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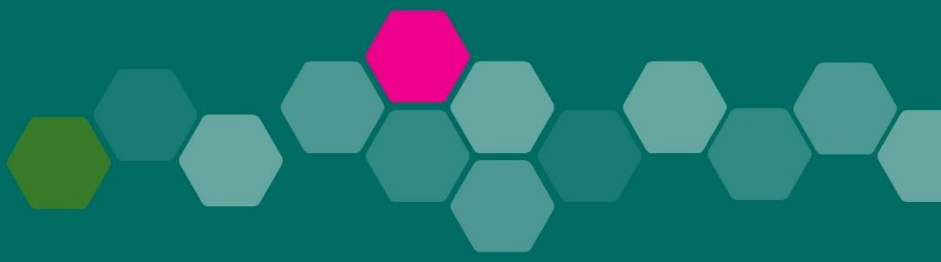
Farm Workers in Scottish Agriculture: Case Studies in the International Seasonal Migrant Labour Market



AGRICULTURE, ENVIRONMENT AND MARINE

social research

Farm Workers in Scottish Agriculture: Case Studies in the International Seasonal Migrant Labour Market.

Commissioned report for the Scottish Government
Project No. CR2016/25

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Photos: Courtesy of Castleton Fruit Farm https://www.castletonfruit.co.uk/

The views expressed in this report are those of the researchers and do not necessarily represent those of the Scottish Government or Scottish Ministers.

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We specifically would like to thank the individuals that gave their time and effort in providing information throughout the course of the project. In particular, we would have been unable to provide such a comprehensive understanding of a complex system without detailed explanations of how seasonal labour provision operates in practice from a dedicated group of people. This group included farmers, labour providers, processors, agencies and the Research Advisory Group (established by the Rural and Environment Science and Analytical Services division within the Scottish Government).

Research Advisory Group
- Scottish Government,
- National Farmers Union Scotland
- Gangmasters & Labour Abuse Authority
- Scottish Land & Estates
- Association of Labour Providers

The openness of many farm businesses was extremely welcomed, and a particular debt of gratitude is owed to those farms that facilitated access to their workforces. The report findings remind us that the sector is reliant on thousands of hard working people from highly varied backgrounds and geographies, who come to Scotland to work hard and earn a living. We would like to offer a special note of thanks to all of the seasonal workers from across the case study farms, many of whom gave up their free time willingly, for sharing their views, observations and insights. The research team now have a much greater appreciation of the contribution those workers play in (i) allowing the sector to prosper, (ii) contributing to local economies, and (iii) ultimately helping deliver growth to Scotland's economy.

Executive Summary

The seasonal nature and physical demands of agricultural work has resulted in some sectors of the Scottish industry, such as horticulture and dairy, becoming increasingly reliant on a supply of labour from outside the UK. Retaining access to this seasonal labour is critical to maintaining competitiveness in an increasingly global industry, and many farmers and labour providers have voiced concerns about potential future labour challenges. This report presents key findings from a project which aimed to provide a better understanding of the use of seasonal workers of non-UK origin in Scottish agriculture. Evidence was collected from a range of sources including Scottish Government administrative data, surveys of farmers and seasonal migrant workers, farmer and wider stakeholder interviews, and group interviews with seasonal migrant workers. The key findings of the study are reported below.

There has been a long term decline in the availability and willingness of the local Scottish and wider UK labour pool to work seasonally on farms. This historic labour resource has been substituted by non-UK workers, initially from Poland, the Czech Republic, Russia and Ukraine. With the accession of the Eastern European countries to the EU in 2004, labour mobility increased from these countries, including Estonia, Lithuania, Latvia, etc.

Since the accession of Bulgaria and Romania to the EU in 2007 there has been an increased reliance on workers from these countries to fill seasonal labour need, particularly after the prohibition of non-EU workers as the Seasonal Agricultural Workers Scheme (SAWS) changed. Bulgarian and Romanian workers remain fundamental to the sector, accounting for an estimated 60% of the seasonal migrant workforce currently employed in Scottish agriculture. The seasonal EU workforce is considered to be "*motivated*, *reliable, hard-working and honest*", and the prevalence of workers from different countries reflects the economic performance of these countries relative to Scotland.

Business perspectives on the importance of seasonal migrant workers

The importance of migrant workers (both seasonal and permanent) to all aspects of the agricultural supply chain was repeatedly stressed by farm businesses and labour providers, with a key link evident between seasonal workers on farms (providing raw product) and seasonal/permanent migrant workers in packhouses (preparing products for the market).

Nearly two-thirds of farmers said that they were likely to switch to other agricultural activities without access to their migrant workforce, with over half saying they would likely diversify their business into non-agricultural activities. Without access to migrant labour, horticulture businesses reported a high likelihood that they would either downscale their business or cease production. Over two thirds of the farm businesses thought there was no real opportunity to substitute labour from the local market and only a fifth of the businesses felt that they would be likely to maintain their existing business structure without an effective and consistent seasonal workforce.

The scale of the seasonal migrant workforce in Scotland

It is conservatively estimated that there were 9,255 seasonal migrant workers engaged in Scottish agriculture during 2017 (including 900 employed directly by labour providers). About 25% work on more than one farm in the UK and there is also transition to other sectors of work, in particular food processing and hospitality.

It is challenging to estimate the extent of seasonal migrant labour use in Scotland for a variety of reasons: (i) variance in the proportion of labour directly employed on farms compared to that indirectly employed through labour providers; (ii) incomplete estimates of seasonal migrant labour provision in administrative databases; (iii) farm businesses leasing their land to specialist growers who undertake all of the farming activity; (iv) the transitory nature of some migrant labour – working on multiple farms. Using the project survey data, the Scottish Government's June Agricultural Census and other published data, estimates of the overall seasonal migrant workforce engaged in Scottish agriculture were made and are summarised in Table 1.

Table 1 Estimated scale of the seasonal migrant workforce engaged in Scottish Agriculture (2017)

	Estimated Workers
Protected soft fruit	6,694
Field fruits	
Strawberry, Raspberry and Blueberries	567
Other Soft Fruit (including blackcurrants)	64
Potatoes	810
Flowers and Bulbs	223
Vegetables	
Cabbages	65
Calabrese	216
Cauliflower	39
Brussels Sprouts	281
Rhubarb	9
Other Veg for human consumption	289
TOTAL SEASONAL MIGRANT WORKFORCE	**9,255**

The use of a large scale seasonal migrant workforce is concentrated on a small number of very intensive horticulture units. For example, 19 of the businesses responding to the farm business survey accounted for 90% of the workforce and workdays of all survey respondents.

The role of labour providers and recruitment agencies

Registered 'gangmasters' either act as recruitment agencies for the industry or as suppliers of short-term contract labour on farms (labour providers). Both forms are regulated by the Gangmasters and Labour Abuse Authority, and are scrutinised over issues such as workplace health and safety, training, working hours, overtime, holidays, sick-pay, etc. There are often long-term working relationships between farmers and labour providers, built on mutual trust.

Farm businesses with high seasonal labour demand, in particular soft fruit businesses, revealed a general preference for directly employing migrant labour, although many used registered labour providers during peak periods or recruitment agencies to help source workers. Those in the field vegetable and flower sectors tended to have a preference for using labour providers to meet their seasonal labour demands.

Despite some farms expressing reservations over the use of labour providers and recruitment agencies, for parts of the industry they are considered a vital, flexible and trustworthy source of temporary labour that can be hired depending on need.

Many labour providers supply workers into a wide array of non-agricultural industries, but there are a few that specialise in agricultural work, largely servicing the potato and field vegetable sectors. These agricultural specialists have strong relationships with their farming clients and work hard at recruiting and maintaining their workforce to be able to undertake a wide variety of tasks.

Labour provider employees generally have their own accommodation and are therefore usually more permanently located in Scotland, or follow a regular multi-season work pattern. Labour providers are often asked to provide services to farms on a 'just-in-time' basis, which can lead to logistical challenges for the business.

Seasonal Migrant Worker Perspectives

The key motivations for non-UK seasonal workers choosing to work on Scottish farms were: (i) earnings potential linked to enhanced quality of life and goals; (ii) conditions of work relative to home countries; and (iii) familiarity, recommendations and farm reputations. Wage motives were driven by significant gaps in the statutory minimum wage between their home country and Scotland. This has resulted in significantly higher relative earning potential for (even seasonal) work in Scotland.

Workers regularly sent money home to families and were often working towards specific life targets, such as paying for a house in their home country. Most workers would like to return home to work on a permanent basis, but that opportunity is heavily linked to the performance of their home country economies. Some workers have long term aspirations to move to the UK on a permanent basis and saw agricultural work as a stepping stone into more permanent work in other sectors of the UK economy, such as hospitality, transport or construction.

The majority of the seasonal workers directly employed on farms rented accommodation (usually in caravans) from their employers. The accommodation was usually in close proximity to the fields / packhouses which workers found convenient and in particular reduced private transport needs.

Many of seasonal migrant workers had some previous agricultural experience and come from a wide range of backgrounds. The workforce had mixed levels of education, with many having higher education qualifications and wider, non-agricultural, work experience.

Informal social networks have been an important source of introduction to businesses, alongside recruitment agencies (e.g. Concordia, HOPS) which are estimated to source around a fifth of the annual workforce. Some businesses are actively recruiting abroad, often using existing staff to promote their business and undertake interviews.

The decline in non-UK workers' effective 'take-home' wage, caused by a weakening of Sterling, was considered a challenge by most workers, with some saying it may affect their decision to return to Scotland in the future. Other key challenges that workers faced whilst in Scotland included missing friends and family, language, workloads, fatigue and the Scottish weather Workers highlighted that friendly relationships with their employers were highly valued attributes of working in Scotland.

Returnee workers represent over half the Scottish seasonal migrant workforce, often leading to long term working relationships built on mutual trust and respect. Returnees reduce the recruitment and training costs for farmers and recruitment and familiarisation costs for workers. Additionally, it can help workers access opportunities for higher pay, overtime, and progression into supervisory / management roles. Long term returnees often become keystone workers, helping supervise staff and manage the business.

Seasonality

The seasonal pattern of crops in Scotland provides an opportunity for extended work for a proportion of seasonal migrant workers, who may actually be working wholly in the UK, but for multiple businesses (farms, labour providers and in non-agricultural sectors). Indeed there is evidence of a proportion of this workforce moving between English and Scottish businesses in line with peak harvest seasons.

On average, seasonal migrant workers were employed for just over four months per year, corresponding to the key soft fruit harvest period, and it was estimated that around three-quarters of seasonal migrant workers only work on a single farm in any given season.

Labour Regulations

The influence of the Scottish Agricultural Wages Board (SAWB) and the statutory minimum wage was evident. Generally there was a standard entry level wage of £7.50 per hour, with some more experienced workers earning more than double this rate. As the industry effectively still works on piece rate (i.e. per kilo / bunch / tray harvested) or a system of bonuses, the statutory minimum wage effectively sets the floor for less efficient workers, with experienced workers capable of earning considerably higher hourly wage rates.

The influence of SAWB was particularly noticeable regarding overtime, with many businesses generally restricting the number of hours worked by workers to minimise overtime. This SAWB influence was contentious amongst many farmers

who claimed it put Scottish businesses at a competitive disadvantage over their counterparts in England where no statutory overtime rate applies.

Worker Integration

Whilst the seasonal migrant workers overall did not consider themselves to be well integrated into Scottish society, it was different for longer term returnees, or semi-permanent staff. This lack of integration was often considered a mere consequence of living on-farm. Very few workers had experienced discrimination or xenophobia on farm but over a quarter expressed that they had experienced discrimination when off-farm. Some workers were well integrated into local sports teams and there was anecdotal evidence of church congregations being bolstered.

It was estimated that seasonal migrant workers engaged in Scottish agriculture were paid in excess of £80 million in wages in 2016/17, and a proportion of this is being spent locally, especially in supermarkets and shops, thereby contributing positively to local economies.

Brexit

Brexit has undoubtedly affected the confidence of a proportion of workers and therefore their expectations about returning to Scotland in 2018. To date, there have been no certain answers for workers' concerns (e.g. the strength of Sterling, potential visa costs, more limited access to the UK labour market), as the businesses themselves are equally uncertain over Brexit issues.

Approximately 40% of the surveyed workers were certain they would be returning to Scotland in 2018, with 12% unlikely to return due to having permanent jobs to go to in their home countries, or returning to studies, etc. 46% were uncertain about whether they would return in 2018.

Many workers in interviews mentioned the attractiveness of other countries (in particular Scandinavia and Germany), where there were fewer uncertainties and high rates of pay. It was, however, acknowledged that there were longer working seasons in Scotland with familiar and friendly people, and that there would be greater language barriers in other countries and higher competition for work from new migrants (referring to Germany).

Agricultural recruitment agencies supplying seasonal agricultural labour experienced a 15-20% increase in demand for seasonal labour in 2017 and extra effort had to be made to recruit in Bulgaria and Romania. Businesses and stakeholders consistently reiterated how access to this workforce is absolutely vital to continuing the current scale of operation of Scotland's soft fruit and field vegetable businesses due to the lack of a reliable, motivated local labour pool.

Businesses called for strong leadership and improved clarity around communications on Brexit, including definitive statements on labour movement and potential future visa requirements for migrant workers. This was seen as presenting an opportunity for minimising uncertainty, thereby increasing business confidence and ensuring workers perceived Scotland as welcoming.

Many farmers and stakeholders viewed a new visa/permit scheme for seasonal migrant workers as critical to ensuring ongoing access to sufficient worker numbers. In addition, it was felt that such a move would provide reassurances that the value of the existing workforce was recognised by government – thereby building business confidence and facilitating future growth. Some businesses recognised a need to explore labour provision options beyond the EU and the main existing providers (e.g. Bulgaria and Romania), due to increasing living standards across the EU. Some potential options identified by interviewees included Russia, the Ukraine, North and West Africa and Turkey.

Summary of Recommendations

Managing business and worker uncertainty

A key overarching recommendation from this work is the development of clear commitments and statements on the part of the UK and Scottish Governments, expressing support for the horticultural industry and identifying/agreeing the ongoing need for access to sufficient numbers of seasonal migrant workers. Statements should also target migrant workers, to ensure workers are aware that they are welcome and valued in Scotland and the wider UK.

Recruitment mechanisms and ensuring future access to labour

Further development is required within the horticultural (and wider agricultural) sector of direct recruitment strategies, including exploring opportunities for coordinated 'inward missions' to countries currently providing high numbers of workers, as well as countries which represent potential future labour markets.

To address existing and ongoing declines in labour availability, the UK and Scottish Government (and the horticultural sector as a whole) should strongly consider potential measures which can be undertaken to increase access to wider labour markets – beyond the current emphasis on Bulgaria and Romania – thereby reducing future labour risks.

The rapid reinstatement of a renewed Seasonal Agricultural Workers Scheme or SAWS-like scheme by the UK Government (or a specific Scottish scheme) represents a key potential opportunity for reassuring employers and providing a specific mechanism to ensure worker availability longer term. Any potential scheme should be specific to agriculture in the short term, while potentially considering expansion to other sectors longer term to facilitate movement between sectors, in particular the food processing sector.

Best practice – maintaining and promoting high standards

The horticultural sector as a whole should ensure that working conditions on Scottish farms are maintained to a high standard and improved where possible, to ensure the reputations of Scottish farms are maintained and enhanced within a competitive international labour market. Developing measures to support further sharing of best practice and knowledge relating to worker induction and training, accommodation and other factors, across the sector are considered beneficial.

Monitoring and long term data gathering

A more comprehensive year-on-year assessment of the use of seasonal migrant labour in Scottish agriculture should be undertaken through the June Agricultural Census (JAC) or through the December Agricultural Survey (DAS). As a minimum the existing seasonal migrant labour question within the JAC should be expanded to assess numbers of seasonal and permanent workers employed of non-UK origin. Additional details should be sought at least every second year regarding the time periods of seasonal workers' employment, their roles, countries of origin and use of registered labour provider workers.

Recognising the value of the seasonal migrant workforce

Increased efforts should be made by both the Scottish Government and agricultural/horticultural sector to recognise and value the role of seasonal migrant workers within the agricultural sector and wider rural economies and their contribution as experienced employment migrants to the success of the sector. This should include recognition of the role of seasonal migrant workers within the Scottish Government's future Agricultural Strategy and the work of the Agricultural Champions.

Contents

1 Introduction and Background

1.1 Introduction

This report presents the findings of a 2017 study, commissioned by the Scottish Government, to examine the use, roles and conditions of seasonal migrant labour in Scottish agriculture. This work draws extensively on the expertise and knowledge of Scottish farm businesses, processors, labour providers, workers, agencies and stakeholders; particularly those engaged in Scotland's fruit and vegetable sector.

The report presents key findings from a range of sources including Scottish Government administrative data, surveys of farmers and seasonal migrant workers, farmer and wider stakeholder interviews and group interviews with seasonal migrant workers. The results are presented thematically throughout the report, with a concise literature summary presented for each theme, followed by an overview of key statistics and worker and business perspectives for each theme. Farmer and migrant worker group interviews were carried out on within a set of five case studies (based on region/ type of business). Where feasible and relevant some cross-comparison between case studies is presented. Six main themes are used to report the findings:

i) Labour trends, recruitment mechanisms and worker pathways;

ii) Motivations for working in Scotland and negative/positive aspects;

iii) Working and living conditions;

iv) Family, community and integration

v) Worker retention, Brexit and key future challenges and opportunities.

vi) International comparisons

1.2 Background

The seasonality of labour demand in agriculture, coupled with the physical nature of the work, has resulted in some sectors of the UK agricultural industry, such as horticulture and dairy, becoming increasingly reliant on a supply of labour from outside the UK. Many Scottish farm businesses, along with those in the wider agri-food supply chain (e.g. food processors), hire both permanent and seasonal non-UK workers (Swales and Baker, 2016). Maintaining the seasonal supply of labour is critically important in retaining the competitiveness of these agricultural sectors, an issue that has become a major concern for many farmers following the UK's decision to leave the EU in June 2016.

The last decade has witnessed the movement of many migrant workers, mainly from central and eastern European countries, to the UK (Ciupijus, 2011). This was largely a consequence of the expansion of the EU through the accession of

the so called 'A8' countries[1] in 2004 and 'A2' countries[2] in 2007, which gave their citizens the right to participate in the UK labour market. Indeed, McCollum *et al.* (2012) estimated that over a million labour migrants, driven by significant wage disparities, entered the UK between 2004 and 2011, with many finding employment in agriculture, where demand for labour-intensive jobs persists (Rogaly, 2008). McCollum *et al.* (2012) suggested that A8 migrants form "*a relatively significant proportion of the UK agricultural workforce*", estimating that up to a quarter of the UK's agricultural workforce could be from these countries. As a result, international workers have become a significant part of the British agricultural workforce (Cooke *et al.*, 2011). This is especially the case in labour-intensive tasks such as harvesting, packing and primary processing of relatively high-value products like fresh fruit, vegetables, salads and ornamental shrubs and flowers (Anderson *et al.,* 2006), where much of the work is seasonal.

Labour conditions, minimum wage rates and the role of migrant workers in the agriculture sector remain key concerns for the Scottish Government. However, data surrounding these issues is often poor, with UK level data either having very small sample sizes in Scotland, or combining rural industries (e.g. farming, fishing, and forestry). Whilst the Scottish Government's June Agricultural Census (JAC)[3] records days worked by migrant workers, it currently does not collect data on the numbers of workers employed. Challenges such as workers potentially working on multiple farms, means that it is difficult to accurately report the extent of seasonal migrant labour use in Scottish agriculture.

It is against this background that the Scottish Government commissioned this project to provide a better understanding of the seasonal labour market in Scottish agriculture. This research has produced new information on the amount of seasonal migrant labour used in Scottish agriculture, employment channels, benefits to and challenges faced by businesses using migrant labour, and reliable (case study based) information relating to the perceptions and motivations of this important workforce.

The specific objectives of the study were to:

- Clarify what is known about seasonal agricultural migrant workers in Scotland from the existing evidence and academic literature, and highlight gaps in the knowledge base;
- Provide data on other similar EU states for comparison;
- Develop evidence from case studies on a range of sectors within agriculture to identify:
    - Reasonable estimates of seasonal jobs,

[1] Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Slovakia and Slovenia

[2] Bulgaria and Romania

[3] http://www.gov.scot/Topics/Statistics/Browse/Agriculture-Fisheries/PubFinalResultsJuneCensus

- Migrant nationality,
- Pay, hours and conditions for seasonal migrant workers,
- Patterns of migration into Scotland, and within Scotland through the picking seasons,
- Duration of stay per annum and per sector,
- Migration to other EU states, where this occurs,
- Effects of age, gender and qualifications on these issues.

The project addresses significant gaps in the information available about seasonal migrant workers in Scotland and therefore improves the evidence base on this important group of workers. This new evidence base can be used to inform a number of national policy domains at a critical time as the UK's withdrawal from the EU is negotiated – including immigration policy, agriculture and rural policy, labour market policies and economic development policies – as well as the work of specialist organisations such as the Scottish Agricultural Wages Board (SAWB).

In Focus Box 1 Examples of permanent EU workers in Scottish agri-food sector

It should be noted at the outset that this project only examined the use of seasonal migrant labour on Scottish farms and did not investigate the use of permanent agricultural workers of non-UK origin (as they are covered by other official surveys, such as the Labour Force Survey). We were given numerous examples of the importance of non-UK individuals as permanent workers, for example in the dairy, haulage and food processing sectors. This anecdotal evidence alone suggests that the total extent of the use of non-UK farm workers in Scotland is significant, with 'work ethic' and 'lack of an appropriately skilled and motivated domestic workforce' commonly cited reasons for their use. For example:

- **Stuart Ashworth of Quality Meat Scotland commented that "*Where non-UK labour is of fundamental importance to the red meat supply chain is in the slaughter and processing sector. Not only is non-UK labour important on the factory floor but it is also key in respect of veterinary inspection" (Quality Meat Scotland, 2017a).* QMS (2017b) reported that Food Standards Scotland estimate that 98% of their official veterinarians are of non-UK origin. In the meat processing sector there is little seasonality in labour requirements, apart from a small peak in employees in the run up to the two busiest trading periods, Christmas/New Year and Easter. Figures from the Scottish Association of Meat Wholesalers suggest that 43% of meat processing sector workers come from the EU with recruitment of local staff a sometime**

challenging due to perceptions of the nature of the work (Pers Comm. SAMW, 2017[4]).

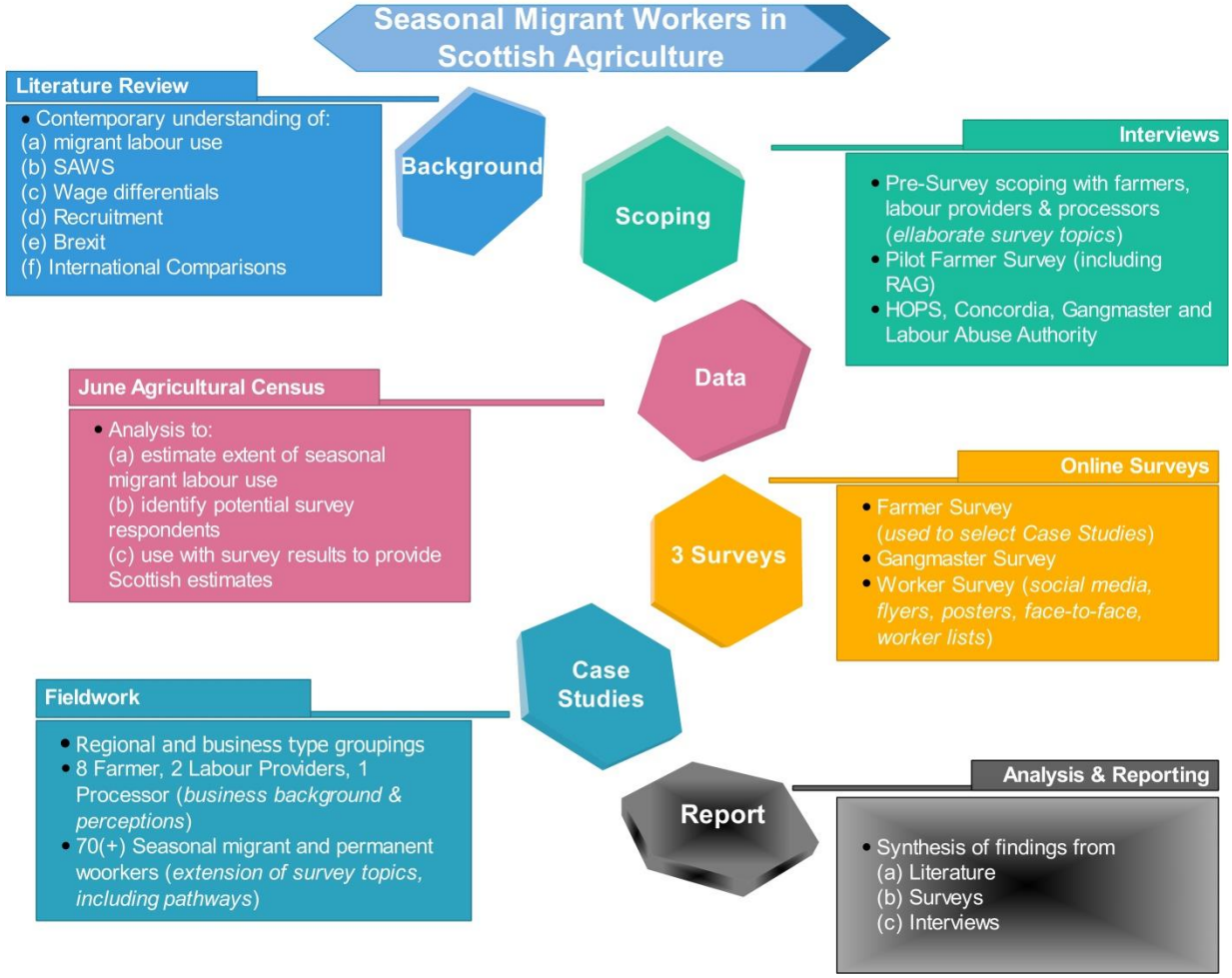
- **In the dairy sector the Royal Association of British Dairy Farmers (2017c) estimate 56% of dairy farmers currently employ workers from the EU. Half of the dairy farmers responding to a 2016 survey had experienced difficulty recruiting staff within the previous five years. Poland, Romania, Slovakia, Latvia and Hungary were common sources of overseas dairy labour and 'willingness to work' was often cited as the reason for their use. Some respondents to surveys conducted during this research emphasised that their dairy labour force was significantly of EU origin ('hard working' and 'no local labour' were the drivers), and any restrictions on the movement of labour would affect their scale of operation. For example one farmer with two permanent Scottish and sixteen permanent EU dairymen stressed that he could not source UK workers – his wage bill for these workers was about £400,000 – and without this workforce he would have to look at automation and reduce his scale of production.**

[4] Ian Anderson (former Executive Manager) Scottish Association of Meat Wholesalers 12th October 2017. Email communication.

2 Methodology and case study selection

This study utilised both primary and secondary data sources and quantitative and qualitative approaches in order to elicit new information on seasonal migrant workers engaged in Scottish agriculture. The main stages of the project are summarised in Figure 1.

Figure 1 Key project stages



In order to provide a contemporary background on the topic, we conducted an extensive literature review on migrant labour use in the UK with a particular emphasis on agriculture. A wide range of academic and grey literature (including stakeholder reports, parliamentary evidence, policy literature, etc.) was used to provide an up-to-date understanding of key issues around labour use, drivers behind migration, recruitment practices, wages, etc. The literature review also provided information on migrant labour and minimum wages, etc. in other countries that enabled some international comparisons to be made.

The **literature review** informed the research team's understanding of how the seasonal market operated, and some of the reported issues surrounding migrant labour use, integration, wages, etc. However, in order to extend the research team's knowledge base beyond the literature a **scoping phase** was undertaken to: (i) develop greater knowledge of the complex system of regulators,

intermediaries, businesses and workers; and, (ii) increase awareness of the project. Semi structured interviews were undertaken with core stakeholders (HOPS[5], Concordia[6], the Gangmasters and Labour Abuse Authority (GLAA)), farm businesses and processors. The first iteration of the surveys was discussed with key individuals and was then piloted with farm business contacts and the Research Advisory Group (RAG).

Terminology: It was evident from the outset that the term 'seasonal' meant different things to different people. Some workers were classed as 'seasonal' despite working extensively in Scotland for long periods (9 to 11 months) before having a short break and then returning the next year. In addition, the terminology around registered 'gangmasters' occasionally led to confusion, in particular the grouping together of two distinct groups that are 'labour providers' and 'recruitment agencies'. For that purpose when presenting our results the terms labour provider and recruitment agency are used.

As the key source of data on agricultural activity and labour use, the Scottish Government's **JAC** (both 2016 and 2017 datasets) was interrogated as follows:

- Firstly, data was extracted on reported use of contract labour and migrant (non-UK) labour. This provided a baseline from which to extend and build the evidence base. Contact details of holdings that reported they had used non-UK workers in 2016, and those whose activities suggest that seasonal workers may be required (e.g. those with horticultural crops over 1 hectare) were provided by RESAS in order to target the project's farmer survey.
- Secondly, once the farm business survey was closed, the survey responses were aligned to the appropriate business/holding (farm businesses were asked to provide their holding number or business reference number to facilitate this process) data of the 2017 JAC. This process allowed: (i) the bio-physical details of the farm to be extracted rather than extending the farmer questionnaire; and (ii) identification of farm businesses/holdings that there were non-responses (from the survey or the JAC). The JAC response data on migrant labour was then adjusted using survey data where available, with extrapolations then made for other holdings/businesses using details of the fruit and vegetables grown.

Online surveys of farm businesses, registered labour providers and farm workers were utilised in order to develop the evidence base. All surveys were sense checked with volunteer businesses contacted during the scoping phase,

[5] Agricultural and horticultural and seasonal labour recruitment specialist. https://hopslaboursolutions.com/

[6] Agricultural and horticultural and seasonal labour recruitment specialist https://concordia.org.uk

with additional review provided by stakeholders through the RAG. The questions were arranged around the key themes identified by the RAG and emerging from the literature.

For the **farm business survey** a letter was sent to all businesses/holdings that were identified through the JAC as having used non-UK workers in 2016. Additionally, letters were sent to any holding/business that may be expected to use seasonal labour for vegetable/fruit production for human consumption (through the JAC data). This resulted in 430 letters being issued. A social media campaign also took place and leaflets were distributed at agricultural shows to raise awareness of the survey and extend the invitation to anyone that had not received a participation invite letter. Additionally, stakeholders published articles that promoted the survey on websites and in newsletters. One hundred and one survey responses were received which, after removal of duplicate entries and responses that did not use seasonal labour, left 59 usable responses where seasonal migrant labour was employed directly by the business with a further 26 that used labour providers or machinery rings. These respondents represented the majority of the industry meaning a high degree of penetration from the survey. The survey can be found in Appendix 1 where it can be seen that the key themes explored related to:

- Farmer and business characteristics.
- General staffing and use of labour providers.
- Seasonal migrant worker use, origins and use throughout the year.
- Worker recruitment and retention.
- Working hours, pay and conditions.
- Accommodation provision.
- Trends in seasonal workforce.
- Brexit.

A ***survey of labour providers*** was undertaken. Some 220 letters were sent to labour providers registered (in the publicly-available GLAA register[7]) to provide labour to the agriculture and horticulture sectors in Scotland, inviting their participation in the labour provider survey. A disappointingly low level of responses were received, although on further discussions with GLAA representatives it became apparent that the database is not updated for

[7] http://laws.gla.gov.uk/Default.aspx?Menu=Menu&Module=PublicRegister

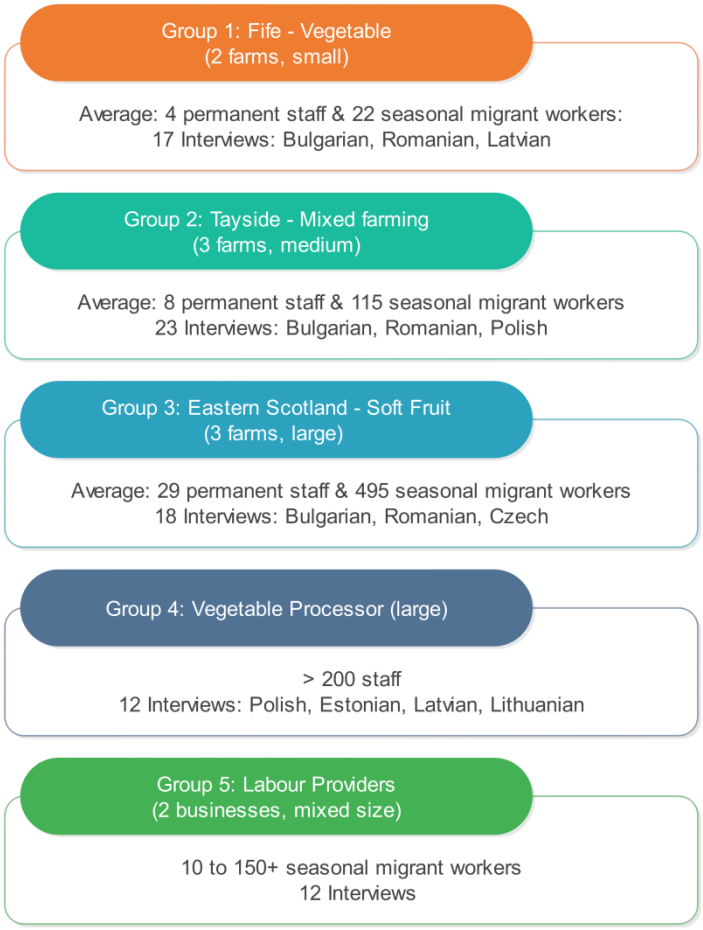
businesses, meaning they may have registered to supply labour in Scotland (or to agriculture) during their initial registration but have never been active in Scotland. The survey can be found in Appendix 2 where it can be seen that the key themes explored related to:

- Business characteristics and sectors workers supplied to.
- Worker recruitment and retention.
- Seasonal migrant worker use, origins and use throughout the year.
- Working hours, pay and conditions.
- Accommodation provision.
- Trends in seasonal workforce.
- Brexit.

The ***worker survey*** was more challenging to administer and target. In order to maximise the number of respondents the survey was professionally translated and made available for completion in 6 languages (English, Romanian, Czech, Bulgarian, Polish and Latvian). These languages were selected on the basis of intelligence gathered through the farm business survey. Leaflets were distributed to workers at a number of farm businesses that had agreed to provide access to their workforce. In addition, a targeted Facebook campaign was undertaken in multiple languages to encourage people that worked seasonally in agriculture and were of non-UK origin to complete the survey. In total 277 survey responses were completed (although completion rates were relatively low) and as they are self-selecting responses and were completed towards the end of the season, they likely introduce a degree of bias to the results. The survey can be found in Appendix 2 where it can be seen that the key themes explored related to:

- Personal background including country of origin.
- Agricultural work experience.
- Current agricultural work activities.
- Recruitment pathways.
- Motivations.
- Accommodation.
- Working community and wider integration.
- Positive and negative aspects of working in Scotland.
- Future work plans and Brexit.

Figure 2 ***Summary details of case studies***



Fieldwork was undertaken in order to collect more qualitative information from businesses and workers and to further expand on points of interest that emerged from the responses to the farmer, labour provider and worker surveys. The businesses where fieldwork was undertaken were self-selecting (they offered access to their workforce and to be interviewed themselves), meaning there was an unavoidable degree of bias in the reported results. It would, however, have been unethical to try and interview workers on businesses where permission had not been granted (this was not necessarily due to secrecy, or not wanting to participate in the study, but often was due to the busy nature of the business in the middle of their harvest season). In total, interviews were undertaken with managers/owners and workers on eight farms, two labour providers and one processor. Over 80 seasonal and permanent workers were interviewed in small groups of 3 or 4 participants in order to extend the survey topics and to try and establish worker recruitment pathways in more detail. Each set of business interviews was then assembled into five case study groupings, based on size of operation; business location and the nature of the business (see Figure 2). All participants were requested to complete a consent form (see Appendix 4) and the themes discussed in worker interviews are detailed in Appendix 5. During these interviews worker profiles were developed for a few consenting workers to enable their motivations and experiences to be portrayed – these are interspersed throughout the report.

The final stage of the project was the ***analysis, synthesis and reporting of the findings***. A deliberate attempt has been made to ensure that the report follows themes rather than methodological stages (i.e. literature review, survey results (1, 2 and 3), fieldwork) to avoid repetition. This means that the results have been analysed with these themes in mind, thereby ensuring that all the pertinent information (literature, quantitative data and qualitative findings) regarding each of the sub-topics is explored in the report.

3 Trends and number of seasonal migrant workers

Section Summary:

Farmers emphasised the critical role seasonal migrant labour played in their businesses, with the majority stating they would cease to operate or substantially reduce their activities should this labour be unavailable.

The country of origin for seasonal workers have shifted as a result of the opening up of the EU, the closure of SAWS and the advancement of key member state economies; Bulgaria and Romania currently provide the majority of seasonal farm workers in Scotland. Additionally, the average age of seasonal workers was perceived as having increased in recent years and the average quality (picking efficiencies) as having declined.

A decline in the availability of seasonal agricultural migrant workers was widely recognised by farmers as having occurred in 2017. Recruitment agencies also reported a significant increase in requests (15-20%) for labour and experienced shortfalls (of 10-15%) in their capacity to provide workers to farmers.

No alternative UK-based labour source was recognised as currently existing – with the decline of UK-based workers in seasonal farm jobs linked to multiple factors, including an increasing emphasis on high quality fresh fruit (and supermarket supply chains), regulatory changes and a de-valuing of seasonal farm jobs.

Current horticultural systems have evolved into high efficiency deadline-driven systems, which require a highly motivated, flexible and experienced workforce. Returnees represented the cornerstone of this workforce on most farms; this component is higher on farms with direct recruitment mechanisms, longer seasons and strong reputations. Returnees play a role in referring new workers to farms, an important recruitment tool on most farms.

The demand for seasonal workers is driven by the Scottish horticulture sector, peaking in the summer months (July and August) to coincide with the height of the soft fruit harvest. The need for seasonal workers does, however, extend throughout the year, particularly in the vegetable and potato sectors.

It is conservatively estimated that there were 9,255 seasonal migrant workers engaged in Scottish agriculture during 2017. This includes an estimated 900 workers of non-UK origin under the employment of registered labour providers that supply contract labour to farms across Scotland.

Labour providers (‘gangmasters’) play a pivotal role in Scottish agriculture, providing workers at short notice to conduct a wide variety of tasks on farms (from stone picking to hoof trimming, fruit and vegetable harvesting to farm

maintenance, potato grading to tractor driving). Labour provider workforces are particularly important for vegetable planting and harvesting and in potato harvesting, grading and packing.

Labour providers often deal with small labour demands from farms with broad geographic coverage meaning logistical planning can be challenging to ensure appropriately skilled workers are available – something that was reported to be a challenge during some peak harvest periods where "*everyone is scrambling to get their crop harvested before it is too late*."

3.1 Background literature

British agriculture has long relied on international workers to satiate the demand for labour (Collins, 1976). The 1990s saw a general trend of increased employment of foreign nationals across various sectors, and past studies have confirmed that this labour pool is especially important to the agricultural industry (Dench et al., 2006).

On 1 May 2004, eight countries acceded to the EU. This opened the UK's labour market to residents of the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Slovakia and Slovenia (collectively known as the 'A8'). Migrant worker inflows to the UK from the A8 countries since then have been substantial. By 31 December 2005, 10% of 345,000 workers from these eight countries had registered with employers in the agriculture or fishing sectors alone (Gilpin *et al.*, 2006). The UK Government subsequently implemented the Worker Registration Scheme (WRS) in an attempt to track how the British labour market would be affected by the A8's ascension. During this period the 'A2' countries of Bulgaria and Romania also acceded to the EU.

The WRS recorded 1,133,950 registrations from May 2004 until the scheme closed in April 2011, with 17.3% and 12.6% of these workers going into the Scottish agriculture and food processing sectors respectively (McCollum *et al.*, 2012). A8 migrants were also found to comprise a significantly higher proportion of the Scottish agricultural workforce than the UK generally with rural areas (Angus, Perth and Kinross, and Aberdeenshire) receiving the highest proportion of migrants.

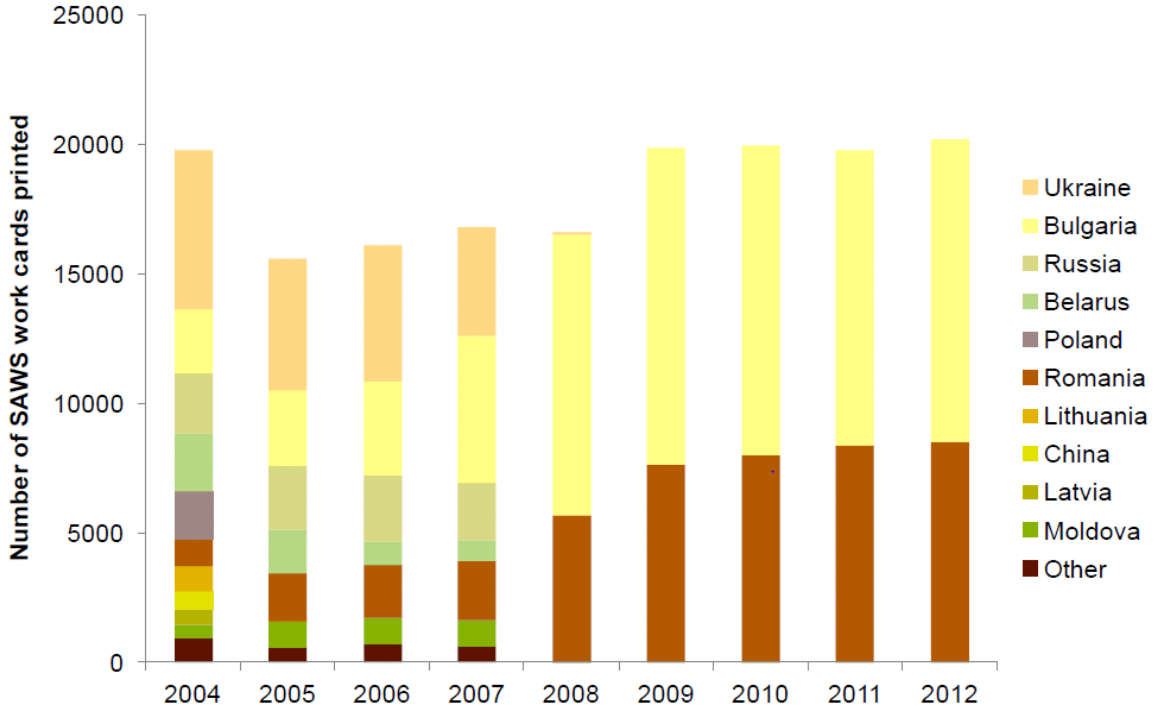
According to the Office for National Statistics (ONS) (2010), migration from Poland to the UK was the highest by far compared to the previous decade. Among A8 countries, Polish immigration was nearly nine times greater than the second highest country (Lithuania) between 2005 and 2009. Polish immigration to both the UK and Scotland was also the highest of all A8 countries over the lifetime of the WRS, although a higher percentage of Polish workers came to Scotland compared to the UK generally. Polish migration to Scotland peaked in early 2007, comprising about 80% of WRS registrations; however, it had declined to under 60% by late 2009 largely due to the 2008 recession and the opening up of the labour market to A2 workers. Migration to Scotland from Latvia, Lithuania and Hungary correspondingly increased over this period, which suggests that

opportunities in A8 countries were "*likely to be significant 'push' factors in relation to migration*" to Scotland (McCollum *et al.*, 2012).

The economic downturn that followed the 2008 banking crisis decreased the overall need for migrant workers across all sectors. However, the decline in demand for foreign-born labour in agriculture and food processing was significantly smaller compared with other sectors, such as construction, hospitality and manufacturing. Findlay and McCollum (2013) highlighted the heavy economic losses that the horticulture sector suffered in 2008 due to labour shortages, leaving crops unpicked in the fields. Moreover, despite agriculture comprising less than 1% of UK jobs, "*data suggests that up to a quarter of all employees in this sector in 2011 could have been A8 workers*", underscoring the key role that these workers play in agriculture despite overarching market conditions (McCollum *et al.,* 2012).

While Bulgaria and Romania acceded to the EU in 2007, they were not subject to WRS regulations. Instead, Bulgarian and Romanian workers were eligible for the Seasonal Agricultural Workers Scheme (SAWS), which was restricted to these two countries after 2007 until the scheme closed in 2013 (Figure 3). SAWS also limited these workers to agriculture (whereas the WRS allowed A8 citizens to work in other sectors) and to a six month work period. From 2008 to 2012, between 15,000 and 20,000 new SAWS cards were printed annually for workers from Bulgaria and Romania that came to work in the UK, mostly in the horticulture sector and especially fruit-picking (MAC, 2013).

Figure 3: Number of SAWS work cards issued in the UK by nationality, 2004-2012[8]



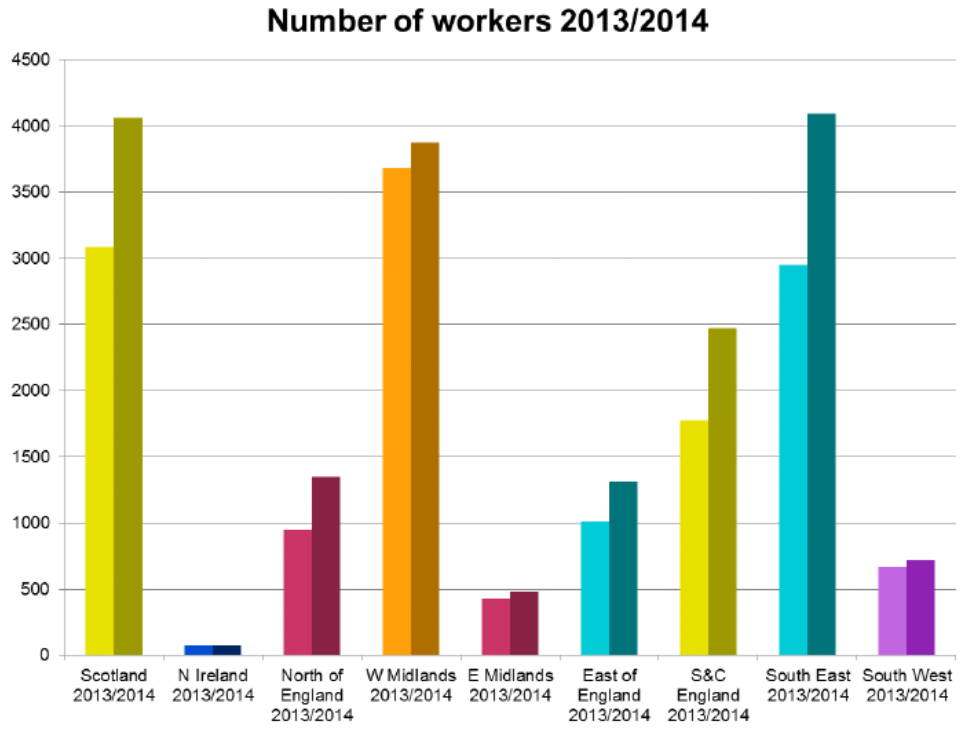
Source: Migration Advisory Committee (2013)

[8] *Note:* Data are only up to September 30 2012.

As with the WRS, SAWS registration totals in Angus, Perth and Kinross and Aberdeenshire were the highest of all local authorities in Scotland. MAC (2013) reported that in the 2012 season (up till 30th September) 14.6% of the UK's SAWS workers were in Scotland. The main regions where they were working were Angus (1,143 workers or 5.7% UK total), Perth and Kinross (966 workers or 4.8% of UK total), Fife (468 workers or 2.3% of UK total) and Aberdeenshire (292 workers or 1.3% of UK total)

Research conducted by the Gangmasters Licensing Authority (GLA)[9] found that the number of agriculture workers employed (either directly or via Gangmasters) increased in every region of the UK except Northern Ireland after the SAWS scheme closed (Figure 4). They attributed this to several factors, such as: demand for labour exceeding the quota under SAWS; higher worker turnover; and greater worker availability. However, the report found that most farmers and growers were concerned about the Scheme's closure, citing fears around "*increasing cost, customer demands and a fear of a lack of experienced and committed workers*" (Gangmasters Licencing Authority, 2014).

Figure 4: Number of agricultural workers in UK before and after the cessation of SAWS



Source: Gangmasters Licencing Authority (2014)

The same report also included overall figures for agricultural migrant workers in Scotland both during and after the SAWS. They estimated that the number of

[9] The Gangmasters Licensing Authority (GLA) was a non-departmental public body established in 2006 that regulated Gangmaster recruitment practices and conduct. However, the Gangmasters and Labour Abuse Authority (GLAA) completely absorbed the role and remit of the GLA in May 2017. In addition to the name change, this granted GLAA significantly more scope to tackle exploitation and sanction unlawful activities. http://www.gla.gov.uk/

workers increased by around 1,000 to just over 4,000 between 2013 and 2014, with the Bulgarians and Romanians making up the largest proportion of the workforces, although the proportion of workers from the rest of the EU also grew during this period. The GLA report also provided an indication of the seasonality of demand for workers with the majority having summer fruit pickers, although there is clear evidence of the spring flower picking season and the winter vegetable season in their analysis (see Figure 5).

Figure 5: Seasonality of Scottish Migrant Workers: 2014

Source: Adapted from Gangmasters Licencing Authority (2014)

Recent analysis of the 2015 JAC data in Scotland undertaken through the Rural Industries work package (WP2.4) of the Scottish Government's Strategic Research Programme (reported by Thomson *et al.,* 2016) highlighted the horticulture sector's particular reliance on seasonal migrant labour. The use of non-UK migrant labour in Scottish agriculture was reported to be heavily concentrated by:

- **Sector**: with 85% of migrant labour being in the horticulture sector, particularly the soft fruit industry (this sector accounts for nearly 10% of Scottish agricultural output
- **Farm Size**: with 87% of the migrant labour being used on large farms (more than 5 full time equivalents (FTEs) when measured by standard labour requirement)
- **Geography**: with three quarters of Scotland's migrant farm work utilised in Angus and Perth and Kinross. (Thomson *et al.,* 2016).

An update of the distribution of seasonal migrant labour use and contract labour use from the 2017 JAC is provided in Table 2 where it is clear how important farms located in both Perth and Kinross (33%) and Angus (31%) were as employers of migrant labour. Over 93% of this 2017 seasonal migrant workforce was employed by large and very large farm businesses (over 4 Full Time Equivalent workers), with around 83% being used on soft fruit farms.

Table 2 Contract and Seasonal Migrant Labour use in Scottish Agriculture 2017

	Scotland	Contract labour			Migrant workers (i.e. non-UK nationals)		
	Holdings	Holdings	Work Days	% Work Days	Holdings	Work Days	% Work Days
Scotland	**55,090**	**6,098**	**284,651**		**267**	**659,138**	
Local Authority							
Perth & Kinross	2,488	370	25,388	9%	38	217,733	33%
Angus	1,341	214	13,042	5%	59	201,176	31%
Aberdeenshire	7,601	947	37,290	13%	45	75,573	11%
East Lothian	560	105	9,676	3%	9	64,648	10%
Fife	1,579	220	29,647	10%	23	55,539	8%

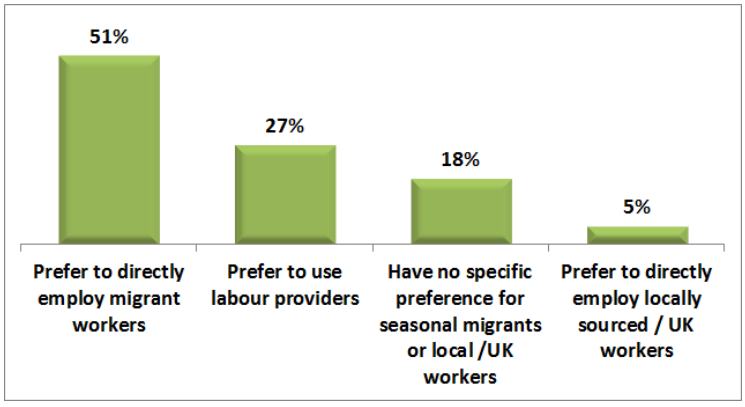
Source: Scottish Government June Agricultural Census 2017

Whilst the JAC can provide estimates of migrant labour used on holdings, it does not readily permit estimation of the number of seasonal workers in Scottish agriculture due to, for example: seasonal employment being for different durations, or some individuals working on more than one holding in a season. The seasonal profile of labour within the Scottish soft fruit sector is likely to peak from May to August (as found by the GLA), but knowledge gaps prevent robust assessments of the true extent of migrant workers on Scottish farms.

Overall estimates for the total number of seasonal workers across the UK in recent years have ranged from 60,000 (Ruz and Stevens, 2016) to more than 80,000 (NFU, 2016b), with the majority coming from central and Eastern European countries. Whilst robust statistics on numbers and nationalities of these migrants is far from certain, they have become a significant part of the British agricultural workforce (Cooke *et al.,* 2011). This is especially the case in labour-intensive tasks such as harvesting, packing and primary processing of relatively high-value products such as fresh fruit, vegetables, salads and ornamental shrubs and flowers (Anderson *et al.*, 2006). A comparison of employers' use of migrant labour across a variety of sectors found that the structure of demand in the agricultural sector has unique characteristics. Firstly, the preference for migrant workers is much stronger in agriculture; and secondly, only in agriculture do employers unequivocally see migrant workers as "crucial" to their businesses (Dench *et al.,* 2006).

3.2 The importance of migrant labour and key trends

Figure 6 Farmers' seasonal worker employment preference



Results from the farm business survey revealed a general preference for migrant labour (see Figure 6), particularly in the horticulture sector, be it potatoes, calabrese, cauliflower, rhubarb, raspberries, strawberries, blueberries, daffodils, etc. Over half of the 79 respondents stated that they preferred to directly employ migrant workers (these tended to be businesses with high labour demand), with a consistent theme

emerging that their work ethic is now preferred because they are "*motivated*, *reliable, hard-working and honest*". Over a quarter of respondents preferred to use labour sourced through labour providers and it is clear that these businesses have strong relationships with labour providers and consider it easier to deal with a reliable and reputable firm, particularly when the work is sporadic and very seasonal. Only 5% of respondents stated a preference for employing local or UK workers and these tended to have lower levels of worker demand overall. Around a fifth of businesses had no specific preference for the use of local or migrant labour, but the general sentiment is that the required local workforce no longer exists, as demonstrated by the following comments:

- "*I use migrants workers as there are not enough other workers to do the jobs needed.*"
- "*I would prefer to directly employ local workers, but find this difficult, so tend to directly employ from overseas as well, and am happy with the quality of workers applying from overseas.*"
- "*Without migrant labour my business would reduce by 80% as UK pickers would not start at 5am and pick solid for three months*."

The farm business survey had an open-ended question on the importance of seasonal migrant labour to the business. In particular the willingness to work for short periods (often less than six months) was cited as a major benefit of employing migrant workers. The level of feedback received reiterated how access to this workforce is absolutely vital to continuing the current scale of operation of Scotland's soft fruit and field vegetable businesses in particular, because a reliable, motivated local labour pool appears to not exist, as the following comments suggest:

- "*We cannot see a scenario where local labour would be willing and able to work such that we could continue with our current operating model."*
- *"Having access to seasonal labour is critical to our business. Without them we couldn't continue our business in the manner we currently do."*
- *"We have no doubt that without seasonal migrant labour our fruit and vegetable production would have to reduce drastically and may have to cease completely."*
- *"We need seasonal migrant workers help to pick and pack our crops; without this workforce we are in danger of being in position of not harvesting our crops."*
- *"No seasonal labour ...no business! It's that simple."*

Whilst it may appear that most of the workforce is engaged in harvesting activities the importance of seasonal workers in undertaking vital tasks throughout the year was also stressed, and potential mechanisation of key tasks was not seen as realistic solution. The following comments illustrate this attitude well:

- *"Without this labour it would be hard to function efficiently as we use it for covering our crop in enviromesh and within our pack house all year round."*
- *"Mechanisation of these operations is the holy grail all growers are seeking, unfortunately although there are prototype machines in development around the world this is still many, many years from commercial reality."*

Indeed it appears that some farmers are already considering the future of their operations over concerns about access to migrant workers, as the following comments reveal:

- *"Seasonal migrant labour is therefore absolutely essential to ensure [our crop] can be successfully harvested to meet the exacting standards of today's retailers. This is a volatile crop which must be harvested in peak condition and which has a very short shelf life. Unless we are sure of availability of migrant labour then the crop will not be grown next year or in the future."*
- *"We have found it much harder to source migrant labour this year and need SAWS in place for 2018 to give us confidence to plant the 2018 crop."*
- *"Seasonal migrant labour has become an integral part of our business and we have come to rely on them for the timely harvest of our crops. Without them we would have to look very seriously at the cropping plan for this farm."*

During the interviews farmers from across all case studies corroborated the survey findings that the availability of seasonal migrant labour is fundamental to the long-term success of their businesses. Any substantial decrease in labour supply was directly linked with crop and income losses due to reduced harvesting capacity. Should migrant labour become unavailable, the majority of farms stated they would either cease to operate or be forced to reduce their activities substantially. As a result, current uncertainties around future labour supply were acknowledged as contributing to lower business confidence and delayed decisions on business investment[10].

Farmers repeatedly identified seasonal migrant workers as highly motivated and 'hungry for work' due to a common focus on providing for their dependents. This motivation, combined with a high level of farm experience among many workers, was seen as facilitating highly efficient harvesting systems – a critical aspect for supplying supermarkets. Notably, labour providers and producer group

[10] These issues were also discussed at a recent meeting of the Cross Party Group in the Scottish Parliament on Rural Policy, where preliminary results from this project were presented. A briefing summarising the key points of discussion at this meeting can be found online here: https://www.sruc.ac.uk/info/120294/cross_party_group_on_rural_policy/1873/meeting_2_the_rural_workforce

interviewees highlighted the importance of migrant workers (seasonal and permanent) to all aspects of the agricultural supply chain, with a key link evident between seasonal workers on farms (providing raw product) and seasonal/permanent migrant workers in packhouses (preparing products for the market).

Farmers and wider stakeholders regularly stated that no local/UK-based source of labour existed for them as an alternative to seasonal migrant labour. Often, farmers had engaged in local/Scottish recruitment; however this was seen as very challenging, with local workers difficult to source (despite repeated advertising efforts). Many farmers commented that unemployed people were very reluctant to lose their unemployment benefits in exchange for seasonal work.

Where local/UK-based workers had been employed, some farmers stated that they demonstrated a relatively low work ethic and picking capacity, and retention was very low, with local/non-migrant workers sometimes failing to return to work after an initial period of work. Some farms had very small numbers (e.g. one to two people) of established British workers employed for seasonal work, and most received few enquiries from potential British workers. This position reaffirms the views of recruitment agencies/labour providers, who also stressed a very low level of interest in seasonal agricultural work from British nationals.

3.3 Estimate of the extent of the seasonal migrant workforce

In the farmer survey, businesses were asked to provide an overview of their labour use, including directly employed seasonal migrants (i.e. wages paid directly to employees rather than through a labour provider). Details were collected on the origin of workers, the monthly number of seasonal migrants employed and the number of work days per month.

Some cleaning and extrapolations were necessary where data was incomplete (e.g. number of monthly workers was included but not monthly workdays) or appeared inaccurate on cross-checking (e.g. every worker was reported as working 30 days per month). These adjustments were made using averages of businesses of similar scale and product mix. The estimated workdays for each business[11] were cross checked with the JAC data for 2017 and discrepancies investigated through various means (including using online business profile information and cross checking to details from interviews and conversations with major producers).

The 59 survey respondents that directly employed seasonal workers reported that they employed 8,200 seasonal migrant workers in 2016[12] peaking at 6,300 in July

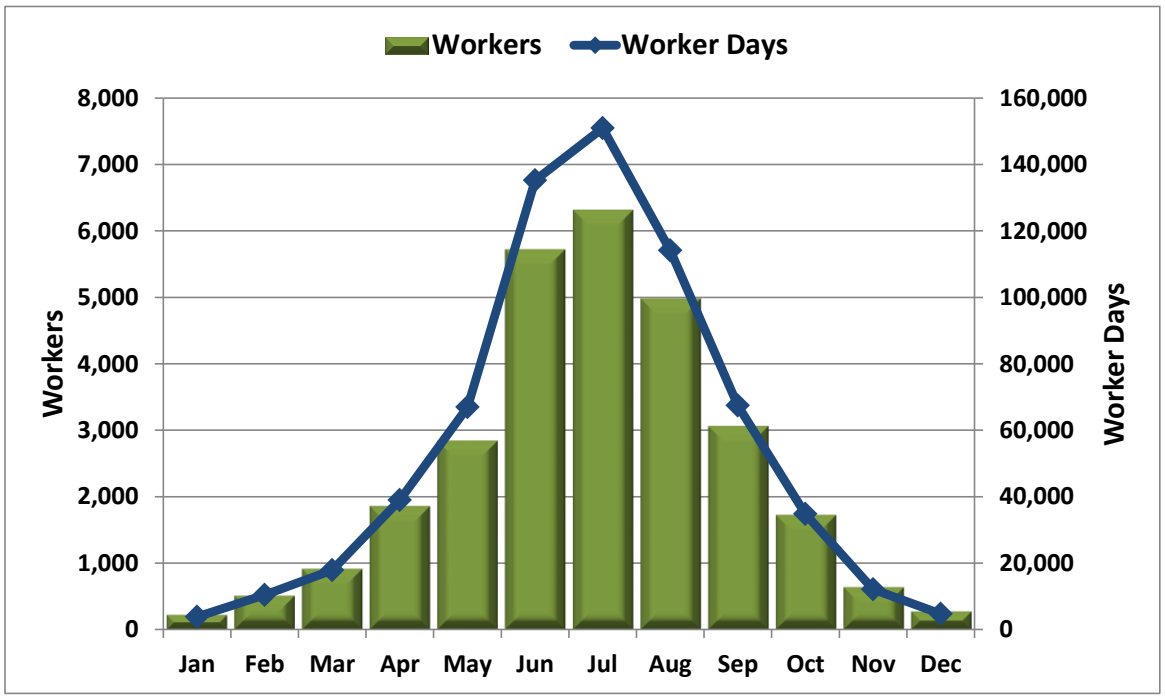
[11] JAC holding data was aggregated to business level where appropriate, and where businesses appeared to be amalgams of two or more businesses for Common Agricultural Policy administrative purposes (Business Reference Numbers).

[12] They were asked the number on two occasions meaning there is an element of cross-checking.

with a low of 224 in January (see Figure 7). It was estimated that these workers undertook over 650,000 days of work on Scottish farms in 2016, peaking at 151,000 days in July and only 3,800 days in January.

The sector is very concentrated with 19 businesses reporting that they had more than 100 seasonal migrant workers directly employed – accounting for 90% of the workforce and days worked on these surveyed farms.

Figure 7 Seasonal migrant workers used and estimated work days on survey respondent's farms



The worker survey and focus groups suggest that around three-quarters of seasonal migrant workers only work on one farm in any given season. However, it is unlikely that there is a great deal of inter-business worker movement (particularly due to the highly concentrated nature of the sector).Therefore we can assume that on these farms the lower bound of the seasonal migrant workforce is around 6,000.

The June Agricultural Census (JAC) returns suggested that there were 659,000 workdays using seasonal non-UK labour on 267 holdings in 2017. Assuming the labour profile of the survey aligns to the JAC, this suggests a recorded seasonal migrant workforce of around 7,000. However, when the data for each survey respondent was aligned to the JAC it became apparent that some of the respondents reporting use of seasonal migrant labour had zero entries in the JAC. Specifically, five respondents reporting a combined 2,735 seasonal migrant workers undertaking 193,707 work days had zero entries in the JAC for their holdings/business. Additionally there were recording errors found in the JAC where it appears that the number of workers had been entered rather than the

number of workdays (including for one of Scotland's major horticulture producers that was estimated[13] to be employing over 500 migrant workers).

A key challenge in estimating the extent of seasonal migrant labour use in Scotland relates to complexities surrounding: (i) variance in the proportion of labour being directly employed on farms compared to that indirectly employed through labour providers; (ii) incomplete estimates of seasonal migrant labour provision in administrative databases; (iii) farm businesses leasing their land to specialist growers who undertake all of the farming activity (which does not appear in official databases but needs to be considered to prevent a gross overestimation); (iv) the transitory nature of some migrant labour – working on multiple farms.

[13] A web search of the business provided details of their labour profile.

Table 3 Estimated total seasonal migrant workforce engaged in Scottish agriculture

	Data	Scottish Area	Estimated Days	Worker Assumptions	Estimated Workers	Estimated Workers after churn
Protected soft fruit	Survey Regression	1,404 Ha	892,485	Average 4 months' work 10% worker churn at peak season	7,437	6,694
Field fruits						
Strawberry, Raspberry and Blueberries	Nix	182 Ha	75,535	Average 3 months' work 20% worker churn	629	567
Other Soft Fruit (including blackcurrants)	Survey Regression	487 Ha	6,428	Average 4 months' work 20% worker churn	71	64
Potatoes	Survey Regression	29,285 Ha	243,067	Average 7 months and 30% churn from fruit	1,157	810
Flowers and Bulbs	Survey Regression	964 Ha	21113	3 months, 5% churn*	235	223
Vegetables						
Cabbages	Nix	278 Ha	11,120	Average 7 months and 30% churn from fruit	93	65
Calabrese	Nix	1,794 Ha	37,008	Average 7 months and 30% churn from fruit	308	216
Cauliflower	Nix	330 Ha	6,643	Average 7 months and 30% churn from fruit	55	39
Brussels Sprouts	Nix	1,040 Ha	48,105	Average 7 months and 30% churn from fruit	401	281
Rhubarb	ADAS	75 Ha	330	Average 1 month (20% churn)*	11	9
Other Veg for human consumption	Survey Regression	16,028 Ha	86,553	Average 7 months and 30% LP churn from fruit	412	289
TOTAL SEASONAL MIGRANT WORKFORCE					**10,811**	**9,255**
**Low worker churn as specialist pickers*						

-

Based on farmer and stakeholder comments an overall decline in seasonal labour availability occurred in 2017 and there was a note of concern from some survey respondents that in 2017 "*agencies are saying it is harder to find people willing to do this hard job"* in Romania and Bulgaria. Some noted some impact, with declines evident in the number of returnees case study farms noted little or no change in labour availability (usually those with a small workforce or a very high returnee contingent). However, the majority of case study farms and referrals/invitees on some farms and most reporting a decline in the availability of labour they were able to access through recruitment agencies, with agencies failing to fulfil their labour requests. For example, one mixed farm failed to receive 50% of the requested numbers from two agencies and was only made aware of this shortfall at short notice.

Recruitment agency interviewees confirmed this view. Both Concordia and Hops (major agricultural recruitment agencies supplying seasonal agricultural labour) experienced a 15-20% increase in demand for seasonal labour (due to declines in returnee numbers and often at short notice), with both agencies failing to fully supply demand in 2017 (with a 10-15% shortfall on requests). In some cases these factors resulted in substantial pressure on existing farm workforces during peak periods, although case study farms did not report any extensive product losses due to these shortfalls. Recruitment agencies also reported increasing difficulties with in-country recruitment: agents were required to make an extra effort to recruit in Bulgaria and Romania, with the number of new recruits in these countries gradually being exhausted. Some farmers raised concerns in relation to a potential cumulative decline in the number of seasonal workers due to returnees gradually returning home permanently as they reach their goals, compounded by an ongoing decrease in the availability of new workers and leakage of workers to other sectors and countries.`

3.3.1 Long term changes in seasonal workers' profile

Farmers and wider stakeholders acknowledged that harvesting had historically been done by Scottish workers. The movement away from using Scottish seasonal workers to the current, largely-EU profile has been occurring over the last 20 to 25 years, with one farmer commenting that:

- "*We are happy to use locally sourced UK labour, unfortunately none is available for this type of seasonal outdoor work (in all weather). Therefore we have used seasonal migrant workers since 2002. Prior to this all seasonal labour was local. Since then our requirements have more than doubled but local seasonal labour has all but disappeared."*

A number of key reasons were given, through survey responses and interviews, which help explain the shift from local labour sourcing to a reliance on seasonal foreign labour, illustrated by the following sentiments:

- "*The decline (15-20 years previously) of picking by local mothers with their children during school holidays, due to: (i) tighter controls over part-time/casual employment while claiming benefits; and (ii) a*

perception of children in the field as child labour, particularly with the increasing reliance of supermarket supply chains for fruit."

- "*The introduction of the minimum wage in 1999 which complicated pay based on a piece rate system (i.e. those picking insufficient amounts to reach the minimum wage equivalent). This resulted in a gradual reduction of the casual (e.g. teenaged) workforce on fruit farms as the piece rate had facilitated a less regimented/casual working day where workers controlled their own output."*
- *"Ongoing low unemployment, particularly in rural areas (with a geographic mismatch between farm labour demands and areas of unemployment), and a reluctance among the unemployed to risk losing their benefits for short-term seasonal work, combined with a need for seasonal staff to work flexible hours and have few commitments during the season (e.g. no dependents on-site)."*
- *"An increasing emphasis on supplying high quality fresh products directly to supermarkets and delivering to market deadlines, as opposed to supplying the processed/frozen fruit industry in the past. This has increased demand for high quality products and high efficiencies, requiring experienced teams capable of skilled, high output harvesting."*
- *"A perception of harvesting work as demanding, often with early starts and a requirement to work in all weather conditions six days a week."*
- *"An ongoing decline in interest among UK-nationals in employment within the agriculture sector in the UK and a devaluing of seasonal agricultural work, with the loss of a 'picking culture' among British nationals."*

There has been a constantly changing regional profile of the non-UK workforce, driven by political decisions - be they on EU accession, the right of movement for EU workers or restrictions introduced to the SAWS. Whilst workers' country of origin was often not reported as a concern by the survey respondents, changing rules on UK labour market access clearly has knock-on effects at farm level due to: (i) the costs of recruitment in new countries; (ii) generating a reputation as a good place to work that leads to returnee workers (in new countries this invariably takes time and money and leads to inevitable bedding-in issues to overcome as new languages and cultures and behaviours are learned and adapted to).

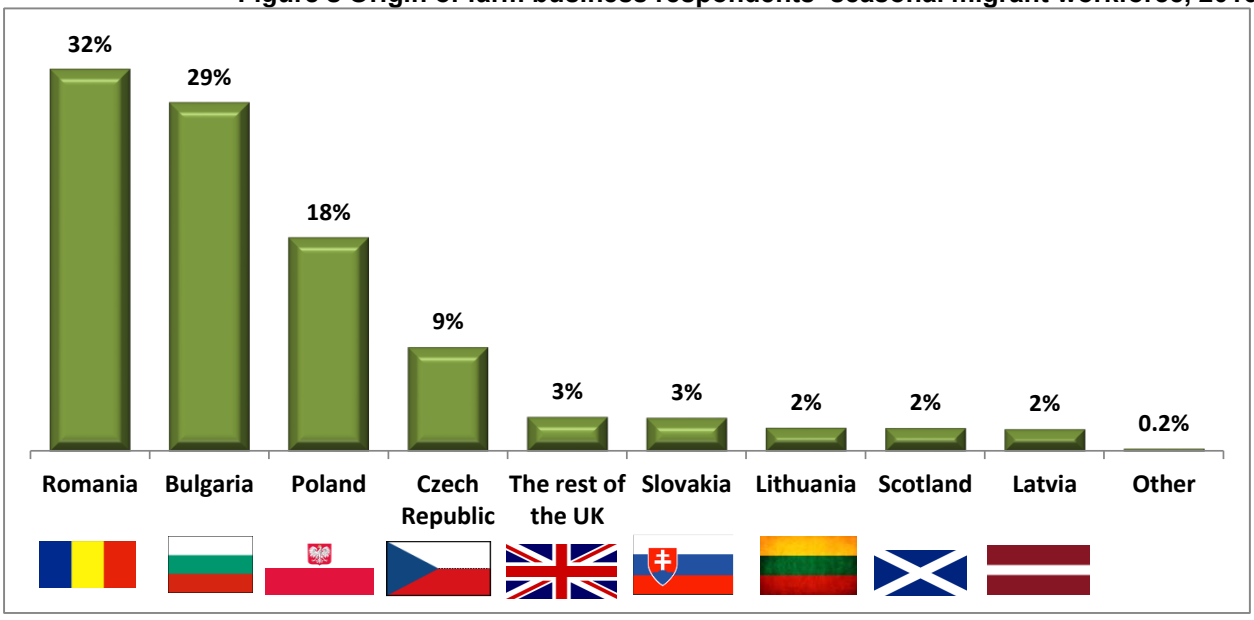
A concern raised by a number of farms and confirmed by recruitment agency interviewees was an increase in the average age of workers in recent years and a decline in the 'quality' of workers. Students and workers in the 18-25 age group were seen as making up a declining component of the workforce on most farms (with some farms still employing reasonable student numbers) in recent years, with a majority on some of the case study farms now over 30-35, and with declining English language ability, less formal education and an increased number of workers picking at lower efficiencies. This was generally seen as linked to the availability of improved opportunities for students and young people in their home countries. As one mixed farmer explained, the shortage of workers "*meant*

that this year we were just happy to get any workers out on the fields picking the berries, no matter how good they were, as we could not afford to let anyone go this year". Looking to the future, farmers also requested that if there were to be restrictions on EU nationals working in Scotland "*we have a very flexible and easy to implement SAWS scheme*" to minimise disruption to their businesses.

3.3.2 Current nationality of the migrant labour workforce

Businesses reported that they had historically sourced most of their labour from Ukraine and Russia, then from Poland, the Czech Republic, Latvia, Lithuania, Slovakia, etc., whereas now they employ far more Bulgarians and Romanians (driven by changes to SAWS in 2007)(see Figure 8). In the minds of the Scottish employers there was a clear link between perceptions of relative wealth and worker expectations in Eastern European economies and the prevalence of their workers in Scottish agriculture (with agriculture often the entry route to working in another sector of the Scottish economy). In addition, there was a perception that the minimum wage means that there has been a move towards a much harder focus on worker output - away from foreign students looking for "working holidays" where they could have a more relaxed approach to work with pay being piece-rate, to the present where "*they are less inclined to come now as it's no longer a holiday*".

Figure 8 Origin of farm business respondents' seasonal migrant workforce, 2016



Foreign labour is therefore perceived as filling a major seasonal workforce requirement within the Scottish agricultural sector. The survey findings were corroborated by farmers and recruitment agencies during interviews. They collectively recognised Romanian and Bulgarians as representing the majority of the current seasonal migrant workforce (over 90% on some farms) due to the continued existence of an earnings and currency differential. Polish and Czech workers were recognised as being in decline, with a core of Polish returnees (and longer term migrants) gradually returning to Poland permanently in line with

improvements to the Polish economy and the achievement of key earnings targets by these workers (e.g. to build/purchase a house in Poland).

Nevertheless, worker origins vary between farms, with Polish, Latvian, Czech and Lithuanian workers remaining an important labour component on some farms, as well as some Spanish and Italian workers. The recruitment agency and producer group interviewees further confirmed these trends, noting a substantial decline in the number of Polish migrants applying for permanent jobs in the UK.

3.3.3 The role of labour providers (gangmasters)

From the farmer perspective, labour providers provided a flexible source of temporary labour which could be obtained subject to need and harvest pressures, with farmers also able to request certain workers or worker teams based on prior experience.

However, in some instances it was difficult to ascertain the role of labour providers on farm businesses due to the varied nature of the labour supply business and their relationship with farmers. For example, some labour providers or 'gangmasters' represent an established form of contracted labour provision in UK agriculture (e.g. a labour provider is contracted to supply labour to cut field vegetables, grade potatoes or pick fruit on a given day). In other instances some labour providers are considered more as recruitment agencies that will source labour for farms for a contracted fee following a period of successful employment – many of these workers appear to then remain with farms.

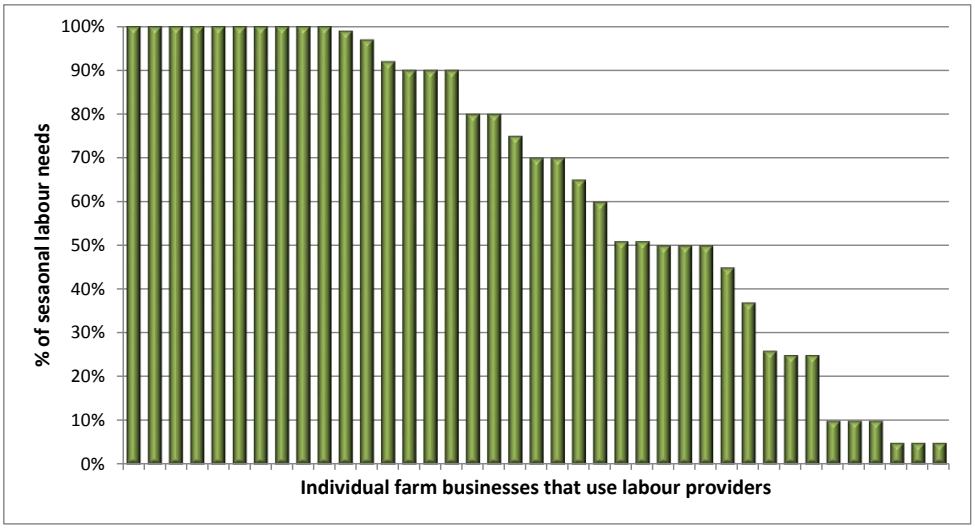
Hence, these regulated 'gangmasters' play a dual role within the industry and for some farms they play a vital role in ensuring there is an adequate workforce for the daily (and highly varied) tasks on the farms. These 'gangmasters' are regulated by the GLAA and therefore are under regulatory scrutiny over issues such as health and safety, training, working hours, overtime, holidays and sick-pay, etc.

Many smaller businesses, or those in the vegetable and potato sectors, prefer to use labour providers as it provides them with labour flexibility. Regardless of preference, there was an underlying feeling that local labour is extremely difficult to source, particularly during peak periods, and that currently finding appropriate labour (migrant or local) was a challenge: "*We cannot stress how difficult it is to find farm staff; it puts pressure on what is a very understaffed business as it is.*"

Over half the farm business survey respondents used labour providers to some extent. Figure 9 shows how much of each of these farms' seasonal labour need was supplied by labour providers. More than half of those actively using labour providers used them for more than 70% of their total seasonal labour needs. Generally, those farms with high use of labour provider workforce were not large soft fruit growers, but rather a mix of potato and vegetable growers or smaller farm businesses. This finding aligns with the evidence gathered from interviews with stakeholders, farms and labour providers. That said, many specialist soft fruit

farms clearly use labour providers at peak periods, for specific tasks, or as recruitment agencies.

Figure 9 Proportion of seasonal labour requirement fulfilled by labour providers (where used))



Workers employed through labour providers were used for a wide range of activities (see Table 4) and accounted for an average of 64% of all seasonal labour needs on those farms that use labour providers. Labour providers were used when there is a specific need, particularly during fruit and vegetable harvesting periods and associated processing and packaging. Labour providers also supplied workers for core activities around preparation, planting, plant husbandry and general maintenance on many farms. 82% of the farms that used labour providers reported that the workers were used for harvesting (accounting for an average of 61% of total seasonal labour needs for harvesting on these farms). Nearly 70% of farms reported that labour provider workers were used for processing/packing, and they accounted for an average of 50% of the seasonal labour need. A third of farms using labour providers utilised their workers for planting and husbandry tasks (potato and vegetable producers) with only a fifth of the labour provider users utilising the workers for maintenance work. This reveals the importance of labour provider workers to half the Scottish horticulture and potato sectors.

Table 4 Proportion of total seasonal labour undertaken by labour provider workers, by task in 2016[14]

Labour Provider supplied workers:	% farms that use labour providers	Average reported % of total seasonal labour use
Total seasonal labour needs		64%
Maintenance	21%	14%
Planting	33%	33%
Husbandry	33%	27%
Harvesting	82%	61%
Processing/packaging	69%	51%

[14] Only farms reporting use of labour providers (n = 39).

Reasons given for using labour providers included: reliability; convenience, particularly on satellite units remote from the core workforce; peace of mind in the recruitment process; continuity of supply, particularly during peak periods; specialist skills, short period of work that does not justify direct employment; taking care of the worker management/training/transport/social/HR responsibilities, etc. Those with a preference for labour providers appear to have long-term working relationships with their provider. The typical type of response for favouring labour providers is summed up by sentiments such as:

- *"X are excellent and we have used them for many years now."*
- *"Because of our very variable demand day to day it's much easier to deal with one entity rather than many individuals."*
- *"They guarantee the number you need, when they arrive and when they leave.*"

Most of the case study farms rarely (if ever) used labour providers, with the main reasons being: i) poor cost-effectiveness of contracted labour (e.g. due to management fees) when used to address labour needs where margins were relatively narrow and labour needs were more long-term; ii) a perception that using labour providers may involve a risk of contravening laws relating to workers' rights and reputational risks and; iii) less reliability and lower efficiency and work ethic of workers relative to in-situ established worker teams. In relation to the final point it should be noted that that the labour provider model was frequently recognised as working well for potato farms, where margins were somewhat higher and labour needs were often short term; workers also often returned to the same farms allowing for the building of trust and experience.

The survey of labour providers yielded 22 responses from a wide variety of businesses providing workers into Scottish agriculture[15]: contract labour for general agriculture, poultry, potatoes, cereal roguing, food processing etc., as well as recruitment agencies. This included 17 businesses that supplied labour to Scotland and were registered with the GLAA with 13 registered to supply workers to the agriculture sector, five to horticulture and eight for processing and packaging of all fresh food, drinks and other produce. About a quarter of these labour providers were also engaged in wider labour provision services, including to the: education, landscaping, recycling, distribution, logistics, non-food manufacturing, construction, hospitality and logistics, cleaning, warehousing, oil and gas, finance, quarry sectors.

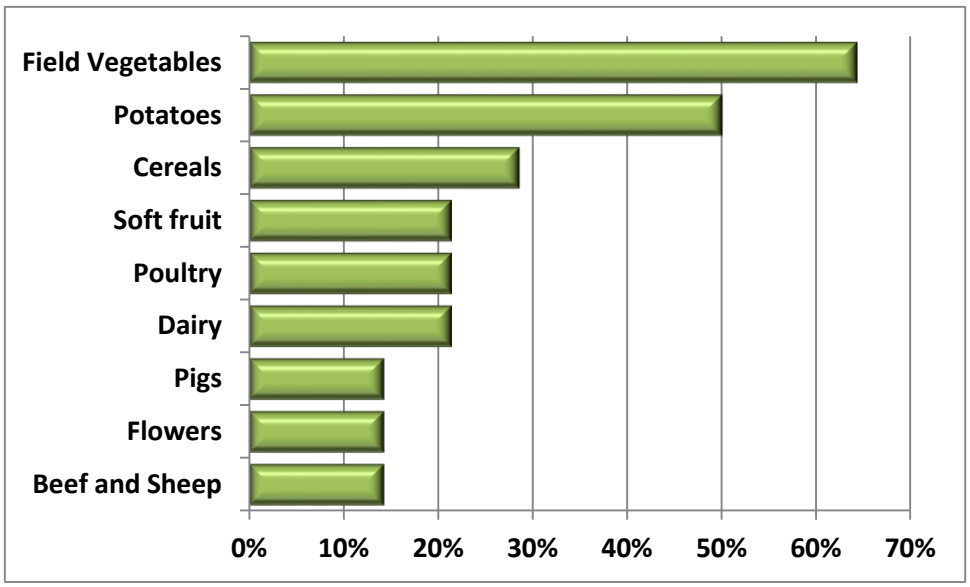
Of the 14 businesses that supplied information, five were more than 90% reliant on the agriculture and horticulture sectors for their business. Another five had less than 5% reliance on these sectors. This reveals the disparate nature of these labour supply businesses with some having wide sectoral spread, being able to supply labour to Scottish agriculture on occasion if the contract is attractive. Other

[15] 4 labour providers with no Scottish labour provision also completed the survey but were removed from the analysis.

specialist suppliers to Scottish agriculture tend to have a workforce with good agricultural experience, prefer that line of work and will supply labour to farmers at a variety of scales and locations depending on need. These agricultural specialists appear to have strong relationships with their farming clients and work hard at recruiting and maintaining their workforce to be able to undertake a wide variety of tasks.

Of the 14 businesses providing data on their activities eight worked at 'local' level (up to 50 miles) with three working regionally (up to 100 miles) and three working nationally. Even though the number of respondents was low, it did provide some details of the farming sectors that labour is supplied to. In support of anecdotal evidence, it is clear that the field vegetable and potato sectors dominate (see Figure 10), with broad coverage of all other sectors which suggests some labour providers can supply workers to a range of farming sectors. The labour providers with more than 50% reliance on Scottish agriculture provide most labour to the potato sector, followed by the field vegetable sector with a couple of specialists providing labour for the daffodil flowerers/bulb sector.

Figure 10 Proportion of labour providers supplying workers to different Scottish agricultural sectors



Interviews were conducted with three labour providers with further clarification provided by a medium sized labour provider. Labour provider interviewees commonly employed staff on temporary zero hours contracts and provided labour to farm businesses based on an hourly rate (which incorporates the workers rate of pay, plus additions for tax, national insurance, holiday pay and a management fee). In some cases larger labour providers also sub-contracted smaller local gangmasters to carry out work on their behalf. These businesses commonly provided labour in small (e.g. 2-6 workers) teams, with the larger ones providing labour to farms across a wider geographic region.

Labour providers were not generally being used by the case study fruit farms (with some occasional exceptions) due to the relatively low margins, higher

intensity workloads and the requirement of high numbers of staff over relatively long periods. The main area of activity for the interviewed labour providers (and recognised as the main area of business for most agricultural labour providers in Scotland) was providing small teams to potato farms of all sizes for harvesting, grading and roguing potato crops, with the main season running from October through the winter months into Spring.

Labour providers employed both seasonal and more permanent staff, with a somewhat wider mix of nationalities (than fruit farms) evident as a result, including a minority of Scottish employees. Labour provider employees were required to have their own accommodation and were therefore usually more permanently located in Scotland or following a regular multi-season working pattern. The larger labour provider required workers to have their own transport (usually shared) to ensure they were able to travel to their place of work, while the smaller provider supplied transport and charged workers a daily fee to cover transport costs. The larger of the two interviewed labour providers operated an in-house recruitment agency (employing over 400 workers across Scotland on a temporary/seasonal basis), with the smaller firm employing predominantly permanent workers and recruiting via word of mouth. Some utilise workers that had been working in the fruit sector for the later potato and vegetable harvest seasons.

Discussions with labour providers suggest that they are equally under pressure to maintain services often on a 'just-in-time' basis, where labour demand is at short notice. The personal nature of some of Scotland's specialist agricultural labour providers allows for this level of flexibility (putting two or more workers into multiple locations on a daily basis). The suggestion is that this approach to labour demand from farms means that it is difficult for labour providers to plan their staff workdays, and ensure that their workers have regular and fulfilling jobs to go to (they stress the importance of their workforce loyalty, as high turnover leads to high recruitment, training and administrative costs). Labour providers suggest that they are often ensuring that labour / wage laws are adhered to on farms and staff are paid overtime when due. Other challenges include managing peaks in demand for workers when crops mature together (e.g. calabrese) or seasonal peaks (e.g. Brussels sprouts at Christmas) which sometimes means there is inadequate supply if the weather causes phased plantings to need harvesting together.

Based on interviews and survey responses it is conservatively estimated that <u>the main Scottish labour providers supplying contract workers to farms employ around 900 seasonal migrant workers annually.</u> This figure is likely to include people that are working in other sectors as well as agriculture, and there is some blurring of boundaries between agricultural and food processing work.

4 Worker characteristics, recruitment mechanisms and pathways

Section Summary:

Recruitment agencies were also used as a source of new workers or to 'top up' returnees and referrals. Workers are often recruited initially through an agency and shifted to a direct recruitment pathway in future seasons.

The majority of the workforce was experienced and highly capable, with most having some previous experience of farm work, including some with experience on other farms and/or in other countries.

The number of months worked varies dependent on farm type and crops grown, with three categories of seasonal worker: short term (2-3 months); ii) medium term (3-6 months); and iii) long term or multi season. The length of season and numbers employed at different times varied across case studies, with fruit farms having relatively long seasons, but requiring higher numbers during an intensive 2-3 month activity peak.

On most farms a smaller cohort of highly 'keystone' experienced workers with central roles existed; they usually worked very long seasons or followed a multi season pattern, spoke multiple languages and acted as supervisors and trainers.

Most workers had been employed in their home countries before coming to work in Scotland across a broad range of sectors and many were educated to degree level. Most had some experience of farm work, although for many this had been gained in Scotland/the UK in previous seasons. Some newer workers (including a student component) had limited/no experience.

Most workers returned home at the end of the season, with some following a multi-season pattern of working on the same farm and a minority working on more than one farm (including farms in England/Europe)

The majority of workers did not work for multiple farms in the UK or elsewhere, due to the travel costs and the potential to save more working a longer season on one farm. The number of months work available on their main farm was a key determinant on whether workers worked elsewhere, with workers seeking additional seasonal work doing so to 'top up' their earnings.

4.1 Background Literature

There is a plethora of literature on the diverse recruitment and employment practices pertaining to migrant labour, and the corresponding impact on employer-labourer relations. Findlay and McCollum (2013) offer a useful five-fold typology (Table 5) for evaluating the various ways in which migrants from East and Central Europe are recruited, employed and managed in the UK's

agribusiness sector. These range from so-called 'gangmaster' regimes (where labour providers are responsible for the day-to-day management of workers, and are thus omnipresent at production sites) to employer-led recruitment of both temporary and permanent staff.

While the latter approach is most common in the hospitality sector, smaller agribusiness firms were found to directly employ labour using "*informal networks*" (which are themselves becoming significant recruitment tools) for short-term work such as planting or harvesting periods. Further, gangmaster and employer collaborations, where the businesses themselves manage workers, were found to be the most common relationship during this research. This enables firms to get "*extra workers during planting or harvesting seasons and… in response to frequent and significant fluctuations in demand for their products (and thus in the requirement for labour*)" (Findlay and McCollum, 2013).

Table 5: Agribusiness migrant labour recruitment, employment and management typologies

Label	Labour chosen by	Wages from	Labour Managed by	Employment status
Gangmaster dominated migration regime	Labour provider	Labour provider	Labour provider	Temporary/fixed term. Some later employed by employer
Gangmaster–employer collaborative system	Labour provider	Labour provider	Employer	Temporary/fixed term. Some later employed by employer
Conventional recruitment agency system	Labour provider	Employer	Employer	Usually temporary/fixed term. Some kept on by employer
Employer-led recruitment of temporary workers	Employer	Employer	Employer	Temporary/fixed term. Some kept on by employer
Employer-led recruitment of permanent staff	Employer	Employer	Employer	Permanent

Source: Adapted from Findlay and McCollum (2013)

Previous research reported a lower tendency for A8 migrants in Scotland to find employment via recruitment agencies compared to the rest of the UK, suggesting that Scottish businesses are more likely to employ migrant labour directly rather than through gangmasters or agencies (McCollum *et al.,* 2012). This has important implications for understanding the extent to which seasonal migrants are, but perhaps more crucially, are not directly associated with agriculture businesses (i.e. being supplied via gangmasters). Where gangmaster-supplied labour is used, the aforementioned JAC may underestimate actual seasonal migrant labour numbers – with some perhaps being recorded by agricultural holders as regular contract labour days (i.e. the farmer simply employs a third party to manage the crop, that may use gangmaster-supplied migrant labour).

Overall, gaining better understandings of the routes through which migrant workers are recruited is crucial. While recruitment agencies may offer security and stability, they also directly impact wages because they charge fees (Parutis, 2014). Rogaly (2008) suggests that some new workers are more likely to be reliant on gangmasters for information about jobs, as well as transportation and access to credit and accommodation, which creates power imbalances between employer and employee. However, information also spreads by word of mouth between employees, but this is often incomplete or inaccurate (Kay *et al.*, 2016).

There is some evidence that whilst agencies serve as initial routes into UK labour pools, migrants will become transient once they have experience. Parutis (2014) outlines how migrants often come to find “any job” and then seek a “better job”, before aspiring to find a permanent “dream job”. These transitions often entail moving between sectors, which is especially important in the Brexit context because barriers to agricultural work may have implications for other migrant-heavy industries such as hospitality or construction.

4.2 Farmer/stakeholder perspectives on recruitment mechanisms

Workers returning to farms for which they have worked previously (returnees) represented the cornerstone of the seasonal workforce for most farms across the survey respondents and case studies. This established mechanism benefitted both farms and workers because it ensured farmers were aware of their returning employees’ capabilities, workers were familiar with the farm and the systems of work, and (in some cases) were able to take a more direct recruitment pathway and avoid recruitment agency fees. Farms often relied on their returnees to ensure sufficient worker numbers and to provide an experienced core of employees to spread across worker teams.

Nearly all survey respondents relied, to differing degrees, on returnee seasonal workers (Table 6). The results suggest that around half of Scotland’s seasonal migrant agricultural workforce are returnees, indicating a high level of worker satisfaction with their previous years’ employment conditions. The second most important form of seasonal worker recruitment (18% of the workforce) was through recruitment agencies (both located in the UK and in the EU). Farm businesses reported that they thought 13% of their workers were recruited through existing or formal employee referrals indicating the importance of informal networks) with 10% recruited directly by the business in the worker’s home country.

Specifically, the larger employers are using their existing non-UK staff expertise and networks during the off-season to undertake annual recruitment events in countries where they target universities, local villages and town halls. They may directly conduct in-country interviews, or use this approach to raise awareness and direct prospective workers to their online application forms. For specialist tasks, such as picking daffodils or bulbs, there is often reliance on communication networks to inform pickers when the season will start on Scottish farms. Many businesses also work directly with recruitment agencies that have in-country representatives in key countries.

Table 6 Recruitment pathways of seasonal migrant workforce – Farm business perspective

Source	Businesses	Average % of Workers	Estimated Survey Workforce	
Returnees	56	62	4,130	(49%)
Recruitment firm	30	30	1,502	(18%)
Referrals	33	22	1,104	(13%)
Own direct recruitment outside the UK	19	10	811	(10%)
Media / advertising	14	4	220	(3%)
Other farms / labour providers	14	18	217	(3%)
Workers sourced through social media	16	7	255	(3%)
Other, please specify	10	14	109	(1%)

The returnee component varied in size across the survey and case study farms. On the case study farms, returnees accounted for 20-65% of the seasonal workforce, commonly making up around half of the workforce. Table 7 summarises staffing, business turnover and seasonal migrant characteristics, including recruitment pathways for farms in the case studies. Total worker numbers increase with farm size (turnover), with a significant jump in worker numbers on large fruit farms (which average 495 seasonal workers). Table 7 also shows the main origins of the workers, with Bulgarians and Romanians constituting the majority on most farms. The returnee component is generally higher on farms with established direct recruitment mechanisms, longer seasons and strong reputations among the seasonal migrant workforce.

Returnees also play a role in referring other migrant workers to the case study farms (a point confirmed by workers themselves), thereby providing a key stream of new workers (referrals/invitees), with referrals commonly constituting 10-20% of the workforce and as much as 40% in some cases. Experienced returnees often played a key role in recruitment, with one long term Latvian worker on a smaller vegetable farm having connections to the majority of the farm workforce through referrals of friends and family members and people from his local region. Nevertheless, as one experienced supervisor on a large fruit farm noted, referrals should be carefully checked to avoid unfair treatment and potentially illegal practices:

- *"Some people do bring people…ok, but as soon as people start to bring 20-30 workers and they charge the workers so this is really not right….this is maybe a reason why people don't choose certain farms, because there is a person like this who charges people to bring them over."*

Table 7 Worker origins, staff costs and labour sources

Case Study	Turnover / Wage bill/ staffing	Worker Origins	Recruitment (returnee %)
Fife Veg	Average: £1-2M £150,000 wages^ 4 permanent & 22 seasonal migrants	Bulgaria, Romania and Latvia	Combination of returnees (Avg. 50%) agency provision and referrals.
Tayside Mixed	Average: £1.6M £600,000 wages 8 permanent & 115 seasonal migrants	Bulgaria/Romania dominant; Polish, Czech, Lithuanian components (one farm)	Returnees 40-65% (Avg. 48%) Referrals 10-35% (Avg.18%); Agency 0-50% (Avg. 30%), Some direct/via social media. Lower agency reliance due to farm-worker relationships.
Soft Fruit	Average £5M £1.7M wages 29 permanent & 495 seasonal migrants	Bulgaria/Romania dominant but greater diversity; Czech, Slovakia, Polish; minority Italian /French	Returnees 20-60% (Avg. 37%), Referrals (Avg. 25%), Agencies 5-70% (Avg. 33%), Some direct/social media recruitment (Avg. 25%).
Labour Providers	Turnover & wage data not provided Up to 300 seasonal migrant workers	Relatively mixed: Romania, Bulgaria, Polish, Latvia, Lithuania, Slovakia and Czech.	Staff more (semi-) permanent but with turnover. Returnees Avg. 50%, Referrals Avg. 30% Agencies Avg. 20%. Combination of permanent and more seasonal

^*partial estimate*

Specialist recruitment agencies (see In Focus Box 2 for an example) also played an important role as a source of seasonal labour for the case study farms, with two of the largest agencies (HOPS Labour Solutions and Concordia) estimating they each supplied in the region of 15% of Scotland's seasonal agricultural labour needs. In many cases agencies were used (together with referrals) as a source of new workers or to 'top up' the returnee and referrals contingent. Returnee workers had often been recruited initially through an agency (in their first season), with the agency providing a basic contract and both the worker and farmer paying a fee for the service. As these workers gained experience with a farm they commonly switched to a direct recruitment approach to avoid paying agency fees. In practice, many workers placed on a farm via a recruitment agency will have originally heard about the job through word of mouth, and therefore constitute formalised (agency managed) referrals.

The use of recruitment agencies varied widely between case study farms. A minority did not use agencies, but one large fruit farm used an agency to recruit 60-70% of their seasonal workforce, with most farms recruiting at least 10-20% of their workers through agencies. The reliance on agencies was more evident on farms which lacked an emphasis on active direct recruitment (e.g. referrals, recruitment via a farm website and active in-country recruitment), with some larger farms emphasising direct recruitment efforts following the expansion of the EU and the closure of SAWS. Some of the larger fruit farms had engaged in direct in-country recruitment in the past, with a minority considering recruitment visits to Romania and/or Bulgaria should labour availability decline further.

In Focus Box 2 Recruitment agency example: The Concordia Farm Programme

Concordia is a charity established in 1943 with the aim of supporting the war effort and addressing shortages of young male workers through recruiting volunteer labour to work on farms. Concordia remains a charity and continues to promote international volunteering abroad and in the UK. The organisation also plays a role in recruiting seasonal international labour to work in the UK horticultural industry, with the aim of fostering cross-cultural understanding between citizens of different nations. Concordia is a self-sustaining charity, which uses income derived from recruitment and worker placement to reinvest in pastoral support and development of workers (e.g. English lessons, repatriation following illness etc.).

Farms on which workers are placed are inspected directly by the organisation to ensure a high level of ethical/legal standards and quality accommodation. Concordia membership also provides workers with travel, repatriation, health and dental insurance and workers are provided with a welcome pack including specific details on the farm and surrounding area. Concordia recruits (with a current emphasis on Romania Bulgaria and Lithuania) through contracted in-country agents licenced by the UK's GLAA. Workers are interviewed (often twice) and given an English test, following which they may be offered a role immediately or at a later date, subject to suitability and labour demand.

When workers are placed with UK farms the farmer pays a finder fee and the worker also pays Concordia a placement fee. From a farmer perspective Concordia have an established reputation and provide access to a large labour pool (of new workers). Farmers are not charged should the worker return home within 28 days, with Concordia addressing worker shortfalls where feasible. The organisation places some 10,000 foreign workers into the UK (with roughly a quarter going to Scotland) on an annual basis, with a peak in the summer months to the end of September due to an emphasis on soft fruit.

Farmers identified the main benefits of using specialist recruitment agencies as:

1. Providing greater control over the number of workers arriving for work (e.g. in comparison to the uncertainty of a direct recruitment approach based on advertising/social media etc. and relying on returnees to return), with agencies seen as a safety net which to some extent guaranteed worker numbers and where possible addressed worker shortfalls.

2. Having the capacity where necessary to address unforeseen worker shortfalls at relatively short notice (i.e. mid-season).

3. Providing reassurance that workers have been be sourced ethically and within the law, that documentation was correct and that workers would be given a degree of pastoral care while in country.

4. Some farmers also acknowledged that agencies represented a source of useful advice on how to increase their attractiveness to workers and increase their likelihood of returning (i.e. providing a wider perspective/base of experience).

5. The larger agencies also acted in a lobbying capacity, thereby playing a recognised role in protecting labour availability in the future.

Nevertheless, farmers also recognised that acquiring labour through agencies was an additional expense and a number of farmers raised concerns around agency shortfalls on labour requests in 2017 and whether agencies could be relied on to acquire sufficient labour in the future.

4.3 Farmer/stakeholder perspectives on seasonality of labour needs

The length of the main season of activity varied by farm type (and the crops being grown and harvested) and farm practices, including the emphasis on polytunnels. In particular, vegetable farms in the case studies (see Table 8) exhibited a higher level of activity later in the season (autumn/early winter), with most workers staying 3-5 months, while mixed farms had a summer peak but with around a quarter of their workforce staying for 6-9 months. In some cases farms shared workers early (or late) in the season to allow them to complete a full working week when the available workload is diminished. In contrast, large fruit farms commonly had a long season (10-11 months in some cases) but usually with an intensive 2-3 month peak in activity which required a high level of shorter term labour, with a smaller cohort (15-20% experienced returnees) staying for longer on these farms, including a number of very experienced workers working extended seasons.

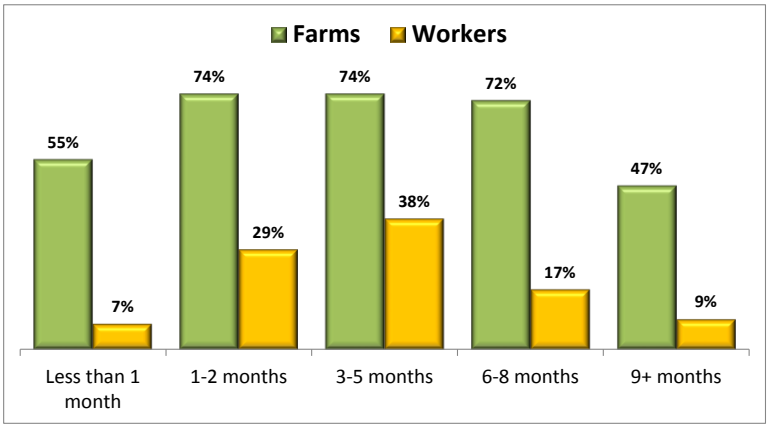
Table 8 Seasonality and worker pathways

	Length of Season/peak
Fife Veg	Season is crop type dependent, up to 8 months (spring to early winter) with 3-4 months peak. Majority stay 3-5 months, with minority longer term (5-8+ months).
Tayside Mixed	Season 9-10 months (March-Nov), peak June-Aug/Sept. Significant component (about 45%) stay 3-5 months and about 25% stay 6-9+ months.
Soft Fruit	Season 10-12 months, peak June-Sept, shorter major (2 months) peaks on some farms; high emphasis on shorter term labour - 65% staying <2 months, 23% 3-5 months and 17% over 6 months.
Labour Providers	A 12 month season peaking somewhat in Sept-Nov. Majority 6-8+ months.

The length of seasonal migrant stays on farms was provided in the survey returns. Figure 11 shows that 74% of farms reported having workers stay between 1 and 2 months, accounting for an estimated 29% of the total seasonal migrant workforce directly employed by farms. 74% of the farms (38% of the workforce) had workers stay for 3 to 5 months, while 72% of farms (17% of the workforce) had workers employed for 6 to 8 months. Small proportions of the seasonal migrant workforce were employed for either less than 1 month (7%) or more than 9 months (9%).

These findings were consistent with the evidence gathered through case study interviews and with Andersons (2017) for example, who state that many soft fruit workers are "*typically working for a 20–25 week season*." This does, however, reiterate that the pattern of seasonal migrant labour use is highly varied.

Figure 11 Proportion of farms with seasonal workers by length of stay and proportion of seasonal migrant workforce by length of stay



Data from the farm business survey provided an overall snapshot of the various monthly uses of seasonal migrant labour (Figure 12). This, once again, highlights the highly variable nature of demand for seasonal migrant labour, which is driven by their specific farming needs.

Figure 12 Seasonality of migrant worker use by farm business survey respondents

4.4 Worker perspectives on experience, pathways and progression

At the outset it was acknowledged that the workers were a ‘hard to reach’ population with no worker database nor any direct means of communicating with workers (and thereby advertising the questionnaire) other than through leaflets distributed on 10 farms that agreed to provide access to their workforce, and a targeted Facebook campaign (all in multiple languages). It is acknowledged that it is highly unlikely that this is a representative sample of the migrant workforce, due to the nature of the promotion of the survey and the fact it occurred relatively late in the fruit picking season. Nonetheless, the worker survey responses allow characteristics of a sample of workers to be observed. The majority of the respondents were from Romania (29%), Poland (28%), Bulgaria (26%) with 7% from Latvia and only 3% from the Czech Republic.

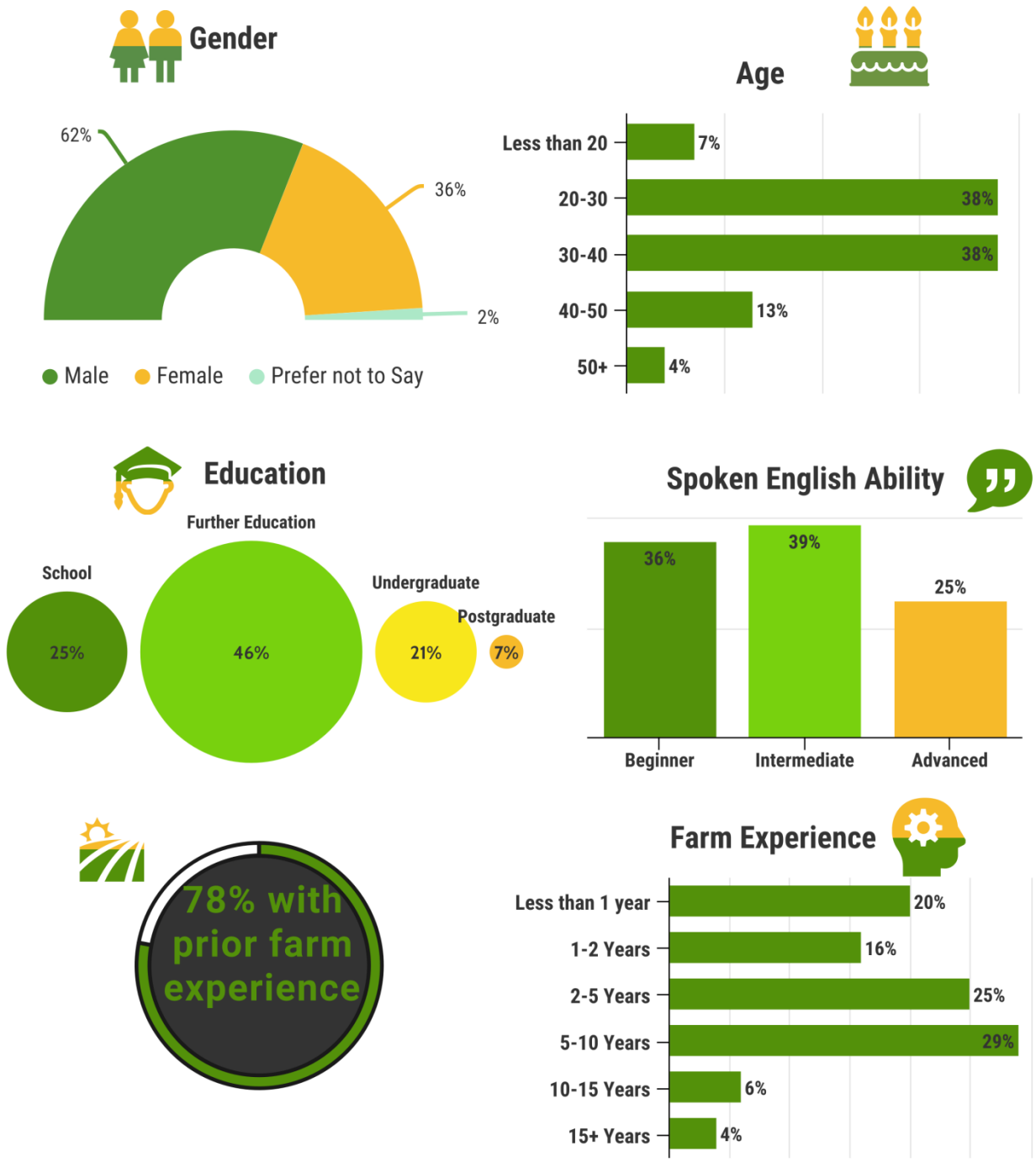
4.4.1 Worker characteristics

Figure 13 shows that overall 36% of the respondents were female, with 62% male and 2% preferring not to say. The majority of the respondents (76%) were in the 20-40 year old bracket, with 17% over 40 and only 7% under 20 (perhaps reflecting the farmer observation that there are now far fewer students on working holidays).

The worker respondents were generally educated beyond school with 46% having further education qualifications, with 28% having either an undergraduate or postgraduate degree. A quarter of the worker respondents classified their spoken English ability as ‘advanced’ with 39% as ‘intermediate’ and 36% as ‘beginner’. The lack of English ability in some workers was raised as an issue by some farmers, who mentioned difficulties in communicating tasks, etc.

Seventy-eight per cent of the respondents claimed to have had prior farm experience before taking their job in Scotland in 2017, with nearly 40% having worked on farms for more than five years. Only a fifth of the respondents said they had less than a year of prior experience on farms, suggesting that the majority of the workforce have some background in farm work with a cohort having long term experience.

Figure 13 Worker survey respondent characteristics

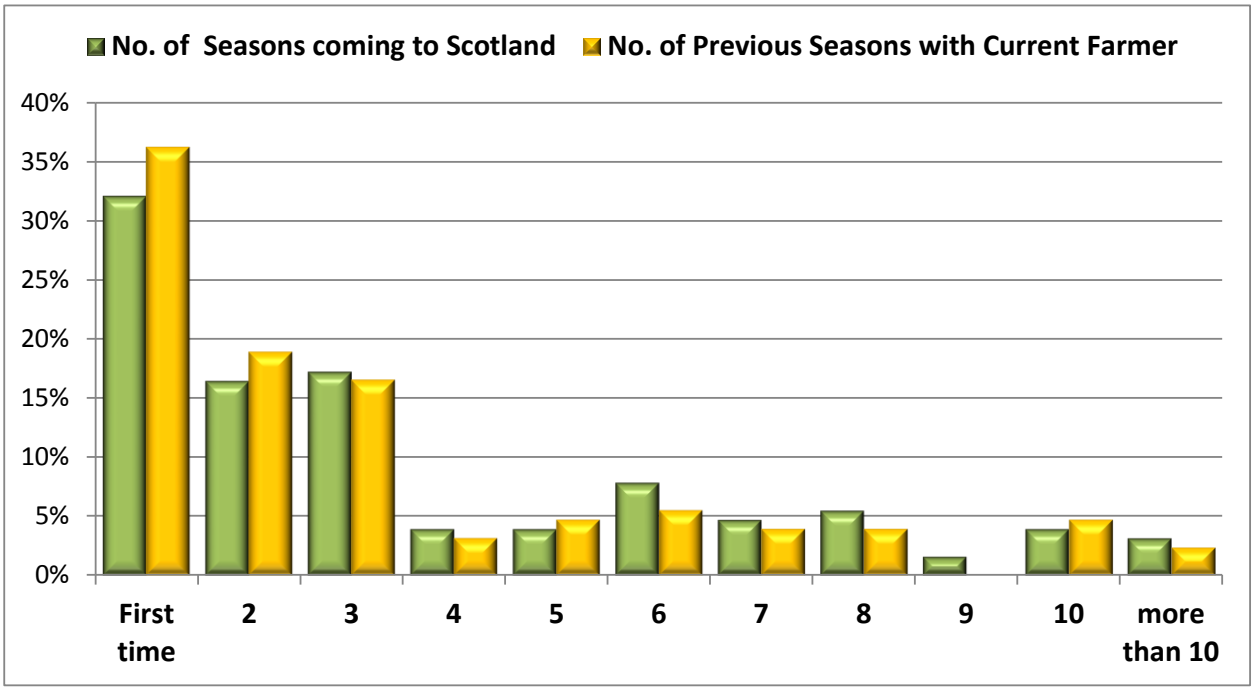


The worker survey revealed a similar picture of recruitment pathways to the farm business survey. Word of mouth was the most prevalent method of pathways into work, with 36% having had connections through friends or family, and 13% having heard about work from existing / former employees. About 40% of the workers had come through recruitment agencies (29% from within their own country) with very few coming directly through advertisement or social media (5%).

Two thirds of the worker respondents had been coming to Scotland for three or less seasons (Figure 14). For 32% of the respondents, 2017 was their first year

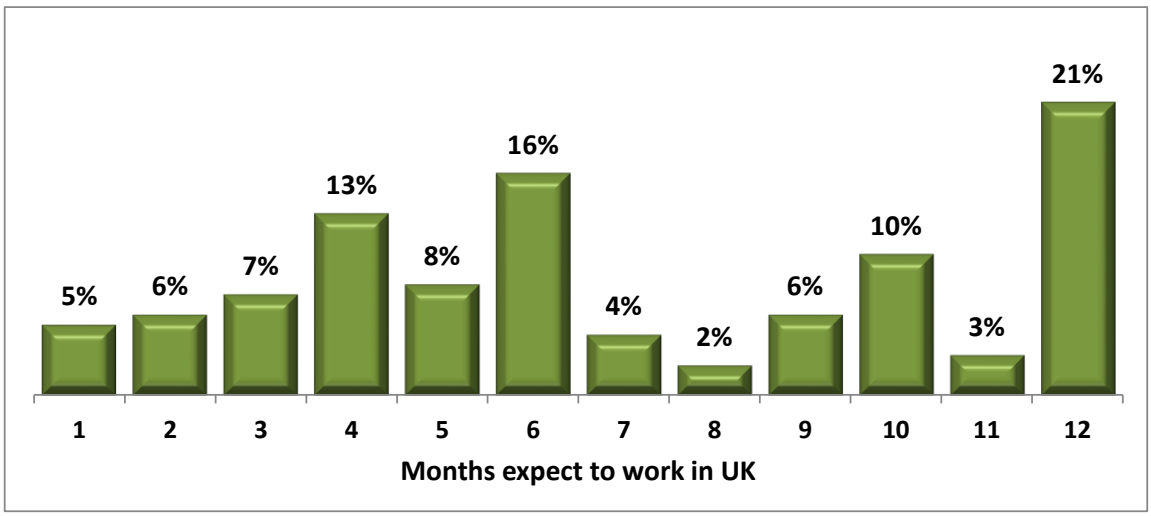
working in Scotland and for 36% of the respondents this was the first year working for the business they were employed by. For 16% this was their second year in Scotland with a similar portion coming for a third year. The high level of returnees as reported by the farmers is perhaps witnessed by the fact that there is a high degree of correlation between the lengths of time a worker has come to Scotland with the number of years they have worked for their existing employer. Overall 30% of the respondents had been returning to Scotland for more than five years with 7% coming for 10 or more years. This reconfirms that there is a degree of satisfaction with Scottish farm work and that it fits in with these respondents' expectations and life goals.

Figure 14 Worker experience in Scotland



The worker respondents were also asked about how long they expected to work in the UK during the 2017 season and interestingly 21% reported that they expected a full 12 months of work, meaning they did not expect to return to their home country to live during the year. Care has to be taken in interpreting this as full time employment for a single business, although there is likely an element of that, as we know some of these workers are employed by more than one business over the season. Only 11% of the workers expected to work in the UK for less than three months, with 28% expecting 3-5 months UK work, 22% 6 to 8 months UK work and 40% expecting 9 or more months work in the UK. When compared to the farm business survey, this suggests there could be a degree of sampling bias (towards more permanent workers) in the worker survey, although many seasonal farm workers will go on to (or have expectations to) work in other sectors of the UK economy once they finish with their farm employment.

Figure 15 Length of time worker respondents expect to work in the UK in 2017



Experience of workers interviewed in the case studies ranged from those with no previous experience of seasonal farm work in Scotland or elsewhere (e.g. students), to long term, highly experienced returnees. The majority of worker interviewees demonstrated an awareness and (often considerable) experience of agricultural work, with returnee workers generally providing a core of experienced staff on case study farms. This group commonly included a core of very experienced long-term returnees (i.e. with more than 5 years of experience on the farm), who often had central/supervisory roles; these workers usually worked long (8-11 month) seasons or followed a multi season (2-3 visits of 3-4 months in a year) pattern, with extended leave breaks in between these working periods. These longer-term experienced workers often spoke multiple languages, set up and supervised worker squads, initiated and training new workers and in some cases played a role in the recruitment of workers for farms (a point confirmed by farmers). These 'keystone' workers commonly multi-tasked, and in some cases they played the role of camp wardens or caretakers and provided general support for the wider workforce (e.g. in relation to English language paperwork).

Among the workers interviewed, many had gained their agricultural experience in Scotland (or the wider UK) and often on a single farm where they had remained for multiple seasons, with strong farm-worker relationships key to their return year-on-year. In most interview groups there were also workers who had gained experience on other farms in Scotland (and the wider UK), and usually a minority that had experience of agricultural work in other countries (examples included Spain, Germany, Italy and Greece), including their home countries. Some workers also pointed out that they had a family background linked to farming and a general awareness of agriculture, with some having worked informally on family smallholdings. As one Bulgarian worker on a mixed farm stated:

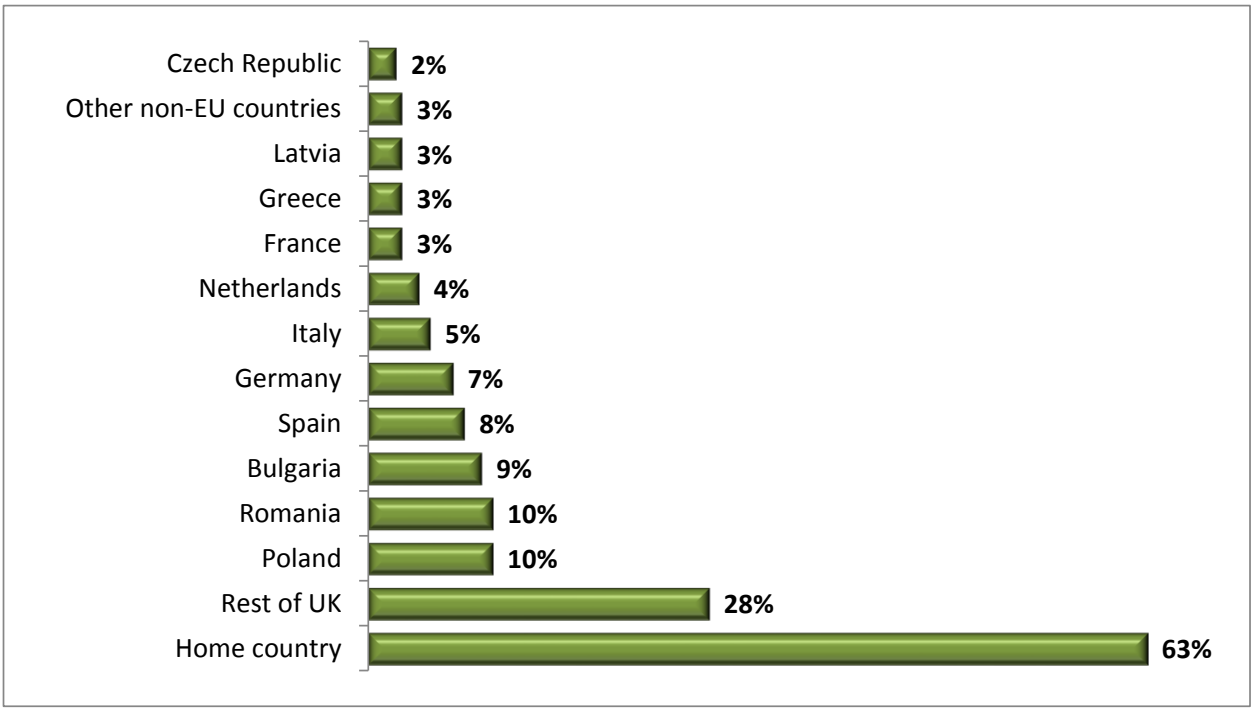
- "Many of us almost have a habit of working in agriculture since childhood…so it's normal almost convenient…for us it is sweet…in the village where I am living currently…many people are looking after raspberries…so it is not far away from my way of living and some of us grew up like that, with farming around us".

Some workers from across the case studies also had experience of working in other sectors, including factory work, building and transport.

4.4.2 Worker pathways and employment in other countries

The worker survey revealed that 63% of the respondents had some prior farm work experience in their own country (Figure 16) before coming to Scotland (remembering that 22% came with no prior farming experience). Twenty-eight per cent had worked in other parts of the UK, which reiterates the findings from the literature and discussions with stakeholders who talk of seasonal pathways from the south west of England, into East England and up into Scotland due to differing seasonal peaks in demand (particularly in the flower sector). The respondents had also worked on farms in a wide range of countries, outside their home country, suggesting that for some respondents seasonal migratory farm employment was a familiar concept (for example one in ten non-Polish workers had on-farm work experience in Poland).

Figure 16 Seasonal worker respondents previous farm work experience by location

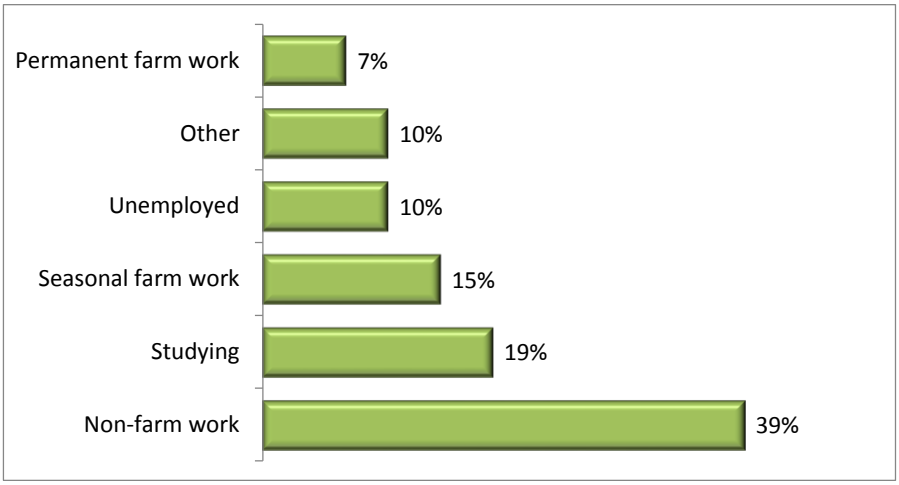


Whilst the survey respondents generally had some level of farm work experience in their home countries, only 22% were directly working on farms (7% permanently and 15% seasonally) before coming to work in Scottish agriculture in 2017 (see Figure 17). One in ten had been unemployed before coming to Scotland, with nearly a fifth being students. Some 39% of the respondents were working in non-agricultural sectors prior to coming to Scotland, showing that many seasonal migrant workers to Scottish agriculture (i) have work experience beyond agriculture, and (ii) give up jobs in home countries to travel to Scotland to work, suggesting it must be economically advantageous to do so.

The worker survey findings were corroborated during the case study interviews. A majority of interviewed workers had been employed in their home countries prior

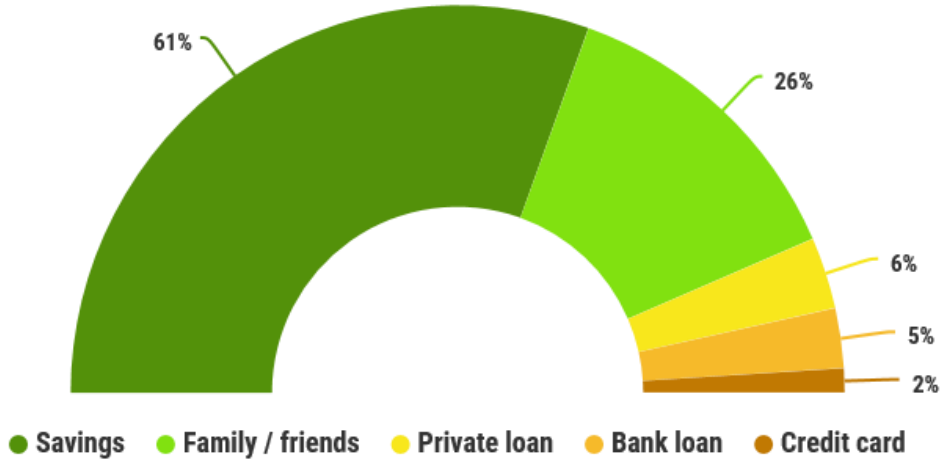
to starting seasonal farm work in Scotland across a broad range of sectors (with workers often having held more than one job), including retail and catering, tourism, manufacturing and warehouse-based work, textiles, fisheries, IT and electronics, building and carpentry, education (teachers), driving/transport, engineering and mechanics, courier work and the public sector. Interviewed workers were therefore often both well-educated and experienced across various sectors.

Figure 17 Activity seasonal migrant workers were doing before coming to Scotland to work in 2017



The majority of worker respondents reported that they had funded their travel to Scotland through saving (61%) with about a quarter borrowing money from family and friends. Only 13% reported that they had taken on debt to pay for their travel to work in Scotland. This is perhaps reflective of the age, work experience, and existing UK experience profile of many of the respondents (particularly as stakeholder interviews reveal some workers take on private debt to fund travel to the UK for the first time). About a quarter of the worker respondents had paid an agency fee to ensure their position.

Figure 18 How worker respondents funded travel to Scotland in 2017



As identified above, many interviewees followed a direct recruitment pathway as returnees, or sourced their employment through a referral/invite from friends or family members working in Scotland. Many newer workers often followed an agency recruitment pathway, either by directly approaching an agency or being referred to one by a farm. Workers themselves often associated agency pathways with providing a better guarantee of employment; however, most viewed it as an expense they would prefer to avoid and were often keen to follow a more direct line of communication with a farm to avoid agency fees.

A minority of interviewees returned home (or to another country) between periods of work in Scotland for a specific seasonal job, including working in ski resorts or other temporary retail or catering jobs, with a small number also using seasonal farm work to support a semi-professional football career in their home country. A student component was also evident among the work force on most farms (usually working short seasons), with the students commonly using their earnings to fund their studies. In many cases experienced seasonal workers had also first started working in Scotland during their studies and continued with this working pattern after completing their degree.

The majority of survey respondents (72%) only worked on a single farm in 2017 with 20% working on two farm businesses, and 5% working on three. After they completed their current employment a third of worker respondents expected to be working in agriculture (mostly in Scotland) with 29% expecting to be working in non-agricultural sectors (mix between Scotland and home country), 15% returning to studies in their home country, and 21% expecting to be unemployed in their own country.

Most interviewees returned home after their period of seasonal work (a point confirmed by farmers) and the most common pathway was home-Scotland-home, although workers sometimes performed this more than once in a year in a ‘multi-season’ working pattern on the same farm (including a proportion of workers on the largest fruit farms). A minority also worked on a second farm in Scotland or England (e.g. a short autumn season on apple farms in England) or worked in England or Europe on temporary non-agricultural (e.g. building) work contracts in the winter. The majority of workers did not work for multiple farms in different countries, largely due to the higher associated travel costs and the potential to save more working a longer season on one farm in the UK where possible. The season length available to them on their current farm was a key determinant in whether workers worked elsewhere, with those seeking additional seasonal work doing so to ‘top up’ their earnings to reach a specific savings target.

Some variation in pathways was evident between case studies (see Table 9), with workers in the vegetable case study more commonly working shorter periods elsewhere earlier in the year (including one group which usually worked on an asparagus farm in England for three months). The majority of interviewees on mixed farms did not work elsewhere, with some doing non-agricultural work in England (e.g. building), Europe or their home countries in the off-season. Among those interviewed on large fruit farms, a minority (of those on shorter season

contracts) worked on other farms in the off-season including in England and Spain. Those working for labour providers (which most commonly involved working on potato farms) often followed a multi-season pattern, with these workers commonly working for a mixed farm or fruit farm during the summer months.

Table 9 Case study worker pathways and work experience

	Multi-farm Pathway	Farm Experience / Other Countries
Fife Veg	Minority of workers on multiple farms extending season including in non-farm work (creating a summer and late/winter season). Majority returning home	Some with experience in home country (farming background) and England.
Tayside Mixed	Majority working on one farm only on all 3 farms, minority building and/or picking elsewhere at season end.	Majority gained experience on case study farm. Some with experience in home country (farming background), other Scottish farms, England and minority in other EU countries.
Soft Fruit	Minority working on more than one farm including apple farming in England and picking in Spain, Greece and Italy.	Most gained experience on case study farm. Some with experience in home country (farming background), other Scottish farms, England and minority in other EU countries.
Labour Providers	Some workers picking (fruit farms) during summer depending on contracts	Some with experience in home country (farming background) and England.

Figure 19 summarises the findings from the worker survey and case study interviews and presents a typology of seasonal migrant workers. In this typology workers are categorised into three broad groups (short, medium and long term/multi-season) based on the length of season worked, experience and common tasks and pathways to Scottish farm work.

Figure 19 Typology of seasonal migrant workers in Scottish agriculture

Short Term Seasonal

- **2-4 Months**
- New workers (direct and agency recruitment) and returnees
- Commonly harvest (pickers), includes students
- Pathways vary – Home-UK-Home common

Medium Term Seasonal

- **5-6 Months**
- Includes new workers and returnees (experience)
- Harvest (longer seasons)
- Pathway commonly Home-UK-Home (also England/other EU)

Long Term (Multi-Season)

- **7-11 Months**
- Commonly returnees (many long term – 5yrs+)
- Includes **keystone workers** (Communicators, labour, worker care)
- Pathways vary (England/other EU)

4.4.3 Farmer and stakeholder perspectives on worker progression

Despite the majority of workers returning home at the end of the season, some opportunities for progression existed and farmers commonly promoted some of their more experienced and skilled (and multi-lingual) workers to supervisory roles. Examples of pickers having progressed through the ranks to become team supervisors and main supervisors were evident on most case study farms. In some cases this included workers becoming permanent employees and moving to Scotland on a full-time basis, including some who had started families in Scotland. As one farmer explained: '*every few years we get one that finds a substantial role for themselves and stays on…we have eight supervisors that have come that route and most now live here all year'*. On some larger farms this included examples of workers having moved into other aspects of the business (e.g. packhouse work).

Some farmers also noted cases where workers had effectively used seasonal farm work as a gateway to employment in other sectors, including food processing and building work, although these interviewees noted this occurred infrequently (as far as they were aware), and of those workers shifting to more permanent roles (on or off-farm) a proportion usually returned to their home countries after a certain period of time. Critically, farmers and wider stakeholders stressed that migrant workers (both seasonal and more permanent) played key roles within the labour force across all aspects of the agricultural supply chain, a factor which is beyond the scope of this report.

Some crossover therefore occurs between seasonal and permanent migrant workers, with a minority of seasonal workers representing a labour stream into other off-farm agricultural businesses (see In Focus Box 3 for an example).

In Focus Box 3 The role of permanent migrant labour in the agricultural supply chain and seasonal worker progression; a cooperative producer group example

Kettle Produce is a vegetable supply business established in 1976 by two farming families in Fife. Kettle grows produce in partnership with over 50 farmers and supplies roots, brassicas, salads and prepared vegetables to major wholesale and retail markets in the UK and Europe – providing a major supply chain component for vegetable farmers. As well as working with Scottish growers, Kettle has established supply partnerships with major growers in England, France, Spain and Portugal, with Kettle Produce Espána SL (based in Spain) formed as a joint venture in 2003. In total over 6,000 hectares of crops grown in the UK and across Europe were supplied to Kettle.

Kettle has two main production sites in Scotland (Balmacolm and Orkie). The business has expanded considerably from an initial turnover of £185,000 to a current turnover of over £110M and an after tax profit of £1.7M in 2016, equating to an annual growth rate of 12.5%. Currently Kettle is responsible for the production and sale of over 100,000 tonnes of fresh

vegetables and salad crops and is one of the largest UK suppliers of fresh produce.

In Scotland, Kettle has supply contracts with around 20 growers, most of which employ on-farm seasonal migrant labour – equating to some 557 seasonal workers in the Fife area in 2017. Kettle also employs approximately 1,200 permanent workers at its production sites in Fife, around half of which are workers of non-UK (predominantly Eastern European) origin, many of whom have worked for Kettle for 5-10yrs or more. Kettle also employs additional temporary workers during peak demand periods (particularly Christmas) through two labour providers on short-term contracts, with some of these workers going on to more permanent positions with Kettle due to on-going staff turnover.

The case study farms within the Fife area (and Kettle) recognised some crossover from on-farm seasonal workers and Kettle staff - with the winter activity peaks at Kettle providing off-season (winter) employment for some seasonal farm workers in Fife. Additionally, both farmers and Kettle recognised cases where seasonal farm workers had progressed into permanent employment with Kettle. Critically (as noted by both farmer and Kettle interviewees), the success of Kettle's partner farms and Kettle as a business were intricately linked – with seasonal and permanent migrant workers playing a major underlying role in the success of both. As identified by Kettle interviewees, business growth has commonly occurred in areas requiring high labour inputs and further growth is also likely to occur in these areas, with labour demand therefore potentially continuing to increase in the future.

Notably, workers at Kettle interviewed for this research commonly identified progression opportunities as a key benefit of working at Kettle. A number of examples of long-term (multi-stage) worker progression were evident, with workers frequently becoming heavily integrated within their local community.

5 Worker motivations and perceptions of seasonal farm work

Section Summary:

The primary motivation for coming to work in Scotland was the potential to earn and save significant sums, which was linked to rates of pay, long seasons and low costs, and the impact of this on their quality of life.

Important parallel motivations were the weak economies, poor working conditions/pay and lack of progression in worker's home countries.

An additional important motivation for returnee or invitee workers was worker familiarity with specific farms or recommendations from friends/family.

Specific motivations can vary and established farm-worker relationships represented a critical motivation for returning for many long-term returnees.

Negative aspects identified by workers included weather conditions and related disruption of working hours; separation from friends and family and the resulting pressure on their families; cultural differences and language barriers; the requirement to gain new skills and adopt different working patterns; and the weakening of Sterling.

Workers identified positives more frequently than challenges and collectively viewed Scotland positively. The most commonly identified positive (across all farm types) was earnings potential and the impact of this on quality of life for workers and their families. Additionally respectful employers and good farm-worker relationships were frequently highlighted (particularly on small/medium sized farms) – suggesting that farm-worker relationships are key to ensuring high returnee numbers.

Additional positive aspects identified included: Scotland being seen as a welcoming country with friendly people; low work-related stress; the potential for skills development (including languages) and career progression (e.g. to becoming a supervisor); and, feelings of safety, security and stability.

Farmer and stakeholder perspectives of worker motivations echoed those of workers themselves, with farmers recognising that motivations varied between nationalities, based largely on the degree of financial disadvantage. Farmers and recruitment agencies also recognised the growing importance for farms to have a positive reputation among workers as an attractive farm in relation to working and living conditions.

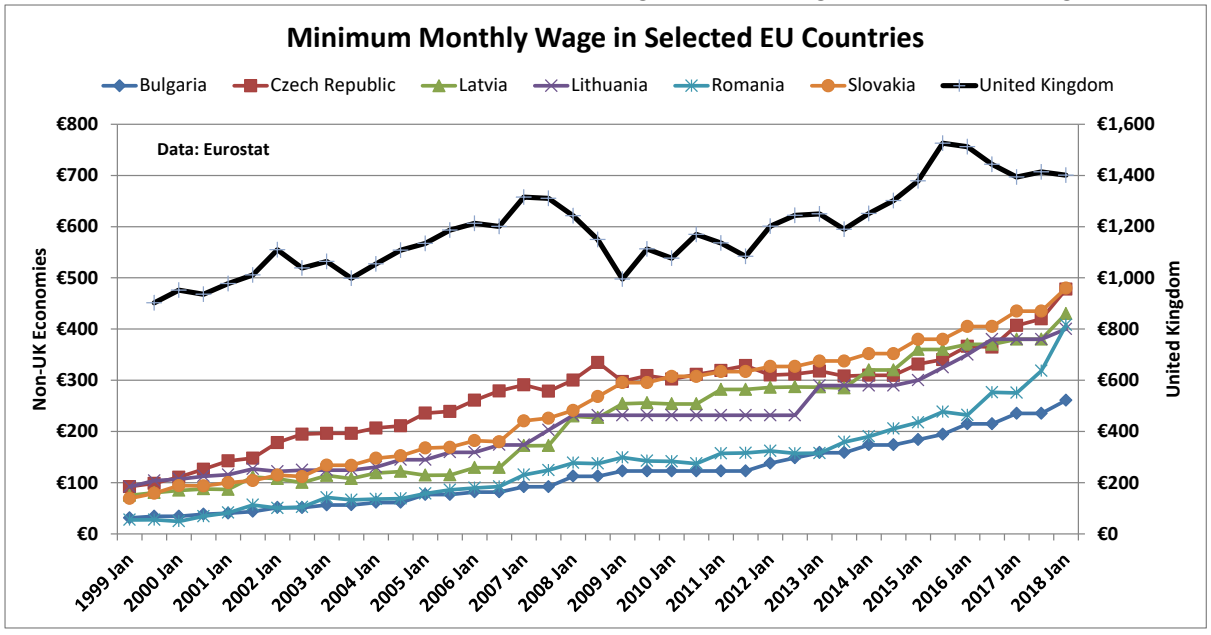
5.1 Background literature

There are many reasons why employers in the agriculture sector often prefer to hire non-British workers. An equally important perspective for this research is that of the workers themselves, and their motivations and aspirations for coming to Scotland to work.

Employment is by far the most common reason for immigration to the UK and Scotland (Kay *et al.*, 2016). According to ONS, work-related migration from the EU to the UK soared from 83,000 in June 2012 to 189,000 by June 2016. In 2016 overall, nearly 7 in 10 EU migrants coming to the UK said they did so for work-related reasons, with 45% holding a "definite job" and 24% "looking for work" (ONS, 2017). Crucially, future job prospects also play a key role in migrants' decision-making (Flynn and Kay, 2017), which has important implications for this workforce given the myriad uncertainties of Brexit. ONS (2018) note declining EU migrants to the UK during 2017, with lower in migration and higher out-migration meaning "*EU net migration has now returned to the level last seen in 2012*."

The amount of earnings that can be earned by migrant and seasonal workers influences whether or not they look for work outside of their home country. Rogaly (2008) found that EU migrants endure hard work and long hours in the agricultural sector because of the relatively high earnings when converted into their own country's currency. It should be noted that minimum wage disparities are shrinking across the EU, with some of the fastest increases coming in A8 and A2 countries, especially Romania, Bulgaria, Estonia, Slovakia and Latvia (Figure 20). Nevertheless, significant discrepancies still exist, with the primary and hospitality sectors often having the lowest average wages. In Romania for example, wages in agriculture, forestry and fishing were only 26% of the national average in 2015 (Ghita and Boboc, 2017).

Figure 20: Changes in minimum wages in the EU



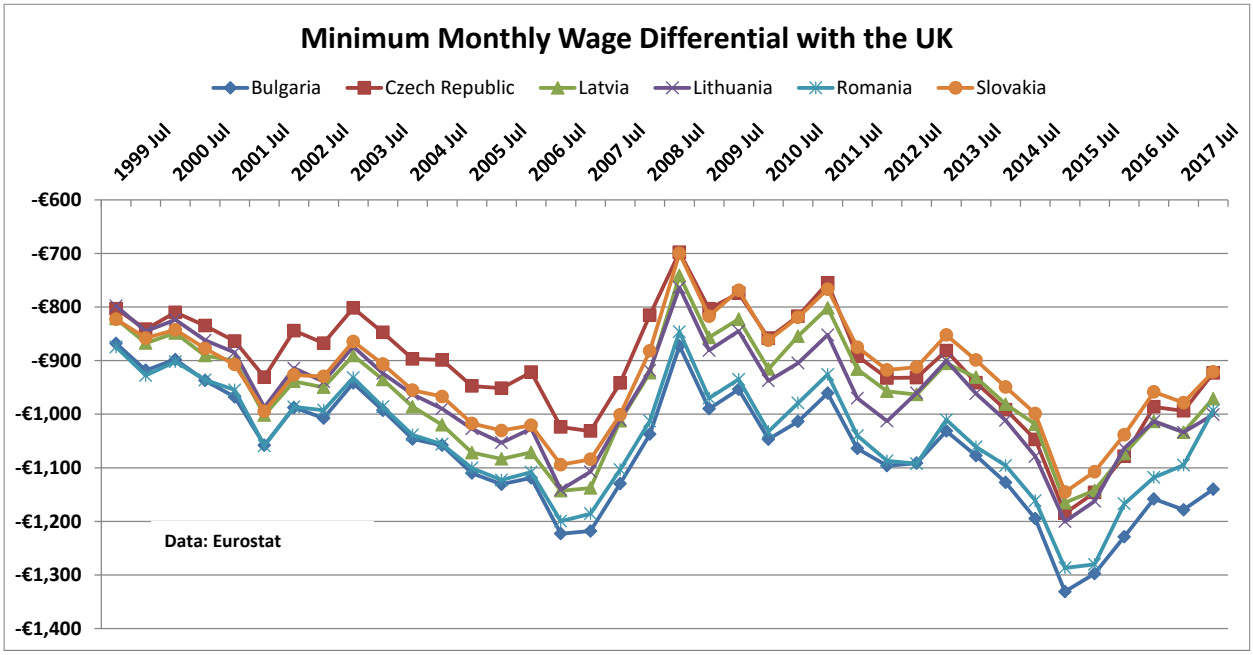
Source: Extracted from Eurostat (2017)

Whilst the minimum wage in many A8 and A2 countries has grown rapidly, they have not kept up with minimum wage growth in the UK (which had a much higher starting base). Eurostat reports that the minimum monthly wage:

- Grew by 55% in the UK from €902 in 1999 to €1,401 in 2018;
- Grew nearly eight-fold in Bulgaria from €31 in 1999 to €261 in 2018;
- Grew fifteen-fold in Romania from €27 in 1999 to €408 in 2018;
- Grew five-fold in the Czech Republic, from €92 in 1999 to €478 in 2018.

The absolute growth in UK minimum wage rates compared to other EU countries means that the minimum wage gap has actually grown over the period (as shown in Figure 21), despite the considerable minimum wage rate growth in A2 and A8 countries previously discussed. However, since 2016 the UK has become less attractive and minimum wage differentials have fallen (ranging from €157 per month for Bulgarians to €287 per month for Romanians).

Figure 21 Minimum wage differential of selected countries compared to the UK, 1999 to 2107



Source: Extracted from Eurostat (2017)

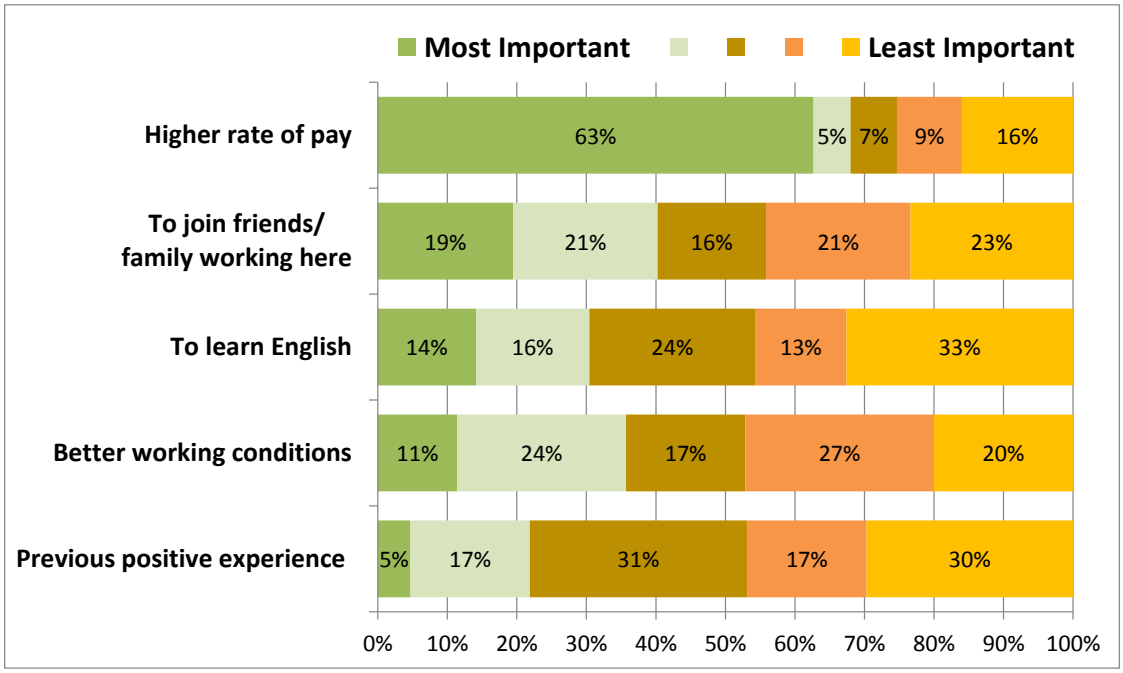
Beyond employment, aspirations and motivations for seeking seasonal employment in the UK's agricultural sector are multitudinous. Typically these involve issues relating to workers gaining some form of financial independence or honing their English language skills, and the latter is especially the case for EU-based university students with professional aspirations after graduating (Rogaly, 2008; Acik *et al.*, 2015). Young migrants in particular are more motivated by "the wish to take control of their lives" than concrete objectives, which enables a degree of flexibility post-emigration (Bloch *et al*., 2014). Parutis (2014) also explained how work-based immigration led to enhanced "*social, cultural and economic capital*" for workers.

5.2 Worker motivations

The results from the worker survey (Figure 22) revealed the motivations behind decisions to come to Scotland for farm work. Corroborating the literature, stakeholder views and wage evidence, it was unsurprising that for 63% of the respondents, a higher rate of pay was the most important factor in coming to Scotland for farm work (with only 16% saying this was the least important motive). Joining friends and family was the second largest driver, followed by better working conditions, then to learn English. Interestingly, previous positive experience was the least important motivation, but that reflects that more than a third of respondents were in Scotland for their first working season.

This reiterates that the motivations for workers coming to Scotland are often a complex mix of financial reward, social networks and aspirations to learn a new language, particularly as an entry-point to further, non-agricultural work in the UK.

Figure 22 Worker Motivations for coming to Scotland



Despite individual motivations for coming to work in Scotland varying significantly, the major motivating factors were relatively consistent with interviewees, both across case study groups and individual farms. The three main motivations for coming to work in Scotland amongst the workers interviewed were: **(i) earnings potential linked to enhanced quality of life and goals; (ii) conditions of work relative to home countries; and (iii) familiarity, recommendations and farm reputations.** These themes and 'other factors' are outlined below and summarised in Table 10, which shows their relative importance based on comments and frequency of mention across the interviews.

Table 10 Worker motivations by order of emphasis/frequency of mention

Primary	Primary/ Secondary	Secondary	Additional Factors
Earnings potential & long term goals: Rate of pay Season length Low cost accommodation Low living costs Value of £ Goals; car, studies, house	**Home Country Conditions:** Weak home economies Low quality employment Lack of progression Worker treatment	**Familiarity and recommendations:** Long term farm knowledge Farm friendships Recommendations from family/friends	Improving English Scottish culture Life experience Pathway to new opportunities

5.2.1 Earnings potential and long term goals

The opportunity for workers to earn at higher rates than in their home countries, combined with the potential for saving and thereby enhancing their quality of life, was the most frequently identified and strongly-emphasised motivation for working in Scotland. During the case study interviews earnings differentials were commonly referred to. Working for 4-6 months in the UK was identified as generating sufficient savings to allow workers to 'survive' for the remainder of the year at home and/or enhance their overall quality of life, and that of their family, than if they had continued working at home.

Sending earnings home was a common theme and widely evident across the case studies, including workers sending earnings home to support their partners and children and in some cases their siblings or parents. The combination of three key factors was crucial in facilitating sufficient 'take home' savings: (i) the wage differential and value of the pound relative to their home currencies; (ii) keeping living costs low in the UK by limiting off-farm activity and spending during free-time; and (iii) low cost accommodation. Workers often had a specific savings target or goal in mind, with the length of their stay and emphasis on repeat visits over a period of time usually linked to their goal. Some of these goals expressed during interviews included:

- Students commonly worked for 2-3 months (often repeatedly during their studies) to support their studies;
- Some workers visit for 2-3 months to save for a car;
- Homeownership was a common goal among working couples and/or workers with young families, with workers often identifying a five year period as sufficient for a couple to save enough for a house in their home country. A proportion of the interviewees commonly work for longer periods (4-8 months) over multiple (4-6) years to save for buying, building or improving a family home: "*Most people…are coming here for a dream…so when the dream is finally made they stop coming…maybe because they have the house…and the money in Romania it's enough…for eating and what is necessary for one family.*"

5.2.2 Conditions of work

A number of worker interviewees from across different case studies referred to the situation in their home countries, and the potential to improve this situation through seasonal work in Scotland, as a key driver for why they come. Workers often referred to their weak economies, ineffective governments and poor levels of pay:

- "*It is not a good situation…In Latvia I can't survive, here I can buy what I want….buy some food. I can send money to my parents and my sisters to help them. The difference is huge because of working here for our families*."

Working in home countries provided income for food only, and required a much greater input of hours and energy to achieve a higher level of income to spend on more than the basics. Some workers also referred to the difficulty in finding a rewarding, enjoyable job with career progression prospects in their home country without a high level of qualifications and experience. A number of workers, across different nationalities, also referred to poor working conditions in their home country relative to the UK and being inadequately reimbursed for hours worked: "*The pay is poor and you are not treated well and may not be paid for all the hours that you worked."* In contrast workers identified the system of seasonal work in Scotland as fair and flexible with farmers and managers generally considered respectful of workers.

5.2.3 Familiarity, farm reputations and recommendations

Returnee workers across multiple case studies, and in particular on smaller (veg and mixed) farms, referred to the importance of familiarity with the farm and their seasonal working pattern. In these cases their employer was often referred to as a 'good person', with whom they had an established relationship, evidencing the building of mutual trust. Established returnee workers commonly referred to the perceived stress linked with 'starting over' on a new farm or in a new country and having to learn a new language and new systems and establish new relationships. The familiarity of returning year on year to the same farm was linked to lower stress and the comfort of knowing what to expect. As one returnee stated: ***"****I know the farm, I would not try another country, I have had enough staying away…the only country now would be Scotland or Romania, it is too late now to go and try another country."*

Returnee workers (particularly on small-medium farms) also referred to the friendships and connections made during their time working as a significant motivation for their return to a farm year-on-year. As one stated: "*it is feeling like home, or like family here, because I know the people I work with….every new beginning is difficult, so it is better to come back to what you know*". Many new workers refer to a positive recommendation from a family member or friend as a motivation for coming to work on a particular farm or to Scotland generally. This included workers in the processing group, many of whom had followed family members to Scotland for work. Farms were often referred to as having 'good

reputations', and certain farms were known as having good rates of pay and accommodation standards, and fair, friendly supervisors.

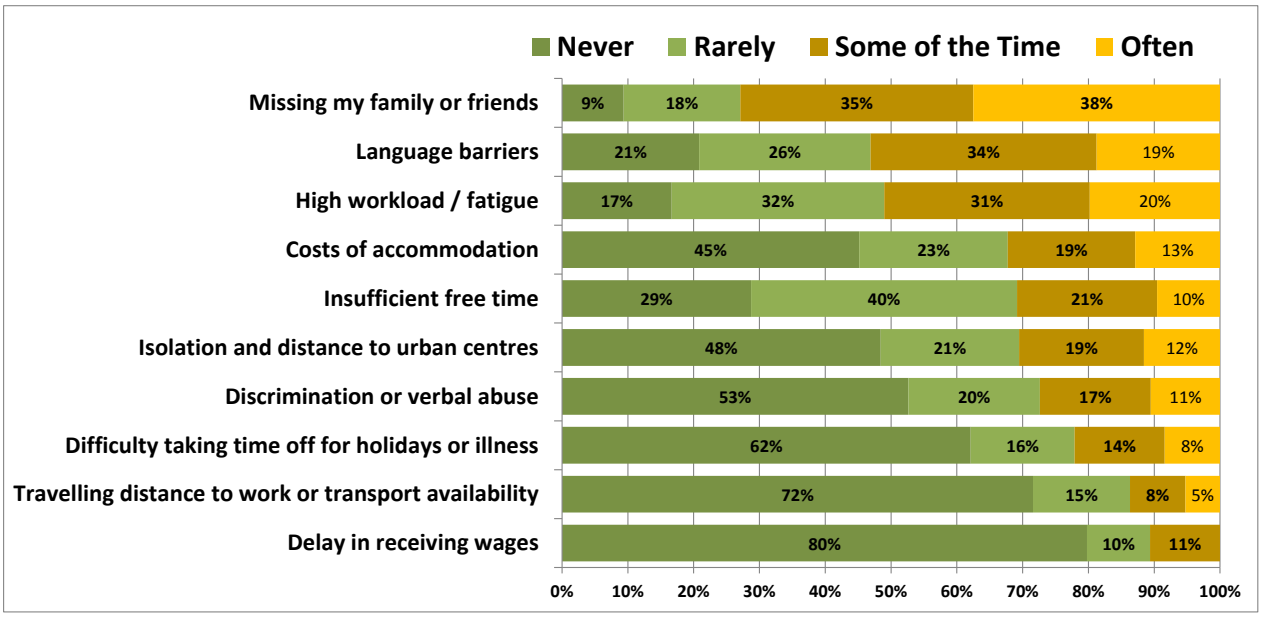
5.2.4 Other factors

Corroborating findings reported in the literature, a number of additional factors were referred to in relation to worker motivations for coming to Scotland, including: the potential for improving English language abilities; experiencing Scottish culture, and; the reputation of Scotland as a 'good country'. A number of younger workers also referred to the opportunity to work in Scotland as giving them a 'life experience' and a possible pathway into a new country and new opportunities in the future. Workers employed by labour providers also commented on the potential for these employers to provide work over a long winter season (work continuity), with opportunities for other work (e.g. berry farms) during the summer months. Some of these factors (among others) were also discussed in greater depth in relation to perceived positives and negatives of working in Scotland.

5.3 Worker perspectives on negative aspects of seasonal farm work

The biggest challenge faced by most worker survey respondents whilst working in Scotland related to having to overcome missing their friends and families – this affected three quarters of the respondents (see Figure 23). Language barriers were reported as regularly being a challenge for 19% of respondents with a further 34% having problems some of the time (meaning over half the respondents experienced language barriers). High workload / fatigue were also a challenge for about half the respondents with a fifth stating it was a regular challenge they faced. Other challenges reported by a minority of workers related to accommodation costs, insufficient free time, distance from urban centres and discrimination. Whilst over a quarter of respondents reported that they had experienced some form of discrimination or abuse there was very limited evidence of this negative experience amongst the case study interviewees (this may be due to selection bias of interviewees or workers feeling less inhibited when completing the anonymous survey in their own time). In these case study interviews any examples of discrimination provided related to off-farm situations.

Figure 23 Challenges faced by seasonal migrant survey respondents to working in Scotland



Across all case studies workers identified relatively few negative aspects of seasonal farm work (with some failing to identify any), with workers more frequently identifying positive aspects. The main negative aspects identified by workers are outlined in order of mention below, with summarised responses to this question shown as a word cloud in Figure 24.

Figure 24 Summary of worker statements relating to challenges of seasonal agricultural work in Scotland

i) **Scottish weather conditions:** The weather was the most frequently-mentioned negative aspect, with this relating to colder temperatures from autumn onwards and rain throughout the year. Poor weather conditions were associated with discomfort and the need to wear waterproofs for long periods. Additionally, in some cases, weather had the potential to affect growth rates thereby impacting the availability of working hours at specific times. As one Bulgarian worker stated: "*good weather is good fruits and you have a lot of job, all day rain means fruits is not ready."* Disrupted scheduling and limited hours was not reported as a common occurrence across the case studies, although some fruit farms had experienced some crops being ready for harvest earlier than planned, resulting in an initial shortfall in worker availability early in the season. Some workers also commented on their accommodation as being cold late in the year when temperatures dropped. Nevertheless, a number of workers also commented on Scottish temperatures suiting picking, with higher temperatures (particularly in tunnels) causing discomfort for pickers. Some workers also commented that they had become accustomed to the Scottish climate and sometimes found it too warm when they returned home.

ii) **Workers missing their families:** While workers often commented on the weather with humour, the most fundamental challenge referred to across case studies was the time workers spent apart from their families. This was particularly the case when workers left young children behind with their partners or relatives. Some workers noted that time away was difficult regardless of whether they had children, and discussed the potential for missing their relatives and siblings 'growing up' as they repeatedly undertook long seasons of work . Some workers also discussed how their departure increased pressure on those left behind to look after children and/or older family members in their absence (and in some cases work at the same time).Despite this, some workers suggested that leaving home became easier after the first season of work, once a pattern was established. Additionally, seasonal work allowed the workers to spend blocks of quality time (often 1-2 months) with their families and generate sufficient savings to improve their overall quality of life. Workers more permanently established in Scotland (from the labour providers and processor group case study) also identified the distance from family as a burden or "*the price you pay to live here*". Longer term migrants recognised that living in Scotland resulted in them becoming more disconnected from the family support system. As one long-term migrant stated:

> "*You feel a bit less connected and the support system is not here, because your family are not here…I am starting to think about all the things I am missing, or do I want to stay here or should I go somewhere else…I went home a couple of weeks ago just to see my niece, because I don't know when I am going to see them and its hard and they are growing up".*

iii) **Cultural differences and language barriers:** A minority of workers also identified cultural aspects such as experiencing cultural differences and changes as challenging. This was related most specifically to language and the difficulty for some workers to learn English and settle for the season in a new country. An additional point of difference referred to by some workers was the difference in foods, with some workers critical of the emphasis on processed and take away foods and the availability of certain foods in supermarkets between the UK and their home countries.

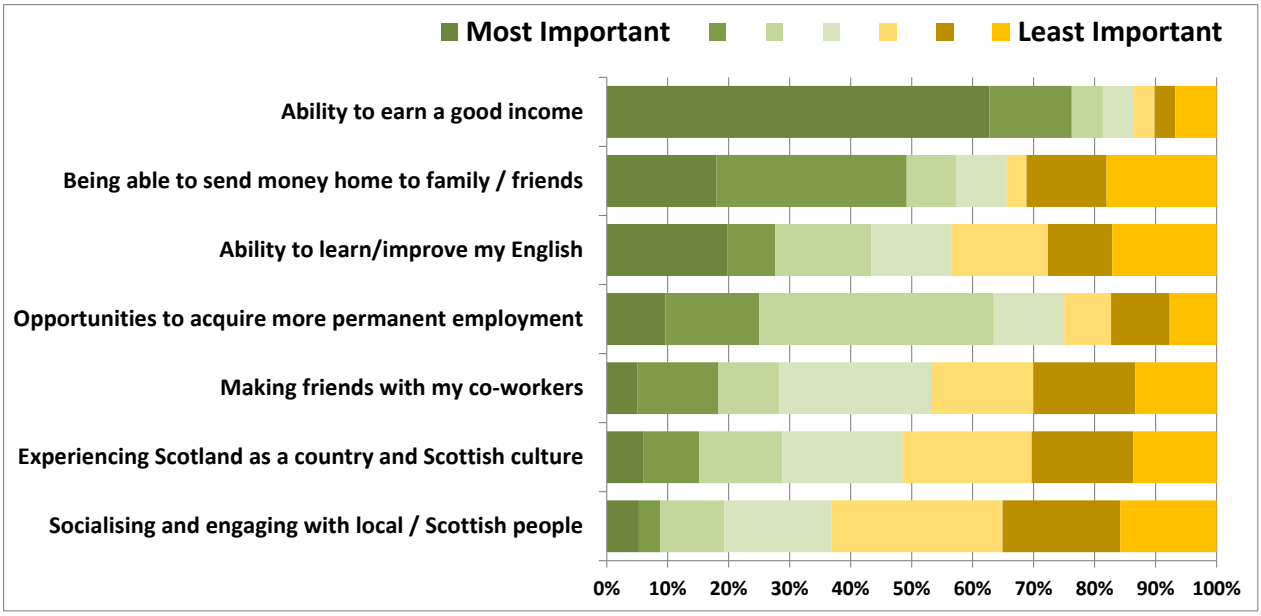
iv) **Acquiring new skills and new work patterns:** A minority of workers also referred to the difficulty of adjusting to a new farm during their first season and increasing their picking speed sufficiently (to generate higher income). The initial physical difficulty of the work combined with living in temporary accommodation was commented on as challenging by a small minority, although these workers recognised that as you gain experience over time the working pattern became easier. A small number also commented on occasional difficulties of working with different groups and different nationalities, with a certain amount of worker turnover occurring across the season. This was seen as necessitating experienced supervisors to facilitate the building and running of effective teams, as one experienced supervisor on a large fruit farm commented: *"some farmers do not realise the importance of supervisors that speak multiple languages and understand different nationalities and support the workers and organise mixed teams that work well together*."

v) **Brexit and the strength of the pound:** Within the discussion around challenges some workers also referred to the uncertainty around Brexit in relation to returning to the UK for seasonal work in the future and the effect of Brexit on the value of the pound (see next section for further detail). A small number of workers also expressed concern around a perceived decreasing likelihood that they would be able to find more permanent work in Scotland in the future, negating the possibility that seasonal work could act as a pathway to more permanent employment in Scotland.

5.4 Worker perspectives on positive aspects of seasonal farm work

Worker survey respondents were asked to rank a number of factors as to the most beneficial or positive aspects of working seasonally in Scottish agriculture (Figure 25). Unsurprisingly, the main positive aspects related to earnings potential in Scotland and the ability to send money home to their family. For some the primary benefit has been to improve their English language with opportunities to gain permanent employment in Scotland and the UK also important, particularly as secondary benefits.

Figure 25 Beneficial / positive aspects of working in Scotland reported by worker survey respondents



Across all case studies, workers identified positive aspects of seasonal farm work. The key positive aspects referred to by workers during interviews are outlined below, with summarised responses to this question shown as a word cloud in Figure 26.

Figure 26 Summarised worker statements on positive aspects of seasonal agricultural work in Scotland

i) **Earnings potential and an enhanced quality of life:** Reflecting the discussions relating to motivations, workers across all case studies identified the potential for generating a good income and saving the bulk of this as a key positive aspect. This was viewed as enhancing the quality of life of workers and their families and enabling workers to acquire their own home in their home country. Scotland was often referred to as one of the best places for seasonal farm work in Europe due to a long season and the availability of consistent hours combined with a competitive hourly rate and the reasonably low costs of living due to the low-cost accommodation. Hourly rates in some EU countries (e.g. Germany, Scandinavian countries) were seen as equal or better than in the UK; however, seasons were recognised as shorter and cost of living was sometimes higher. Other EU countries were sometimes criticised for lower wages and poorer quality working conditions and accommodation.

ii) **Respectful employers and good farm-worker relationships:** Workers from across the case studies identified examples of receiving respectful treatment and support from their employers. This was particularly emphasised by workers on smaller and medium sized farms (but also evident in some comments from workers from larger farms). As one Latvian workers from a smaller farm stated: *"They are not looking at us like we are foreigners…we can talk with them about our problems and they will always listen and try to help….maybe bank accounts opening, if somebody needs the hospital or dentist he brings us."*

Many workers identified this positivity and worker treatment as one of the biggest positives of working on farms in Scotland: "*The best thing about this farm is that…the attitude of the owners and supervisors is good, a positive attitude and we are treated well.*" Some workers contrasted this with working conditions in their home country, which were sometimes referred to as unfair, with pay and conditions reflecting a greater emphasis on worker welfare in Scotland. "*At home your bosses don't care about you, you are less than an employee…you are there for them, here there is some sort of understanding that without us our bosses do not make any money."* Workers referred to *"being treated like a person and not a number"* on Scottish farms, with farmers respectful of workers concerns. Despite a slightly higher number of comments on earnings, these respect-related aspects were often heavily emphasised by workers, as one worker on a large fruit farm stated in relation to employer attitudes: "*Sometimes this is more important than money because I have been on farms where you can make a lot of money but they treat you only like a number….This is a big farm but the way they treat the people, they are much closer to the people and you can go and talk to the boss not like on other big farms, and they know my name!"*

iii) **Friendly working environments:** Workers from across all case studies referred to Scottish farms as friendly, welcoming working environments. Younger workers in particular commented on the potential for meeting new

people from different countries and making new friends, some of whom stayed in touch after leaving Scotland. Scottish people were generally referred to very positively, as friendly, helpful and warm. As one (now permanent) worker from Estonia commented: *"the people are a big influence, I have never felt out of place or not welcomed or on my own, your friends that you make here they kind of become your family because you don't really have family here"*. A minority of workers with experience in England also referred to Scotland as being more welcoming of foreign workers than parts of England. Scotland as a country was also referred to as a '*good country'* with a good system for rewarding workers and providing support (e.g. health care).

iv) **Low work related stress:** Some workers contrasted the level of work related stress in their seasonal work (which they saw as low) with the stress associated with working in their own country (seen as high). Workers referred to the availability of free time and a positive working environment on the farms. As one worker on a vegetable farm stated: "*In our countries it is more stressful…a main difference…when I first came last year (I thought) why is everybody smiling? Two weeks later I knew, because everybody is happy….it's not like this (in our home countries)."* Workers referred to the importance of good, positive supervision and clear instruction and working in happy teams that worked well together, which were commonly referred to as attributes of their farms. Some workers also noted how seasonal farm work provided them with an opportunity to distance themselves from their financial worries and the stresses of their day-to-day lives: "'' Y*ou don't need to think about problems, your mind is free…the farm…it's like a family*. *We enjoy the free time…we come back (home) and we don't have time for us, we have other stuff we need to do, here we are thinking about just me, what I want to do…I am worried about going home"* (Female worker on a smaller vegetable farm).

v) **New experiences, skills and languages:** Workers from across case studies referred to the opportunities seasonal farm work provided for improving their English and gaining experience of different cultures (including Scottish but also the languages and cultures of the other foreign workers present on farms). Some workers had learned other languages (e.g. Romanian/Bulgarian) through establishing long term friendships with workers from other countries. Some workers noted how improving their English had led to improved work opportunities (such as supervisory roles) due to their enhanced communication skills. Longer term permanent workers also noted how improving their English had "*opened up doors"* to higher paid employment and commented on the life experience, confidence and independence they had gained from living in and adapting to life in a different country.

Some workers also referred to the wider skillsets they had gained through seasonal farm work in Scotland, including learning how to grow and tend different crops (with some workers hoping to establish their own farms in their home countries) and supervise workers, with these skills having

increased their employability, thereby guaranteeing them work in the future. As one Bulgarian worker from a mixed farm stated: *"I learned everything here, had never seen a farm before…the skills and experience I have I gained here….my first job was planting Broccoli on a machine and after that* [the farmer] *gave me the chance to try as a tractor driver…he trained me step by step with a tractor, trailer, forklift…eventually I got all the licence categories on my licence…each year when I went home I did the test, this has given me many skills."*

vi) **Job security and future potential:** Workers recognised how gaining farm related skills and experience had allowed them to return year-on-year in a relatively stable seasonal employment arrangement. The majority of supervisors interviewed that gained their experience in Scotland 'moved up the ladder' as a result of their improved language and farm experience. The importance of the potential for progression and improved earnings and responsibility were particularly emphasised by the long term permanent workers, who collectively recognised that working hard and gaining experience presented opportunities for progressing to more permanent work arrangements and better pay.

5.5 Farmer and stakeholder perspectives on worker motivations

Some farmer/stakeholder interviewees chose not to discuss worker motivations, with some suggesting workers would be better placed to discuss their motivations. Those that did identified earnings potential (facilitated by wage differentials and exchange rates) and established farm-worker relationships as key factors – closely aligning with worker perspectives. Farmers and recruitment agencies also recounted numerous examples of workers earning towards specific long-term goals and investing in opportunities in their home country (e.g. a house, farm, or paying for their degree), usually to provide an enhanced quality of life for their dependents. This was seen as resulting in highly motivated workers, who had travelled specifically to work and had often been working in their home country prior to leaving.

Some farmers and recruitment agencies also confirmed that a minority of workers viewed seasonal work as a gateway to longer-term permanent employment or higher earnings opportunities in the UK. Some farmers noted motivations varied between nationalities, with migrants from newer member states (Bulgaria/Romania) heavily focused on working and earning as much as possible to support their families, while younger Polish workers often showed an interest in cultural experiences and were saving for a holiday, laptop or additional spending money – this resulted in farmers often being most interested in Bulgarians and Romanians. Reflecting workers views, farmers also recognised the importance of having a positive reputation and ensuring the availability of a diverse workload, with husbandry techniques to reduce worker fatigue (e.g. raised table-top picking opportunities) for attracting workers.

6 The working and living conditions of workers

Section Summary:

The bulk of activity consisted of harvesting, although workers (particularly longer season workers) were involved in a range of activities, including packaging and husbandry; workers showed a preference for a diversity of activities. Inductions, worker training and mixed experience teams were viewed as important for gaining experience and increasing earnings.

The average number of hours worked per week (40-48) and the pay range for hourly rates (£7.50-10.50) were reasonably consistent across farms, with upper pay rates higher on some larger farms depending on experience. Workers were generally satisfied with working conditions; in some cases workers would prefer to work longer and more consistent hours.

The majority of workers stayed in on-site low cost (£40-60 a week) shared accommodation (caravans), which allowed them to save most of their earnings. Transport arrangements were important and many farms had cars available for workers, with larger farms using buses for worker transport and day trips.

As pay is reasonably consistent, other factors (e.g. accommodation costs/quality, Wi-Fi provision) may become more important to workers in the future in determining where they go to work.

Farm businesses were generally content with paying the minimum wage, and if workers failed to achieve that through piece-rate then they were not offered overtime and were often the first workers to be shed as the season winds down. In tight labour seasons, all workers are considered important and the perception was that some poorer workers were being carried but the farms could not afford to get rid of them.

Some farm businesses raised concerns that Scottish producers were at a disadvantage due to the continuation of the SAWB. Additional concerns related to temporary workers holiday pay entitlement and pension contributions (which were seen by many as counterintuitive and expensive for workers that would never see any pension benefit).

6.1 Background literature

Rogaly (2008) outlined how changing relationships between corporate retailers and agriculture/horticulture firms in the UK have impacted the use of migrant labour in agricultural production over the past 30 years. Specifically, the former's emphasis on production volume, product quality, and low margins (for growers) has led to a substantial intensification of horticultural production. To meet these increased demands, growers have increasingly sought workers who are "*reliable,*

flexible and compliant", which are perceived as being traits "*more likely to be found in foreign workers*".

This trend coincided with shifts in how gangmasters operate. The establishment of the Gangmasters Licensing Authority (GLA) in 2006 significantly increased regulations to ensure gangmasters "*were not cutting corners, for example on wage payments or non-wage benefits such as holiday pay, nor charging excess fees for transport, or exorbitant rents on accommodation*" (Rogaly, 2008). This shifted the model from small gangs with a leader and 'core members' to larger ones with multiple customers and often absentee gangmasters. The fact that gangmasters are more likely to provide accommodation, a source of profit and a means of labour control means they are "*more likely to take advantage of the specific vulnerabilities of migrant workers*" (Rogaly, 2008).

Production intensification also has serious ramifications for wages. Specifically, the increased reliance on migrant workers has coincided with widespread introduction of 'piece rates'. Whilst minimum wages are strictly regulated, piece rates are much more lenient because there is no specification of rates for crop, task, season, etc. Implementing these rates thus offers significant scope to undercut the minimum wage (Gidwani, 2001). Rogaly (2008) found evidence of increased working speeds and enhanced labour control due to piece rates replacing time rates (where pay is based solely on hours worked), as well as a marked drop in the rates themselves due to reduced grower margins. Gangmasters reported that price per unit of output "*declined in cash terms by two-sevenths between 1999 and 2004*", and that "*piece rates had declined by 15% since 1998*" (Rogaly, 2008).

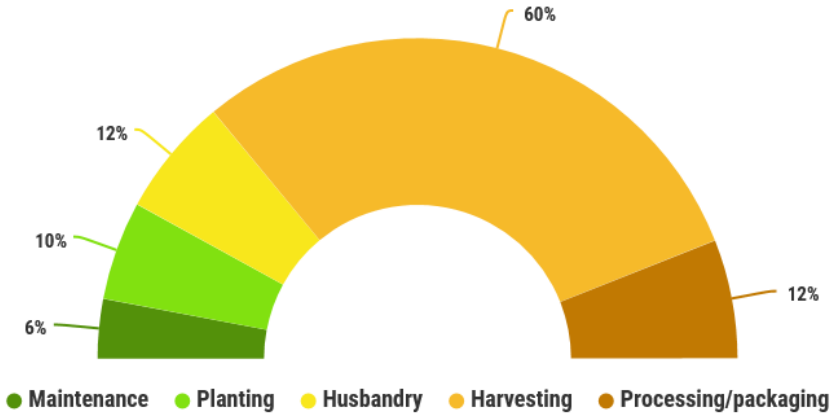
Indeed, the increasingly stringent criteria to meet minimum earnings targets has led to some migrants earning less than the minimum wage to which they are entitled, and there has been some evidence of this in Scotland (TUC, 2008). Further, previous research has suggested that migrant workers were known to be living in poverty in Scottish rural areas, and this situation may be particularly prevalent in the agricultural sector (EKOS, 2009). This evidence is particularly worth considering in light of in light of the SAWB's requirement that all workers in the agricultural sector, including those from outside the UK, must be paid the National Living Wage of £7.50 per hour from April 2017 (Scottish Government, 2017).

6.2 Farmer and stakeholder perspectives on conditions of work

The farm business survey respondents reported that 60% of their seasonal migrant labour was utilised in harvesting, with 12% used for processing and packaging and a further 12% used for crop husbandry. Sixteen per cent of the total directly employed seasonal migrant labour was used for planting and maintenance activities on these farms. These proportions vary significantly between farm businesses, depending on the key products grown, as represented by the following explanations from farmers as to their seasonal labour demands:

- "*In winter months (January, February) there is just a little work like cleaning up tunnels, preparing for planting. In March and April there is a bit more work to do like first planting and some husbandry jobs. End of April / beginning of May is the period for time consuming jobs - bringing flowers down on table top strawberries. End of May to July is the peak of the season when we have all recruited workers on the farm. Then the season goes quiet in August. September that is the time for lifting potatoes. And in October there is just few people left doing some husbandry and maintenance jobs*."
- "*We employ seasonal migrant workers to pick our daffodils from about March to May and our bulbs from about June to August but the seasons are all weather dependent. In our bulb season we also use migrant workers in our shed to dress and pack the bulbs*."
- "*Our principal crop (for labour requirement) is broccoli. We plant from March until July and harvest/pack from mid-June until mid-November. The work is dictated by the weather and by customer demand. We use maintenance work and grading of other crops (potatoes and onions) as "fillers" to maintain hours worked for seasonal staff when the weather causes gaps in harvesting.*"
- "*Low numbers are required for potato and broccoli planting but activity by those workers is intense. Other work during growing season includes weeding and irrigation, etc. The main requirement is for broccoli harvest and processing which is all done by hand*."
- "*Potato harvest occurs in a six week period during September/October but grading working varies throughout the year depending on when potatoes are being marketed*."

Figure 27 Seasonal migrant labour use by task on business respondent farms



Harvesting constituted the primary activity for the majority of workers on case study farms, with peaks in production generally coinciding with peaks in worker numbers. Packaging also represented a key activity on some farms, depending on the products and system of working. Nevertheless, the case study farms utilised seasonal workers across a wide range of activities, particularly outside of the peak harvest periods, including erecting poly tunnels, planting, pruning and weeding. Labour providers commonly placed workers on potato farms working on

a range of activities (particularly grading), with those working for the food processing and supply group commonly working in packaging and processing as well as in support roles (e.g. administration).

The farm business survey respondents reported an average working week of eight hours per day for five and a half days for their seasonal migrant workforce. The majority of businesses had an entry level wage rate of £7.50 per hour but workers could earn up to £19 per hour, especially on the larger farms where there was a wage premium for experience (supervisory, unsocial hours, experienced piece rate workers). About half of the businesses reported that they restricted working hours of their workers to minimise overtime payments:

- *"No more than 12 hrs per day. Max 6 days per week offer of work."*
- *"I don't feel it is necessary to work them overtime unless we are behind due to weather or other unforeseen issues and so it is reviewed on a daily basis."*
- *"We work shift patterns to try and avoid overtime."*
- *"Must work no more than 39 hours except in exceptional circumstances."*
- *"Try and keep them to 8 hrs per day and no more than 48hrs in a week."*

However for some businesses the practice of restricting overtime appeared counterintuitive: *"Where we used to, we cannot afford to have unproductive people sitting in their caravans not working"* or overtime is based on worker ability:

- "*Only very good pickers are allowed to have overtime. Supervisors get more overtime"*
- *"Majority of work is paid at piece rate, and any employee not earning the minimum wage on piece work isn't offered overtime."*

Whilst a small number of farm businesses actively commented that they felt that seasonal migrant workers should be entitled to the same conditions as UK workers there were a number of concerns relating to the continuation of the SAWB, pension contributions, holiday pay, minimum wages, etc. The type of sentiment provided included:

- "*Scottish growers are at a competitive disadvantage if selling within the wider U.K supply chain as our competitors in England and Wales do not have an Agricultural Wages Board to contend with, which means our labour rates and consequently our growing costs are not competitive. The impact of this is very expensive for Scottish businesses*."
- "*I think it is overly generous to pay holiday pay to a worker that works less than two months. The pickers are shocked that they get holiday pay and many feel that they are on a working holiday*."
- "*Increasing living wage rate is making it more difficult for piece work related activities. The minimum hourly rate is making productivity fall as migrant workers are now guaranteed money regardless of poor work*

output. Cost of production increasing without an associated increase in produce selling price."

- "*The pension provision for migrant workers is difficult. None of them want it as they don't wish to contribute themselves. They would rather send as much money home to their families as they can*."
- "*As wages are 25% of our costs we are concerned about rises in wage costs. Rises in hourly rates have a much larger cost when National Insurance, pensions, holiday pay and overtime are factored in*."
- "*Minimum wage, holiday pay, working time directive, pensions - rules, rules and more rules - makes the job of employing people unattractive especially when dealing with crops where margins are tight*."
- "*Automatic enrolment in the state pension for workers who do not want to participate creates a meaningless amount of work and hassle*."

Workers on case study farms were commonly employed on zero hours contracts, with most working a 40-48 hour week (over 5-6 days); with additional hours and overtime pay reasonably common during busy periods (see Table 11 for a summary). Workers were most commonly paid minimum wage, with many receiving elevated hourly rates due to picking bonuses/piece rates and in the case of supervisors and workers with specialist skills (e.g. machinery drivers). Rates of pay were reasonably consistent (influenced by the SAWB), with the majority earning the minimum hourly wage (£7.50), with some workers earning more (£7.50-£10.50) due to higher picking rates or supervisory roles, with upper pay rates higher on some larger farms.

Piece rates were reasonably common on case study farms, with the wages of workers who picked insufficient amounts to reach the minimum wage equivalent being raised to the minimum wage to ensure legal compliance. Piece rates were not used universally, with vegetable farms in particular noting that piece rates can result in a drop in quality for more skilled tasks; adverse weather conditions were also noted as potentially impacting workers incomes substantially if based on a piece rate. Piece rates were commonly set based on daily/weekly picking averages (average weight or number of trays picked per hour), with workers picking above these rates receiving an hourly bonus, thereby providing high efficiency workers the opportunity to increase their hourly rate.

While overtime pay was a feature on most case study farms during peak periods, it was common for farms to avoid employing workers beyond the limit over which overtime must legally be paid (currently 48 hours) where feasible. Farms facilitated this to an extent by employing sufficient numbers of workers and alternating worker teams to avoid high levels of overtime pay – as this was generally seen as unaffordable. Where workers were employed on an overtime basis some farms noted these hours would normally be given to their higher efficiency workers. Notably, farmers commonly perceived the shift in the regulation on overtime (with the requirement for overtime pay switching from 39 to 48 hours in 2017) as crucial to their margins in 2017.

Planting and harvesting was commonly staggered carefully to provide a consistent working pattern and minimise very high workload periods and periods where insufficient hours were available to workers. In some cases farms were planting specific additional crops (e.g. late cherries and blueberries) to extend their working season and 'fill gaps' to ensure a consistent workload across a long enough period to satisfy worker demand for hours and increase overall farm efficiency. As the seasonal workload decreased towards the end of the season, on most case study farms (and particularly fruit farms) workers picking at lower efficiencies were often laid off first, or in some cases left themselves during the season due to their lower hourly rates.

Table 11 Conditions of work on case study

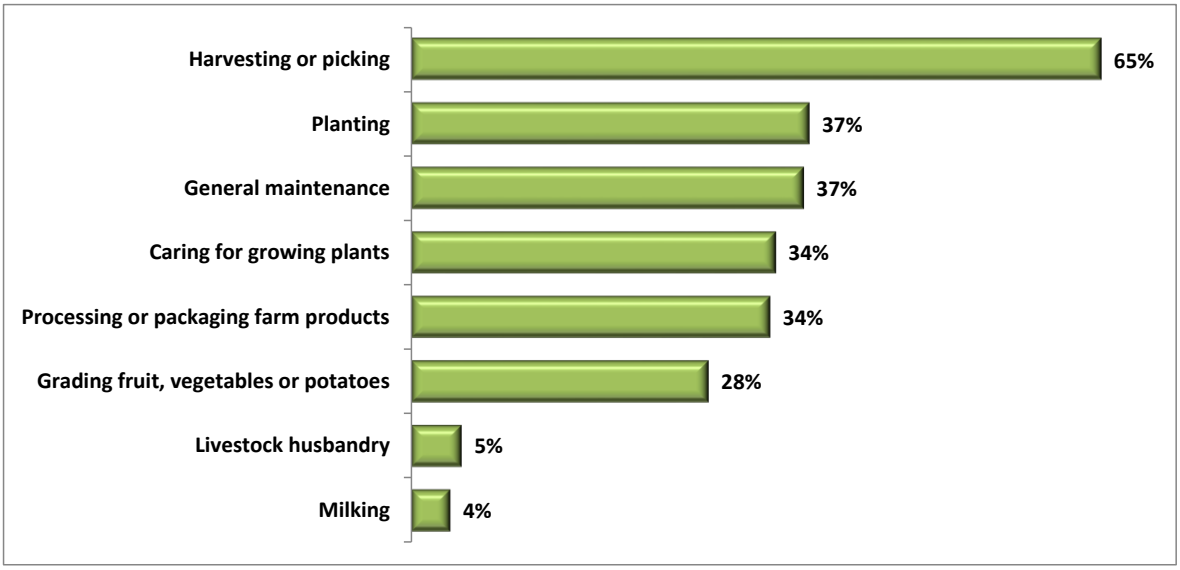
	Average Hours	Pay Range (per hour)	Accommodation & Transport
Fife Veg	8hrs per day over 6 days (48hrs), with some overtime	Basic rate: £7.50 Avg. Upper rate: £10.75 Maximum rate: £12.00	Majority in mobile homes on-site; Cars provided for workers (and fuel)
Tayside Mixed	8hrs per day over 5-6 days (40-48hrs), with some overtime	Basic rate: £7.50 Upper rate (Avg.): £10.50 Maximum: £12.50	Majority in mobile homes on-site (small % off site accommodation); Cars provided, farm-owned buses used at peak times
Soft fruit	8hrs per day over 6 days (40hrs-48hrs), with some overtime	Basic rate: £7.50 Avg. Upper rate: £10.50 Maximum: £15.00	Majority in mobile homes on-site (small % off-site accommodation); Farm-owned buses, some car availability, workers own cars/sharing, and bikes
Labour Providers	8hrs per day over 5 days (40hrs), with some overtime	£7.50-£8.70; specialist skills, drivers etc.	Majority in own housing, work normally within a 50 mile radius ; Own cars (costs)

Reflecting perspectives provided in the worker survey, case study farmers frequently recognised the importance of worker welfare and developing positive working relationships, with positive treatment of workers seen as being rewarded by worker loyalty in the longer term. Recruitment agencies were also seen as playing a role in worker welfare, as farms were frequently visited and inspected by agencies to assess working and living conditions prior to the arrival of workers. Organised social events and well managed living areas and work-teams were also noted as key to the development of a positive working environment and flexible, responsive staff teams.

6.3 Worker perspectives on tasks, pay and conditions

73% of the worker respondents to the survey reported that they had worked directly for a farm business in 2017, with 22% reporting that they had worked for a labour provider and 22% a food processor. The majority of worker respondents (71%) had worked in the fruit sector during 2017, with 39% having worked in the vegetable sector, 36% in potatoes and 7% in the dairy sector. Figure 28 shows how nearly two thirds of the worker respondents reported that they had been engaged in harvesting activities in 2017, with 37% in planting or maintenance activities and 34% in crop husbandry or processing activities and 28% in grading activities. This labour profile perhaps reveals some of the biases towards a more mature, longer term migrant worker profile.

Figure 28 Day-today activities undertaken by seasonal migrant survey respondents

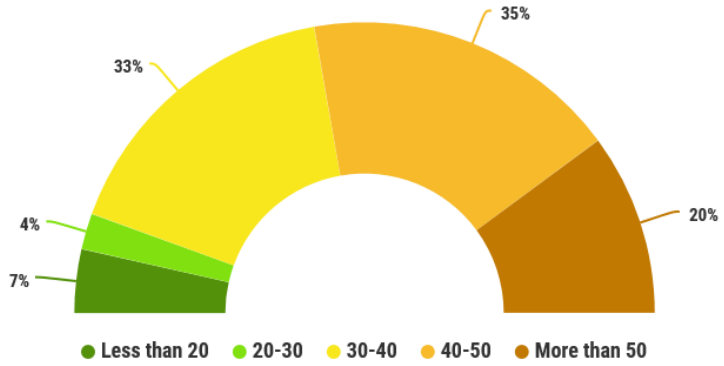


Workers in the case studies often expressed a degree of satisfaction with their work and in broad terms viewed their work environments and treatment by their employers and supervisors very positively. In particular, workers frequently referred to their employers as fair (often contrasting this with worker treatment in their home countries). Workers were generally satisfied with their working activities, although some referred to the importance of some diversity in their workload, including working across different crops, inside and outside of polytunnels and moving from ground based strawberry picking to picking from taller plants (e.g. blueberries) or table top strawberry plants. Workers generally raised few complaints (see Section 5.3 on negative aspects), with the exception of starting early on cold mornings and long periods of ground-based picking.

Ensuring new workers were appropriately inducted to the farms and accommodation, trained in appropriate skills and placed in teams which included experienced workers from whom they can learn, was highlighted as critical to ensuring workers felt motivated to do the work.

A fifth of the worker survey respondents reported that they regularly worked more than 50 hours per week, with 35% working between 40 and 50 hours and a third working between 30 and 40 hours. This generally reflects the position explained by the farm businesses although there are higher than expected proportion working more than 50 hours (this could again be bias in the sample towards older, more experienced workers who may be picking up overtime).

Figure 29 Average hours worked per week reported by worker survey respondents



Interviewed workers were generally content with both their hours and rates of pay, with some commenting specifically on how piece rates motivated them to work and increased their overall savings across the season. Some workers commented that they would prefer to work longer and more consistent hours, with a minority (in one case study) referring to hours having been restricted due to weather problems or small orders, with workers often used to working longer hours in their home countries: "*We would like more hours all the time…if I was working in Romania I would be working 12 hours per day…but they might say today you must stay 2-3 hours more but…without paying you extra…coming here, working 6hrs, the day was nothing, three times more money working at 50%"*.

Some returnee workers commented during the case study interviews on the changes in the regulations around overtime (with the requirement from overtime pay switching from 39 to 48 hours in 2017) which they felt had reduced the amount of overtime potential; many interviewed workers still received overtime pay during very busy periods and some viewed a longer working week positively. Some workers expressed a desire to obtain a more secure, all year round job and those on permanent all year round contracts (in the food processing group) often commented on their job security as a key benefit, although those in more permanent roles were at times more critical of their rate of pay than seasonal workers. Those working for labour providers and living on a more permanent basis in the UK also commented on the difficulty of ensuring regular work when they did not have a permanent contract. Workers generally viewed their leave allowance as generous, with multi-season workers on some farms working three months on and then one month in their own country before returning, which they viewed as essential to maintaining family relationships.

In Focus Box 4 Ivelin – vegetable and potato worker experience

Ivelin has worked on this farm for two years; prior to this he worked on a carrot farm in Scotland and worked in construction in Bulgaria. Ivelin is studying for a degree in engineering in Bulgaria and will go into third year when he finishes work for the 2017 summer. He comes back to work on the farm because *"here you don't have a lot of free time to spend your money, usually if I am in Bulgaria when I finish work there are my friends, my family, let's go out, let's go out, here I don't have time so I save more money".* There are opportunities to earn money in Bulgaria but he likes it in Scotland.

"In our countries it is more stressful than here, when I first came last year (I thought) why is everybody smiling? And after that, maybe two weeks later I knew, because everybody is happy, they look happy….it's not like this (in our home countries). You are working all the time, probably working for a big company, you buy a house and this company shuts down, it's not happening every day but it could happen and you are aware of that". **Ivelin enjoys the work however says that whilst it is not easy it is easier and he works less hours than he did in construction.**

He lives in a house on the farm that he shares with other workers; it has a good internet connection so he can keep in touch with his friends and family in Bulgaria. Being away from family and friends is one of the most difficult things he faces while in Scotland. Ivelin, like many others, sends money back home to his family. In his spare time, Ivelin goes to Dundee to shop with others working on the farm.

Ivelin would like to come back to work in Scotland in 2018, however he is aware that the money he earns at the moment is less than last year due to the exchange rate. In the future he would like to stay longer than six months, so he is looking for other types of work. He would like a permanent job in Scotland most likely as an engineer. He will complete his degree in two years.

6.4 Accommodation and transport

6.4.1 Farmer and stakeholder perspectives

The farm business survey respondents reported that they provided accommodation (for a fee) for over 6,500 seasonal migrant workers (80% of the respondents' workforce) in 2017. The majority of this was on large scale soft fruit farm businesses. Half of the respondents provided accommodation for all of their workers and only 14% did not provide any accommodation (smaller scale businesses with lower labour requirements). The rationale for providing accommodation was convenience for workers (on-site with no transportation requirements). Caravans accounted for about 80% of this provision, as it was a low cost option for workers (who demand accommodation local to farms) and helps avoid Houses in Multiple Occupancy regulations that govern larger housing units.

The majority of workers on case study farms lived in on-site accommodation (predominantly mobile homes and caravans) generally arranged before their arrival, with workers commonly paying a returnable safety deposit (e.g. £50) and weekly fee of £40-60 to cover the on-going costs of maintaining accommodation (see Table 11). In contrast, those working for labour providers and the processing group were generally living in private (off-site) rented accommodation. On some farms a small minority of workers also used off-site private rented accommodation.

A number of farm case studies recognised an increasing range of regulatory requirements relating to accommodation (e.g. electrical and gas testing requirements, fire safety) and increasing costs for maintenance and updating. However, increasing accommodation charges to counteract rising costs was acknowledged as potentially counter-productive in terms of discouraging workers. Notably, recruitment agencies (and some farms) emphasised the importance of maintaining high standards and sufficient heating in accommodation on Scottish farms to ensure strong farm reputations and to engender a strong sense of respect for workers and attract workers in an increasingly competitive labour market. Heating in the autumn/winter months was a key challenge in this respect, with one large fruit farm having established a biomass district heat network to provide heat and hot water to all their mobile homes.

As farms were commonly some distance from urban centres, transport for workers is important, particularly for food shopping and on days off. Many farms had a number of cars available for workers (some with designated, insured drivers) to use when required (see Table 11), with particularly good access to cars on small and medium sized farms, with larger farms making greater use of farm-owned buses to transport workers to the supermarket at specific times. Farms also commonly organised trips to tourist attractions at specific times during the season. Vehicle ownership was more common among long term returnees, some of whom drive to Scotland from their home country at the start of the season. Workers on some sites also make use of online-ordering and supermarket delivery services to minimise travel costs. One large farm (due the closeness of a town) also made bicycles available to workers during their season for a small charge (£40 for the season, with £20 returned on departure). Those working for labour providers and the processing group commonly owned their own car and/or lift shared with fellow workers to keep travel costs down.

6.4.2 Worker perspectives

Nearly half of the respondents of the worker survey reported that they lived in caravans on farms (47%) with 14% living in on-farm housing and 29% in private rented accommodation (reflecting the respondent profile – more experienced, older and working with labour providers). Sixty percent of the workers reported that they had accommodation arranged before arriving in Scotland with 59% having it pre-arranged by the farmer, with the remainder being arranged by themselves (14%), friends or family (14%) or recruitment agencies (14%). For those that arrived in Scotland without accommodation arranged most relied on farm businesses to arrange their accommodation (48%) or sorted it out themselves (34%). Three quarters of the survey worker respondents reported that they were satisfied with their accommodation provision (meaning one in four thought it could be better).

Interviewed workers were generally very satisfied with their accommodation and viewed the availability of low-cost accommodation as critical to ensuring they made sufficient savings during their period of seasonal work. Farms commonly facilitated workers sharing with their partners, family members and friends, with two to six workers sharing a caravan depending on the time of the year and size

of the accommodation. Some workers referred to caravans as cold during the autumn and winter months, although workers recognised accommodation was generally well maintained and heated. A preference was shown for accommodation with inbuilt showers and kitchens as opposed to shared site facilities. The availability of good quality internet access (a common feature on case study farms) was often referred to as important as it facilitated regular communication with family members. Shared games and meeting areas were also common on case study farms where workers often socialised at the end of the day and at weekends. Car availability was generally seen very positively as it gave workers a level of freedom and allowed them to see parts of rural Scotland and the cities (e.g. Edinburgh) during their time in Scotland, with workers on some farms not required to pay for fuel for short journeys.

7 Family, community and integration

Section Summary:

Workers often travelled with friends and family members. Workers on all farm types referred to the existence of a support network and a 'farm family', particularly on smaller farms. Farmers and supervisors were seen as playing a role in creating a supportive environment;

Workers often left young families behind and regular communication with home was a major feature of seasonal work; those with family at home were heavily motivated and focused on providing a better life for their families through seasonal work;

Seasonal workers did not generally feel they were integrated with Scottish society due to their limited time in the country, the reality of being accommodated on-farm and their focus on work;

Although more than a quarter of workers reported that they had experienced discrimination the feedback from the case study workers interviewed suggested that this was mostly in off-farm environments with very few incidents of on-farm issues reported. It was generally commented that Scotland was perceived as being more welcoming to foreign workers than parts of England.

The presence of seasonal migrant workers was positive for local economies as they spend a proportion of their wages in local shops and pubs. There is anecdotal evidence of some workers playing important roles in local sports teams and churches.

7.1 Background literature

In addition to reduced earnings resulting from a weakening of Sterling, migrant workers in rural Scotland face other challenges. These include language and communication barriers, poor access to services (with diverse needs and working hours creating particular difficulties), social isolation and limited accommodation options (often temporary, seasonal and tied to their job) (de Lima 2006, 2008). All these factors make the migrant worker population particularly at risk of social exclusion.

Research undertaken in Fife and the Highlands identified specific barriers to employment including inadequate language support, lack of appropriate childcare and instances of discrimination, prejudice and racism (de Lima, 2006; 2008; de Lima, *et al.*, 2005a; 2005b; 2007; Fife Partnership, 2007; Jentsch, *et al.*, 2007; de Lima and Wright, 2009). Factors such as disability, gender and ethnicity and remote living conditions further amplified the impacts of poverty in different ways and for different groups (EKOS, 2009). Worker communities and wider support mechanisms therefore represent important factors for tackling many of the challenges migrant workers face.

7.2 Worker perspectives

7.2.1 On-farm communities

The majority of the case study workers interviewed had travelled with friends or family members including couples working together, parents with their older children, wider family groups and groups of friends. These groups were common across the case study farms, resulting in the creation of multiple family units and a strong sense of 'family' on the case study farms – with this being referred to most frequently by workers on small and medium sized farms. As one Romanian worker who worked with her partner stated: "*This farm is a second home for us, it is like a family here…we feel very welcome, because we come here for 10-11 months and go home for 1-2 months and then we come back. We like this farm…we have friends here and know the people."*

These on-farm communities provided crucial support for workers who often referred to missing home and family, and explained how these on-site worker networks "*made being away ok*". In some cases (on smaller farms in particular) the farmer's family also played an important supporting role in this on-farm community. As one Polish worker on a vegetable farm stated: "*We have a good farmer which makes a difference for lots of things, he is just a good person, sometimes when people go that have been here a long time he is upset and his wife is nearly crying, so it's like a little family".* Some workers also referred to developing strong new friendships with other workers and in some cases learning new languages through these friendships. Travelling with friends and family was seen as giving workers confidence to engage with new people and situations and (particularly for female workers) making the process of travelling to and working in a new country safer.

7.2.2 Staying in touch and providing for your family

As well as travelling with adult family members (and in some cases extended family), many workers also had children who remained with relatives in their home countries while they worked in Scotland. Workers with children at home participated in worker interview groups across all case studies. The importance of regularly communicating with home (and Wi-Fi availability) was therefore frequently mentioned. Workers (often couples working together) with families at home were primarily focused on earning enough to support them by sending money home, often with the aim of building a house and/or improving their family's quality of life. As one experienced Romanian worker stated: "*Being away from them is difficult but we need to offer them a better life so we work here and send money home and so this helps us make our children's lives better."* As one younger worker noted, working in Scotland took her away from her financial problems at home and reduced the stress linked to this, and provided a means to lessen these difficulties for her young family on her return. Separation from family was also discussed by permanent workers from the labour provider and processing group case studies, with some of these workers also sending money to family members in their home country.

In Focus Box 5 Boris, fruit farm experience

Boris first came to work on this farm in 2005, where he works as a mechanic and tractor/forklift driver. Prior to coming to Scotland he worked in bars, as a taxi driver, a car parts salesman and as a car mechanic. He first came to the UK when he was a student, when it was easier to enter the UK for work. Having never previously worked on a farm Boris has learnt many new skills including how to drive a tractor, then a tractor and trailer and a forklift.

Boris now comes to Scotland each year from February and stays until mid-November when he returns to his native Bulgaria in the quieter wintertime. Other than the skills that he has learned, he feels that the money earned is one of the positives of working in Scotland, adding that most workers come to the UK to save money for a house. Boris lives in a caravan on the farm and has his own car that he uses to take other workers to the shops at the weekend.

Boris is concerned about the uncertainty surrounding Brexit and thinks that it will be much harder for UK farmers to recruit from Bulgaria and Romania as their economies are improving whilst the pound has weakened resulting in workers earning less in real terms: *"I am 33 and I came here when I was 22 years old, so this is 33% of my life really. When we came we were children, so really it's our adult life...we have lived our adult lives here."*

7.2.3 Integration and xenophobia

This section builds on some of the findings highlighted around social integration in Scottish communities and experiences of discrimination discussed in Section 5. The majority of workers interviewed in the case studies did not feel they were regularly interacting with Scottish people (see Figure 25), beyond those that worked on the farm, and case study interviewees identifying the main reasons for this as:

(i) Limited time in the country and limited free time across their work season;

(ii) Being in shared on-site accommodation with other foreign workers, which encouraged on-site socialising;

(iii) Limited time away from the farm with the exception of food shopping trips and some day trips with other workers; and

(iv) Limited English language ability or language confidence among some workers.

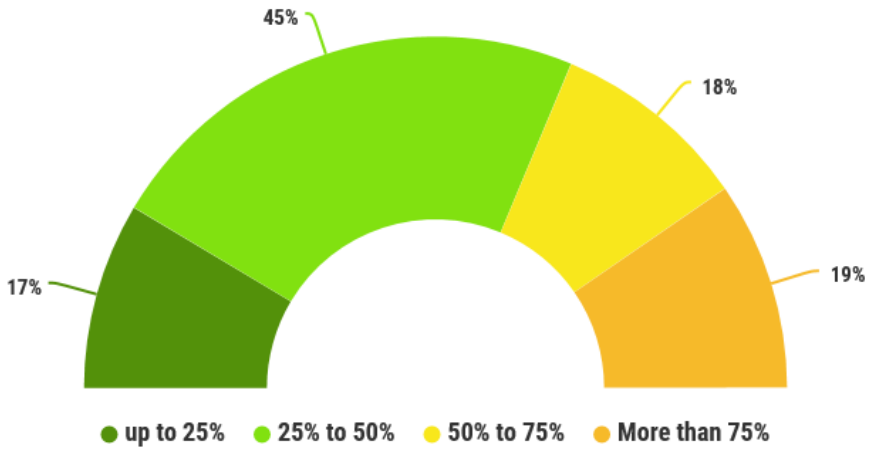
Workers therefore did not generally see themselves as heavily integrated with Scottish society, although some experienced returnees working relatively long seasons were meeting Scottish people more regularly. A small number of workers also frequently met Scottish people through a specific channel; for example by

attending church (with some anecdotal stories of congregations being bolstered by workers), playing basketball or football for local clubs, or interacting with locals as a machinery driver and farm mechanic. Workers from the processing group and labour providers in more permanent roles (and rented housing) were generally much more integrated, particularly those with children of school-going age, with these workers evidencing a very high level of integration. These workers: (i) had made friends with Scottish people and a wide range of other nationalities through their work; (ii) had met other people through their children; (iii) had been in Scotland longer; iv) had improved English; and (in some cases) (v) had a Scottish partner.

Having children in Scotland was seen by some as a commitment to the country, partly as they viewed the opportunities for their children as being better in the UK than in their home country. Nevertheless, the degree of integration can also vary across permanent workers, with one worker recognising that she and her husband integrated less because they were eventually planning to return to Romania. For more permanent workers, 'time' was seen as a critical influence on their degree of integration and likelihood of leaving. As one worker on a full-time, permanent, contract noted: "*the longer you stay for, the more commitments and ties you get - which means leaving becomes more complicated. Moving now would mean leaving all the people here too".*

Whilst it may appear that there is a lack of integration within local communities, seasonal migrant workers are impacting on local economies. Anecdotal stories of local shops becoming partially reliant on seasonal migrant workers were common. During the worker survey respondents were asked about the amount of their earnings that they spent in their local area. Figure 30 shows that 37% were spending more than 50% of their wages locally with 45% spending between a quarter and a half of their wages locally. From the farm business survey (using the number of work days, a 7 hour day and the minimum wage) it was estimated that these businesses alone were spending around £34 million on seasonal worker wages in 2017. The retention of a proportion of this in the local economy is a much overlooked consideration as to the importance of the workforce beyond the farm sector.

Figure 30 Worker respondent's proportion of earnings spent in the local economy



The majority of interviewed worker across all case studies did not report negative experiences (see Figure 23) with people in Scotland (i.e. discrimination and xenophobia). Nevertheless, 28% of worker survey respondents and a small minority of interviewees recounted negative experiences within the case studies. According to case study workers and discrimination usually occurred away from the farm (in urban areas), with no workers in any case study reporting negative interactions within farm environments. The most common incident (reported by four workers) related to workers being accused of '*taking Scottish jobs'* or told to '*go home'* by young people. One worker (now living permanently in Scotland) had also experienced some harassment and one Polish worker recounted a negative experience with the NHS. Additionally, some workers referred to unintentional but offensive characterisations or generalisations, as one Latvian worker stated: *"Sometimes you feel like a foreigner. When I went to the hospital here with a sprained ankle the first thing the doctor asked me was are you a Polish man, so that's kind of for me, why are they not asking where you are from, so everyone is from Poland."* Importantly, these occurrences appeared to be related to isolated incidents and throughout the interviews workers were consistently positive about Scottish people, often referring to Scotland as a welcoming country with good people. As one Polish worker noted: "*I remember when I came here, I did not speak English and I would run away when Scottish people tried to talk to me - but never ever would they laugh or say 'Ha! She doesn't speak English'…Scottish people are very nice and friendly."*

Based on their experiences in both countries a small number of workers (six) in different case studies contrasted their experiences in Scotland (commonly seen as welcoming) and England, which these workers referred to as less welcoming of foreign workers. Some workers related this to the higher numbers of foreign workers in some parts of England and a growing resistance to immigration in certain areas. As one experienced Romanian worker from the Fife case study commented: *"people here* [in Scotland] *are nicer, it's different really. The situation in Boston was not so good…there is many foreign people….we have not ever had that here…this was getting worse, it was while I was working, people making bad jokes, a lot of people, coming and talking and saying ah go home…it was not a nice place so I said no stop too much so I left."* Nevertheless, it should be noted that these incidents were recounted by a minority of workers, with no reporting of specific on-farm incidents in this study.

In Focus Box 6 Maris - food processing experience

Maris has lived and worked in Scotland for 12 years; she came to this position for a summer job and has stayed ever since. The then-poor Estonian economy pushed her to come, and she was also curious about what Scotland would be like. She feels that the Estonian economy is improving, although the minimum wage is still very low. Maris originally came to Scotland as part of a bigger group of friends and they used an agency to sort out work and accommodation. No one in the group had any experience of previously working in a fruit and vegetable processing.

Maris has lived in Scotland since 2005 and is now thinking about buying a house. Normally she goes home 1-2 times per year. She feels a bit less connected to her family and lacks a support system. Like other workers, Maris started at the bottom and gradually progressed to her current supervisor position. Maris is happy with her work and now works Monday to Friday 9-5 which is what she wants. Maris explains that that food in Scotland is the one thing that is different from Estonia: *"It is a big point of difference, food, I would always go home and get certain foods but now there is a bigger variety here now so we don't miss many things."* The best things about Scotland for Maris is the landscape especially the mountains. Also *"the people are a big influence, I have never felt out of place or not welcomed or on my own".*

Maris is not sure of her long term plans: *"a big question for me is probably family - because you start missing things in Estonia, like family occasions. Maybe when you are younger you don't think about it so much."* Maris is curious about what Brexit means for her: *"with Brexit I am mainly wondering what's going to be needed, you know if you go home for a visit, what will be changing, it depends probably on how long you have been here, will it be Kettle that has to make the changes or will it be us, we are not sure how easy or hard it will be"*

7.3 Farmer and stakeholder perspectives

Farmers from across the case studies confirmed the importance of on-farm worker communities, recognising their role in providing support and in creating a positive working environment for workers. Smaller and medium sized farms in particular referred to workers as being 'part of the family' and emphasised the importance of establishing working relationships built on trust with their workers.

Most farms recognised the importance of organising day trips to allow workers to recuperate, particularly after long intensive periods of work and to facilitate socialising and relaxing off the farm. Farmers and stakeholders also collectively recognised the importance of 'staying in touch with family' for workers, with Wi-Fi seen as key to this. For longer term/multi-season workers the ability to go home between 3-4 month working periods for an extended break was also viewed as critical to facilitating their return year-on-year.

Despite the high numbers of workers on some farms, farmers across the case studies were not aware of any resulting issues locally, or of concerns being raised by local communities or by workers themselves. These case study farmers also noted that (although rare) disruptive workers were usually asked to leave, to ensure any potential for anti-social behaviour was minimised.

Farmers, labour providers and stakeholders interviewed agreed that (from their perspective) discrimination or racism was not generally an issue for seasonal migrant farm workers. The general feeling was that isolated incidents may sometimes occur in urban centres.

In some cases, local communities ran specific events for seasonal workers, with one community church running an annual ceilidh for all the fruit and veg pickers in the Fife area.

Nevertheless, case study farmers recognised that seasonal workers were not heavily integrated with local communities as they spent the bulk of their time working on the farm and while workers usually engaged in weekly shopping trips, they were generally reluctant to spend their earnings unnecessarily (e.g. in local pubs). Despite this, large numbers of workers using local supermarkets was recognised as having an impact on the local economy, with one local supermarket apparently commenting to a farmer that their business increased by 30% over the summer due to the influx of seasonal workers.

This lack of seasonal farm-based worker integration contrasted with the labour provider and producer group interviewees. These businesses recognised that many of their longer-term permanent workers were well integrated, including some who had bought homes, married Scottish colleagues and had children in local schools. This was seen by some interviewees as having 'boosted' rural communities including church attendances, spending in the local economy and increased numbers of young and working age people. These interviewees also recognised that permanent migrant workers may be more likely (than seasonal workers) to experience xenophobia from a '*less-accepting small minority*' of the Scottish public, reflecting the worker interview findings (where most incidents were reported by permanent workers in urban areas).

8 Worker retention, Brexit and key future challenges and opportunities

Section Summary:

A majority of workers would preferentially return to work in Scotland in the future; however, most expressed some uncertainty due to concerns around Brexit, the decline in the value of the pound and potential visa requirements.

Most workers aspire to return home permanently longer term, with seasonal work viewed as a mechanism to achieve a specific goal (e.g. a home) and enhance quality of life for workers and their families in their home country. Nevertheless, timescales for returning were often uncertain and seen as subject to improvements in their home country economies.

A small proportion of workers are interested in living and working more permanently in the UK. This cohort are generally experienced younger workers (with English language skills) who did not have children.

Workers expressed concerns regarding Brexit, particularly the decline in value of the pound (a potential influence on whether workers would return), conflicting messages and uncertainty (complicating planning), workers feeling less welcome and potential visa costs.

Some workers were interested in working in other countries (out-with the UK) and would consider this should UK requirements become restrictive and the pound drop further in value, with Germany and Scandinavia viewed favourably – although most did not see them as preferential destinations over the UK currently. Most workers did not have a definite alternative plan should working in the UK become challenging.

Businesses have serious concerns about their future if EU migrant labour access is disrupted with the majority predicting business decline and structural adjustment without access to their workforce.

Businesses believe that any future seasonal agricultural worker scheme be straightforward and administered at farm/labour provider level. There were some concerns expressed that all sectors (soft fruit, vegetables, potatoes, cereals) and business types (farmers and labour providers) must have equal access to any future workers entering through a visa scheme.

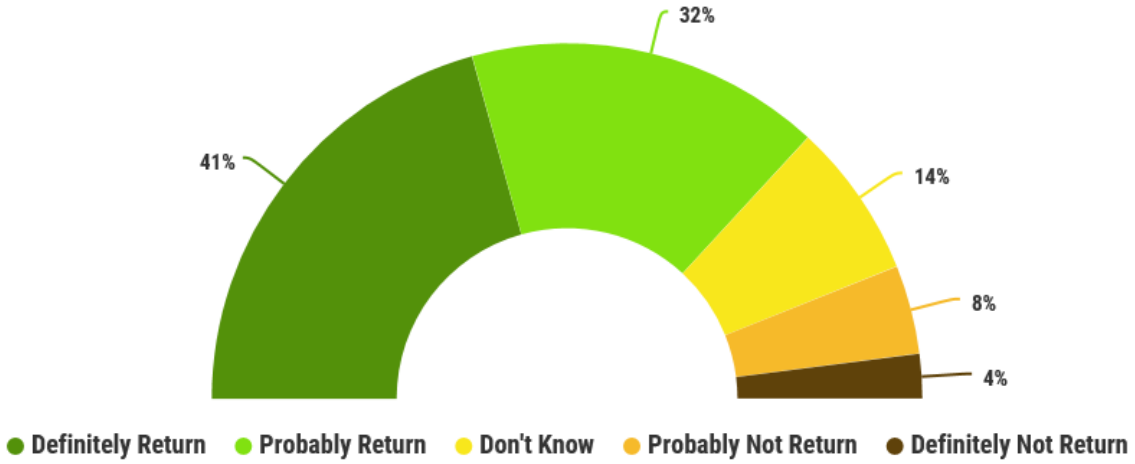
Businesses expressed the need for some certainty: a) for their business decisions on plantings / contracts, etc. and (b) for their migrant labour pool.

8.1 Worker perspectives on the future and returning to Scotland

8.1.1 Returning to Scotland in 2018

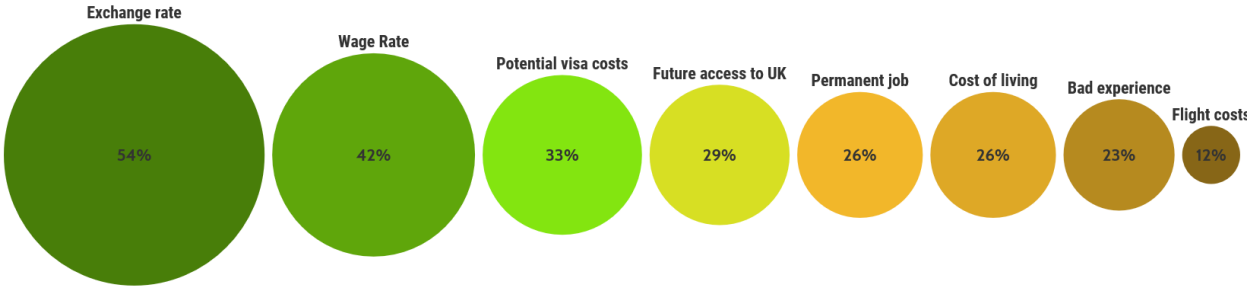
Respondents in the worker survey were mainly expecting to return to Scotland to work in 2018 (Figure 31). About 40% of the respondents thought that they would definitely be returning in 2018 with a third 'probably returning'. Only 12% felt that they would not be returning in 2018, with 14% not knowing what their plans are.

Figure 31 Worker respondents perception of whether they will return to Scotland in 2018



Respondents' that were uncertain about their return to work in Scottish agriculture in 2018 reported that exchange rate impacts (54%) leading to lower effective (home take home) wage rate (42%) were the main drivers of uncertainty. Uncertainty surrounding Brexit and access to the UK was clearly a factor for about a third of workers that had uncertainty over their return, with specific concerns over having to pay visa costs to enter the UK (33%) or harder access to the UK labour market (29%). A quarter of respondents were not returning as they had permanent work arranged, and 23% said their return was uncertain because of a negative experience whilst in working in Scotland (this is linked to the 28% that stated that they had experienced discrimination – as discussed in Section 5.3).

Figure 32 Worker respondent reasons for uncertain return to Scotland in 2018



The majority of interviewed workers across all of the case study farms aspired to return to Scotland for further seasons of farm work, largely due to the earnings potential and their established relationship with a specific business. Despite this,

many workers remained uncertain about their future employment, due to Brexit and whether they would be allowed to return, potential future visa costs and the attractiveness in 2018-2019 of other countries for work relative to Scotland/the UK (following the survey responses). Some workers also said they would not be returning for other reasons (e.g. family needs at home and finishing their studies), with a minority interested in trying seasonal work elsewhere (e.g. in England) due to an existing family or friend connection. Nevertheless, the majority of workers did not have a clear alternative plan should returning to Scotland and/or the UK for work become more difficult, although a minority were travelling to other countries for seasonal work when their current period of work in Scotland ended.

Whether workers sought employment in their home country when they finished in Scotland related to the length of their Scottish season. Longer term (i.e. more than 8 months) seasonal workers often did not work when they returned home, instead using the time to see their families and work on their houses (or in some cases smallholdings). Shorter term seasonal workers sometimes returned to part-time work in the winter (e.g. building, retail and factory work), although most viewed the pay in their home country as poor relative to their work in Scotland, and those returning for 2-4 month periods often found it difficult to obtain work on such a short term basis.

In Focus Box 7 Pavlin, fruit farm experience

Pavlin came to work in Scotland on a large fruit farm in 2016 as a fruit picker. In his second season he was made a supervisor, a job he progressed to very quickly in part as a result of his good English skills (a wide mix of worker origins means English is used by supervisors). Pavlin and his colleagues' English skills have improved further as a result of speaking daily in English. In 2016 he worked in Scotland until August and then worked as an apple picker in England before returning to Bulgaria. Whilst living in England he experienced some negative comments that said he had not experienced whilst living in Scotland. He likes working on this farm as the people he works with have good attitudes and he is not treated like a number, unlike some of the other places he has worked at.

After a couple of months at home Pavlin plans to return to Scotland and the farm to work: *"if the money continues to be good, I will come back,…if this changes and it is not so good I will start looking at my options"*. In the future he would like to permanently live in Scotland, and he might look for a job in a supermarket and get a flat. If his home country could provide a better standard of living he would never think of coming to live in the UK.

8.1.2 Achieving a goal and moving home permanently

The majority (though not all) of interviewed workers across all case studies and farms aspired to move back to their home countries in the longer term, usually due to family connections. Nevertheless, workers often recognised that this was largely dependent on the financial situation in their home countries improving

substantially, with many workers (excluding Polish) commenting that the situation in their home economies seemed to be worsening rather than improving.

Workers commonly viewed the length of time they continued doing seasonal agricultural work as linked to specific end goals – including building a house and improving their quality of life (and that of their families) in their home country. As one Romanian couple stated: *"We are building a house now so all the money we make we send home…the house is built but we have to finish it inside…it will take maybe two more years here to finish the house."* Some workers also had shorter term goals (e.g. funding the completion of their studies), while others viewed seasonal work as allowing them to fund a major goal, as well as providing them with the skills to enable this: "*We want to be in Romania and have our own farm so that's why we are saving the money and we are gaining experience…If we do another 2-3 years we will be able to get a farm but we need more time and money, an eco-farm…where the British can come and enjoy Romanian traditions."* Nevertheless, workers were often uncertain as to how many years they would need to continue with seasonal work, due to the situation in their home country and the uncertainty around this longer term, with a minority suggesting they would consider permanently migrating elsewhere should the situation not improve (e.g. the UK, Australia or Canada).

8.1.3 Aspirations for moving to Scotland/the UK

This is part of a wider theme in the literature emphasising how decision-making can often be open-ended and negotiable following immigration. Despite the challenges that some migrant workers face, this flexibility also leads some workers to stay longer than initially intended (Piętka-Nykaza and McGhee, 2016; Flynn and Kay, 2017). A positive work environment, supportive employers and opportunities for advancement often encourage otherwise seasonal migrants to consider working (often for the same employer) long-term (Rye, 2014), and these benefits may mitigate the difficulties of agricultural work to some extent (Flynn and Kay, 2017). Children are also key to settlement decisions, especially those born in and/or growing up in the UK (Kay *et al*., 2016). Indeed, a key determinant in not only immigrating but remaining long-term, is the emotional importance of stability, that is, the opportunity to live what Flynn and Kay (2017) call "a normal life". However, despite references in this report to A8 and A2 countries as a collective, there is no homogenous 'central or east European community' (Kay *et al*., 2016). Any policy intervention in the context of Brexit must therefore account for the varying socio-economic contexts in migrants' home countries.

The majority of interviewed workers did not aspire to move to Scotland or the UK permanently, although a minority in most case studies showed some interest in this, particularly should the earnings potential in their home countries not improve (reflecting the reality of a minority of workers progressing to permanent). This most commonly included younger workers (often with multiple seasons of experience) who had not yet started a family in their home countries, some of whom viewed seasonal farm work as a possible gateway to more permanent work in Scotland. This aspiration was often viewed cautiously, due to potential complications linked to Brexit, difficulty finding more permanent work and

language barriers. In some cases workers had also begun to build a house in their home country and/or had elderly parents at home, factors which further complicated their decision making.

A small number of experienced workers had either begun a UK citizenship application or were exploring this as an option, due to their interest in moving more permanently to the UK and concern related to the implications of Brexit. The more permanent migrant workers interviewed generally viewed their situation very positively and those with children generally viewed themselves as committed to living in Scotland, while some of the younger permanent migrant workers were considering trying other countries for a period (e.g. Canada, Australia) due to the positive experience of living longer term in a different country.

In Focus Box 8 Martin, vegetable producer experience

Martin came to work on a smaller scale vegetable producer 12 seasons ago, when he got the job through agency Concordia. He now plays a key role in the recruitment of staff, and many of the staff on the farm are now from his village in Latvia. This includes some of Martin's family, who have worked or still work on the farm. When he first came to the farm he was the only Latvian worker but now the entire workforce (between 12-15 people), are Latvian. Nearly all new workers are recruited by word of mouth.

Martin feels that his life would be very different in Latvia *"I am still alive because of coming and I have enough to eat".* Martin has a daughter, who stays with her mother in Latvia - he says this is not easy, but they cannot do anything else as he could *"only survive"* in Latvia. His daughter comes to visit every year for a couple of weeks for a holiday. "*Life is good here - we have a good farmer … if you have problems he always helps…We also have good access to a car which means that people can come and go unlike on other farms where they only go to the shop one day per week."* Martin plans to stay the winter in the UK - in previous years he has worked in vegetable processing and worked in England in a factory. In the long-term he hopes to return to Latvia however at the moment "*you cannot earn work for now but maybe it will be better sometime".* Currently he isn't sure things are getting better in Latvia and *"more than half of my friends work outside of Latvia*".

8.1.4 Alternatives to seasonal farm work in Scotland

The preference for most interviewed workers was to continue doing seasonal work in Scotland, particularly where they had built a relationship with a farm and established a familiar working routine year-on-year. A small minority were interested in trying to find work in England, although some were critical of the working conditions on large fruit farms in England compared to those on Scottish farms. Many workers had not seriously considered their alternatives should working in Scotland/the UK become more difficult. Nevertheless, some identified three factors which might drive them to consider an alternative to seasonal work in Scotland/the UK: (i) a continued decline in the value of the pound; (ii) specific

future barriers (e.g. visas) relating to Brexit; and (iii) a significant improvement in the pay and working conditions in their home countries.

Polish workers in particular recognised an upturn in pay and conditions in their home country which has led to an increase in the number of Polish migrants returning home permanently, with this group the most optimistic about future conditions in their home country. Other alternatives for seasonal farm work viewed favourably included Germany (the most frequently identified alternative), Spain, Italy and Scandinavian countries (e.g. Denmark, Norway). Rates of pay were noted as being highest in Scandinavian countries, although travel costs were higher and work more difficult to source. Germany was seen by some as favourable due to the proximity of the work to their home country, the current value of the Euro and a perception of favourable working conditions including rates of pay, although working seasons were shorter.

Language barriers were recognised as a key challenge to working in these countries, with the number of migrants currently in Germany also seen as a challenge. Mediterranean countries were seen by a minority as attractive due to the climate, but pay and working conditions in these countries were seen much less favourably. Workers that had worked multiple seasons in Scotland/the UK often perceived changing to a different country for work as very challenging due to the (possible) need to learn a new language, adapt to a different system of working and get to know a new group of people.

8.2 Perspectives on Brexit

8.2.1 Worker Perspectives on Brexit

Workers had mixed perspectives on Brexit, with some expressing significant unease while others were much less concerned. As one experienced Bulgarian worker noted, many workers had been very concerned following the original announcement, but the long timescales and lack of clear information on the outcomes had resulted in discussions around Brexit becoming a less immediate issue: *"in the beginning Brexit had a very bad impact…everyone was very worried, about visas, about money and then it calms down and now everyone is waiting to see what happens."*

Many workers recognised that they came specifically to work in an agreed job and filled a labour requirement for which there was no obvious UK-based alternative: "*I don't think the people from here want to do these jobs…so they need us to do these jobs…Scottish people don't have an appetite for the work, they usually leave"* (Romanian worker on a mixed farm). This sentiment informed a belief among some workers that the government would ensure they would be allowed to return and that the impacts of Brexit for them would therefore be negligible. Despite this, many interviewed workers from across the case studies had concerns relating to Brexit such as:

- **Conflicting messages and uncertainty:** Workers from across all case studies often expressed concern due to a lack of any clarity or 'answers'

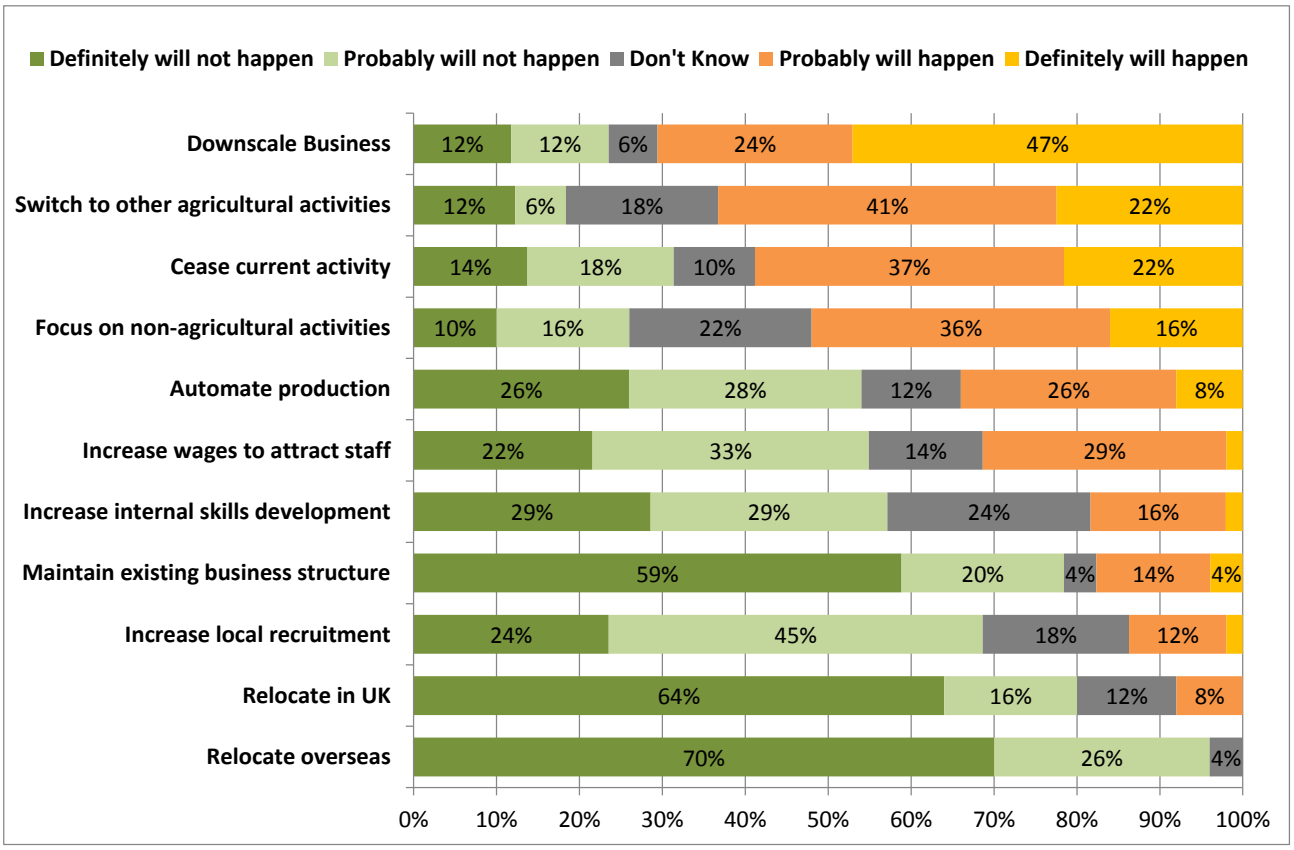
around what Brexit might mean for them in terms of future working in the UK . Some workers said they had stopped reading or thinking about Brexit because *"there is too much* (information) *and too many different versions of what will happen, too many people talking about this and too much lies."* Some workers also identified that thinking about Brexit was counterproductive as it was stressful but outside of their control.

- **Difficulty planning for the future:** Linked to the perceived uncertainty, some workers referred to difficulty planning for the future. This was particularly emphasised by some of the younger workers with considerable experience of seasonal work in Scotland, who viewed it as an important part of their future. In some cases, where workers had established a strong working relationship with a farm, they had developed an outline plan for their futures which they now saw as uncertain.
- **The value of the pound:** The most commonly reported, and most significant 'real', impact of Brexit thus far was the declining value of the pound relative to the currencies of worker's home countries. This was seen as having an impact on the amount workers are able to save over the season, with workers referring to a 20-30% loss of earnings since the Brexit announcement due to exchange rates. This value of the pound was repeatedly referred to by workers as a factor which they were considering in relation to whether they would return to the UK for seasonal work. Nevertheless, some longer term workers noted previous similar drops in the value of the pound, with some recognising the decline may be temporary and suggesting they would assess the situation over the longer term before making any decisions.
- **Feeling less welcome:** A minority stated they felt less welcome in the UK as a result of the Brexit vote, although most differentiated Scotland and England in this respect. Some also recognised that the sentiment behind the Brexit vote may result in some seasonal migrant workers leaving England to work in Scotland, which was seen by some as more welcoming to migrants.
- **Costs and flexibility of potential permit/visa schemes:** Some workers expressed concern around whether Brexit would result in a visa or permit scheme for seasonal farm workers and questioned what the requirements would be and whether there would be a cost associated with this for them and/or for farmers. Some workers also expressed concern around the duration of a potential permit/visa and whether this would allow them to continue their current (multi-season) working pattern which for some incorporated multiple (2-3) visits to Scotland, totalling 9-10 months across a year. As one experienced Polish worker explained: **"***I am most of the time here, so if Brexit will tell me that I can only come here for 3 months I would never do that, so I will look for a job there and that's it. I am coming here for three months but 3-4 times a year."*

8.2.2 Farmer and stakeholder perspectives on Brexit

Farmers expressed concern about the future of their business should they no longer have access to seasonal migrant workers as a result of Brexit (Figure 33). When faced with a scenario of no access to seasonal migrant labour 63% expressed that they were likely to switch to other agricultural activities, with over half saying they would likely diversify their business into non-agricultural activities. Without access to migrant labour there was a very high likelihood that these farmers (largely fruit, vegetable and potato producers) would either downscale their business or cease production. Over two thirds of the farm business thought there was no real opportunity to substitute labour from the local market and relocation of the business was seen as highly unlikely. Perhaps most telling was that only 18% of the businesses felt that they would be likely to maintain their existing business structure.

Figure 33 Likelihood of changed business activity / practice if no access to seasonal migrant labour



The majority of farmers and wider stakeholders had a strongly negative perception of Brexit and expressed considerable concern relating to the potential short and long term impacts on their businesses. Some farmers also noted that Brexit is already impacting them, with the drop in the value of Sterling and knock-on effect on worker availability in 2017 identified as evidence for this. One farmer commented: "*Currently the labour pool has shrunk and it is much more difficult to recruit new workers. Between the devaluation of the pound and the Brexit worries then the people do not want to come to the UK to work."* Additional specific

concerns noted by farmers and stakeholders relating to Brexit can be summarised as:

- A further decline in the availability of seasonal migrant workers, with some farms predicting more significant shortfalls in 2018, potentially exacerbated by any further weakening of Sterling (and therefore earnings potential), workers feeling unwelcome due to the Brexit vote and the potential costs and complexity of any visa requirements (see above).
- Farms and recruitment agencies collectively recognised a lack of any alternative sources of labour or a 'back up plan' should worker availability decline significantly, and a lack of any 'succession planning' on behalf of the UK government to address declines in labour availability.
- On-going uncertainty around free movement of labour and/or potential visa scheme requirements, as well as whether returnee workers will return in 2018-2019. This was noted by a number of farms as impacting business confidence and resulting in decisions on business expansion and development being delayed (with negative knock-on impacts for local economies, and for the wider national economy).
- The potential for long-term wider economic impacts linked to labour shortages and impacts on trade and market development for agricultural outputs.

Notably, despite general negativity and concern around the implications of Brexit, some farmers and stakeholders also recognised that some of the existing pressures had been present pre-Brexit, including (i) previous recent declines in the value of the pound (2008); (ii) gradual improvements in the home economies of some Eastern European countries (e.g. Poland); (iii) concern around in-migration and xenophobia, and (iv) an increasingly competitive labour market within the EU (e.g. removal of National Insurance contribution requirements for seasonal workers in Germany).

8.3 Farmer and stakeholder perspectives on key challenges and opportunities

8.3.1 Key challenges

As discussed previously an ongoing decline in new migrant labour availability, compounded by a lack of any potential for recruitment of suitable UK-based labour, represents the most widely recognised challenge facing the industry. This may be further compounded by a gradual cumulative decline in the number of returnee workers coming to Scotland – due to many reaching their earnings targets/goals and/or gradual improvements in the economies of their home countries. Additional key challenges (some of which have been outlined in greater detail in previous sections) recognised by farmers and stakeholder include:

- An increasingly competitive labour market (and therefore increasing worker expectations), with a weakening pound potentially contrasting with more favourable factors (e.g. distance from home, tax incentives) in other European countries – leading to further workforce losses. Recruitment agencies highlighted difficulties in recruiting workers for Scottish farms due to the additional travel costs (relative to England), distance from major cities and a perception of Scotland as being "cold and remote" amongst new workers. Competition for labour was recognised as placing increasing pressure (and costs) on farmers (particularly smaller growers) to ensure they were able to provide high quality, warm accommodation, a majority of table top-picking, consistent hours throughout the season and sufficiently long growing seasons.
- Some farmers recognised the regulatory framework around overtime pay and the minimum wage as restrictive (particularly in relation to younger [e.g. aged 16] workers). Restrictions on overtime were also seen as restrictive by some (despite the overtime limit having been extended in 2017 to 48hrs), largely due to a perception that this placed Scotland at a disadvantage relative to England, which has no Agricultural Wages Board and no legal requirement to pay overtime above a certain number of hours.
- As well as farmers and stakeholders recognising that no alternative UK-based labour pool existed, many also noted that no viable mechanical alternative to labour-based harvesting existed for the tasks currently being undertaken by migrant labour. While a minority of large farmers had some experience of mechanical raspberry harvesting, this was seen as resulting in substantial crop losses, damage to the growing crop and inconsistent quality of the harvested fruit. Mechanisation in horticultural harvesting was widely viewed as insufficiently progressed to offer a serious viable alternative solution – at least in the short term (5-10 years).
- Farmers identified an increasing demand from buyers for high quality, high specification products (influenced by the switch to supply supermarket supply chains), including specifications on the size and colour of fruit/vegetables and increasingly stringent regulations around hygiene. Collectively these resulted in higher production costs and tightening margins, a factor compounded by increasing labour costs (through minimum wage increases but also potentially from labour shortages resulting in increased need for overtime pay). Farmers argued these higher costs were not reflected in product price increases, with price negotiations generally concluded before the season began, negating any potential for passing increasing labour/production costs on to the end consumer.

8.3.2 Key opportunities

Further to the concerns around Brexit and wider challenges identified above, farmers and stakeholders identified a number of opportunities or critical actions which offer potential for addressing key challenges:

- Strong leadership and improved clarity around communications on Brexit at political levels, including definitive statements on labour movement and potential future visa requirements for migrant workers. This was seen as presenting an opportunity for minimising uncertainty, thereby increasing business confidence and ensuring workers perceived Scotland (and the wider UK) as a welcoming country with high quality short and longer-term employment opportunities.
- The development of initiatives by the horticultural/agricultural sector and related stakeholders to highlight the importance of seasonal migrant workers in Scottish agriculture and to the Scottish economy. This could potentially include the creation of an accurate up to date evidence base (of which this report is part) and clear valuation of the contribution of seasonal workers (as employment migrants), as well as efforts to promote and communicate their role and value to a wider audience (e.g. through knowledge exchange, press coverage, short films etc.). This report also notes the wider role of permanent migrant workers (in agriculture and other sectors) and the potential crossover between these two groups, with scope for further exploration and quantification of the role migrant workers (seasonal and permanent) play across the agricultural supply chain and in other sectors.
- In parallel with initiatives to value the workforce, some farmers recognised a need to develop a more integrated approach to agricultural policy post-Brexit – and in particular highlight the role and value of the fruit and vegetable industry within the context of the national health and 'Good Food Nation' agendas. This was seen as linked to the restructuring of agricultural support, taxation of unhealthy foods and subsidising healthy foods, thereby supporting fruit and vegetable production.
- Recruitment agencies and farmers both recognised the importance of adequately incentivising migrant workers to come to Scottish farms in the future. Due to weakening of Sterling and (in some cases) narrowing wage differentials, additional factors were recognised as increasingly important in terms of workers' decision making processes. Maintaining and improving standards of worker accommodation, providing sufficient transport options, free Wi-Fi access, ensuring some diversity of tasks and table-top picking, ensuring the development of a strong farm reputation among worker communities and offering end of contract bonuses were all recognised as opportunities in this regard.

The Seasonal Agricultural Workers Scheme (SAWS) was widely recognised as having been influential in terms of access to, and origins of, the migrant labour workforce. Farmers noted some limitations of the original SAWS scheme, including restrictions on worker movements (e.g. to a second farm), labour

demand exceeding quotas under SAWS and a narrow focus (Bulgaria and Romania) in terms of worker origins. Nevertheless, many farmers and stakeholder viewed a new visa/permit scheme for seasonal migrant workers as critical to ensuring ongoing access to sufficient worker numbers, as well as providing reassurance that the value of the existing workforce was recognised by government – thereby building business confidence and facilitating future growth. Specific concerns were raised however, in relation to the design and operation of any potential visa/permit scheme, with key points raised including:

- The potential for a visa/permit scheme of any kind to act as a disincentive for workers to come to the UK relative to other EU countries – necessitating that any scheme be simple for workers (and farmers) and low cost.
- While recognising the need for the development of a visa/permit system that was not open to abuse and allowed for sufficient monitoring of worker movements, farmers also perceived a need for any scheme to facilitate some flexibility of worker movement between farms to allow workers to work for additional periods at the beginning or end of their main season and 'top up' their earnings (with the original SAWS scheme committing workers to one employer). In addition flexibility to allow a period of work outwith agriculture would be beneficial and attractive to potential agricultural workers.
- Inclusion/consideration of measures to ensure workers are not overly restricted in terms of the length of their working periods/seasons. In particular, the inclusion of measures to protect the returnee workforce and facilitate the working patterns of longer term, experienced returnee workers – who collectively provide a critical workforce component, often working in Scotland for 8-9 months a year or longer.
- Case study farmers raised concerns around the basis for how quotas for permits could be usefully set – with any historical basis seen as unsuitable due to the considerable growth of some farms since the closure of SAWS (with worker numbers having more than doubled since then on some farms).
- Some interviewed farmers who placed considerable emphasis on direct recruitment efforts recognised a need for protection of their returnee worker contact databases should any potential scheme be centrally administered. This information, which had been developed over a number of years was viewed as valuable, with the potential for this information to be lost should any scheme return to a system of administration by recruitment agencies.
- For some case study farmers and survey respondents the SAWS scheme was considered as burdensome: "The trouble with SAWS is that they would not allow many returnees as they felt everyone deserved a go! This makes it very difficult as you are effectively paying a lot of money to train pickers every year and it is difficult enough without vast majority being novices." However, many stressed the need

for a new flexible scheme as "*the country of origin is not relevant to us - just availability of good workers*." Farm interviewees highlighted concerns around a perceived need for any future SAWS-type scheme to be straightforward and administered (potentially via an online registration system) at farm/labour provider level - as opposed to controlled by the two main recruitment agencies as was the case with SAWS, which was criticised by some interviewees as a form of labour monopoly.

Within the context of a scheme and more generally, some interviewees recognised a need to explore labour provision options beyond the EU and the main existing providers (e.g. Bulgaria and Romania), due to shifting drivers (e.g. reducing wage differentials and increasing living standards across the EU). Some potential options identified included Russia, the Ukraine, North and West Africa and Turkey. Brexit was recognised by a minority as a potential opportunity in this respect, with the potential for labour transfer arrangements to be developed with a range of countries.

9 International comparisons

Section Summary:

Immigration rules and regulations, and the temporary programmes which 'sit' within them, vastly differ between countries, particularly between EU and non-EU countries. Exhaustively examining international regulations and schemes was outside the scope of this project. Although these differences will limit the extent to which features can be transferred to Scotland, it is important to understand the key features of these schemes when shaping any potential future Scottish system.

It seems that other countries also face challenges in accurately recording the numbers of migrant workers they have (and indeed in some cases numbers of native workers too). If a method can be found to enable Scotland's Agricultural Census to do this more effectively in future, this could be usefully shared with other countries.

Migrant workers may be more important in some countries, and sectors within countries, than others. Certainly a key message from the Scottish agricultural sector has been that migrant workers are critical to the future of the industry, but this may not be the case elsewhere, and this context must be borne in mind when exploring the transferability of other schemes to Scotland. For example, it may affect the balance in a scheme between recording workers and restricting their entry and/or movement.

There may also be useful learning from the Canadian experience, particularly in relation to its points based immigration system. Canada also has a mechanism for negotiations to take place between the Federal and provincial Governments on the numbers of migrants for particular sectors to meet specific labour market shortages in different provinces. Information is available on Canada's Temporary Foreign Worker Programme which may be useful to access, including a review of how critical these workers are to the agricultural sector and issues relating to their human rights.

This section of the report briefly describes the numbers of workers in five EU/non-EU countries, and outlines schemes or programmes which are in place to record their existence and to support them. Guidance was given by the project Research Advisory Group on which countries could be explored. It should be noted that a key limitation of this work was accessing information in English relating to schemes in other countries, and it was beyond the scope of this project to employ specialist translators to help in this task.

9.1 International policy learning opportunities

Methods for recording and supporting migrant workers in other countries around the world are relevant for this report as they may offer guidance for developing future schemes or measures in Scotland. This section of the report provides

comparative data for four EU and non-EU countries, with a short summary section at the end which briefly outlines the key messages for Scotland. It should be noted here that detailed review of the regulations and programmes operating in other countries was beyond the scope of this project.

9.1.1 Germany

Germany has traditionally had a strong agricultural sector. Despite agriculture only accounting for ~2% of the country's GDP, Germany's arable land comprises over 12 million hectares, or around a third of the country's total area (Gonzalez, 2014). Consequently, Germany produces more pork, dairy and bread goods than any other EU country. Agriculture is thus a key driver of Germany's rural economy.

Whilst increased mechanisation has substantially boosted productivity, total agricultural employment in Germany declined by over 25% between 2000 and 2010 (Eurostat, 2012b), a trend also observed in other EU countries. By 2013, an estimated 706,300 people were regularly working in German agriculture (Eurostat, 2015), down from over 1.1 million in 2000. After accounting for time actually worked and converting this into 'annual work units'[16], the equivalent of 522,700 people worked full-time on German farms in 2013. Of this total, an estimated equivalent of 55,900, or over 10%, were seasonal workers (Eurostat, 2015). Interestingly, Germany did not implement a statutory minimum wage until 2014 (Friec, 2016). Research conducted prior to this found that the growing presence of migrant labour specifically in the German meat processing sector negatively impacted wages and working conditions, with foreign workers often supplanting native ones (Hardy *et al.,* 2012).

Germany has historically had a highly-regulated market for unskilled labour. For example, in 2006 the Bundesagentur für Arbeit (Federal Agency for Labour) mandated that 10% of seasonal farmworkers should be German. However, the scheme had mixed results, with farmers complaining that native-born workers were "*only half as efficient as the Poles*" (Tzortzis, 2006). Germany was also one of two EU countries (with Austria) that prolonged restrictions on freedom of movement for workers from A8 countries until May 2011 (Hardy *et al.,* 2012). Nevertheless, EU enlargement has seen a "*continuous inflow of migrants from A8 and A2 countries... Between 2004 and 2009 their number increased by about one third… more than half from Poland*" (2012, p.351). Despite this increase, it does not appear that detailed records of migrant nationalities are maintained in English at either the federal or state level.

Immigration regulations are even stricter for non-EU/EEA residents. Throughout the 1990s Germany forged 'bilateral agreements' with various countries in Central and Eastern Europe (then outside the EU) to protect worker's rights. Whilst it may

[16]Annual work units (AWU) is a measure devised by Eurostat which converts time actually worked into a full-time work equivalent, and they correspond to the work performed by one person on an agricultural holding on a full-time basis.

seem that these treaties would have become obsolete as partner countries have acceded to the EU, these agreements actually remain prerequisites for non-EU workers wishing to work in Germany. If this condition is met, foreign workers must first obtain a visa to enter Germany, and then a residence permit to actually work. This permit limits holders to a maximum six months' work, and only to a handful of sectors including agriculture and fruit/vegetable processing (European Commission, 2015). However, this permit can only be approved when there is a concrete job offer, and when there are no "preferential" workers for the job in question (Bundesagentur für Arbeit, 2016).

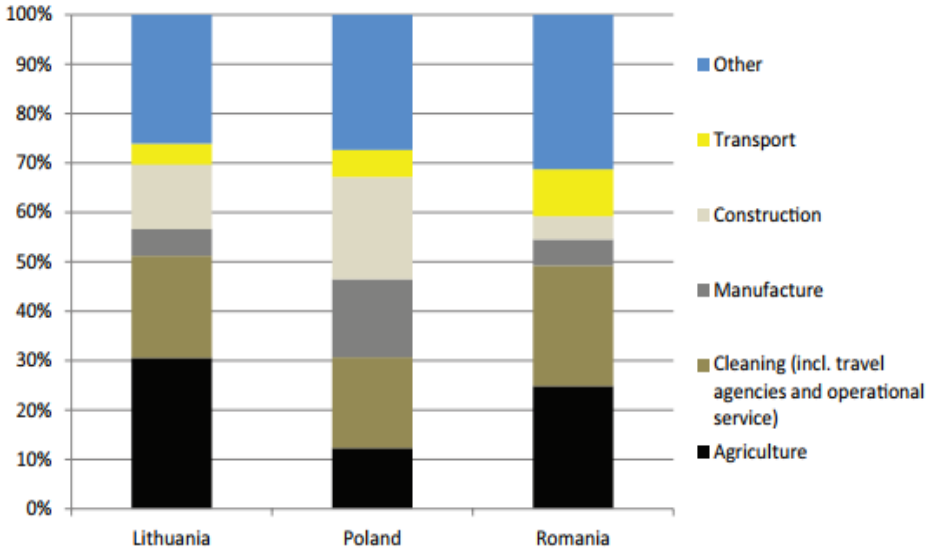
9.1.2 Denmark

Denmark is the smallest Scandinavian country, yet 61% of its total land is used for agricultural purposes. The sector accounts for over 25% of total Danish exports, with Germany, the UK, Sweden and China being the main export markets (Danish Agriculture and Food Council, 2016).

Whilst the percentage of cultivated land in Denmark remained stable, falling by just 1% between 2000 and 2010 (2016; p.42), the agricultural labour force dropped by 22% in that period (Eurostat, 2012a). In 2013 it was estimated that the sector employed 81,000 people (Eurostat, 2015). When converted into AWU, the equivalent of 54,500 people worked full-time on Danish farms, just 2,200 of which were seasonal workers (Eurostat, 2015). However migrant inflows from A8 and A2 countries to Denmark have been substantial over this period, with more workers arriving between 2004 and 2009 than the Danish Ministry of Finance estimated would come by 2030 (Refslund, 2014). So while overall agricultural employment has declined precipitously, the proportion of workers from A8/2 countries accounted for 24% of the agricultural workforce in Denmark by 2014, having doubled since 2008 (Refslund, 2014).

Whilst Polish nationals remain the largest migrant group in Denmark they constitute a lower proportion of the agriculture workforce compared to other A8 countries (Figure 34). Refslund (2014) posits this is because "*Poles who formed the first wave of migrants are moving into e.g. manufacturing, leaving less attractive work in agriculture to Romanians and Lithuanians…. Similar trends are observed elsewhere, e.g. cheaper Bulgarian and Romanian workers are replacing Polish workers in the German subcontracted slaughterhouse industry*". As noted above, this reinforces how the pathways that migrant workers take when finding work, including the 'pull' and 'push' factors, could have substantial implications on sectors beyond agriculture post-Brexit.

Figure 34: Differences in Danish sectorial composition by country, 2012



Source: Refslund (2014)

Denmark's lack of a statutory minimum wage (Worstall, 2015) has also impacted the sector dramatically because the increased employment of A8/2 migrants has lowered wages and working conditions and also displaced native workers (Refslund, 2014). Further, the marked increase in subcontracting means that only about 50% of agricultural employees in Denmark are covered by collective bargaining agreements which could lead to precarious working conditions, and "*workers experiencing these conditions are typically working on time-limited, specific tasks like berry-picking and cutting Christmas trees*" (Refslund, 2014)

Whilst the Danish agriculture sector is open to EU nationals[17] Denmark has implemented strict immigration policies for non-EU nationals since the most recent *Folketing* (Danish Parliament) election in 2015. For example, in 2016 the Danish Government repealed the Green card scheme and imposed a much stricter test for those seeking permanent residence (Khan, 2016). The right-wing *Dansk Folkeparti* (Danish People's Party, which currently provides parliamentary support) has called for increasingly stringent immigration controls, which may impact the eligibility and willingness of migrants seeking to work in Danish agriculture in future.

9.1.3 Ireland

Before acceding to the EU in 1973, Ireland "*was almost totally economically dependent on farming*" (European Commission, 2017). Today, the agri-food sector remains the nation's most important, employing 8.6% of the working population (2017) and producing 5.7% (€13.54bn) of the country's gross value added(Teagasc, 2017).

[17] For example see http://www.pickingjobs.com/denmark/ and http://www.balticworkforce.com/index.php/en/working-sectors/64-english/job-offers/agriculture/167-agriculture

In contrast to many other EU member states, the number of full-time agricultural employees in Ireland actually increased by 5.5% between 2000 and 2010 (Eurostat, 2012c). In 2013, the number of people working on farms totalled 269,500 people. This translates to 163,700 people in AWU, with roughly 3,100 of these being seasonal workers (Eurostat, 2015; Table 9). This is nearly identical to the agriculture sector's total AWU in 2000 (163,900), which is remarkable given that Ireland's population swelled by nearly 20% in the inter-census decade (Eurostat, 2012c). Further, over 90% of agricultural labour input came from families, one of the highest proportions in Europe (Eurostat, 2015).

In 2007, it was estimated that about 10% of Ireland's overall workforce were non-Irish nationals, however this population was underrepresented in agriculture, forestry and fishing, comprising just 4.2% of the workforce in those sectors (Mulligan, 2007). That same year, the Agricultural Workers Association (AgWA) claimed that: "*While the total number and percentage of migrant workers within the sector is not known exactly, AgWA estimates currently that up to 70% of non-family agricultural workers are international migrant workers. In certain sectors, such as the mushroom growing industry, the most significant horticultural crop grown in Ireland, it is estimated that more than 90% of those employed are migrant workers*" (Murphy, 2007)

Ten years on, the profile of Ireland's agricultural workforce remains opaque. According to *An Phríomh-Oifig Staidrimh* (Central Statistics Office), an estimated 5,900 non-Irish persons aged 15 years and over were employed in Irish agriculture, forestry and fishing in Q2 2017. However, these statistics provide no further information on nationality (EU or otherwise), age, gender or the type of work (An Phríomh-Oifig Staidrimh, 2017).

As with most other EU countries, non-EEA migrants require an employment permit to work in Ireland. In 2010 approximately 1.2% of the total labour force held such a permit. Seasonal employees are eligible for the 'Work Permit', which covers lower-paid work, but applications for this are subject to a Labour Market Needs test, wherein the job must be publicly advertised for at least 8 weeks and an applicant must prove no other Irish/EEA national is available (MRCI, 2010).

9.1.4 Australia

Seasonal migration with regard to Australia must be viewed through a fundamentally different lens than the previous case studies. It is not in the EU and thus immigrant origins, profiles and pathways into the country are substantially different. ,. Despite these contrasts, agriculture is likewise indispensable to Australia. As of 2015, the sector employed 271,000 people and the gross value of farm production exceeded $24bn AUD. Australia also exports over 60% of total farm production, with the biggest markets being China, the USA, Japan, Indonesia and South Korea (National Farmers' Federation, 2016).

Australian agriculture has historically struggled to meet labour demands with native workers. Research conducted by the National Farmers' Federation in 2008 found that there were approximately 22,000 unfilled fruit-picking jobs in

horticulture alone, and in 2014 nearly 50% of farmers said that "*a shortage of labour was the greatest impediment to their business*" (Productivity Commission, 2016). The agriculture sector is thus heavily dependent on seasonal migrants to meet labour demands.

Therefore, Australia has comparatively lenient visa arrangements compared to the aforementioned case studies. The most notable of these with regard to agriculture is the Working Holiday Makers (WHM) regime[18], where young adults aged between 18 and 30 from selected countries can enter Australia under two 12 month visas (depending on country of residence), which enable holders to work for up to 6 months with any one employer and/or study for up to 4 months:

- Work and Holiday Visa (462): Argentina, Bangladesh, Chile, China, Hungary, Indonesia, Israel, Luxembourg, Malaysia, Peru, Poland, Portugal, San Marino, Singapore, Slovak Republic, Slovenia, Spain, Thailand, Tukey, USA, Uruguay, Vietnam [Austria and Czech Republic from 19 October 2017] (Department of Immigration and Border Protection 2017a)
- Working Holiday Visa (417): Belgium, Canada, Cyprus, Denmark, Estonia, Finland, France, Germany, Hong Kong, Republic of Ireland, Italy, Japan, South Korea, Malta, Netherlands, Norway, Sweden, Taiwan, United Kingdom (DIBP, 2017b).

These are also both renewable for up to 12 additional months (2 years total) if the holder has worked at least 88 days in agriculture, construction or mining. WHMs are becoming an increasingly important part of the country's seasonal agricultural labour force. In 2013-14, 239,592 WHMs entered Australia (DIBP, 2014), representing about 33% of overall immigration to the country (Table 12). Of this total, 20% of immigrants were holding their second visa, with the vast majority of returnees being employed in agriculture, forestry and fishing.

Table 12: Australian Temporary Immigration Figures, 2013/14

	Numbers	% of Temporary Intake
Working holiday makers	239,592	32.5%
Students	292,060	39.7%
Temporary work (skilled)	98,571	13.4%
Other temporary visas[19]	105,901	14.4%
TOTAL TEMPORARY	**736,124**	**100%**

Source: DIBP (2014)

Finally, it is worth noting that there has been a net decrease in applicants for Working Holiday visas (Table 13), but a substantial increase for Work and Holiday

[18] https://www.australia.com/en-gb/facts-and-planning/working-holiday-visa-faq.html

0[19] Temporary Work (Short Stay Activity), Temporary Graduate, Training and Research, Business (Long Stay Independent Executive), Skilled Recognised Graduate, New Zealand Citizenship Family Relationship, Student Guardian

visas (Table 14). This once again underlines the importance of 'pull' and 'push' factors in workers' home countries in employment-driven immigration.

Table 13 Applications for Working Holiday Visa (417), 2014/15 to 2015/16

Citizenship Country	2014 15 to 30/06/15	2015 16 to 30/06/16	% Change from 2014 15	2015 16 as % of Total
United Kingdom	45,544	43 485	-4.5%	21.7%
Germany, Fed Republic of	26,516	26 273	-0.9%	13.1%
Korea, South	26,540	23 005	-13.3%	11.5%
Taiwan	27,535	22 497	-18.3%	11.2%
France	23,652	21 937	-7.3%	11.0%
Japan	11,633	12 434	6.9%	6.2%
Italy	14,346	11 781	-17.9%	5.9%
Canada	7,808	7 805	0.0%	3.9%
Ireland, Republic of	7,894	6 955	-11.9%	3.5%
Hong Kong (SAR of the PRC)	10,110	6 514	-35.6%	3.3%
Netherlands, Kingdom of The	4,564	5 033	10.3%	2.5%
Sweden	5,031	4 704	-6.5%	2.3%
Belgium	2,223	2 304	3.6%	1.2%
Denmark	1,597	1 688	5.7%	0.8%
Estonia	1,797	1 588	-11.6%	0.8%
Finland	1,626	1 563	-3.9%	0.8%
Norway	513	544	6.0%	0.3%
Malta	103	86	-16.5%	0.0%
Cyprus	76	60	-21.1%	0.0%
Not Specified	15	15	0.0%	0.0%
Total	219,123	200,271	-8.6%	100.0%

Source: DIBP (2016)

Table 14 Applications for Work and Holiday Visa (462), 2014/15 to 2015/16

Citizenship Country	2014 15 to 30/06/15	2015 16 to 30/06/16	% Change from 2014 15	2015 16 as % of Total
United States of America	8,534	8 734	2.3%	44.6%
China, Peoples Republic of (excl SARs)	na	5 109		26.1%
Chile	1,375	1 751	27.3%	8.9%
Indonesia	303	840	177.2%	4.3%
Argentina	463	726	56.8%	3.7%
Thailand	475	522	9.9%	2.7%
Spain	467	502	7.5%	2.6%
Israel	na	445		2.3%
Poland	219	212	-3.2%	1.1%
Portugal	102	209	104.9%	1.1%
Slovakia	na	111		0.6%
Turkey	115	108	-6.1%	0.6%
Uruguay	46	107	132.6%	0.5%
Malaysia	100	100	0.0%	0.5%
Bangladesh	67	85	26.9%	0.4%
Slovenia	na	42		0.2%
Not Specified	< 5	<5	0.0%	0.0%
Total	12,267	19,604	59.8%	100.0%

Source: DIBP (2016)

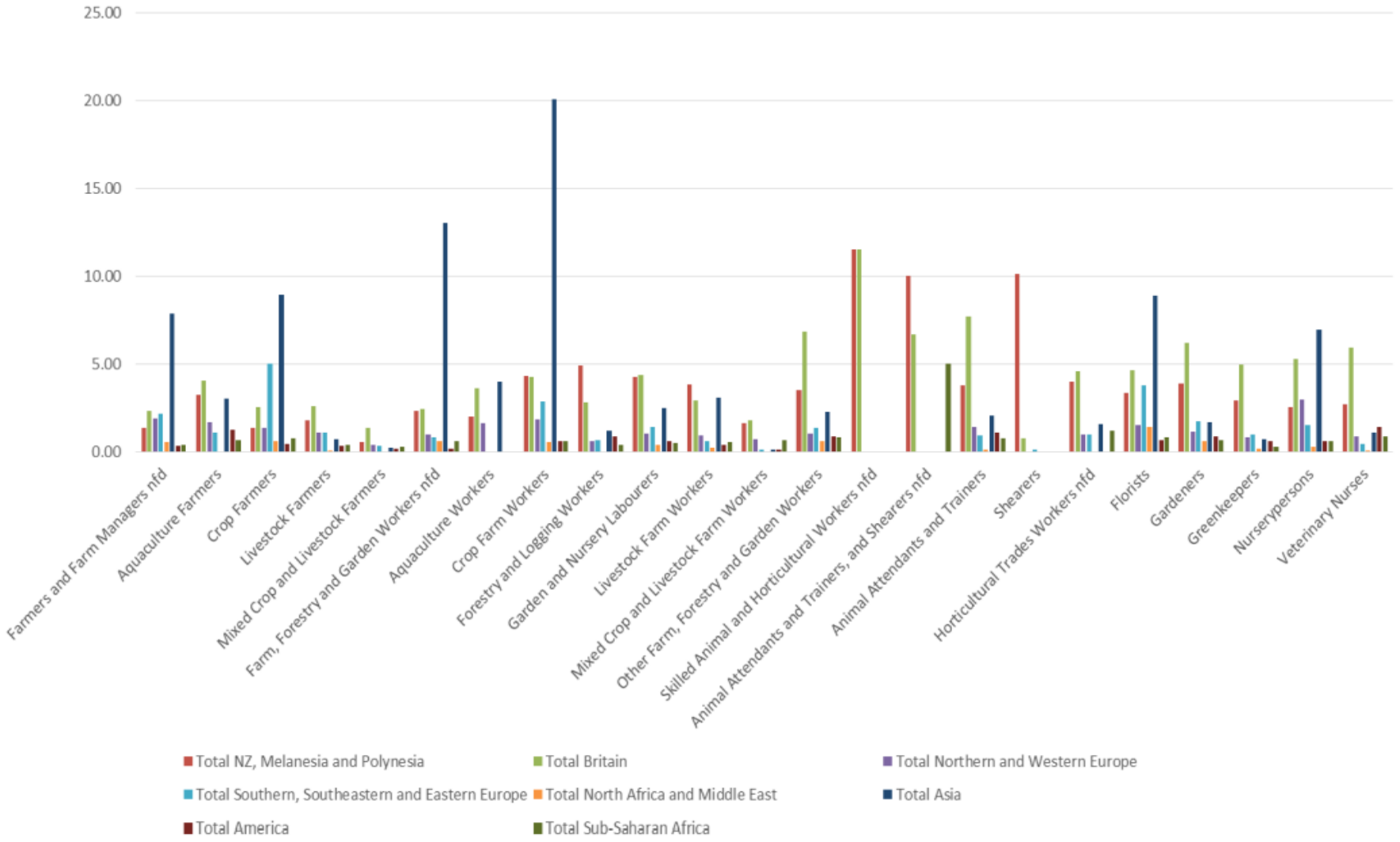
The final scheme worth mentioning here is the Pacific Seasonal Worker Visa (416). First piloted between 2008 and 2011, this visa opened up Australia's agriculture sector to seasonal workers from various Pacific Islands[20] to work in low-skilled jobs for up to 12 months. These countries continue to face significant

[20] East Timor, Fiji Nauru, Kiribati, Papua New Guinea, Samoa, Solomon Islands, Tonga, Tuvalu, Vanuatu

economic hardships, so Visa 416 is intended to facilitate economic development of Pacific Island/Asian nations by providing work opportunities in Australia. The programme has seen significant uptake, increasing from around 400 in 2010/11 to nearly 3,000 in 2014/15 (Collins *et al.*, 2016) and was renewed after the pilot period. The National Farmers' Federation "*concluded that the program can deliver increased productivity for the agricultural sector and is a valuable scheme that brings together foreign aid and labour market policy for the economic benefit of Australia and participating nations*" (Productivity Commission, 2016).

Collins *et al.* (2016) offer an exhaustive overview of the significant role that immigrants play in Australian agricultural production and innovation. In 2011, the sectors with the highest proportion of overseas-born workers were vegetable and mushroom growing (42%) and fruit growing (35%). Worth noting is the concentration of overseas-born workers in clusters around particular industries: "*While Chinese, Mon-Kmer, Korean and South East Asian language groups tend to be more involved in mushroom and vegetable growing, Italian, Greek and Indo-Aryan language groups tend to enter fruit and tree nut growing*" (Collins *et al.* 2016). They also provide a detailed breakdown of non-Australian employment by sector (Figure 36).

Figure 35: Participation and distribution of migrant workers in Australian agriculture, 2011

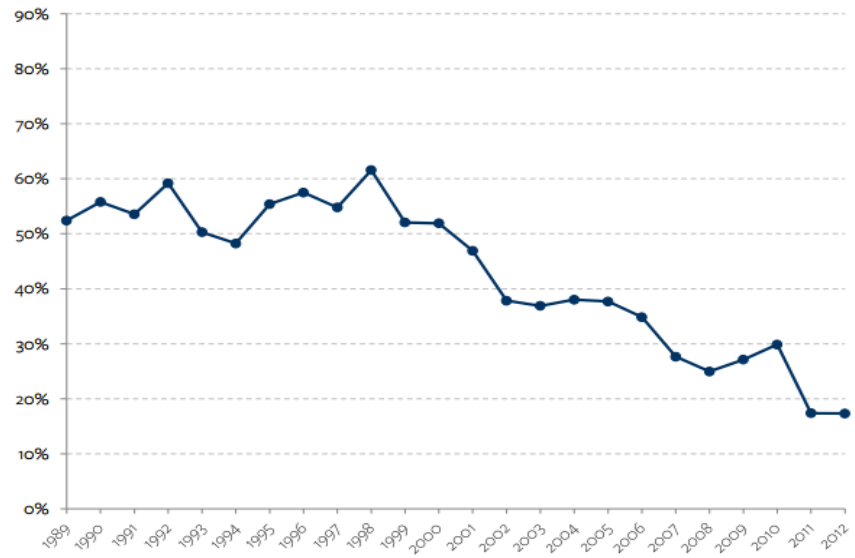


Source: Collins et al (2016)

9.1.5 USA

In 2015, agriculture, food and related sectors contributed nearly $1 trillion to the United States' Gross Domestic Product and also provided about 11% of overall employment (Morrison and Melton, 2017). Migrant workers have long augmented the US agricultural labour force. It was estimated that there were three million migrant and seasonal farmworkers in the US in 1993 (National Center for Farmworker Health 2012). While the proportion of migrant farmworkers declined significantly in the past 20 years (Figure 36), they remain crucial to the functioning and viability of the US agriculture sector (US Department of Labor, 2016).

Figure 36: Percentage of migrant farmworkers, US



Source: Fan and Perloff (2016)

The comprehensive National Agriculture Workers Survey conducted by the US Department of Labor provides a thorough overview of the agricultural workforce, including seasonal/migrant workers, in the US. The vast majority of seasonal agricultural employment comes from Mexico, accounting for 68% of hired farmworkers in 2013/14. Moreover, similar to Scotland, the majority of migrant workers were employed in the fruits and nuts sector (Table 15). However, robust estimates on seasonal and migrant labour figures are difficult to determine due to the high proportion of undocumented workers; just 53% of farm workers were legally authorised to work in 2013/14, either by being either US citizens or having legal permanent residence (USDOL, 2016).

Table 15 Primary crop, all workers, 2013/14

Crop	All Farmworkers	Employed by Grower	Employed by Farm Labor Contractor	Migrant Farmworkers	Settled Farmworkers
Field Crops	13%	14%	3%[a]	9%	13%
Fruits and Nuts	41%	36%	71%	50%	39%
Horticulture	22%	26%	-[b]	14%	23%
Vegetables	21%	20%	26%	24%	21%
Miscellaneous	3%	4%	0%	3%[a]	3%

Source: USDOL (2016)

The H-2A Temporary Agriculture Program is the primary legal way in which foreign-born workers can temporarily work in US agriculture, and this visa is open to citizens of 84 countries around the world. To be eligible, employers must demonstrate, and the U.S. Department of Labor must certify, that efforts to recruit U.S. workers were not successful. Employers must provide housing, and pay the higher of the applicable state or federal minimum wage, the prevailing wage in that region and occupation (as determined by the USDOL), or the regional average wage (Hertz and Zahniser, 2017).

Once again, Mexico accounts for the largest amount of H-2A visas, with 61,324 Mexicans coming in 2012 - compared to the second largest, South Africa, at 1,122 (Global Workers Justice Alliance, 2012). However, using this to estimate migrant labour numbers is challenging because government agencies record data differently. For example, in FY 2011, the US Department of Labor approved 90,328 H-2A visas, the Department of State granted 51,927 H-2A visas, and the Department of Homeland Security admitted 174,898 H-2A visa holders (2012). As such, the true scope and scale of migrant labour in the US remains opaque.

10 Conclusions and recommendations

10.1 Conclusions

Based on multiple surveys and a comprehensive range of interviews with workers, farmers and wider stakeholders, as well as literature review and secondary data analysis, this report provides a substantial evidence base to support future decision making relating to the seasonal agricultural migrant labour force in Scotland.

- The majority of workers arrive, work for the vast majority of their time on-farm and leave at the end of their season, with many people in Scotland largely oblivious to their critical role in Scottish agriculture. As evidenced here, the seasonal migrant labour workforce represents the cornerstone of the horticultural industry – with no clear alternative in terms of either a UK-based workforce or a mechanised approach to harvesting available in the near future.
- The historical decline of UK-based workers in seasonal farm jobs can be traced back to a variety of factors, including an increasing emphasis within the sector on high quality fresh fruit (and supermarket supply chains), regulatory changes and a de-valuing of seasonal farm jobs. Production systems and market demands within horticulture have evolved with a continually increasing reliance on foreign labour, with very limited scope for any significant reversal to a system supplied (even partially) by domestic labour. As evidenced by the farm business survey and interviews, without access to sufficient numbers of seasonal migrant workers the vast majority of case study farms and surveyed farms would be forced to change their modes of operation.
- There were estimated to be over 9,200 seasonal migrant workers engaged in Scottish agriculture (including 900 provided through labour providers) during 2017. About 25% work on more than one farm in the UK and there is also transition to other sectors of work, in particular food processing and hospitality.
- Around two-thirds of the seasonal migrant workforce are estimated to come from Romania and Bulgaria. However, the country of origin has evolved significantly over time as a result of government schemes, restrictions imposed within those schemes and EU laws. If EU workers face greater restrictions in the future the evidence from the pre-2007 SAWS scheme is that workers will come to Scotland from a multitude of countries where a significant minimum wage gap exists. Whilst there a more liberal approach to sourcing workers may be a solution to future labour needs, businesses are likely to face: (a) additional transaction costs of recruitment and training: (b) potential for greater language barriers: and (c) social and cultural challenges.
- While the activities carried out by seasonal workers are often referred to as ‘unskilled’, the evidence is that there many tasks being undertaken require considerable skill and care, to ensure products reach the market in

prime condition. The evidence presented here also highlights that the majority of migrant workers are both highly motivated and experienced in agricultural work. Many workers are relatively well educated and have often left employment in their own country, with the aim of coming to Scotland to earn and save sufficient amounts to improve their quality of life and that of their families. Wage and currency differentials are therefore critical and the factors of greatest importance in driving the current system of labour movement. Whilst 'take-home' wages have been affected by exchange rates farms have limited ability to increase wages to their workforce due to retail pressures and international competitiveness.

- A major seasonal spike in the numbers of migrant workers is evident, confirmed across multiple sources, with the majority of workers working relatively short (2-4 month) seasons, coinciding with the main summer harvest period on large fruit farms. Nevertheless, considerable numbers of seasonal workers are also present outside of this seasonal peak period, with some workers returning more than once across the year.
- Returnee workers represent a critical component of the workforce, with established farm-worker relationships and worker familiarity with farms a key motivating factor for returning for many experienced workers. These experienced workers play a key role in referring new workers (a key source of new labour) and providing a strong base of experience which can be shared across teams of mixed experience.
- Most farms are reliant on a minority of highly experienced 'keystone' returnee workers who work for the bulk of the year on-farm or follow a multi-season pattern of working. These workers commonly play a role in worker supervision and coordination, as well as often multi-tasking to address problems where and when they arise. The possible loss of this core group was recognised as potentially disproportionate (to their actual numbers) due to their critical roles and high levels of knowledge and experience of farm systems. The relative experience of many workers, combined with the fact they generally live on-site without dependents and are highly motivated, has led to the development of a highly efficient and flexible horticultural workforce – specifically suited to addressing the market demands of deadline-driven supermarket supply chains.
- In general, seasonal migrant workers have very positive perspectives on working and living conditions on Scottish farms; positive working environments and 'respectful employers' represent key reasons why workers return to Scotland over multiple seasons. Nevertheless, recent declines in the value of Sterling and the relative distance of Scottish farms from Europe suggests that farm reputations and specific aspects of working conditions have become more important within an increasingly competitive labour market – particularly for attracting new workers. It is therefore critical that Scottish farms build on existing positive reputations and ensure the development of attractive working environments, considering a range of factors including possibilities for extending their seasons and ensuring the availability of consistent working hours, limiting

ground-based picking, ensuring accommodation is of high quality and priced competitively and providing new workers with sufficient training and opportunities to work with experienced skilled workers early in their season.

- The majority of workers show a clear desire to return for further seasons of work to Scotland; however, this is offset against widespread uncertainty within the labour force and concern relating to possible further weakening of Sterling and potential visa requirements in future years. Furthermore, the majority of workers aspire to return to their country of origin (as opposed to settling in the UK), particularly those with young families at home. However, timescales for returning were often uncertain due to concerns around workers home economies.
- A minority of workers are clearly interested in working and living more permanently in the UK, particularly experienced younger workers (with English language skills) who do not have children at home. There is clear evidence that some seasonal workers have become more established in Scottish agriculture, and have managed to obtain more permanent positions, often as supervisors. Some crossover from the seasonal worker labour force to the permanent wider agricultural workforce (e.g. food processing) is also evident although the evidence presented here for this crossover is limited as it was beyond the scope of this project (although worthy of further investigation).
- Brexit and related uncertainties have clearly impacted on both the horticultural industry generally and more specifically on the availability of migrant workers. The declines evident in the availability of seasonal migrant workers in 2017 (particularly those reported by recruitment agencies) were a significant concern for those in the horticultural industry, with the underlying drivers likely to include the decline in the value of the pound, worker uncertainty (and feeling less welcome) and improvements in the home economies of some EU countries and associated opportunities for students. These declines in worker availability are further compounded by a decline in the availability of younger and high efficiency (very fast pickers) workers, with the average age of workers increasing in recent years.
- The origins of workers have shown a clear shift linked to the closure of SAWS and the expansion of the EU. Critically, as returnee workers achieve their key goals (e.g. building a home) in their home countries, this may also result in gradual declines in returnee numbers, compounded by a decline in the availability of referrals and new workers available through recruitment agencies and an overall loss of experience within the seasonal migrant worker workforce. A factor which further threatens worker availability for UK farms is the availability of opportunities for seasonal work in other countries – with many workers identifying this as an opportunity should UK requirements become restrictive and Sterling weaken further. Germany and Scandinavia were both viewed favourably by the case study workers that were interviewed, although most did not

currently see them as preferential workplaces over the UK. Furthermore, most workers did not have a definite alternative plan should working in the UK become increasingly challenging.

- Due to the combination of factors discussed above, the availability of seasonal migrant labour represents both short and long-term concerns for the industry, suggesting a need to identify alternative labour sources (e.g. outwith the EU) or alternative approaches to harvesting (particularly if there is a future trade approach that "*lower prices for consumers*" under Brexit (Defra, 2018)). Critically, the horticultural sector faces a potent combination of factors with respect to labour availability, including the decline in the value of the pound, potential additional visa costs for workers and/or farmers (and visa complexity), a lack of any viable mechanical harvesting alternative or local source of labour, improvements in the home economies of key EU countries (e.g. Poland), potential recruitment saturation in Bulgaria and Romania and increasingly competitive labour markets across Europe. These factors are effectively leading to an incremental decline in workforce availability due to declines in the numbers of returnees, referrals and new workers, as well as an increase in the average age of migrant workers and a reduction in worker quality. Combined with reduced availability during peak harvest periods, this ongoing incremental decline has the capacity to reduce the profit margins of fruit and vegetable farms considerable, due to crop losses and the need to employ workers for increasing amounts of overtime. Should worker availability remain in decline, this has the potential to result in the loss of some farms and impact the overall viability of the horticultural industry, with knock-on impacts for local rural economies, and the sustainable, inclusive growth of the Scottish national economy.
- Notably, this report explored in detail only the seasonal component of the migrant workforce. As has been noted previously, permanent (non-seasonal) migrant workers represent an important additional component of the workforce both within agriculture and other sectors – a factor worthy of further study and quantification in its own right. Furthermore, the report has made no attempt to quantify the economic importance and impact of the seasonal or permanent migrant agricultural workforce in Scotland.

10.2 Recommendations

10.2.1 Managing business and worker uncertainty

A key overarching recommendation from this work is the development of clear commitments and statements on the part of the UK and Scottish Governments, expressing support for the horticultural industry and identifying/agreeing the ongoing need for access to sufficient numbers of seasonal migrant workers. Specifically, such statements should recognise the critical value of the seasonal migrant labour workforce, the lack of current alternative sources of labour and the threats to the Scottish horticulture sector as evidenced in this report. Government statements represent a key mechanism for reducing uncertainty and reassuring farm businesses, labour providers and recruitment agencies, thereby fostering

confidence relating to future business investment, expansion decisions and further economic growth in the horticulture sector.

Critically, statements by the Scottish and UK Government should also target migrant workers, to ensure workers are aware that they are welcome and valued in Scotland and the wider UK. Specifically, a concise direct statement should be drafted (potentially circulated to workers via employers and recruitment agencies) reassuring workers that they are welcome and that all relevant measures are being taken to secure their future employment, particularly recognising the important contribution made by returnee workers.

10.2.2 Recruitment mechanisms and ensuring future access to labour

Utilising a range of recruitment mechanisms provides a more resilient approach to ensuring an adequate supply of seasonal migrant labour over the longer term. In particular, further development is required within the horticultural (and wider agricultural) sector of direct recruitment strategies, including exploring opportunities for coordinated 'inward missions' (e.g. from grower groups) to countries currently providing high numbers of workers, as well as countries which represent potential future labour markets. Existing (returnee) workers represent a key mechanism for promoting employment opportunities in Scotland and 'referrals' remain an important source of new labour; however, inward missions by employers working in partnership with returnees offers an important opportunity to engage directly with labour pools and market the positive aspects of working in Scotland.

To address existing and ongoing declines in labour availability, the UK and Scottish Government (and the horticultural sector as a whole) should strongly consider potential measures (e.g. recruitment methods and visa scheme development, see below) which can be undertaken to increase access to wider labour markets – beyond the current emphasis on Bulgaria and Romania.

The rapid reinstatement of a renewed Seasonal Agricultural Workers Scheme or SAWS-like scheme by the UK Government (or a specific Scottish scheme) represents a key potential opportunity for reassuring employers and providing a specific mechanism to ensure worker availability longer term. Any potential scheme should be specific to agriculture in the short term, while potentially considering expansion to other sectors longer term to facilitate movement between sectors, in particular the food processing sector. In designing any new scheme the following should be considered:

- It must be straightforward to administer and simple to engage with on the part of workers. An online registration system offers potential for rapid registration (potentially administered at both labour provider/recruitment agency and farm-level, overseen by inspectors).
- Scheme registration should be low cost and/or that registration costs are shared between workers and employers.
- Scheme requirements incorporate specific measures which facilitate longer term workers (e.g. 10-11 month seasons), multi-season workers (i.e. to allow for multiple entries within a calendar year and ensure

retention of experienced workers) and flexibility of movement of workers between farms/employers (unlike the original SAWS scheme which committed workers to one employer). An online registration scheme should incorporate recording of worker initial placements and any subsequent movements/changes in employment.

- Specific differentiation within the scheme of experienced returnee workers, potentially including a simplified/lower cost registration for returning workers and/or the provision of a longer term seasonal work visa for workers which have worked within the UK/Scotland previously.
- The use of existing (2017/2018) workforce numbers (as opposed to historical SAWS workforce numbers) as a basis for any potential allotment of scheme quotas for employers (to account for the growth of some farms since the closure of SAWS).
- The development of adequate measures to protect the confidentiality of the underlying database of scheme registrations – recognising that many larger farms have developed extensive farm-based confidential worker contact databases through long term direct recruitment.
- The consideration longer term of specific measures within any scheme to facilitate access to labour beyond the EU (e.g. Russia, the Ukraine, North and West Africa and Turkey).

10.2.3 Best practice – maintaining and promoting high standards

The standards of living and working conditions for seasonal migrant workers on Scottish farms is recognised within this report as being consistently high. The horticultural sector as a whole should ensure that working conditions on Scottish farms are maintained to a high standard and improved where possible, to ensure the reputations of Scottish farms are maintained and enhanced within a competitive international labour market. Specific key recommendations relating to ensuring Scottish employers are seen by workers as an attractive option include:

- Developing measures to support further sharing of best practice and knowledge relating to worker training, accommodation and other factors, across the sector;
- The provision of farm inductions (in multiple languages) for new workers, to ensure site awareness and clarity of the requirements of their role and their entitlements;
- Sufficient training for workers to ensure they have the capacity to fulfil their role, including on the job training through working in teams of mixed experience to provide opportunities for learning from co-workers and increasing worker efficiency and potential earnings;
- Supervision of workers in teams (and by supervisors) with shared languages.
- Ensuring workers are provided with opportunities wherever possible to share accommodation with friends and family members to support the

development of cohesive worker communities and on-farm support networks;

- The development of on-farm social events and 'away days' to allow for workers to relax during non-working periods and increase the potential for socialising and the development of a strong work ethic and positive working relationships between workers and their employers;
- The development as far as possible of mixed tasks for workers to ensure some diversity within worker workloads (e.g. multiple fruit types and table-top picking);
- Careful planning of harvesting periods to facilitate as far as possible the availability of consistent working hours for workers to avoid excessive peaks or troughs in activity;
- Sufficient maintenance of accommodation and renewal of older caravans/mobile homes as required, including provision of adequate wifi to facilitate communication and the provision of sufficient heating and insulation, particularly later in the season;
- The provision of sufficient transport to allow workers to gain access to local shops and to leave the farm during non-working periods;
- Maintaining communication with workers after they leave Scotland at the end of the season to ensure they are made aware of job opportunities the following year early in the season.

10.2.4 Monitoring and long term data gathering

Specific measures should be undertaken by the Scottish Government to monitor the numbers of seasonal migrant farm workers in Scotland over the longer term. In particular, a more comprehensive year-on-year assessment of the use of seasonal migrant labour in Scottish agriculture should be undertaken through the June Agricultural Census (JAC) or through the December Agricultural Survey (DAS). As a minimum the existing seasonal migrant labour question within the JAC should be expanded to assess numbers of seasonal and permanent workers employed of non-UK origin.

Additional details should be sought at least every second year (perhaps through DAS) regarding the time periods of seasonal workers' employment, their roles, countries of origin and use of registered labour provider workers. For the larger producers this should not be an onerous task as much of the detail is already reported to membership of schemes such as SEDEX[21].

Additionally, in order to ensure there is robust data on seasonal migrant workers in the future, a system should be established to cross-check JAC returns from holdings that grow soft fruit to any scale (at a minimum any holding growing more than two hectares of any fruit crop) and where significant discrepancies exist

[21] Sedex is a non-profit membership organisation manage their performance around labour rights, health & safety, the environment and business ethics. https://www.sedexglobal.com/

compared to standard labour requirement adjustments to the entry made, or follow up calls to the holder for clarification undertaken.

10.2.5 Recognising the value of the seasonal migrant workforce

Further to the recommendations above, increased efforts should be made by both the Scottish Government and agricultural/horticultural sector to recognise and value the role of seasonal migrant workers within the agricultural sector and wider rural economies and their contribution as experienced employment migrants to the success of the sector. This should incorporate:

- Enhanced recognition of the role of seasonal migrant workers within the Scottish Government Agricultural Strategy and the future work of the Agricultural Champions;
- Consideration of potential collaborative mechanisms for wider awareness raising around the role of seasonal migrant labour within Scottish agriculture e.g. through the development of a short film on seasonal workers by the Scottish Government and the agricultural sector.
- Consideration within Scotland of the role and value of migrant workers outside of the seasonal workforce and both within agriculture and other sectors, potentially through a wider study of the role of non-seasonal migrant workers in multiple sectors in Scotland.
- As there is a paucity of information on the socio-economic impacts of migrant labour in rural areas, not just in Scotland but internationally, consideration of further investigation into the contribution migrant workers make to economic activity in rural areas (that was beyond the scope of this project) should be made.

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Appendix 1 – Farm Business Survey

This survey is being undertaken by Scotland's Rural College (SRUC) as part of a Scottish Government funded research project on seasonal migrant workers in Scottish agriculture. This survey is aimed at farm businesses - if you are a registered labour provider / gangmaster please complete the alternative survey that can be found here.

The aim of the project is to produce reliable information on the seasonal (non-permanent) migrant labour market, including the amount of migrant labour currently utilised in Scotland, worker origins, labour conditions and the main types of work undertaken. Developing accurate data on seasonal migrant worker requirements in Scottish agriculture will mean the Scottish Government is better informed during the Brexit process. The project should result in significant new data to help inform decisions on how to react to, and improve access to migrant labour in Scottish agriculture.

Both the National Farmers Union Scotland and Scottish Land and Estates have endorsed this survey and encourage participation from across the farming community where seasonal migrant labour is utilised.

Please note that all the information you provide in your responses will remain fully confidential and used only in aggregated form in any resulting publications. In no way will any of the responses you provide be directly linked back to your business in any of the outputs from this research, or in any other respect. The information you provide will only be used by the SRUC research team and will not be available for any other use than this research project.

DEFINITIONS: Throughout this survey when we refer to seasonal migrant workers we mean non- permanent workers that are not UK citizens or non-permanent workers that do not have UK residency.

When we refer to seasonal workers we mean all temporary workers, regardless of their origin. When we refer to workers provided through labour providers we mean any workers not directly employed by you (i.e. you pay an agency / gangmaster who is responsible for paying their workers).

In our questions we are generally referring to the 2016 growing season.

To minimise your time inputting data on your farming activities we aim to use your agricultural holding number or Business Reference Number (BRN) to extract data from the June Agricultural Census.

Thank you for participating in the survey. Your input is important. If you should have any queries please contact:

Steven Thomson steven.thomson@sruc.ac.uk 0131 535 4192 or Rob Mc Morran rob.mcmorran@sruc.ac.uk 0131 535 4268

1. What is your principle role in the business?
   Owner / Partner, Manager / Supervisor, Other (please specify)
2. In your words, what is the main purpose of your business?
3. Can you please provide either your main holding number or business reference number~
   Holding Number (parish / holding format), Business Reference Number
4. How many farm workers did you directly employ in 2016 under the following categories?
   P*ermanent staff of UK origin, Permanent staff of non-UK origin, Seasonal staff (both UK and non-UK)*
5. If you have permanent non-UK origin employees approximately what proportion of them started as temporary / seasonal migrant workers? (you can drag the bar to the appropriate % or simply type it in the box)
6. Do you use seasonal labour for farm activities that is sourced through labour providers (i.e. you do not employ the workers directly - rather you pay a machinery ring or Gangmaster to provide a service)?
   Yes, No
7. In 2016, what proportion of the total work undertaken by workers contracted through labour providers related to the following activities (estimate % of the total activity in each case):
   Maintenance, Planting, Husbandry, Harvesting, Processing/packaging, Other, please specify:
8. Why did you use labour providers to carry out this work?

9. Roughly what percentage of your total seasonal labour needs in 2016 was provided through labour providers?

Throughout the rest of the survey when we refer to seasonal migrant workers we mean non-UK temporary workers that are directly employed by you (including those sourced through agencies such as HOPS or Concordia).

10. In relation to your seasonal labour requirements do you: (please select one)
Prefer to use labour providers (i.e. registered gangmasters), Prefer to directly employ migrant workers, Prefer to directly employ locally sourced / UK workers, Have no specific preference for seasonal migrants or local /UK worker…Please comment further on why you have chosen this option:

11. Did you directly employ seasonal migrant workers on your farm business in 2016?
Yes, No

12. Please indicate the number of seasonal workers (including non-migrants) you employed over the course of 2016 from each of the countries listed below:
Scotland, The rest of the UK, Bulgaria, Romania, Poland, Latvia, Lithuania, Slovakia, Czech Republic,

13. In total, approximately how many seasonal migrants did you employ on your farm business over the course of 2016 (i.e. the total number of individuals)?

14. Do you undertake active recruitment of seasonal migrant workers outside the UK (e.g. in Bulgaria / Poland)?
Yes, No…If yes, please elaborate (e.g. why, where, how, when):

15. In 2016 approximately what percentage of the seasonal migrant workers you directly employed were sourced from the categories shown in the table below:
From your own direct recruitment activities outside the UK, Returnees (workers returning having worked on the farm in previous years), Referrals (workers referred by an existing or former employee), Workers sourced through a recruitment firm, Workers sourced through media / advertising, Workers that used to work for other farms / labour providers, Workers sourced through social media, Other, please specify

This question is designed to show the monthly employment profile of seasonal migrant workers in your business. Considering each month in 2016 please indicate in the table below:

16. The approximate total number of seasonal migrant workers employed per month;
Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sep, Oct, Nov, Dec

17. The approximate total number of person work days undertaken by seasonal migrant labour each month:
Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sep, Oct, Nov, Dec

18. What percentage (estimate) of all the seasonal migrant workers you employed in 2016 would you classify in the following categories:
Less than 1 month, 1-2 months, 3-5 months, 6-8 months, 9+ months

19. In 2016, what percentage of the total activity undertaken by the seasonal migrant workers you directly employed related to the following areas (estimate % of the total activity in each case - total should add up to 100%):
Maintenance, Planting, Husbandry, Harvesting, Processing/packaging, Other, please specify activity and %:

20. Please provide brief comments on the main ways in which the types of activities undertaken by seasonal migrant workers across the year vary, and why:

21. How many hours work per day do seasonal migrant workers undertake? (i.e. their working day)
Minimum, Typical, Maximum

22. How many days work per week do seasonal migrant workers undertake? (i.e. their working week)
Minimum, Typical, Maximum

23. Do you restrict how many hours seasonal migrant workers are employed each day or week to minimise overtime?
Yes, No….If yes, what restrictions do you apply to employed time?

24. What current hourly rate do you normally pay seasonal migrant workers?

25. Excluding overtime, does the rate you pay vary between workers for any reason?
Yes, No…If yes, why do pay rates differ? (experience, piece work, type of activity etc., please specify)

26. If pay rates differ (excluding overtime) please specify the lowest and highest hourly rates (pay range) you pay seasonal migrant workers:
Lowest rate (per hour)
Highest rate (per hour)

27. It would be helpful to understand the wider economic impact of your business, and seasonal employment. If you are willing, please give an approximation of your (a) total wage bill for seasonal employment and (b) business turnover:
Seasonal worker wages
Business turnover

28. Do you provide accommodation for seasonal migrant workers?
Yes, for all; Yes, for some; No

29. Approximately, how many seasonal migrant workers in total did you accommodate in 2016?

30. As far as you are aware, roughly what percentage of the seasonal migrant workers directly employed on your farm stay in each of the following forms of accommodation (answers should add up to 100%)?
On farm housing provided specifically for seasonal workers
Temporary on-farm accommodation (caravans/mobile homes)
Off farm private rental housing in local area
Off-farm private rental housing outside of the local area
Temporary off-farm accommodation (caravans/mobile homes)
Other (please specify)

31. Is there any specific driver behind the type of accommodation utilised by your seasonal migrant workers?

32. Do you or your employees organise any specific sports/social/recreational activities for the seasonal migrant workers, either on or off-farm?
Yes, No…If yes, please give some details:

33. Please comment on the importance of access to seasonal migrant labour for your business and any constraints you face in accessing seasonal labour (migrant or otherwise):

34. If you have any other specific comments you would like to add in relation to working hours, pay and conditions (e.g. sick pay, overtime, National Insurance, pension provision) please use the space below:

35. In the last 20 years have the countries from which your seasonal migrant workers originate changed substantially?
Yes, No….Please comment on the key changes and what you think has driven them:

36. If your company did not have access to seasonal migrant labour, what is the likelihood of the following occurring in relation to your business (Definitely will not happen, Probably will not happen, Probably will happen, Definitely will happen, Don't Know)
Maintain existing business structure, Downscale business, Cease current activity, Relocate overseas, Relocate within the UK, Automate production, Increase local recruitment, Increase wages to attract staff, Increase internal skills development, Switch to other agricultural activities (e.g. cereals / livestock), Focus on non-agricultural activities.

37. If you have any other comments you would like to add on any of the aspects covered in this survey please add them below:

38. The next phases of this project are important in providing a fuller picture of seasonal migrant agricultural labour in Scotland. Please select the options below if you are willing to help with further aspects of this research, or if you would prefer not to.
I would be willing to distribute a flyer to our workers and encourage them to answer a short survey on their experiences and motivations for coming to work in agriculture in Scotland
I would be willing for our business to be used as an anonymised case study within this project (this

would involve a visit or visits by the researchers and on-site interviews with migrant workers)
No thanks, I'd prefer not to.

39. Thank you very much for offering to participate in the next stages of this project. Please provide your contact details so we can get in touch with you when we are ready to start the next phase of the project:
Your Name, Company Name, Address, Address 2, City/Town, State/Province, Post Code, Country.
Email Address, Phone Number:

That completes the survey. We would like to thank you for your efforts in providing information to help improve awareness of the important role that seasonal migrant workers play in Scottish agriculture. We will be reporting in the Autumn and the expectation is that the full report and summaries will be accessible to all interested parties.

Many thanks once again.

Appendix 2 – Labour Provider Survey

This survey is aimed at registered labour providers (with the Gangmasters Licencing Authority) that supply seasonal m labour to the agriculture sector - if you are a farm business please complete the alternative survey that can be found here.

This work is being undertaken by Scotland's Rural College (SRUC) as part of a Scottish Government funded research project on seasonal migrant workers in Scottish agriculture. The aim of the project is to produce reliable information on the seasonal (non-permanent) migrant labour market, including the amount of migrant labour currently utilised in Scotland, worker origins, labour conditions and the main types of work undertaken. Developing accurate data on seasonal migrant worker requirements in Scottish agriculture will mean the Scottish Government is better informed during the Brexit process. The project should result in significant new data to help inform decisions on how to react to, and improve access to migrant labour in Scottish agriculture.

Both the National Farmers Union Scotland and Scottish Land and Estates have endorsed this survey and encourage participation from all that supply labour to the farming and horticulture sector.

All the information you provide in your responses will remain fully confidential and used only in aggregated form in any resulting publications. In no way will any of the responses you provide be directly linked back to your business in any of the outputs from this research, or in any other respect. The information you provide will only be used by the SRUC research team and will not be available for any other use than this research project.

DEFINITIONS: Throughout this survey when we refer to seasonal migrant workers we mean non-permanent workers that are not UK citizens or non-permanent workers that do not have UK residency. When we refer to seasonal workers we mean all temporary workers, regardless of their origin.

Thank you for participating in the survey. Your input is important. If you should have any queries please contact: Steven Thomson steven.thomson@sruc.ac.uk 0131 535 4192 or Rob Mc Morran rob.mcmorran@sruc.ac.uk 0131 535 4268

1. What is your principle role in the business?
   Owner / Partner, Manager / Supervisor, Other (please specify)
2. In your words, what is the main purpose of your business?
3. Please indicate the primary location of your business - use your postcode but excluding the last 2 digits to give us an indication of where your business is based (e.g. EH11 3)
4. Are you a registered labour supplier with the Gangmasters and Labour Abuse Authority (formerly known as the Gangmasters Licencing Authority)?
   Yes, No….If yes, please give your GLAA registration number
5. Do you also supply labour to other parts of the UK?
   Yes, No….If yes, please indicate what percentage of your business is reliant on supplying labour to Scottish businesses:
6. Which sectors do you supply labour to in Scotland under your GLAA licence?
   Processing and packaging of all fresh food, drinks and other produce, Agriculture, Horticulture, Shellfish gathering, Other (please specify)
7. Do you supply any labour to the agriculture and horticulture sectors in Scotland under GLAA exemption?
   Yes, No…If yes, please provide some details:
8. Do you also supply labour to other sectors in Scotland outwith your GLAA licence?
   Yes, No….If yes, please provide some details:
9. Approximately, what proportion of your business is reliant on supplying labour to Scotland's agriculture and horticulture sectors?

10. Approximately, what percentage of the labour you supply to agriculture and horticulture is for use in the following sectors?
Beef and Sheep, Cereals, Dairy, Field Vegetables, Flowers, Potatoes, Pigs, Poultry, Soft fruit

11. What geographic coverage do you supply labour into Scottish agriculture and horticulture sectors in relation to your business location:
Local - up to 50 miles, Regional - up to 100 miles, National - 100+ miles

12. Did you supply seasonal migrant workers (non-UK temporary labour) to the Scottish agriculture and horticulture sector in 2016?
Yes, No

13. Please indicate the number of seasonal workers (including non-migrants) you employed/supplied over the course of 2016 from each of the countries listed below (total unique individuals supplied over the year):
Scotland, The rest of the UK, Bulgaria, Romania, Poland, Latvia, Lithuania, Slovakia, Czech Republic, Other (please specify country and number)

14. In total, approximately how many seasonal migrants did you employ/supply to Scottish farming and horticulture over the course of 2016 (i.e. the total number of individuals)?

15. Approximately, what proportion of theses workers were male and female?
Male, Female

16. How do you ensure that you have sufficient labour availability throughout the year to meet seasonal demand (i.e. if they are not permanent employees they may find alternative piecemeal work)?

17. Do you undertake active recruitment of seasonal migrant workers outside the UK (e.g. in Bulgaria / Poland)?
Yes, No…If yes, please elaborate (e.g. why, where, how, when):

18. In 2016, approximately what percentage of the seasonal migrant workers you directly employed were sourced from the categories shown in the table below:
From your own direct recruitment activities outside the UK, Returnees (workers returning having worked for you in previous years), Referrals (workers referred by an existing or former employee), Workers sourced through a recruitment firm, Workers sourced through media / advertising, Workers sourced from farms or other labour providers, Workers sourced through social media, Other, please specify

These two questions are designed to show the monthly profile of seasonal migrant workers that you supply to Scottish agriculture and horticulture sectors. Considering each month in 2016 please indicate in the table below:

19. The approximate total number of seasonal migrant workers supplied per month:
Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sep, Oct, Nov, Dec,

20. The approximate total number of seasonal migrant worker employment days for each month:
Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sep, Oct, Nov, Dec,

21. What percentage of your seasonal migrant labour pool would you say were available for your use over the following time periods in 2016:
Less than 1 month, 1-2 months, 3-5 months, 6-8 months, 9+ months

22. In 2016, approximately what percentage of the total work undertaken by your seasonal migrant labour pool was in the following activities (answers should add up to 100%):
Maintenance, Planting, Husbandry, Harvesting, Processing/packaging, Other, please specify activity and %:

23. Please provide brief comments on the main ways in which the types of activities undertaken by your seasonal migrant labour pool varies across the year:

24. What percent of your seasonal migrant labour supplied in 2016 was:
Paid directly by you (i.e. you act as the employer), Paid directly by farm businesses (i.e. you act as an agent)

25. How many hours work per day do seasonal migrant workers undertake? (i.e. their working day):
Minimum, Typical, Maximum

26. How many days work per week do seasonal migrant workers undertake? (i.e. their working week):
Minimum, Typical, Maximum

27. Do you restrict how many hours seasonal migrant workers are employed each day or week to minimise overtime?
Yes, No…If yes, what restrictions do you apply to employed time?

28. What current hourly rate do you normally pay your seasonal migrant workers?

29. Excluding overtime, does the rate you pay vary between workers for any reason?
Yes, No…..If yes, why do pay rates differ? (experience, piece work, type of activity etc., please specify)

30. If pay rates differ (excluding overtime) please specify the lowest and highest hourly rates (pay range) you pay seasonal migrant workers:
Lowest rate (per hour), Highest rate (per hour)

31. It would be helpful to understand the wider economic impact of your business, and seasonal employment. If you are willing, please give an approximation of your: (a) total wage bill for seasonal employment and (b) business turnover:
Seasonal worker wages
Business turnover

32. Do you provide accommodation for any of your seasonal migrant labour pool?
Yes, for all, Yes, for some, No….If yes, could you provide a brief description of your accommodation provision:

33. Please comment on the importance of access to seasonal migrant labour for your business and any constraints you face in accessing seasonal labour (migrant or otherwise):

34. If you have any other specific comments you would like to add in relation to working hours, pay and conditions (e.g. sick pay, overtime, National Insurance, pension provision) please use the space below:

35. In the last 20 years have the countries from which your seasonal migrant workers originate changed substantially?
Yes, No…Please comment on the key changes and what you think has driven them:

36. If your company did not have access to seasonal migrant labour, what is the likelihood of the following occurring in relation to your business?
Maintain existing business structure, Downscale business, Cease current activities, Relocate in the UK, Increase local recruitment, Increase wages to attract staff, Diversify operation to match available skills and labour supply

37. If you have any other comments you would like to add on any of the aspects covered in this survey please add them below:

38. The next phases of this project are important in providing a fuller picture of seasonal migrant agricultural labour in Scotland. Please select the options below if you are willing to help with further aspects of this research, or if you would prefer not to:
I would be willing to distribute a flyer to our labour pool and encourage them to answer a short survey on their experiences and motivations for coming to work in agriculture in Scotland
I would be willing for our business to be used as an anonymised case study within this project (this would involve a visit or visits by the researchers and on-site interviews with migrant workers)?
No thanks, I'd prefer not to.

39. Thank you very much for offering to participate in the next stages of this project. Please provide your contact details so we can get in touch with you when we are ready to start the next phase of the project:
Your Name, Company Name, Address, Address 2, City/Town, State/Province, Post Code, Country. Email Address, Phone Number:

That completes the survey. We would like to thank you for your efforts in providing information to help improve awareness of the important role that seasonal migrant workers play in Scottish agriculture. We will be reporting in the Autumn and the expectation is that the full report and summaries will be accessible to all interested parties.

Many thanks once again.

Appendix 3 – Migrant Workers Survey (English version)

This survey is being sponsored by the Scottish Government to provide information about the nature of seasonal labour used in Scottish agriculture that is sourced from outwith the UK. This will be used to inform the Government on the use of and need to support access to migrant labour after the UK exits from the EU.

Your answers are very important to us and Scottish agriculture. Everything you say will be confidential and only be used together with other responses. Your answers will only be used by the SRUC research team and will never be shown to your employer or the Government.

If you have any questions please email SeasonalWorkers@sruc.ac.uk

1. Please select your home country from the drop down menu:
   Bulgaria, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Slovakia, Romania, Slovakia, Slovenia, Other (please specify)
2. Select your gender:
   Male, Female, Rather not say
3. What age are you? (slide to your age or inset number in box)
   15 to 70 Years
4. Have you undertaken any formal English language training since beginning working in Scotland?
   Yes, No
5. How would you describe the level of your English speaking ability?
   Beginner, Intermediate, Advanced
6. What is your highest level of education?
   School, Further Education (College Diploma, Certificate or job related qualification), University Degree, Postgraduate Degree
7. Do any of your family members currently live with you in Scotland?
   Yes, No
8. How many years experience in agricultural work do you have (in Scotland or elsewhere)?
   Less than 1 year, 1-2 Years, 3-5 Years, 6-10 Years, 11-15 Years, 15+ Years
9. In which of the following countries have you done agricultural work? (choose all that apply)
   My home country, Rest of UK (not Scotland), Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, Other non-EU countries
10. Within Scottish agriculture, what does your current employer do? (choose all that apply)
    Farm business (directly employed by a single farmer business), Labour provider / agency (organised labour, moving from farm to farm), Food processor, Other (please specify)
11. Which sector of agriculture is your current job?
    Fruit, Vegetables, Potatoes, Dairy, Other (please specify)
12. In your current job which of the following activities do you carry out? (choose all that apply)
    Planting, Caring for growing plants, General maintenance, Harvesting or picking, Processing or packaging farm products, Grading fruit, vegetables or potatoes, Milking, Livestock husbandry
13. To help us consider responses from different parts of Scotland please provide the name of the farm / business you currently work for and / or the name of the nearest town. (Note: if you do not want to provide this information please move to the next question)
    Farm / Business name, Town

14. When did you start your agricultural work in the UK this season?
Before Sep 2016, Sep-16, Oct-16, Nov-16, Dec-16, Jan-17, Feb-17, Mar-17, Apr-17, May-17, Jun-17, Jul-17, Aug-17, Sep-17, Oct-17

15. For how many months in total do you expect to work on UK farms this season?
1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12

16. How many different farm businesses have you, or do you expect to work for in the UK this season?
Only 1, 2, 3, 4, 5, More than 5

17. How many years / seasons in total have you come to Scotland for periods of agricultural work?
This is my first time, 2, 3, 4, 5, 6, 7, 8, 9, 10, More than 10

18. For how many previous seasons / years have you worked for your current employer?
This is my first time, 2, 3, 4, 5, 6, 7, 8, 9, 10, More than 10

19. Have you ever been employed in the UK outside of the agricultural sector?
Yes, No

20. Where were you when you found your first seasonal agricultural job in Scotland?
My home country, Scotland, Rest of UK, Other - Europe, Other - Rest of World

21. How did you find your current employment? (tick all that apply)
I worked for this business previously (returning employee), Suggested by an existing / former employee, Friend or family member, Through a different business I worked for previously, Recruitment company in my own country, Scottish / UK recruitment company, Advertisement / Social media / website, Other (please specify)

22. Did you have to pay a recruitment fee to get seasonal work in the UK this season?
Yes, No

23. What are the main reasons you came to work in Scotland? (Please rank in order of importance from 1-5, where 1 is the most important)
Higher rate of pay/income levels than in my home country, Better working conditions (hours worked, type of work etc.) than in my home country, Previous positive experience of working in Scotland, To join friends and/or family members working here, To learn English

24. What was the main activity you were doing during the 12 months before you started working in Scottish agriculture this season?
Studying, Working seasonally in agriculture, Working permanently in agriculture, Working in non-agricultural sector, Unemployed, Other (please specify)

25. Which country was this activity in?
My home country, Scotland, Rest of UK, Other - Europe, Other - Rest of World

26. How did you fund your travel to the UK / Scotland?(choose all that apply)
Savings, Credit card, Borrowed from family / friends, Bank loan, Private loan, Other (please specify)

27. In your current job, how many hours per week do you work in a typical week? (use the slider or insert a number)

28. Please indicate which of the following statements you most agree with:
I would prefer to work more hours than I currently work, I would prefer to work less hours than I currently work, I am happy with the number of hours I currently work

29. What type of accommodation do you currently stay in?
Housing on the farm / business I work for, Caravan on the farm / business I work for, Private rental housing, Other (please specify)

30. Were your arrangements for accommodation made before you came to Scotland?
Yes, No

31. Who made your accommodation arrangements?
Myself, Friends or family, My employer, Recruitment agency

32. How many months do you expect to stay in this accommodation during this season?
1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12

33. What is the cost per week of your accommodation? (enter value in box in £)

34. How satisfied are you with this accommodation?
Very unsatisfied, Unsatisfied, Satisfied, Very Satisfied

35. Did you know some of your co-workers before you came to work in Scotland?
Yes, No

36. Do you think that there is a strong sense of community between (Strongly agree, Agree, Disagree, Strongly disagree, Don't know):
Seasonal workers of same nationality, Seasonal workers from different countries, Seasonal workers and full-time farm workers, Seasonal workers and the local community

37. Approximately what proportion of your wages do you spend locally? (use slider or insert percentage % in box)

38. When you finish working for your current employer what are your employment plans for the rest of the year / season?
Seasonal agricultural work, Permanent agricultural work, Seasonal non-agricultural work, Permanent non-agricultural work, Studying, Unemployed

39. Which country will this this activity be in?
My home country, Scotland, Rest of UK, Other – Europe, Other - Rest of World

40. Which of the following best represents your view on whether you will return to Scotland for future seasonal agricultural work:
I will definitely return, I will probably return, I don't know if I will return, I will probably not return, I will definitely not return

41. What factors may influence your decision not return to Scotland for seasonal agricultural work (choose all that apply):
Bad experience, Permanent job arranged, Wage Rate, Exchange rate, Ease of future access to UK, Cost of living, Flight costs, Potential visa costs, Other (please specify)

42. During your time working in seasonal agricultural work in Scotland how often have you experienced any of the following challenges:
Language barriers, Delay in receiving wages, Difficulty taking time off for holidays or illness, Insufficient free time, High workload / fatigue, Discrimination or verbal abuse, Costs of accommodation, Travelling distance to work or transport availability, Isolation and distance to urban centres, Missing my family or friends, Other (please specify)

43. What are the most beneficial/positive aspects during your time doing seasonal agricultural work in Scotland? (please rank where 1 is most important to you):
Ability to earn a good income, Being able to send money home to family / friends, Developing opportunities to acquire more permanent employment here, Making friends with my co-workers, Socialising and engaging with local / Scottish people, Experiencing Scotland as a country and Scottish culture, Ability to learn/improve my English

44. Please add any further comments you may have on any aspect of your seasonal farm work in Scotland not covered here:

Thank you very much for completing this questionnaire

We can assure you again that your answers will only be available to the research team and will be used to inform Government on future access for migrant labour to the UK agriculture**.**

Appendix 4 – Worker Consent Form

Farm Workers in Scottish Agriculture
Worker Interviews – Participant Consent Form

Please tick next to each statement to demonstrate you are happy to consent to being part of the project

☐	1.	I have been informed about the research project 'Farm Workers in Scottish Agriculture' and the purpose of these interviews.
☐	2.	I agree that all information collected as part of the research process can be used anonymously within the final outputs from this project.
☐	3.	I have been given the opportunity to ask questions.
☐	4.	I understand that I can also choose not to answer questions in the interview.
☐	5.	I understand that any information I provide during the interview will be kept anonymous, and findings will be presented in anonymous form in all outputs from this project.
☐	6.	I understand that taking part is voluntary and that I can change my mind at any time without having to give a reason.
☐	7.	I confirm my agreement to the interview being voice recorded (please tick): [ ] Yes (I am happy for the interview to be voice recorded) [ ] No (I do not wish the interview to be voice recorded)
☐	8.	I agree to take part in the study by signing below

Participant name_____

Age_____ **Country of Origin**_____

Signature _____

Date _____

The Scottish Government
Riaghaltas na h-Alba

SRUC

Appendix 5 – Themes for migrant worker interviews

1. General details (for each participant) [5 mins]

- Job role (what you do and if it varies)

-Previous work experience here/elsewhere

2. Your home country, family and friends [7 mins]

-Do you have a partner/children in your home country?

-How do you maintain links with family? (plan to bring them here?)

-Do you provide financial support for family members?

3. How and why you came to work in Scotland (Pathway up to now) [8 mins]

-How did you find this job and when/where?

-How long will you work in Scotland in 2017 (why, move or stay on one farm?)

-What was your situation before working here?

-Which countries have you worked in previously and what types of work have you done?

4. Working conditions [5 mins]

-What sort of hours do you normally work (daily, weekly)

-Are you happy with your working conditions? (pay, hours, breaks etc.)

5. Where do you stay/type of accommodation? [6 mins]

-How was it arranged and when (e.g. before you came)?

-Do you have to travel to get to work (how far and what transport)?

-Do you have access to nearby communities/towns etc.?

-Is the accommodation/ living conditions satisfactory? (e.g. cost, Wifi?)

6. Positives and negatives [6 mins]

-While working in seasonal agricultural work in Scotland what challenges have you faced?

-What have been the most beneficial/positive aspects of this work for you?

7. What will you do next when you finish this job and where? [8 mins]

-Will you return to Scotland here for seasonal agricultural work (why/why not)?

-Do you think Brexit will have an effect on whether you work here in the future? Why?

-Where would you like to live and work in the long term?

Do you have any other comments or questions? [2-5 mins]

INTERVIEW FORMAT

1. Introduce the team and ask workers their names. Offer some tea/cake if possible.
2. Explain purpose of the work - to accurately identify role of seasonal migrants in farming and the scale and importance of this resource as a base of information which the Scottish Government can use during the Brexit process in their efforts to protect the resource.
3. Explain timing and confidentiality – **40-45 minutes**, completely confidential and go through process of singing the consent forms.
4. Make the workers aware that as well as the interviews there is an online migrant worker survey – encourage them to complete.
5. Begin recording interviews (two recorders) and take a note of date and time and location/farm on the recording and on paper
6. Where possible one person takes notes and the other asks questions (keep discussion informal), additional questions ok but one person needs to watch timing

If acceptable to the workers take a group photo of them at the end of the interview

Appendix 6 – Worker Estimation

Estimating Seasonal Worker Numbers

As one of the key objectives of the project was to provide a robust estimate of the number of seasonal migrant workers engaged in Scottish agriculture several approaches were taken in order to rigorously verify the number of total migrant farm workers. This included using all available sources of information and even looking at satellite images and Google street maps (identifying covered crops – polytunnels, and caravans as a way of verifying / estimating workforce scale). One key way of assessing the data provided through farm business survey and the JAC was to undertake multiple regression analysis to develop estimates of labour requirements per hectare of different crops, which were then compared to other data sources. The advantage of using many different approaches to the estimation process is that the robustness of each approach's results can be assessed based by how close it is to other approaches.

Appendix 6a Regression Analysis

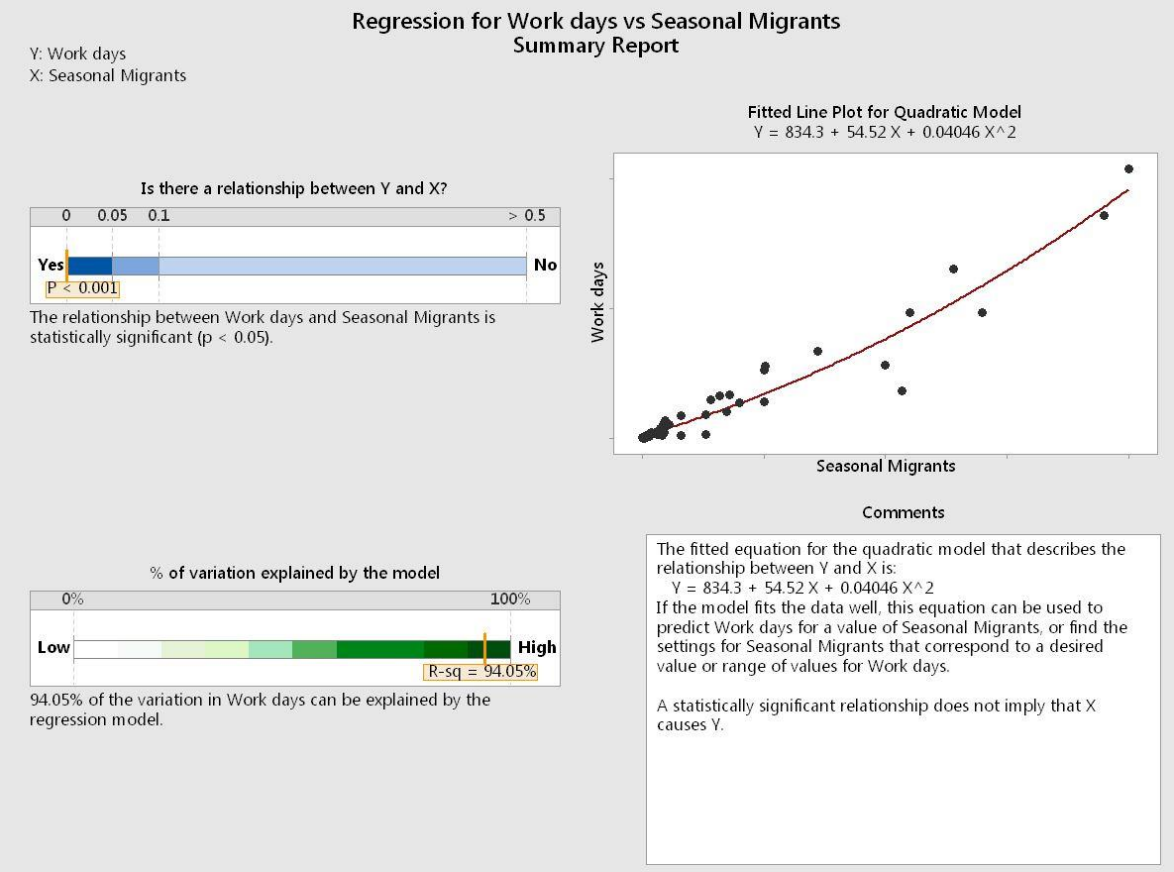
Seasonal Migrant Workers and days worked relationship

In order to check the robustness of the survey data, Figure 37 shows that there is a very strong statistical (R^2 =0.94) relationship between the reported number of seasonal migrant workers and the reported number of work days they are employed for. The nature of the best fitting curve reiterates that as the (mostly soft fruit) business size increases there is proportionally more work days undertaken per worker - a result of increased prevalence of processing and packing and extended seasons through more varied cropping mix (something reported during the interviews and survey results).

Survey Regression Seasonal Migrant Labour Coefficient Estimation

A common approach to measuring the strength of association and effect of multifactor data is regression analysis, which is often called a regression model, or just model. Modelling data produces two useful set of statistics in verifying the number of migrant workers in Scotland. Firstly, it provides a parameter of impact for each variable included in the model which is useful for extrapolation to other datasets. Secondly, it provides a measure of model fit telling us how confident we can be in the model.

Figure 37 Minitab – regression analysis of number of reported migrant workers and reported work days undertaken by them



Regression models handle missing data in different ways, so it is important to consider the missing data prior to running models. In order to obtain a robust estimator of the number of migrant workers we first used an ordinary least squares (OLS) model to estimate the number of workers that each farm would be expected to use – including those that noted that they used contracted labour provider workers to complete all, or some tasks. The full model, which includes variables that measure hectares of crops as predictor variables and total labour hours as the dependent variable, is shown in the following table.

Table 16 OLS Regression estimates with no missing data

	Model 1
(Intercept)	-432 *(3,934)*
Vegetable for human consumption	-21 *(94)*
Field fruits	-114 *(174)*
Protected crops	751*** *(195)*
Flowers & bulbs	10 *(214)*
Potatoes	-24 *(167)*
R^2	0.57
Adj. R^2	0.50
Num. obs.	45
RMSE	14798.74
p < 0.001, p < 0.01, p < 0.05	

When the above model is run using a method called Non-Negative Least Squares (NNLS), we get the following parameter estimates: protected crops = 724, flowers and bulbs = 21.3 and potatoes = 3; field fruit, other crops and vegetables for human

consumption all equal 1. These values represent work days needed to harvest one hectare.

In an attempt to accurately measure the error due to the missing data, a series of models were created that used imputation methods. Each model uses a slightly different method of data imputation that ranges from less strict to more strict. For more information see van Buuren and Groothuis-Oudshoorn (2012). The conventional approach is to take the average of the imputed model estimates. The results from the imputed models are shown below in Table 17.

Table 17 Regression models with different imputed values

	Model 1	Model 2	Model 3	Model 4	Model 5
(Intercept)	5417.27*	-2173.74	-696.89	2281.63	2788.56
	(2639.95)	*(2442.68)*	*(2650.71)*	*(2089.19)*	*(2663.01)*
Vegetable for human consumption	-68.86	83.68	-120.87*	-44.73	-46.94
	(56.32)	*(52.11)*	*(56.55)*	*(44.57)*	*(56.81)*
Field fruits	-68.10	-94.20	-43.50	-77.14	7.30
	(170.83)	*(158.07)*	*(171.53)*	*(135.19)*	*(172.32)*
Protected Crops	493.38**	699.10***	613.85***	682.98***	738.40***
	(172.92)	*(160.00)*	*(173.62)*	*(136.84)*	*(174.43)*
Flowers & bulbs	-139.58	-92.45	-72.79	27.43	131.49
	(194.19)	*(179.68)*	*(194.98)*	*(153.68)*	*(195.89)*
Potatoes	-138.54	-96.47	22.88	-49.93	29.29
	(111.29)	*(102.97)*	*(111.74)*	*(88.07)*	*(112.26)*
R^2	0.41	0.59	0.51	0.57	0.44
Adj. R^2	0.36	0.56	0.47	0.53	0.40
Num. obs.	81	81	81	81	81
RMSE	15108.58	13979.62	15170.19	11956.54	15240.55

p < 0.001, *p < 0.01,* p < 0.05

In order to provide estimates of per hectare labour requirements from the various regression models convention is to use the average value of each imputed model's coefficient as final results. These are presented in Table 18along with the values for the non-imputed regression model present in Table 16 (all values are given in non-negative terms).

Table 18 Aggregated regression co-efficient and estimated results (non-negative estimates)

Crop	Imputed (days/Ha)	*No imputation (days/Ha)*	Regression (Hours/Ha)	Scottish Hectares	Total Days
Field fruits	13.2	*0*	105.6	716	9,452
Flowers & bulbs	21.9	*21.2*	175.2	964	21,113
Other crops	5.4	*0*	43.2	9,889	53,400
Protected crops	635.7	*723.8*	5,086	1,404	892,485
Potatoes	8.3	*3.3*	66.4	29,285	243,067
Vegetable for human consumption	0	*0*	1	-	-

Appendix 6b Standard Labour Requirements and published casual labour requirements

In order to fill in the missing data to corroborate regression estimates from the farm business survey and 2017 JAC, various labour requirements for main horticultural crops were gathered from various published sources. Standard Labour Requirements represent an estimate of the number of hours of work specific agricultural crops and livestock require on an annual basis. The Scottish

Government publish[22] coefficients that include regular farm labour. Table 19 shows these coefficients and includes an estimate of the number of workdays.

Table 19 Scottish Government standardised labour hours per crop (and estimated workforce)

	Hours	Scottish Hectares*	Hours	Workers 4 months	Workers 8 months
Main-crop potatoes	110	16,177	222,437		927
Early potatoes	200	13,108	327,697		1,365
Outdoor vegetables and salad	280	19,546	684,125		2,851
Top and soft fruit (*field fruit*)	425	716	38,039	396	
Vegetables under glass (*soft fruit*)	7,000	1,404	1,228,448	12,796	

Andersons (2017) in their estimate of soft fruit labour use, for British Summer Fruits, used farm level data to calculate the median labour use by crop type on an "hours per tonne" basis. Then, using Defra estimates of total fruit output (tonnes) they derived an estimate of the total number of hours per UK crop. Using the assumption that a "*single seasonal worker is employed on average for 22 weeks at 40 hours per week (i.e. 880 hours)"* they estimated the required UK workforce (permanent, part time and seasonal workers) for the chosen crops (strawberry, raspberry and other fruits – excluding blackcurrants) was 28,959. This is summarised in Table 20 where the number of hours per hectare and workers per hectare are calculated using the published data alongside Defra estimates of crop areas. It should be noted that blackcurrants were excluded in the Anderson (2017) study, "*as this crop is mainly grown for processing, with both husbandry and harvesting operations now largely mechanised; there is therefore a negligible requirement for seasonal labour*".

Table 20 Anderson's estimated UK workforce and labour requirement by selected crops

	Hours per Tonne	Tonnes	Hours	Workers	Hectares^	Hours per Hectare`	Workers per hectare`
Strawberry–soil	160	51,975	8,316,000	9,450	2,061	4,036	4.6
Strawberry–substrate	120	63,525	7,623,000	8,663	2,518	3,027	3.4
Raspberry	350	17,200	6,020,000	6,841	1,538	3,914	4.4
Other Soft Fruit*	375	9,400	3,525,000	4,006	933	3,778	4.3

Defra – Horticulture Statistics 2015[23]
*Excluding 2,511ha blackcurrants
` own calculation

Defra 2016 horticulture statistics[24] suggest that on average (five year average) 5.44 tonnes per hectare are produced across the UK. Whilst a proportion is still harvested by hand for the fresh fruit market (with labour requirements similar to other soft fruits) the bulk of the crop is likely harvested at (excludes husbandry inputs) 0.5 hectares per worker per day.

[22] http://www.gov.scot/Topics/Statistics/Browse/Agriculture-Fisheries/Publications/SOCoeffs

[23] https://www.gov.uk/government/statistics/horticulture-statistics-2015

[24] https://www.gov.uk/government/statistics/horticulture-statistics-2016

Using Anderson's coefficients (and assuming the average fruit seasonal worker is employed for 4 months – from the survey) with the area of crop extracted from the June Agricultural Census (see Table 21) suggests that there are 7,295 workers on fruit farms (excluding blackcurrants).

Table 21 Estimated Scottish workforce using Anderson's estimates

	Scottish Area	Estimated Hours /Ha	Estimated Workers
Strawberries – in the open	77 Ha	4,036	402
Raspberries – in the open	127 Ha	3,914	650
Blueberries - grown in the open	25 Ha	3,778	122
Mixed and other Kinds of Soft Fruit	166 Ha	3,778	819
Protected crops - Area of which is strawberries	981 Ha	3,027	3,868
Protected crops - Area of which is raspberries	172 Ha	3,028	676
Protected crops - Blueberries	159 Ha	3,029	626
Protected crops area of which is other fruit	34 Ha	3,031	133
Total Workers			**7,295**

ADAS (2014), in their assessment of the potential for growing a variety of horticultural crops in Wales, provided gross margin calculations for a number of crops grown in Scotland that could be used as comparator data. The data only includes production and harvesting labour requirements and therefore does not account for any processing, grading and packing that may occur.

Table 22 ADAS estimates of field labour hour per hectare (and estimated Scottish days) required for certain crops

	Production	Harvest	Total	Scottish Hectares*	Days (8 hrs per day)
Cauliflower	50	280	330	330Ha	13,612
Raspberries	250	1,500	1,750	299Ha	65,406
Rhubarb	6	346	352	75Ha	3,300
Strawberries	310	1,000	1,310	1,058Ha	173,247

The John Nix Pocketbook (Redman, 2017) also provides estimates of the labour cost (and hence, use) for a number of crops, as summarised in Table 23.

Table 23 Nix Pocketbook casual field labour hours per hectare (and estimated Scottish days) required for certain crops

	Hours per Hectare	Scottish Hectares*	Days (8Hrs /day)
Strawberries	2,947	1,058	389,741
Raspberries	3,684	299	137,690
Cabbages	320	278	11,120
Calabrese	165	1,794	37,008
Cauliflower	161	330	6,643
Daffodils	191	699	16,683
Brussels Sprouts	370	1,040	48,105

*June Agricultural Census

The SAC Farm Management Handbook (SAC, various) was used to provide gross margin data for selected horticulture crops that included estimates of casual labour use and cost. The estimates of labour used by crop are provided in Table 24.

Table 24 SAC Farm Management Handbook estimates of casual field labour hours (and estimated Scottish days) per hectare required for certain crops

	Hours per Hectare	Scottish Hectares*	Days (8Hrs /day)
Potatoes	60	29,285	219,638
Daffodils	190	699	16,596
Cabbages	124	278	4,309
Calabrese	130	1,794	29,158
***June Agricultural Census**			

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The views expressed in this report are those of the researcher and do not necessarily represent those of the Scottish Government or Scottish Ministers.

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