

House of Lords Communications and Digital Committee Inquiry: Creative Futures 2022

Introduction

The House of Lords Communications and Digital Committee is undertaking an inquiry into the future of the UK's creative industries – **Creative Futures**. The Committee has invited written and oral evidence contributions. Lesley Giles attended one of the oral evidence sessions on 25th October 2022 examining the skills system and whether skills provision is sufficiently responsive and agile to meet the changing needs of the sector to ensure it can remain competitive. This paper provides a brief written summary of some of the key issues discussed at the meeting.

Purpose

The oral session confronted a number of questions, as follows:

1. *What skills are going to be in needed in the creative industries labour market in the next 5-10 years?*
 - Possible supplementary questions: *To what extent are creative skills likely to be needed across the sector versus other skills such as business management and leadership?*
 - *Where do you expect the greatest shortages and how extensive do you expect the impacts to be?*
2. *How well set up is Government education and business policy to meet the future skills needs of the sector? How could this be improved?*
 - Possible supplementary questions: *What are other countries doing around the world to improve their talent pipeline, and is there anything the UK could learn from these approaches?*
 - *How well are business and the education sector working together to identify and address future skills needs?*

These are briefly outlined in turn below. The Creative Industries Policy Evidence Centre (PEC) has been working over the last 4 year to support growth of the sector moving forward and to strengthen the evidence-base around the opportunities and challenges to address to ensure future success. The novelty of the PEC's approach concerns its focus on undertaking research not only to advance our understanding of the main challenges facing the creative industries but how to overcome those challenges by securing improvements to policies and working practices. Given this priority, the PEC has been supporting stakeholder engagement end to end in the research process. This means working with a range of industry partners, including policy makers from the UK and Devolved Governments, industry bodies such as Creative UK (formerly the Creative Industries Federation), trade unions and professional bodies. This submission draws on this evidence.

Response

1. *What skills are going to be in needed in the creative industries labour market in the next 5-10 years?*

Given the rising turbulence in the global economy, and an ever changing future world of work this is a vital question to be asking and answering, especially in relation to sectors with high growth potential such as the creative industries. This is particularly in the context of the creative industries success story over the past two decades prior to the pandemic, seeing the sector contributing around £116bn in

Gross Value Added (GVA) to the UK economy and providing around 3m jobs¹. With much of that success undoubtedly due to the skills and innovation of its highly skilled workforce - 95% of creative workers work within 'higher skilled occupations' compared to 46% of workers generally in the economy and nearly three quarters of the workforce hold a qualification to degree level or higher compared to 44% of the workforce as a whole.

That said, as labour markets are continuously disrupted, just as much by more regular short term shocks like the Covid pandemic or the costs of living crisis created by the effects of the Ukraine, as well as longer running megatrends connected to rapid rates of technological change, climate change, demographic change and globalisation, it is not necessarily a straightforward exercise. Despite that, there is, nevertheless, an increasing body of authoritative research to draw upon to give a strong sense of what future creative skills are required over the next decade.²

- ❖ On the one hand – there is much you can say about future skills by understanding and researching the current structure, operations and composition of the existing creative industries and their workforce, as an indicator of the future. Most future employment and skills requirements will have solid foundations in the here and now and will have formed from strong roots in the past. With this perspective in mind, it is likely that part of the answer is that as the creatives industries grow, some future skills in the creative industries will simply involve **an increase in demand for existing jobs and skills**.
- ❖ But on the other hand, we know that in broader circumstances, there are significant forces for change (such as the effects of technological advances and climate change) and these will continuously transform working practices, and employment and skills requirements. For some roles this will result in **new and emergent skills demands** driven by innovations in ways of working which evolve and create new tasks, duties, and roles for creative workers. In some case these developments will take place within existing jobs but in the most extreme forms this is also likely to create entirely new jobs and skills requirements which we are yet to even define. Futures research needs to continuously track and understand such evolving requirements and consider their future implications for skills.

With that structure in mind, there is much we can draw from the existing evidence base about the future skills needed

An increase in demand for existing jobs and skills

A focus on existing skills deficiencies where current skills are in increasing demand but not being met within the creative industries (i.e. shortages and gaps³) gives a sense of the nature of likely future skills requirements within the UK, where growth and developments in skills are not keeping pace with supply. This gives insights, in particular, to technical and specialist skills⁴. This analysis highlights a number of issues concerning the skills in growing demand:

- ❖ **The highest density of skills shortage vacancies are found in high skilled roles** thus reflecting the high skilled nature of employment within the sector (i.e. 48% of vacancies are displaying shortages affecting creative professionals & 29% for associate professionals compared to only a fifth of vacancies respectively for professional & associate professionals in the broader economy as a whole).
- ❖ **The intensity of skills deficiencies varies significantly by the sub-sectors** of the creative industries, highlighting their substantial heterogeneity. So, whilst overall skills shortages are on a par with all other industries (Just under a quarter (23.4%) of vacancies are skills shortages similar to the national average level 24.8%), this conceals a varied distribution and hence

¹ Giles et al (2020) Creative Skills Monitor. Creative Industries Policy and Evidence Centre.

² See for example the work of the OECD on the future of work; the McKinsey Global Institute; and the Industrial Strategy Council.

³ See for example the Department for Education's [Employer Skills Survey](#) which has been analysed by the PEC

⁴ This is reflected in the UK Government's Migration Advisory Committee Skills Shortages List. Creative Occupations have been included on the list for many years.

sub-sector picture around the mean. As such, particular skills shortages are much stronger in the **ICT and digital sector** (28.7%); **Architecture** (33.2%); **Design** (36.8%); **Games, Film and TV** (including 'Visual Effects – VFX - and Animation'); and parts of the **Performing and visual arts**. They also match the distribution of jobs, occurring in higher skilled roles.

- ❖ **Evidence points to greater issues affecting certain key roles** such as: **Designers**, (Games Designers (included within 2136: Programmers and Software Development Professionals); UX user (experience) and VFX (visual effects) Designers (part of 2137: Web Design and Development Professionals); **Artists** (3D artists, animators, VFX artists, storyboarders; and a whole host of other roles included within the Artists code (3411)⁵; and **Dancers and Musicians**.
- ❖ **There is also evidence on skills gaps** when the existing workforce is not fully proficient. Whilst skills gaps are not reported to be as great in the creative industries (i.e. only 7% of creative employers report gaps versus 11% nationally, which applies to 3% of the workforce versus 5% nationally), again there is wide variation around the mean. Indeed, skills gaps are higher in **Screen industries** (6% of the workforce); **Advertising** (5%) and **Digital areas** (4%).

International evidence backs some of these critical skills needs in creative areas with the OECD reporting that fine arts and design feature in the 30 skills essential to a modern economy from their international skills for jobs database pooling labour market information for over 38 member countries.

New and emergent future skills

Although in the recent past, employment numbers have been affected during the Covid pandemic, as the sector recovers to its pre-covid trends, it is expected that numbers will continue to grow. Recent employment forecasts give a sense of the future scale of demand. Indeed, projections from Oxford Economics⁶ suggest in the medium term, up to 2025, employment could have grown to 2.3m in the sector with a further 1m in creative jobs outside the sector – the creative economy. This takes numbers well beyond the pre-pandemic levels.

The latest available Government sponsored labour market forecasts presented for the sector also suggest the creative industries are likely to see substantial future growth over the next decade or so, which will place further pressures on creative skills demands. For instance, according to DfE's Working Futures project⁷, the creative industries are projected to cover a greater share of the economy by 2027 than now, at 7.6%. This exceeds other priority sectors such as **Manufacturing** (6.7%) and **Construction** (6.5%)⁸. By 2027 the largest sub-sectors within the creative industries are anticipated to be **IT** (32%); **Architecture** (24%) and **Advertising** (11%). Furthermore, growth will continue in high-skilled roles with at least 8 in ten workers in **IT**, **Architecture** and **Advertising**, for example, in these roles. Again, looking at more detailed occupational breakdowns, it appears that these sub-sectors expect to continue to demand higher skilled workers in future.

Wider futures research focusing on the nature of future skills demands, looks more closely at the effects of longer running megatrends with the most common emphasis on the impacts of technological advances. Two examples of this are seen with a growing requirement for:

- ❖ **Skills Fusion and "creatch" skills**: where creativity is combining with various technologies driving innovations in the ways creative content is produced, accessed and used⁹. There is an incredible growth in digital content, design and internet applications, which all require creative skills in conjunction with digital or other technical abilities, enhancing audience engagement and experiences with user generated content. For example, this includes optimising advances in: digital technologies and machine learning, smart mobile devices, sensors and the internet of things, creative robotics, immersive technologies, augmented

⁵ Artists include: Technical artist; UI artist; VFX artist; Character artist; Junior animator; Lighting artist; Storyboard artist; Concept artist; Layout artist; Previsualisation artist; VFX production coordinator.

⁶ Oxford Economics (2021) Developing Economic Insight into the Creative Industries. Report for Creative UK

⁷ Whilst these forecasts pre-date the Covid pandemic, with the OBR expecting the economy to recover by 2022 to pre-covid trends, the WF forecasts are still broadly indicative of future trends as a nationally comparative source.

⁸ Whilst NFER are updating the Working Futures Series information is not currently available cut by the creative industries.

⁹ Carey et al (2019) [Skills, Talent and Diversity in the Creative Industries](#).

reality and virtual reality. This is in line with wider research suggesting a growing need amongst employers across the economy for workers that offer 'STEAM' skills: that is science, technology, engineering and mathematics alongside 'arts', and particularly creativity and design skills.

- ❖ **more general - transversal/interpersonal/workplace skills** as people aim to work more effectively alongside machines. Many of these include higher cognitive creativity and critical thinking, as well as digital skills, communication, problem solving and analytical skills, a capability to unlearn and relearn, and resilience. McKinsey forecast that in the next 10 years (by 2030) 30m people will need to upgrade their transversal skills and half them will be in critical thinking and information processing – which includes creativity. (IS suggests 3m with upskilling needs in creativity alone). Research at Nesta suggests greater creativity will enhance the resilience of people to automation (e.g. they forecast that nearly 9/10 roles will technology resilient).

2. How well set up is Government education and business policy to meet the future skills needs of the sector? How could this be improved? Possible supplementary question: What are other countries doing around the world to improve their talent pipeline, and is there anything the UK could learn from these approaches? How well are business and the education sector working together to identify and address future skills needs?

From its central, oversight position across the system, and hence strategic vantage-point, the UK Government has a vital role to play as a convenor, funder, reformer, in ensuring the skills and employment system in England is agile and responsive to enhance individuals' and businesses' future prospects. This means ensuring the system continually adapts to supply the skills that the economy and industry needs. This role will be essential to inspire the levels of lifelong learning, upskilling and reskilling required in a modern and dynamic economy and to keep everyone's skills current and relevant so they can retain a foothold at work. It also means ensuring sufficient opportunities for adults to continually learn as well as young people as modes of working change. In principle with access to a range of policy levers in its policy toolkit, from legislation to funding, and advice and guidance, it has the potential to both support, and incentivise better investment in people and their skills in future, working with and for businesses, individuals and providers, to drive system reforms and ongoing modernisation.

On the positive front, following the Tory manifesto, and under Johnson's premiership, we have seen some important strategic developments initiated by UK Government and ongoing skills policy reforms to strengthen technical education linked to industry needs. Indeed, with the post-16 skills white paper¹⁰, and Levelling up white paper¹¹, linked to the Covid recovery plan and Plan for Growth¹², this confirms skills investment as a key future Government priority to build a stronger labour market relevant skills system on a par with other leading nations¹³.

That said the cycle of skills reforms is far from complete, and with huge recent pressures on finances given the economic and political uncertainties around the costs of living crisis, on the back of the Covid pandemic, there are still some significant challenges to overcome. In particular, this raises some substantial concerns about meeting the pressing skills needs of the creative industries. Indeed, a recent independent National Audit Office report¹⁴ on the skills system within England drew attention to some critical problems needing further improvements. For example, it suggested that:

- ❖ **the skills challenge that government is addressing has actually grown significantly** rather than subsiding, as wider changes in the labour market are intensifying but training levels are not. This was signified through a range of training indicators going in the wrong direction. So, individual

¹⁰ DfE (2021) [Skills for Jobs](#)

¹¹ DfLUH&C (2022) [Levelling Up the UK](#).

¹² HMT (2021) [Build Back better: Plan for Growth](#)

¹³ OECD (2019) [Getting Skills Right: Future Ready Adult Learning Systems](#).

¹⁴ NAO (2022) [Developing Workforce Skills for a Strong Economy](#).

participation in government-funded skills programmes have declined as has employers' investment in workforce training.

- ❖ the current system is too complex, hard to navigate, and does not provide well-defined education pathways to individuals to pursue routes into careers critical to the economy. This is compounded by short-termism in policy making and frequent change in different policy initiatives which leads to fragmentation and disconnect so it's not clear how programmes fit together.
- ❖ it was unclear whether the conditions were in place to ensure the achievement of a truly connected, employer-led skills system and hence to provide the skills the country needs.

Some of these issues are highly evident within the creative industries. For example, investment in skills and opportunities for professional development are also more limited in the creative industries, as highlighted in a current, and forthcoming, study being led by the PEC¹⁵. This shows that rates of training across the sector fall behind other industries (i.e. the share of individual participation in job-related training in the last 3 months is 18% within the sector compared to 24% for all industries). Further, in some sub-sectors participation levels are amongst the lowest in the UK economy (such as the design sector at 8% of individuals and crafts at 5%). Levels of investment in training by creative employers is also low with only around half of creative businesses offering training to their staff in the last 12 months compared to 61% for the economy as a whole. Furthermore, only around a quarter of creative employers stated that training led to a nationally recognised qualification as against 42% of employers in the economy as a whole¹⁶. Past research including recent submissions to a PEC-led call for evidence¹⁷ suggest training opportunities are also hindered in some sub-sectors by a lack of clarity in career and progression pathways and system complexity which inhibits the ability to identify, access and navigate into and through creative careers. Given the focus of the sector on high skills, this clearly raises issues about the adequacy of ongoing investment in training. This is acknowledged by businesses themselves with 43% of creative industries wanting to train more but being prevented by barriers.

In that context, it's important to consider whether we have a common view of what success in skills might look like in future in a more industry-facing and "future-ready" system and where improvements might be needed within England moving forward. For guidance we can look to the international think tank the OECD and its skills centre which has led analysis within the national skills systems of its 38 member countries over the last 20 years to learn from leading international practices around what works. This highlights several critical success factors which are summarised here¹⁸:

- i. The Government needs a compelling long-term strategic vision for skills ideally set within a refreshed long-term economic strategy. The strategy needs to deal with megatrends (and disruptive shocks) and to reference a "a system-wide framework" to deliver the vision, supporting a more co-ordinated whole Government approach for skills activities. This needs to extend beyond short cycles of Parliament, especially if deep rooted and structural labour market challenges are to be addressed. Such an approach will help to unlock investment, ensure policy continuity and to share risks providing a mechanism for better strategic management of the economy and more systematically tracking and evaluating of progress against agreed Key Performance Indicators.

This should be clear what sectors are key to the economy as vehicles to drive enduring co-investment and action working with industry and means the Government must move beyond previous "narrow" debates about picking winners and short-term, transient, ever changing sector priorities. In such a context, it is crucial that if UK Government has prioritised the creative industries in the Plan for Growth and the Levelling Up White paper for the long-term, surely this has implications too for wider policies such as in the skills system. Crucially, the skills vision needs to signal the importance of lifelong learning for all age groups right through a lifetime (adults as well as young people), so skills investment can respond to changing industry demands and

¹⁵ Carey and Giles (forthcoming) A Review of Job Quality and working practices in the Creative Industries. [Good Work Review](#). This updates an earlier skills assessment conducted by the PEC through the [Creative Skills Monitor](#).

¹⁶ DfE (2020) [Employer Skills Survey 2019](#). Results for the creative industries have been produced by the PEC.

¹⁷ See more details of the PEC-led call for evidence as part of their [Good Work Review](#).

¹⁸ OECD (2019) [OECD Skills Strategy 2019: Skills to shape a better future](#).

people can keep their skills up to date. Clearly, this does not just mean for priority sectors – that said it is vital priority sector needs are given specific attention.

- ii. The skills system, to deliver on the vision, needs to **support responsive provision and skills programmes** in a dynamic economy. As such, there is requirement for systematic mechanisms, to modernize and adapt provision to meet labour market changes, coordinated by UK Government, working with key industry partners as well as skills providers. These need to operate across career pathways, creating opportunities for upskilling, reskilling and progression of adults as well as supporting entry routes for young people.

This acknowledges a **formal role for Labour Market Information** to anticipate current and future skills needs, dealing systematically with megatrends, and to agree shared priorities to shape reforms in provision and curriculum and strengthen education and career pathways. This also needs to allow space for customized, placed-based responses as outlined below. In the past the UK Government has had a **common LMI framework** aligning and analysing official “top down” data sources with “bottom-up” skills assessments developed with employers and industry¹⁹ to support investment priorities. These need to be revisited with the new Unit for Future Skills (UFS) to help ensure core information is collected and produced once but used many times by a range of partners in the system. As the UFS firms up its approach and work programme, there is a need to ensure indicators and measures sufficiently capture the value of skills investment in the creative industries beyond narrow economic measures such as wage returns to ensure investment in the right areas. This Framework should set out core LMI sources and indicators including consistently defining sectors – that means applying the DCMS definitions for the creative industries. It can also provide guidance on detailed bottom up industry assessments so that they better align.

It also means where Government runs skills improvement programmes centrally that enough consideration is given not only to how they meet the specific needs of priority sectors such as the creative industries but how they do so in a way that ensures good practices can become mainstreamed and systemic, connected and build overall continuity and capacity in the system over time. This can be illustrated with reference to a number of potentially important pilots and initiatives being tested which rarely prioritise the creative sector in a way that can be effectively scaled up to extend reach. This includes for example steps to: improve the relevance of provision in colleges, Unis and ITPs and test and embed modern learning options (such as the the [OFS Higher Education Short Course Challenge Fund](#)); strengthen technical education pathways from L2 to L6 and above (including but not restricted to the work of the Institute for Apprenticeships and Technical Education such as funds to trial the delivery of [new technical courses](#) between colleges and the Open University); and extend sector-specific and industry-facing networks of providers beyond Institutes of Technology.

In the absence of stability in the UK skills system and constant policy churn and changes to the skills delivery infrastructure, industry has often developed its own solution. See for example the British Film Institute's Film Academy²⁰ for young people and Tech UK's Tech Industry Gold Educator Network, which is involved in creating and delivering accredited education and training programmes serving the needs of the digital sector under the banner of their Tech Industry Gold Programme²¹. Drawing lessons from leading international practice there are substantial benefits in pooling resources from Government and industry partners to build on existing hot spots of good industry practice to create wider industry-endorsed networks, encouraging more **industry-facing providers** acting as “**centres of excellence**” and providing **technical and specialist training programmes** alongside general programmes. This is evident in

¹⁹ See for example Campbell (2016) [Skills and lifelong learning](#). Insights on LMI needed in the skills system for the Government Office for Science Inquiry on the Future of Skills and Lifelong Learning. The LMI framework was also referenced within the OECD England Review for [Getting Skills Right](#) in 2017.

²⁰ Further information is available on the [BFI's website](#)

²¹ Further information is available on the [Techskills website](#) which is an arm of Tech UK

the Next Gen Skills Academy, which provides technical training to visual effects (VFX), animation and games employers in the screen industries. This was originally established through joint funds from industry and Government to continually develop future generations of talented creative workers for the sector such as animators, games designers and visual effects artists.²² Such examples provide pockets of good practice on which to build in future.

- iii. The OECD analysis also puts a focus on the importance of **building multiple-partnerships** within skills systems and strengthening the local delivery infrastructure and ecosystems. Different partnerships encouraging schools, colleges, universities, private providers and industry members to network, are a vital means to pool resources and expertise and to unlock co-design and co-investment nationally, sectorally and especially locally. There is also room to connect to wider industry bodies in certain localities as seen through the UKRI funded creative clusters programme. Where skills partners are given the space and autonomy to act together on shared goals, this can help to build sustainable and lasting benefits by directly improving the capacity of **communities of practice** rather than creating competition. In England steps are being taken to review the governance and funding of skills institutions such as FE colleges²³ and support partnerships²⁴ as a basis to enable such opportunities in future but they have yet to be fully realised.

Improvements are needed too in **strengthening employer engagement** with different parts of the skills system as research suggests low levels of employer engagement currently, whether with schools, colleges, universities and/or with particular programmes. Whilst this is a general problem in the UK skills system it is also very apparent amongst creative employers. For example only 7% of creative businesses are accessing training through FE colleges and 13% with universities and higher education institutions compared to 17% and 9% for all industries. Partnership working is also more limited between businesses with only 14% of creative employers currently work with other employers to develop skills in their workforce – this is similar to the all industry average.

Insights drawn from international practice from the OECD suggests mechanisms are needed to drive employment engagement in breadth and depth end to end in the skills system – nationally and locally. A core goal is to ensure that employers in scale working through key industries like the creative industries display long-term commitment and involvement in ensuring an agile and responsive system – whether that be: to help with skills anticipation, co-investment; co-designing industry specific training, strengthening work-based learning and supporting flexible and blended learning options (as outlined above); endorsing networks of sector-specific and training and institutions to meet industry needs and/or; supporting take up.

Yet, in this context, there is a need to agree in different parts of the UK what are the mechanisms that should be used to secure stronger and deeper employer engagement? There are a wide range of incentives that could be deployed from the international policy toolkit²⁵, but the UK has frequently changed its approach which has done much to undermine the longer-term benefits for the economy and the skills of the workforce. For example, in the not too distant past industry was largely engaged through a network of 25 Sector Skills Councils who developed their own vehicles for co-investment tailored to industry-needs²⁶. This is still illustrated within the creative industries through dedicated sector training funds as seen in Screenskills²⁷. These generate funding to be used to shape industry-focused initiatives and prioritise technical and specialist training for businesses. Examples also still exist in other sectors such as the Construction Industry Training Board (CITB) which also runs a number of sector levies. However, the UK Government has currently moved away from a sector-based approach to deploying macro measures instead, through the form of a national skills levy, but

²² This was launched in 2014 by the DCMS minister and backed by funding from the [UK Commission for Employment and Skills](#)

²³ For example see the consultations earlier in 2022 on a [new FE funding system](#).

²⁴ See also the DfE's plans through [Local Skills Improvement Plans](#) and the Strategic development Fund.

²⁵ See for example the OECD (2017) [Financial Incentives for Steering Education and Training](#)

²⁶ See for example the UKCES (2009) [Review of Employers Collective Measures Final report](#) and information on the UKCES' services of sector [Investment Funds](#)

²⁷ More information on Screenskills sector funds can be found at their [website](#)

given that it is fairly standardised this has been insufficient to drive the levels of engagement sought. As a consequence, further action is likely to be required, especially in more specialised sectors such as the creatives ones.

- iv. The OECD also emphasises the need for a strong “place-based” approach where steps can be taken to strengthen the local delivery infrastructure and ecosystem for skills. In many places this is enabled through embedded devolved governance and funding structures which helps to ensure colleges, schools and universities are enabled to work with employers to meet the skills needs of their local economy. These are less well-established ways of operating within England.

The UK Government is extending place-based initiatives to drive stronger business collaborations locally and this is seen through developments connected to the Levelling Up agenda. For example, currently the DfE is moving to local skills improvement plans which aim to allow local skills providers to work more closely together in responding to industry needs in local areas. In some regions such as Greater Manchester and the Greater London Authority (GLA), where the creative industries have been identified as a vital priority to their local economies, this has enabled changes in the delivery infrastructure building on “industrial place based strategies” which have set a long term vision. For instance, this has been illustrated through PEC research in the Thames Estuary²⁸. Partners in this region from Kent, South Essex and London have pooled resources to shape activities to support the growth of creative industry clusters identified within different parts of the Estuary. Local funding, across the area, is combining with national funding to create a greater focus on industry facing providers and to support a mixed delivery model involving different types of institutions with varying expertise across creative career pathways. One such example is seen in the GLA which is supporting the creation of a new creative industries academy²⁹ which connects and works with the existing network of providers in the region. Local initiatives are also being developed to customise support more closely to the needs of local communities such as supporting under-represented groups of individuals to access the developing training programmes. Funding, in particular, has a key role in incentivising and enabling action, allowing room for customisation and experimentation and thus supporting the conditions for modernisation and improvements in delivery. There is an opportunity to draw lessons from such practices to apply to other areas.

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²⁸ Giles and Carey (2021) [Growth Through Skills: lesson from the Thames Estuary production Corridor](#).

²⁹ See for example the [Mayors Academy programme](#) at the GLA