The Outlook for Migration to the UK

Summary

1. This paper looks ahead for the next twenty years in the event that the UK votes to remain within the EU. It assesses that net migration would be likely to remain very high or indeed rise further still, with serious consequences for our population and quality of life.

2. The paper focuses on EU migration and sets out two scenarios for a lower and higher estimate which are summarised in Annex A and B. Under the low migration scenario, EU net migration would not fall below 155,000 by 2035 and it would add 3.4 million EU migrants to the UK population by that date. Under the high migration scenario, EU net migration would be 220,000 a year by 2035, adding an additional 4.3 million EU migrants to the population of the UK. Net migration from the EU is currently recorded at 184,000. However, the unexplained discrepancy between the growth in the population of EU migrants and registrations for National Insurance Numbers suggests that the true EU net migration figure is closer to 220,000. (See paragraph 15)

3. A continuing flow of non-EU migrants would add to this total. Non-EU net migration currently stands at 188,000. Under the low scenario the government's recent efforts to tighten the system are assumed to bring non-EU net migration down to 100,000 a year. Under the high scenario non-EU net migration would only be reduced to 150,000 a year.

4. Taken together, this implies that the UK faces foreign net migration of between 255,000 and 370,000 a year by 2035. From this, net emigration of 50,000 British citizens a year (the average of recent years) should be subtracted giving total net migration of between 205,000 and 320,000 per year for the next 20 years or so.

5. We have taken the average of these two scenarios as the best estimate of total net migration (Annex D). That amounts to net foreign migration of 315,000 of which 60% comes from the EU and total net migration of 265,000 by 2035. This is, as it happens, the high migration scenario of the current ONS population projection, which projects that the UK population will be 70 million by 2024 and 75 million by 2044. These population projections are set out in Annex E.

6. Both of these scenarios assume that Turkey will not join the EU by 2035. If Turkey should join, we would expect net migration of 30,000 a year during a seven year period of transitional controls followed by 100,000 a year when those controls were lifted. This additional scenario is set out in Annex C.

7. In the longer term it is hard to see what would reduce these numbers until the economies of Eastern Europe reach a similar level to the UK and the Eurozone recovers from its difficulties.

Introduction

8. A decision to remain in the EU would have enduring consequences for the medium and long term. This paper attempts to estimate the prospects for EU migration to the UK over a similar period. It examines the recent pattern of immigration from the original EU14, the newer members from Eastern Europe known as the EU8 (Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Slovakia and Slovenia) and, most recently, from Romania and Bulgaria, the EU2. These patterns suggest that the key drivers of migration to the UK are differences in potential earnings and in unemployment rates (especially among the young). Other important factors such as the English language, free access to the NHS and to education as well as a generally free society, are likely to continue relatively unchanged over the period so they also contribute to our assessment of the next twenty years.

An Overview of EU migration – What has happened

9. Immigration is mainly driven by differences in wealth and opportunities between countries. As the diaspora of migrants in the UK grows it facilitates the arrival of new migrants from the home country so migration can (and often does) accelerate.

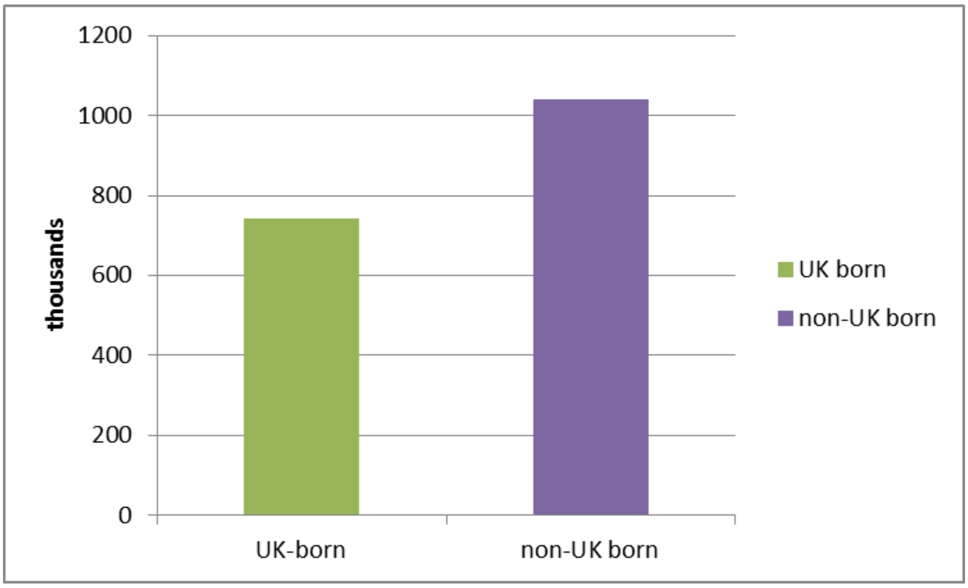
10. Migration from the EU soared following the addition of eight Eastern European countries in 2004. The net flow fell (but remained positive) following the financial crisis but then rose rapidly to return to record levels.

Why has migration picked up since 2010?

11. The UK returned to economic growth in 2010. By 2015 an additional 1.8 million people were in work in the UK, with the majority of this increase (60%) coming from workers born outside the UK.[1] Of the additional 1.1 million non-UK born workers around 680,000 came from the EU.

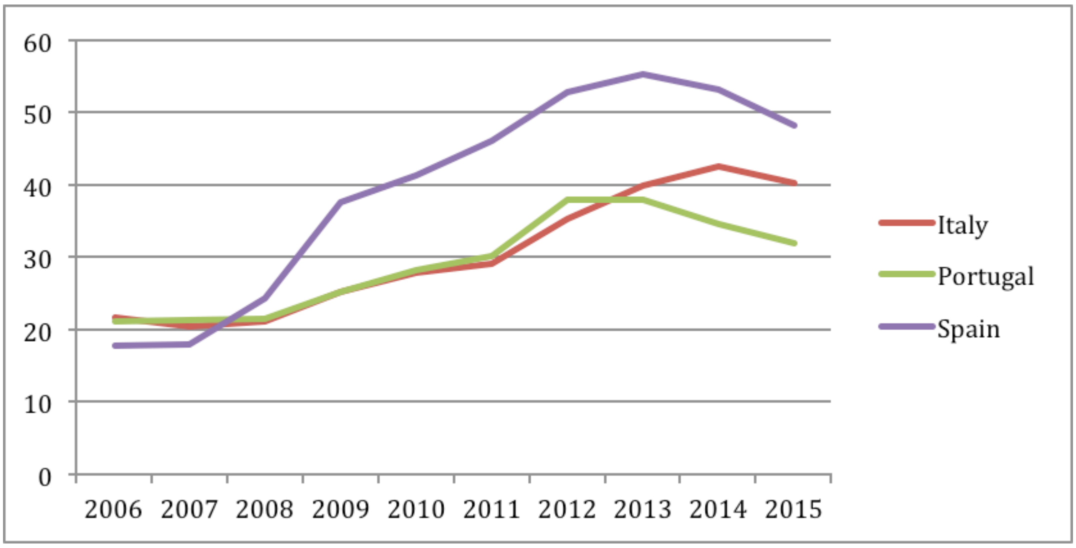
[1] Q2 2010 to Q2 2015, Employment by country of birth, Table EMP06, Office for National Statistics.

Figure 1: Employment by country of birth, 2010 to 2015



12. Many EU migrants came to the UK to find work from southern Europe (e.g. Greece, Italy, Portugal, Spain); many were young people fleeing high unemployment. Youth unemployment rates in their home countries rose dramatically following the financial crisis and have since remained high. This is a relatively new development.

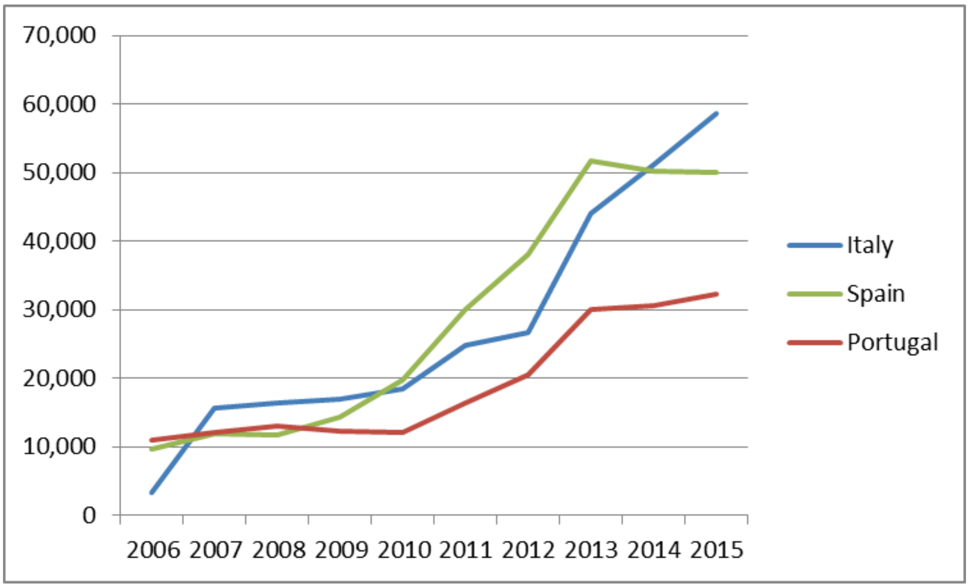
Figure 2: Youth Unemployment Rate in Italy, Portugal and Spain.[2]



13. As a result, since 2010, there has been a very large increase in the annual number of national insurance numbers (NINOs) allocated to citizens of Italy, Portugal and Spain.

[2] Eurostat, http://ec.europa.eu/eurostat

Figure 3: UK National Insurance Numbers allocated to nationals of Italy, Portugal and Spain.[3]



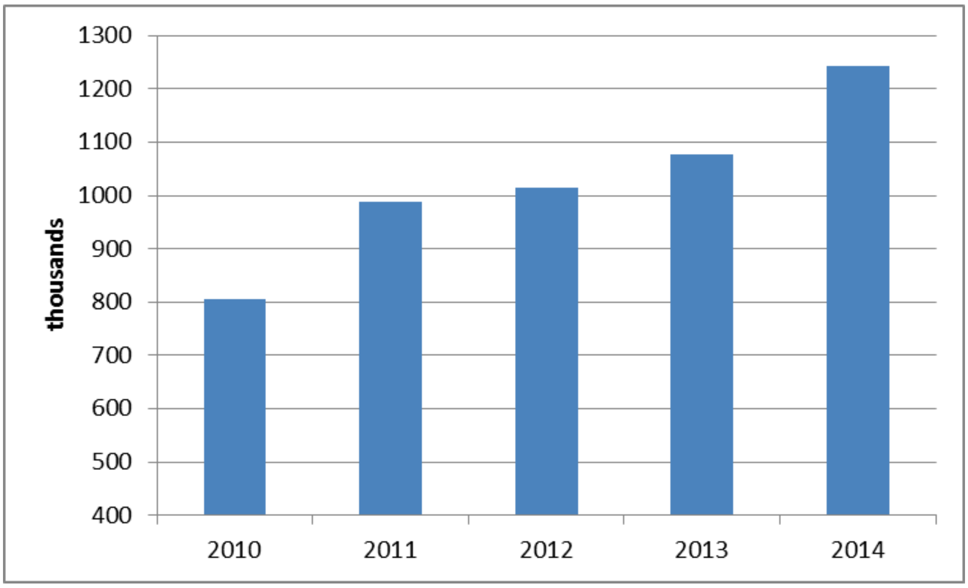
EU8 countries of Eastern Europe

14. In 2010 there were an estimated 884,000 EU8 born migrants living in the UK.[4] Since 2010 an average of 180,000 NINOs a year have been issued a year to EU8 nationals.

15. Many EU8 nationals have come to the UK for short periods of time to earn money to send home. Nonetheless, many others have settled in the UK and the numbers born in the EU8 and living in the UK increased by around 400,000 between 2010 and 2014.[5] This growth in population is considerably higher than the official net migration figures for the EU8 which have averaged only around 40,000 a year across this period. Separate analysis by Migration Watch estimated that EU8 net migration was more likely to have been of the order of 90,000 a year over the past five years.[6]

[3] Department for Work and Pensions, https://stat-xplore.dwp.gov.uk/
[4] ONS Annual Population Survey, 2010.
[5] http://www.migrationwatchuk.org/briefing-paper/380
[6] http://www.migrationwatchuk.org/briefing-paper/380

Figure 4: Population recorded as living in the UK who were born in the EU8, 2010 to 2014.



16. The majority of Eastern Europeans who have arrived since accession have taken low paid work in the UK, with three-quarters of Eastern European migrants in work classified as' low-skilled' including one third in elementary level occupations.[7] Despite this, the wages available in the UK are considerably higher than in their home countries. For example, the minimum wage in the UK, between 2010 and 2015, was over three times higher than in Poland.[8] There is even an economic incentive to leave an average paying job in Eastern Europe to take minimum wages in the UK. The minimum wage in the UK is around 1.5 times higher than the average wage in Poland.[9]

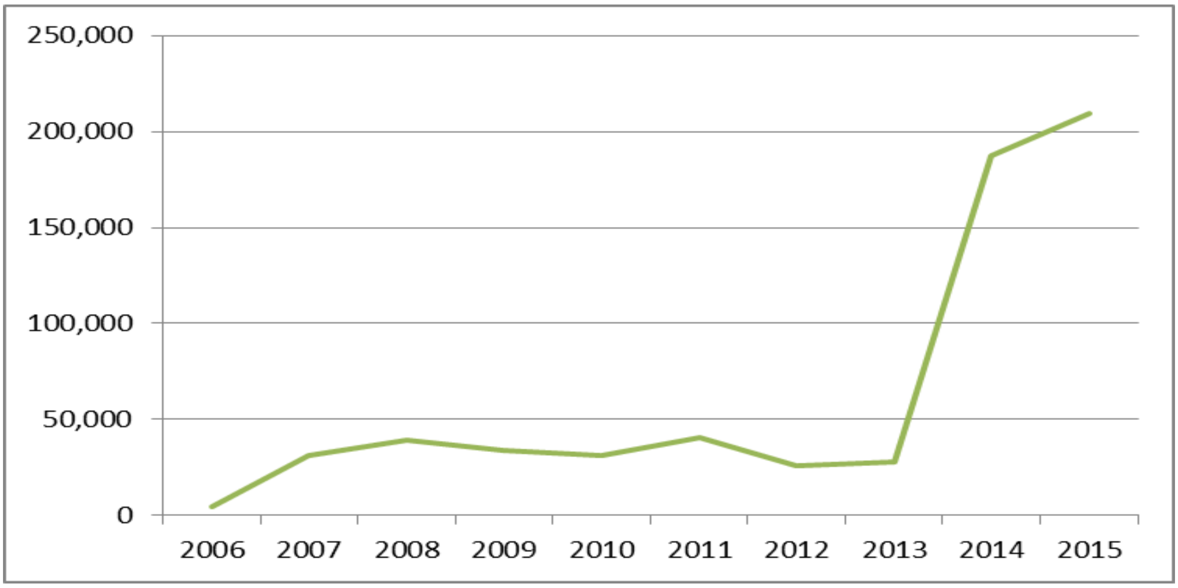
17. Most Eastern Europeans migrants have arrived in the UK as single or in childless couples but if they do go on to have children the financial benefits available for single earner households on the minimum wage are significant.[10] The total fertility rate of Poles living in the UK has been much higher than for Poles living in Poland[11] and is higher than the UK national average. The same applies to immigrants from a number of other EU8 countries. Figure 4 above does not include the children born to migrants after they have arrived in the UK, so the population of families of migrants is even larger.

[7] EU Born Workers in Labour Market by SOC One-Digit Code/Skills Level by year of first arrival 2004-2014, Labour Force Survey Q2 2015.
[8] Minimum wage data from the OECD and the ONS.
[9] Average Annual Wages, OECD, https://stats.oecd.org/Index.aspx?DataSetCode=AV_AN_WAGE
[10] http://www.migrationwatchuk.org/briefing-paper/375
[11] http://www.thenews.pl/1/10/Artykul/161201,Polands-baby-boom-in-UK

EU2 – Romania and Bulgaria

18. Romania and Bulgaria joined the European Union in 2007 but transitional controls limiting their right to work were in place until 2014. The subsequent rise in migration has been greatly exceeded by the number of NINOs issued which has soared to over 200,000 in 2015.

Figure 5: National Insurance numbers issued to EU2 nationals since 2006

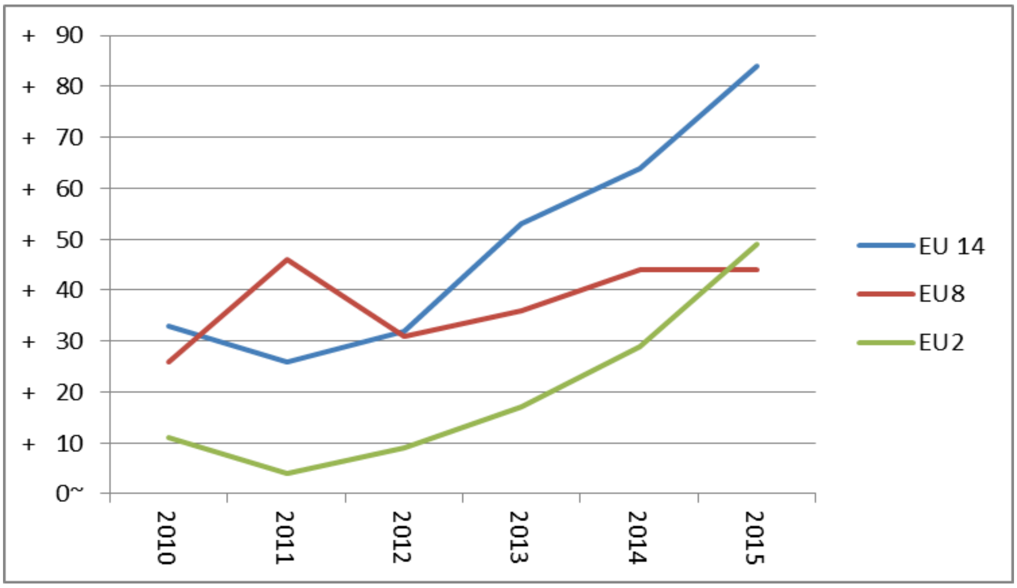


19. The economic incentives to come to the UK from Romania and Bulgaria are exceptionally high: the minimum wage in the UK is six times higher than in Romania and seven times higher than in Bulgaria.[12]

20. Official Net migration from the EU14, EU8 and EU2 since 2010 is shown in Figure 6 below. In reality annual net migration from the EU8 was in the order of 50,000 higher meaning it has been around 90,000 a year. This adjusted value of EU8 migration will be used when looking at ahead at future flows of migrants.

[12] Eurostat data on minimum wages http://ec.europa.eu/eurostat/tgm/table.do?tab=table&init=1&language=en&pcode=tps00155&plugin=1

Figure 6: Net migration by EU region since 2010



What could happen – projections to 2035

21. This section looks at the potential scale of migration over the next 20 years, firstly by looking at the period to 2020 and then by looking at the longer term to 2035. It discusses the factors involved in producing two scenarios for EU net migration; one of 'low migration' and one of 'high migration' (summarised in Annex A and B). It then briefly looks at non-EU migration to build a picture for the total scale of potential non-UK migration to the UK.

22. Of course, the actual number of migrants that will end up coming to the UK is unknown but these two scenarios illustrate a possible range within which the level of future migration is likely to sit.

The Outlook to 2020

23. The Office for Budget Responsibility (OBR) has forecast that the UK economy will grow by around 2% a year to 2020 and that approximately an additional one million people will be in work.[13] The UK employment rate of those aged 16-64 now stands at a high level of 74% and the OBR does not expect unemployment to fall further.[14] Instead, for the period to 2020, the rise in forecast employment is expected to come entirely from "additional population growth", most of which is driven by migration.

[13] Economic and Fiscal Outlook 2016, Office for Budget Responsibility, Table 1.1. http://cdn.budgetresponsibility.org.uk/March2016EFO.pdf
[14] Ibid, paragraph 3.76, page 64.

24. It is therefore likely that there will be continued opportunities for employment resulting in continued high levels of net migration from the EU.

25. Spain, Italy and Portugal are all forecast to undergo moderate economic growth out to 2020 and unemployment is expected to fall, although not to the levels seen before the financial crisis. Youth unemployment, too, is likely to remain significantly higher than its pre-recession levels for a long time. For example, Spain's youth unemployment is expected to remain above 40% even in 2020.[15]

26. The incentive to come to the UK to find work will remain high for large numbers of young people in the EU. In 2014, Migration Watch UK estimated that net migration from the EU14 would be around 40,000 a year for the medium term.[16] That may prove to have been an underestimate: the ONS official estimate for EU14 net migration is 79,000 in 2015. This figure might yet fall but it seems unlikely that it will fall below 40,000 in the period to 2020.

27. As regards Eastern Europe, Migration Watch estimated in 2013 that annual net migration from the EU2 (Romania and Bulgaria) would run at 50,000 for the five years from 2014-2019.[17] This forecast is similar to the official estimate for 2015 of 58,000.

28. In 2014 we estimated that EU8 net migration would run at 40,000 a year in the medium term.[18] The official estimate for 2015 is 47,000. However, official figures have underestimated EU8 migration, possibly by about 50,000 a year (see above), so the true figure could be closer to 100,000 a year.[19]

29. The economies of Eastern Europe are forecast to grow over the next couple of years[20] and both Romania and Poland have raised their minimum wage in 2016. Yet the economic incentives to move to the UK will remain strong as incomes will still remain substantially lower than in the UK.

30. The UK national minimum wage, now set on an upward course, will add significantly to the pull factor and ensure that a substantial difference remains between basic wage levels in the UK and those in Central and Eastern Europe - the main driving force for migration. As most EU migrants arriving in the UK are single or childless couples they are eligible for only small amounts of benefits even if working

[15] Spain Youth Unemployment Rate Forecast 2016-2020 , http://www.tradingeconomics.com/spain/youth-unemployment-rate/forecast
[16] http://www.migrationwatchuk.org/briefing-paper/331
[17] http://www.migrationwatchuk.org/briefing-paper/287
[18] http://www.migrationwatchuk.org/briefing-paper/331
[19] http://www.migrationwatchuk.org/briefing-paper/380
[20] http://ec.europa.eu/economy_finance/eu/forecasts/2016_winter_forecast_en.htm

at the minimum wage. The delay negotiated by the government in this eligibility for in-work benefits will therefore deter few people from migrating to the UK.[21]

31. Alternative destinations within the EU have lost much of their attraction. Romanians used to favour Italy and Spain but (as noted above) these countries have high unemployment and are themselves now countries of emigration. Germany contains the largest number of Polish citizens outside Poland but they may face much more competition for low paid work as Germany seeks to integrate hundreds of thousands of migrants from the Middle East, Afghanistan and elsewhere. While Germany introduced a minimum wage for the first time at the beginning of 2015, at around the same level as the UK's, it will be considerably out-stripped by the UK as the NLW is introduced.

32. It is therefore hard to see how, in the period to 2020, net migration from the EU10 (EU8 and EU2) will fall significantly in the absence of some form of regulation (which would require treaty change). We believe, therefore, that EU10 migration will remain high, of the order of 90,000 a year from the EU8 and 50,000 a year from the EU2.

33. EU14 migration is more uncertain. Under our 'low' migration scenario it falls back to 40,000 a year by 2020 while under the 'high' migration scenario it remains at around 80,000 a year

The outlook to 2035

34. The situation in the longer term is, of course, much more uncertain. The UK's future "demand" for workers is unclear. Most projected UK economic growth in the forecasts of the official Office of Budget Responsibility (OBR) comes from productivity gains yet to be realised. The OBR economic outlook does project an increase in employment out to 2035 but this is itself based on an assumption of net migration supplied by the ONS and on their own assumption that migrants will have the same employment rate as the UK born.

35. Without net migration, the population of people of nominal working age in the UK (conventionally 20-64) is projected to fall slightly by around 3% between 2015 and 2035 and the proportion of older workers with lower employment rates is expected to increase across this period.[22] However, these conventional age limits are already obsolete as the age of entitlement to the state pension is progressively increased. It is regrettable that the OBR and other forecasters continue to use these obsolete limits which understate the future population of working age. The employment rates of those

[21] http://www.migrationwatchuk.org/briefing-paper/373
[22] ONS Population Projections by age group, URL: http://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationprojections#datasets

aged 50-64 have already risen from 57% in 1995 to 70% in 2015 and could rise further to meet any additional demand for labour (the employment rate of those aged 35-49 is around 86%).[23]

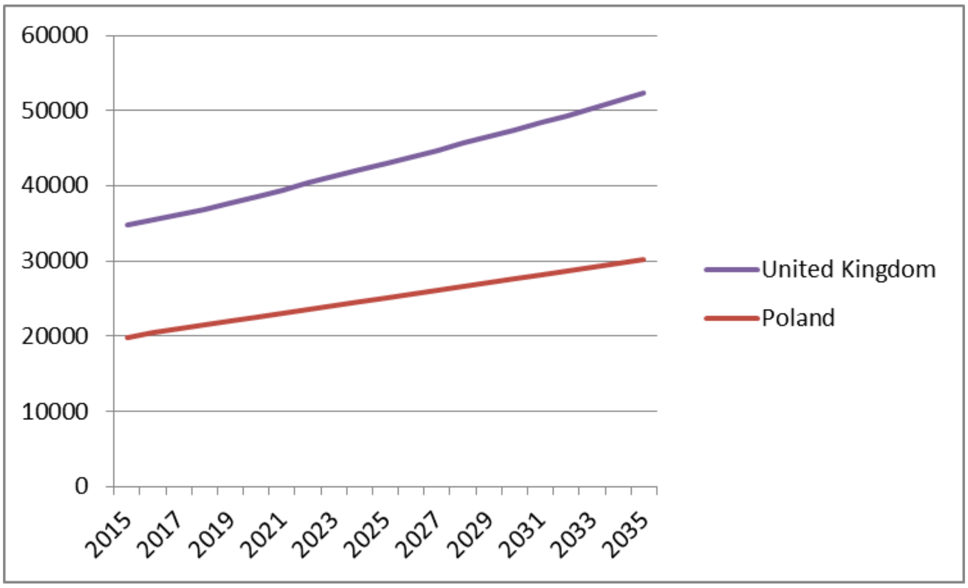
36. More speculatively, conventional demand for labour at many levels, including skilled non-manual work, may be challenged by new developments in increased automation and in artificial intelligence.

37. Yet, to some extent, demand for immigration by employers feeds on itself as the population growth from migration continually increases demand for goods and services, requiring more immigration for its satisfaction.

38. If unemployment across Southern Europe does fall substantially then net migration from those countries is also likely to fall. However, the economic incentive to leave Eastern Europe to come to the UK for work is expected to remain strong.

39. Although Eastern Europe is projected to become wealthier, the OECD does not forecast any convergence in incomes between the UK and countries in Eastern Europe with the gap in GDP per capita remaining wide, as Figure 7 below for Poland illustrates.

Figure 7. GDP per capita in US dollars (PPP).[24]

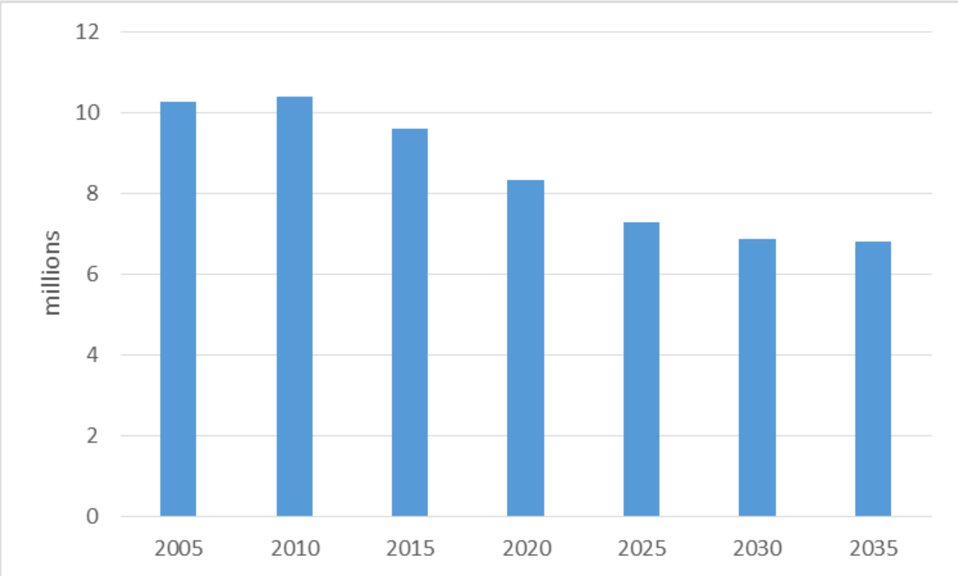


40. This suggests that net migration from Eastern Europe is likely to remain high for at least the next twenty years and could even accelerate as the diaspora grows.

[23] Table A05, ONS Labour Market Statistics.
[24] Economic Outlook No 95 – May 2014 Long-Term baseline projections, URL: https://stats.oecd.org/Index.aspx?DataSetCode=EO95_LTB

41. The population of younger people in Eastern European countries has remained broadly stable in recent years but is now projected to fall because of low birth rates. The population of 18-34 year olds in Poland was around 10 million in 2004 and in 2015 was estimated to be around 9.6 million. It is projected to fall by 1.3 million to 8.3 million in 2020 and continue falling to reach 6.8 million by 2035.[25] Across the EU8 the population of younger people is expect to decline by a quarter from 17.1 million in 2015 to 12.9 million in 2035. A similar situation is projected for the EU2. This means that there will be fewer young people to migrate to other countries.

Figure 8: Actual and Projected Population Aged 18-34, Poland.



42. The extent to which the falling population reduces the scale of immigration partly depends on what countries do to address it. Poland has been issuing work permits to Ukrainian migrants, around 1,000,000 of whom now live in Poland.[26] In Poland and elsewhere in Central and Eastern Europe labour market participation rates amongst women and older workers are much lower than in the UK and other Western countries. Increasing the workforce by employing these workers would lessen the impact on their own economies of continued emigration to the UK.[27]

43. Under our 'high' migration scenario the declining population of younger people is offset by effect of the growing diaspora in the UK and efforts to increase labour market participation in Eastern Europe. Net migration from the EU8 remains at

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[25] Population Projections, Eurostat, URL: http://ec.europa.eu/eurostat/data/database
[26] http://uk.reuters.com/article/uk-europe-migrants-poland-ukraine-idUKKCN0UY2BN
[27] McKinsey and Company, 'Poland 2025: Europe's new growth engine', January 2015, URL: http://www.mckinsey.com/~/media/mckinsey/business%20functions/economic%20studies%20temp/our%20insights/how%20poland%20can%20become%20a%20european%20growth%20engine/poland%202025_full_report.ashx

around 90,000 a year out to 2035 and net migration from the EU2 remains at 50,000 a year out to 2035.

44. Under our 'low' migration scenario EU8 net migration falls in line with reduced population of younger people to 65,000 a year while EU2 migration falls to 30,000 a year.

Recent Refugees

45. The current flow of migrants from the Middle East and elsewhere into Europe will eventually affect the UK. In 2015 and the first quarter of 2016 1.67 million asylum applications were received in EU member states. The total number that end up being granted protection could be in order of one million, which, along with subsequent family reunion could bring the total number to an estimated 4.8 million.[28]

46. The relative ease of finding work and the attractions of the English language would mean that a proportion of those migrants who had been granted EU citizenship and the right to free movement would move on to the UK. If the EU is successful in relocating asylum seekers across the continent the numbers coming to the UK could be higher as migrants located to and subsequently granted asylum in Southern and Eastern Europe leave for jobs and higher wages in the UK. Under our 'low' migration scenario 5% or 240,000 move to the UK over a number of years from 2020 onwards. Under our 'high' migration scenario the figure is 10% or 480,000. This takes no account of further arrivals in the EU, whether from Turkey or North Africa.

Turkey

47. The European Heads of State have reiterated their wish to see Turkey join the EU. Efforts have been made to speed up the process and to open up new chapters in the accession negotiations. That might lead to Turkey joining some time over the next 20 years. Turkey is home to around 80 million people with a GDP per head of around one quarter of the UK. Its population grows faster than that of any European country. If free movement rights were granted, it seems inevitable that there would be substantial and sustained immigration to the UK from Turkey. Even under transitional controls there would likely be significant migration. On the pattern of Romania and Bulgaria[29] we would expect net migration of 30,000 a year while transitional controls were in place and 100,000 a year once they were lifted.[30]

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[28] http://www.migrationwatchuk.org/briefing-paper/382

[29] Of the population of Romanians and Bulgarians living in the UK around 18,000 a year arrived during the period 2007 to 2013 when transitional controls were in place.

[30] Migration Watch UK, The Impact of Potential Turkish Accession to the European Union on Migration to the UK, June 2016, URL: http://www.migrationwatchuk.org/briefing-paper/383

48. To be cautious both our low and high migration scenarios assume that Turkey will not join the EU during the timeframe in question. A third scenario in Annex C assumes that Turkey joins the EU in 2024 and transitional controls are put in place for the full seven years. In this scenario (‘high migration’ scenario plus Turkey) net migration from Turkey is estimated to run at 30,000 per year for the first seven years before rising to 100,000 a year from 2031 onwards once transitional controls were lifted and Turkish citizens are granted unrestricted access to the labour market.

Non-EU migration

49. There have been extensive revisions to the immigration rules that have reduced the options for non-EU migrants to settle permanently in the UK. This has been backed up by a series of Acts of Parliament that make it harder to stay on and work illegally. In 2015 there were 90,000 grants of settlement for non-EU migrants – the lowest level since the 1990s. Despite those restrictions, net migration from non-EU countries remains at 188,000. It is uncertain whether the decline in settlement indicates that non-EU net migration will fall in the future or whether there will continue to be a gap. Upcoming data on exit checks will hopefully provide information on the scale of overstaying by non-EU migrants and perhaps on the accuracy of the emigration figures in the international passenger survey, the basis for the net migration statistics.

50. Under our ‘low’ migration scenario non-EU net migration is brought significantly down to 100,000 a year while under our ‘high’ net migration scenario non-EU net migration remains at close to current levels at 150,000 a year.

The longer term outlook

51. In the longer term it is hard to see what would reduce the inflow to the UK until the economies of Eastern European members of the EU reach a level much closer to our own and until the Southern Europeans recover from the difficulties that now inflict the Eurozone. Alternatively, of course, a serious downturn in the UK economy could reduce its attractiveness as a destination.

Conclusion

52. Under the ‘low migration’ scenario net migration falls to 205,000 by 2035 (net foreign migration would be 255,000). The average rate of net migration in this scenario is 230,000 over the period.

53. Under the ‘high migration’ scenario, total net migration reaches 320,000 by 2035 (net foreign immigration is 370,000, and net British emigration is 50,000). The average annual net migration rate under this scenario is also 320,000.

54. As noted, there is a risk from a migration perspective that Turkey could join the EU. If it does, net migration could rise to 420,000 by 2035 (net foreign migration of 470,000). Under this scenario the average annual rate of net migration is 355,000. The average over the period is lower than the rate for 2035 because it is assumed that Turkish migration is zero until 2024 when Turkey joins the EU and only picks up in 2031 when transitional controls are lifted. Under this scenario our population would be over 76 million by 2035.

55. When planning for the future, a cautious outlook would be to omit Turkey and take the average of the high migration and low migration scenarios. This gives total net migration of 265,000 by 2035 (this comprises net foreign migration of 315,000 of which 60% comes from the EU, offset by net British emigration of 50,000, see Annex D). The average level of net migration per year would be 274,000. Assuming net migration at 265,000 a year the population of the UK would reach 70 million by 2024 and would be 75 million by 2035.

56. Despite the rapid rise in the UK's population in recent years there is still complacency and denial at official levels about the likelihood of continued rapid population growth. To be clear – if mass immigration continues then the UK will continue to undergo rapid population growth with the population climbing to 80 million and with no particular reason why further population growth should not continue. The actual date that it will reach 80 million would be between 2040 and 2050.

57. In the much longer term it is hard to see what would reduce these numbers until the economies of Eastern Europe reach a similar level to the UK and the Eurozone recovers from its difficulties.

13th June 2016

/Annex

Annex A: 'Low migration' Scenario to 2035 – A cumulative total of 3.4 million EU migrants by 2035.

- EU14 net migration falls back to 40,000 by 2020 and remains at that level.
- EU8 net migration remains at 90,000 to 2020 then falls in line with its declining population of younger people to 65,000 a year.
- EU2 net migration remains at 50,000 to 2020 and then falls to 30,000 a year. This fall is partly because the initial surge in migration to the UK from the lifting of transitional controls fades and partly because of the declining population of younger people.
- Turkey does not join the EU
- Only 5% of those refugees who have arrived as a result of the current migrant crisis and who can expect to be granted settlement elsewhere in the EU but might later come to the UK.
- Non-EU net migration is reduced from its current level of 188,000 to 100,000 a year.

Table A1. Low Migration Scenario to 2035 (thousands)

	EU14	EU8	EU2	Turkey	Refugees	EU Total	Non-EU	British	TOTAL
2016	80	90	50	-	-	**220**	**180**	**-50**	**350**
2017	70	90	50	-	-	**210**	**160**	**-50**	**320**
2018	60	90	50	-	-	**200**	**140**	**-50**	**290**
2019	50	90	50	-	-	**190**	**120**	**-50**	**260**
2020	40	90	50	-	5	**185**	**100**	**-50**	**235**
2021	40	85	45	-	5	**175**	**100**	**-50**	**225**
2022	40	80	40	-	5	**165**	**100**	**-50**	**215**
2023	40	75	35	-	10	**160**	**100**	**-50**	**210**
2024	40	75	30	-	10	**155**	**100**	**-50**	**205**
2025	40	70	30	-	15	**155**	**100**	**-50**	**205**
2026	40	70	30	-	15	**155**	**100**	**-50**	**205**
2027	40	70	30	-	15	**155**	**100**	**-50**	**205**
2028	40	70	30	-	20	**160**	**100**	**-50**	**210**
2029	40	70	30	-	20	**160**	**100**	**-50**	**210**
2030	40	65	30	-	20	**155**	**100**	**-50**	**205**
2031	40	65	30	-	20	**155**	**100**	**-50**	**205**
2032	40	65	30	-	20	**155**	**100**	**-50**	**205**
2033	40	65	30	-	20	**155**	**100**	**-50**	**205**
2034	40	65	30	-	20	**155**	**100**	**-50**	**205**
2035	40	65	30	-	20	**155**	**100**	**-50**	**205**
	900	**1505**	**730**	-	**240**	**3375**	**2200**	**-1000**	**4575**

Annex B: 'High Migration' Scenario to 2035 - A cumulative total of 4.3 million EU migrants by 2035.

- EU14 net migration is currently at 80,000. It remains at this level to 2020 and then falls back to 40,000 a year for the long term up to 2035 due to falling unemployment in their home countries.

- Annual EU8 net migration is currently 47,000 according to official figures. However, MW have calculated that EU8 net migration has been underestimated by around 50,000 a year, so the true figure for net migration is around 90,000 a year.

- EU2 net migration is currently estimated to be 58,000. Our earlier estimate of 50,000 a year following the lifting of transitional controls is looking accurate.

- In the longer term the impact of the falling population in Eastern Europe is counter balanced by the growing diaspora in the UK. Therefore, EU8 net migration remains at 90,000 a year and EU2 net migration remains at 50,000 a year out to 2035.

- Turkey does not join the EU.

- 10% of those refugees who have arrived in the EU as a result of the current migrant crisis (and who can expect to be granted citizenship elsewhere in the EU) subsequently move to the UK.

- Non-EU migration is reduced from its current level of 188,000 to 150,000 a year

Table B1. High Migration Scenario to 2035 (thousands)

	EU14	EU8	EU2	Turkey	Refugees	EU Total	Non-EU	British	TOTAL
2016	80	90	50	-	-	**220**	**180**	**-50**	**350**
2017	80	90	50	-	-	**220**	**170**	**-50**	**340**
2018	80	90	50	-	-	**220**	**160**	**-50**	**330**
2019	80	90	50	-	-	**220**	**150**	**-50**	**320**
2020	80	90	50	-	10	**230**	**150**	**-50**	**330**
2021	70	90	50	-	10	**220**	**150**	**-50**	**320**
2022	60	90	50	-	10	**210**	**150**	**-50**	**310**
2023	50	90	50	-	20	**210**	**150**	**-50**	**310**
2024	40	90	50	-	20	**200**	**150**	**-50**	**300**
2025	40	90	50	-	30	**210**	**150**	**-50**	**310**
2026	40	90	50	-	30	**210**	**150**	**-50**	**310**
2027	40	90	50	-	30	**210**	**150**	**-50**	**310**
2028	40	90	50	-	40	**220**	**150**	**-50**	**320**
2029	40	90	50	-	40	**220**	**150**	**-50**	**320**
2030	40	90	50	-	40	**220**	**150**	**-50**	**320**
2031	40	90	50	-	40	**220**	**150**	**-50**	**320**
2032	40	90	50	-	40	**220**	**150**	**-50**	**320**
2033	40	90	50	-	40	**220**	**150**	**-50**	**320**
2034	40	90	50	-	40	**220**	**150**	**-50**	**320**
2035	40	90	50	-	40	**220**	**150**	**-50**	**320**
	1060	**1800**	**1000**	-	**480**	**4340**	**3060**	**-1000**	**6400**

Annex C: 'High Migration and Turkish Membership' Scenario – A cumulative total of 5 million EU migrants by 2035.

- The same assumptions about EU migration as in the high migration scenario.

- Turkey joins the EU in 2024. Under transitional controls Turkish net migration is around 30,000 a year. When transitional controls are lifted in 2031 net migration becomes 100,000 a year.

- 10% of those refugees who have arrived in the EU as a result of the current migrant crisis (and who can expect to be granted citizenship elsewhere in the EU) subsequently move to the UK.

- Non-EU migration is reduced from its current level of 188,000 to 150,000 a year

Table C1. High Migration Scenario and Turkey joins EU to 2035 (thousands)

	EU14	EU8	EU2	Turkey	Refugees	EU Total	Non-EU	British	TOTAL
2016	80	90	50	0	-	**220**	**180**	**-50**	**350**
2017	80	90	50	0	-	**220**	**170**	**-50**	**340**
2018	80	90	50	0	-	**220**	**160**	**-50**	**330**
2019	80	90	50	0	-	**220**	**150**	**-50**	**320**
2020	80	90	50	0	10	**230**	**150**	**-50**	**330**
2021	70	90	50	0	10	**220**	**150**	**-50**	**320**
2022	60	90	50	0	10	**210**	**150**	**-50**	**310**
2023	50	90	50	0	20	**210**	**150**	**-50**	**310**
2024	40	90	50	30	20	**230**	**150**	**-50**	**330**
2025	40	90	50	30	30	**240**	**150**	**-50**	**340**
2026	40	90	50	30	30	**240**	**150**	**-50**	**340**
2027	40	90	50	30	30	**240**	**150**	**-50**	**340**
2028	40	90	50	30	40	**250**	**150**	**-50**	**350**
2029	40	90	50	30	40	**250**	**150**	**-50**	**350**
2030	40	90	50	30	40	**250**	**150**	**-50**	**350**
2031	40	90	50	100	40	**320**	**150**	**-50**	**420**
2032	40	90	50	100	40	**320**	**150**	**-50**	**420**
2033	40	90	50	100	40	**320**	**150**	**-50**	**420**
2034	40	90	50	100	40	**320**	**150**	**-50**	**420**
2035	40	90	50	100	40	**320**	**150**	**-50**	**420**
	1060	**1800**	**1000**	**710**	**480**	**5050**	**3060**	**-1000**	**7110**

Annex D: Average of High and Low Migration Scenarios – A cumulative total of 3.8 million EU migrants by 2035

Table D1. Average of High and Low Migration Scenarios in each year.

Average of low and high migration scenarios, by year				
	EU	Non-EU	British	**Total Net Migration**
2016	220	180	-50	**350**
2017	215	165	-50	**330**
2018	210	150	-50	**310**
2019	205	135	-50	**290**
2020	207.5	125	-50	**283**
2021	197.5	125	-50	**273**
2022	187.5	125	-50	**263**
2023	185	125	-50	**260**
2024	177.5	125	-50	**253**
2025	182.5	125	-50	**258**
2026	182.5	125	-50	**258**
2027	182.5	125	-50	**258**
2028	190	125	-50	**265**
2029	190	125	-50	**265**
2030	187.5	125	-50	**263**
2031	187.5	125	-50	**263**
2032	187.5	125	-50	**263**
2033	187.5	125	-50	**263**
2034	187.5	125	-50	**263**
2035	187.5	125	-50	**263**

- Each line above is the average in that year of the high and low scenarios.
- The percentage of net foreign migration that is due to EU migration varies slightly but is nearly 60% from 2019 onwards.

Annex E: Population Projections based on Four Migration Watch UK Scenarios

Table E1. MWUK Population Projections

Year	Population Growth Implied by 4 MW Scenarios			
	Final population level (millions)			
	205k	320k	420k	263k
2014	64.6	64.6	64.6	64.6
2019	67.8	67.8	67.75	67.8
2024	70.3	70.8	70.84	70.6
2029	72.7	73.8	73.86	73.2
2034	74.8	76.7	76.87	75.7
2039	76.7	79.4	80.17	78
2044	78.5	82.1	83.77	80.2
2049	80.2	84.8	87.47	82.4
2054	81.8	87.4	91.28	84.6
2059	83.4	90.1	95.2	86.7
2064	85.1	92.9	99.27	88.9
2069	86.7	95.8	103.52	91.2
2074	88.5	98.8	107.98	93.6
2079	90.2	101.9	112.59	96
2084	92	104.9	117.28	98.4
2089	93.7	108	122.01	100.8