA countries not to put in place seven-year transitional controls following Polish accession in 2004 (Sweden and Ireland were the others). We have therefore also examined Romania as a counterexample. In this case, transitional controls were employed by a range of countries following the country's accession to the EU in 2007. These controls ended for the UK, as well as for Germany, Austria, the Netherlands, Malta and France, in January 2014.

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88 Eurostat, 'People at risk of poverty or social exclusion', December 2015, URL: [http://ec.europa.eu/eurostat/statistics-explained/index.php/People\\_at\\_risk\\_of\\_poverty\\_or\\_social\\_exclusion](http://ec.europa.eu/eurostat/statistics-explained/index.php/People_at_risk_of_poverty_or_social_exclusion)

89 Turkish Statistical Institute, 'Income and living conditions survey 2014', 18<sup>th</sup> September 2015, URL: <http://www.turkstat.gov.tr/PreHaberBultenleri.do?id=18633>

90 World Bank data, GDP per capita, URL: <http://data.worldbank.org/indicator/NY.GDP.PCAP.CD?page=2>

91 United Nations Economic Commission for Europe data.

4. There are a number of factors unique to Turkey that might increase the migration potential. They include:

- the deteriorating security situation there, including the five-year war on its border with Syria and a violent insurgency in its big cities.
- an economy currently plagued by inflation and high overseas debt.
- a significant proportion of Turkey's large Kurdish minority (between 14% and 18% of the population) who consider themselves oppressed.
- an increasingly authoritarian government.

5. Furthermore, recent events have seen more than a million migrants cross into Europe from other parts of the world in 2015 and there was a 48% rise in illegal migration from outside the EU in 2013. This suggests that the continent may have increased in attractiveness as a destination in the eyes of potential economic migrants and those seeking asylum, including those from Turkey.

## Method 1: Polish migration to the UK 2004-2014

6. ONS figures show that the increase in the UK-resident contingent of Polish-born between 2004 (95,000) and 2014 (790,000) amounted to 695,000, or 1.8% of the total Polish population in 2004 of 38.4 million. 1.8% of the projected Turkish population of 78.6 million in 2015 would give an estimate of just under 1.42 million for the first ten years, or about 142,000 a year.

7. Given that the UK was one of only three countries not to impose transitional controls on Polish citizens following the country's accession to the EU in 2004, the inflow from Poland must have been higher than it would have been if the all members of the EU, and especially Germany, had opened their labour markets simultaneously. Accordingly, we consider the migration of Polish citizens to Germany in the period after transitional controls were ended with respect to Poland in April 2011. There was, according to Eurostat, an increase in the population of Polish citizens in Germany of around 192,000 between 2011 and 2015, or an average increase of just under 48,000 per year over the four years. This amounts to 0.124% of the 2011 Polish population (38.6 million) each year. Sized up to the Turkish population of 78.6 million, this gives a figure of just under 98,000 a year. This is very broadly consistent with an enhanced flow to the UK as suggested above.

## Method 2: Romanian migration to EEA countries, specifically the UK and Germany, 2014-2015

8. According to Eurostat, there were just under 2.6 million Romanian citizens living in other EEA countries in 2015. This was around 13% of the total Romanian population in 2014 of just under 19.7 million. It reflected an increase of nearly 173,000 on the year before – equivalent to around 0.88% of Romania's population. If scaled up to Turkey's projected population of 78.6 million, the Romanian experience suggests that around 690,000 Turks might travel to the EEA in the first year after the end of transitional controls.

9. Eurostat also tells us that the 178,000 Romanian citizens living in the UK amounted to just under 7% of the total number of Romanians in other EEA states in 2015. However, their numbers rose by 41,000 between 2014 and 2015. This amounts to nearly 24% of the total increase of 173,000 in the number of Romanian citizens living in other EEA countries. If, based on Romanian experience, we take 24% of the 692,000 total number of Turks expected to come in the first year after transitional controls are ended, we can make a very rough estimate of 166,000 Turks migrating to the UK.

## Annex B

# The Vote Leave paper and the prospects for Turkish immigration

## Introduction

1. The Vote Leave paper “paving the road from Ankara: The EU, immigration and the NHS”<sup>92</sup> was easily dismissed by the Government on the grounds that:

- It lumped together five rather different candidate countries.
- It assumed that all, including Turkey, would achieve membership by 2020, a date that seems very unlikely at present.
- It made no allowance for transition periods in its headline figures.
- It claimed a direct correlation between A&E attendance and net migration for which there is little solid evidence.

2. This note examines their methodology and finds that the highest estimate is unconvincing. That is not to deny, however, that the possibility of yet another mass migration from poorer member states is a serious risk in the longer term if the UK remains a member of the EU.

## General

3. The estimates assume that current levels of net migration from the existing EU member states will remain constant at 172,000 per year for the next fifteen years.

4. They make no mention of non-EU migration, which is running at 190,000 a year, nor of British emigration of about 40,000 per year – giving a net inflow of 150,000 in addition to that from the EU.

5. They assume in their main forecasts that there will be no transition periods – an aspect that attracted some criticism.

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92 Vote Leave campaign document, ‘Paving the road from Ankara: the EU, immigration and the NHS’, May 2016, URL: [https://d3n8a8pro7vhmx.cloudfront.net/voteleave/pages/24/attachments/original/1463745000/Vote\\_Leave\\_-\\_Paving\\_the\\_road\\_from\\_Ankara\\_the\\_EU\\_immigration\\_and\\_the\\_NHS.pdf?1463745000](https://d3n8a8pro7vhmx.cloudfront.net/voteleave/pages/24/attachments/original/1463745000/Vote_Leave_-_Paving_the_road_from_Ankara_the_EU_immigration_and_the_NHS.pdf?1463745000)

## The Low Scenario

6. The authors take the net average inflow from the East European members (the A8) between 2004 and 2015 as a percentage of their total population. (46,000 divided by 73,000,000 gives 0.063%).

7. They assume that the same proportion of the five accession states will move to the UK to give an annual inflow of 61,000 by 2022.

8. Based on the projected populations for 2020, this gives a net inflow of  $172,000 + 61,000 = 233,000$  from the EU alone.

## Comment on the Low Scenario

9. Turkey comprises 85% of the five projected populations in 2020, so 52,000 a year is their low estimate for Turkish annual migration to the UK.

10. Taking all eight East European accession states as the comparator, combines countries with rather different migration profiles, but it is perhaps defensible for broad brush estimates of this kind.

11. However, their estimate of only 557,000 persons (net) who moved from the A8 to the UK is seriously wrong. It is taken from the International Passenger Survey (IPS) with no allowance for its subsequent revision in the light of the 2011 census which added some 350,000. Given the doubts about the IPS, it would be better to look at the increase in the UK population of those born in A8 countries over the same period. This gives about 1.2 million, roughly double their estimate. This change would bring their estimate for Turkey to 100,000 per year (and for all five candidates to 120,000 per year).

## The Medium Forecast

12. This calculation repeats the exercise but bases it on the inflow from just Romania and Bulgaria, and only over the first two years of their accession. They take the IPS inflow of 46,500 a year or 0.173% of the populations of these two states. Scaled up to the new accession states gives an annual inflow of 167,000 or 140,000 just from Turkey.

13. They add this 167,000 to the current 172,000 from existing member states to reach 339,000 by 2022.

## Comment on the Medium Scenario

14. The methodology is the same as for the low scenario but the starting point is uncertain. It is based on only two years data and there are doubts about its accuracy. The numbers may even be an undercount. Given these factors the use of Romania and Bulgaria has unavoidable limitations.

## The High Forecast

15. This takes the Medium Forecast and scales it up by 34% in line with the anticipated increase in the National Living Wage (NLW). This produced net EU migration of 428,000 per year from 2022. It is possible, indeed likely, that this increase in the NLW will add to the inflows from poorer member states, but there is absolutely no basis for this degree of upscaling.