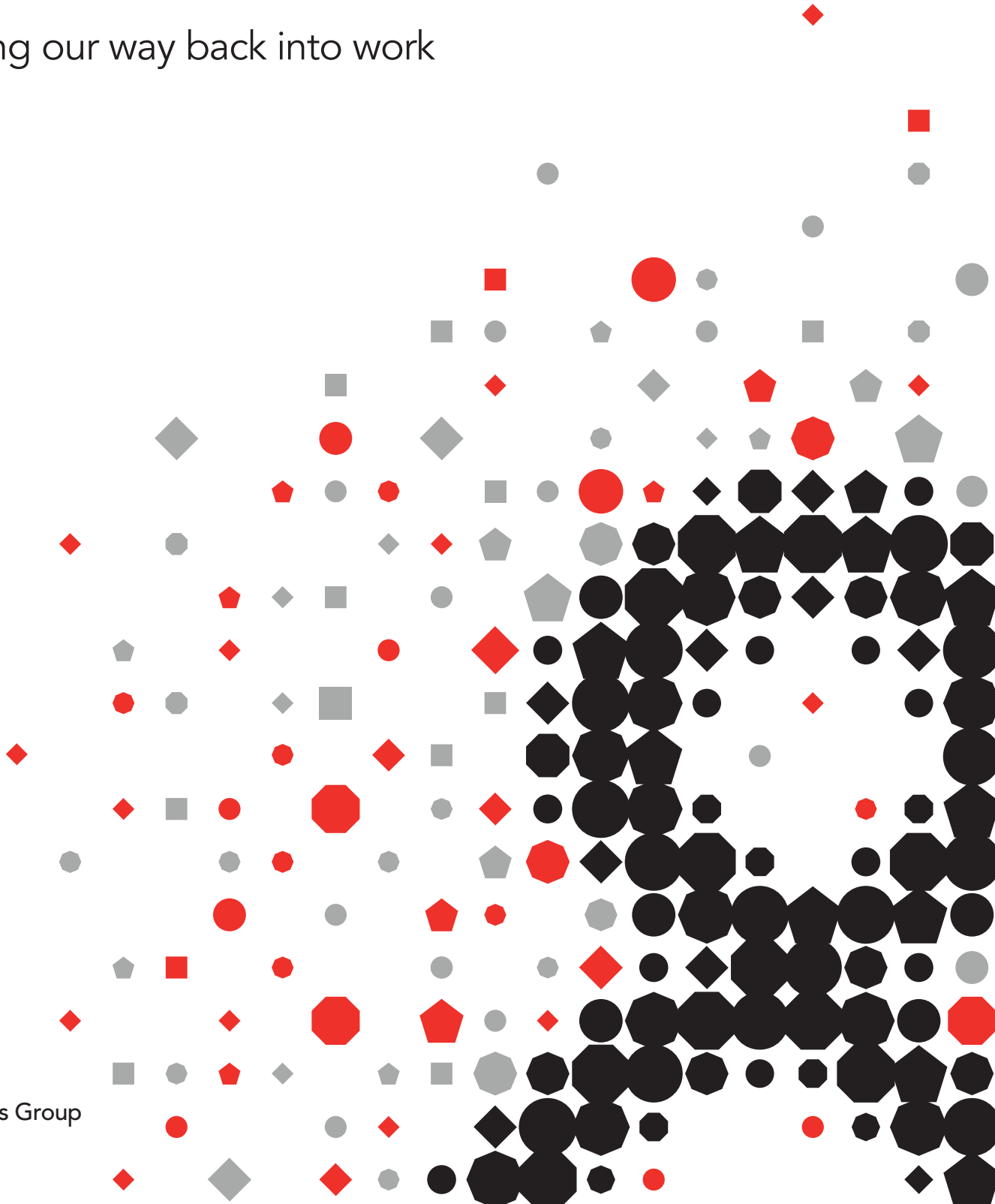
Emsi

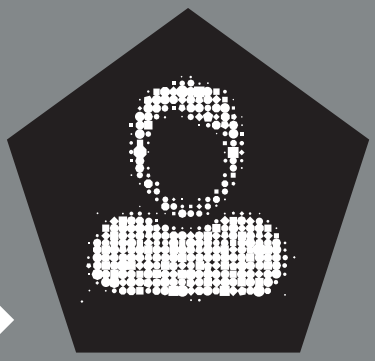
City & Guilds Group

# Recovery and resilience

## Reskilling our way back into work



City & Guilds Group
July 2020



We are far from the end of this crisis

**4.5million**
estimated jobless total by the end of 2020

**nine million**
are currently on the government's furlough scheme

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# Foreword from Robert Halfon, MP, Chair of the House of Commons Education Select Committee

It is no secret that the UK Further Education (FE) sector has been left-behind for decades, spending on apprentices and other work-based learning for adults has fallen by 25% in real terms since 2009/10 according to the Institute of Fiscal Studies[1]. It is an often-neglected part of the education system that is frequently thought of as being 'for other people's children'.

1. https://www.ifs.org.uk/uploads/R162-Education-spending-in-England-2019.pdf

It is an often-neglected part of the education system that is frequently thought of as being 'for other people's children'.

Since being elected as MP for Harlow in 2010, I've visited my extraordinary FE college over 70 times. Seeing colleges in action, meeting the students and staff, is the best way to understand the crucial role FE plays in meeting our country's skills needs, providing opportunities for those from disadvantaged backgrounds, learning excellence and playing important roles as vital community hubs in the many towns in which colleges thrive.

Never in recent history has the FE sector been more important. The impact of coronavirus will have a stifling impact on our economy, with unemployment expected to affect as many as five million people. Research from the Sutton Trust suggests that, already, over one third of existing apprentices have been furloughed and one in ten have been made redundant.

However, it is not all bleak. FE can have a central role in getting people back on the skills ladder of opportunity.

That is why I am supporting this essential piece of research from City & Guilds Group. Using new data gained from over 2,000 working and non-working adults in the UK, City and Guilds set out clear and achievable recommendations, including redirecting existing funding and resources in a much more effective way. The idea of a 'skills credit', for example, could make a huge difference to companies investing in job creation. A flexible apprenticeship levy would also ensure that more apprentices are employed. Lifelong Learning and Employment Hubs will mean upskilling millions of adults in advance of the fourth industrial revolution.

The Prime Minister's announcement of an apprenticeship guarantee to every young person is exciting. Alongside apprenticeships, we also need skills and training.

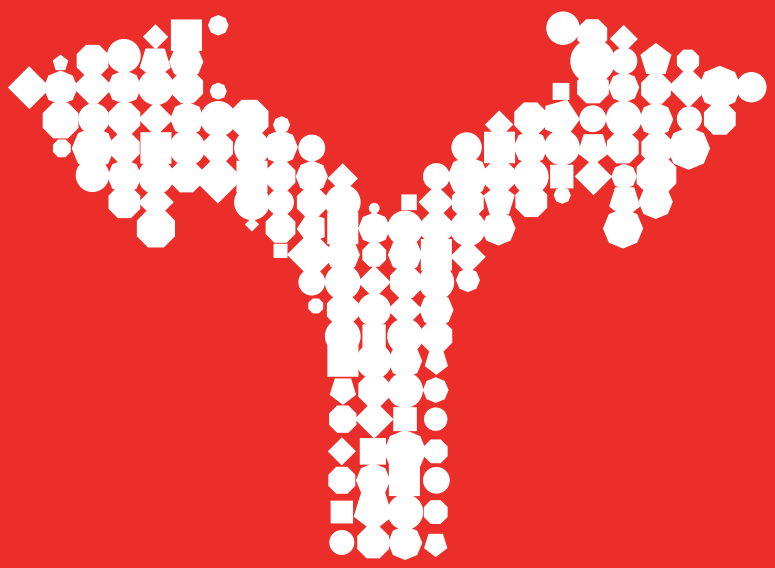
More needs to be done at every level, from provision for 16- to 19-year-olds to adult skills and lifelong learning, so that everyone has the chance to retrain and re-skill and get good jobs for the future.

When it comes to further education, Governments of all persuasions never miss an opportunity to miss an opportunity. We should not make that mistake again. Investment in apprenticeships, FE and skills has to be the number one priority for the Chancellor.

Robert Halfon, MP,
Chair of the House of Commons
Education Select Committee

# Introduction from Kirstie Donnelly, MBE, Chief Executive Officer at City & Guilds Group

Over the last few months, economies and societies worldwide have changed in ways that none of us could have foreseen. Here in the UK, the outlook for 2020 swiftly moved from one of relative economic prosperity and growth to sitting on the precipice of the biggest economic crisis since the Great Depression of the 1920s.



Prior to Covid-19, Brexit, revised immigration laws and the rapid adoption of Artificial Intelligence (AI) in the workplace were already causing significant disruption across the world of work. As a result of the crisis, digital transformation is taking place at an exceptional rate. A record number of people moved to home working arrangements, aspects of personal and professional lives have changed beyond recognition and the requirements for both digital skills and digital delivery of training have skyrocketed.

New research presented in this report, reveals that people urgently need financial support, job specific training and digital skills if they are to remain employed – or find routes into employment – as we emerge from the crisis. It is critical that we have an FE system in place that can support (re)training for all of these displaced people, both young and old, and support them into meaningful work.

Yet we don't currently have a skills system to enable this.

In this report, we show how rapid interventions are needed to bring the country back from the cliff edge of increasing unemployment and an inadequately skilled workforce to a position of sustainable economic and social prosperity. As an organisation with over 140 years history we have been here before and we know that with the right focus and sensible investment in the things that really matter change can happen.

**There is no more time to consult, we have both the means to make this happen and the evidence to prove how much it is needed. This is our Act Now moment.**

1 **First and foremost, we are calling on the Government to take immediate action and urgently redirect existing funding for skills development, as well as use funding levers at their disposal to save us from losing a whole generation of workers.**

2 **We are calling on employers and education providers to work together to drive forward digital transformation through digital skills investment and online learning tools, with the right investment from Government to allow this to happen.**

3 **And we are calling for the creation of 'Lifelong Learning & Employment Hubs' to create a skills network that can match employer demand with the skills of those looking to get back into work.**

Kirstie Donnelly MBE,
Chief Executive Officer
at City & Guilds Group

# 1 The diagnosis: skills and employment in a Covid-19 world

## Unemployment is continuing to rise across industries and geographies and is disproportionately affecting certain groups

Since the introduction of the lockdown in March, unemployment in the UK has steadily increased. According to the ONS, for the first time since 1996, the number of people claiming benefits due to unemployment has risen to almost three million[2]. And the number of people registered on UK payroll fell by 600,000 between March and May of this year[3].

Yet with nine million people currently enlisted on the government's furlough scheme and the jobless total expected to rise to as many as 4.5 million people by the end of the year[4], we are far from the end of this crisis.

Despite this, there is a sense that people are largely unaware of the widespread impact of economic contraction upon the jobs market. New research we carried out amongst the UK population shows less than a third (28%) of those currently in employment are worried about losing their job. Furthermore, over two thirds (68%) remain confident, stating they are not very or not at all worried about losing their job, perhaps inadvisably so, given the circumstances.

While the number of people worried about losing their job rises to 33% amongst those working part time, it is significantly higher among those currently furloughed (54%); a group likely to be more aware of the precarious nature of the economy.

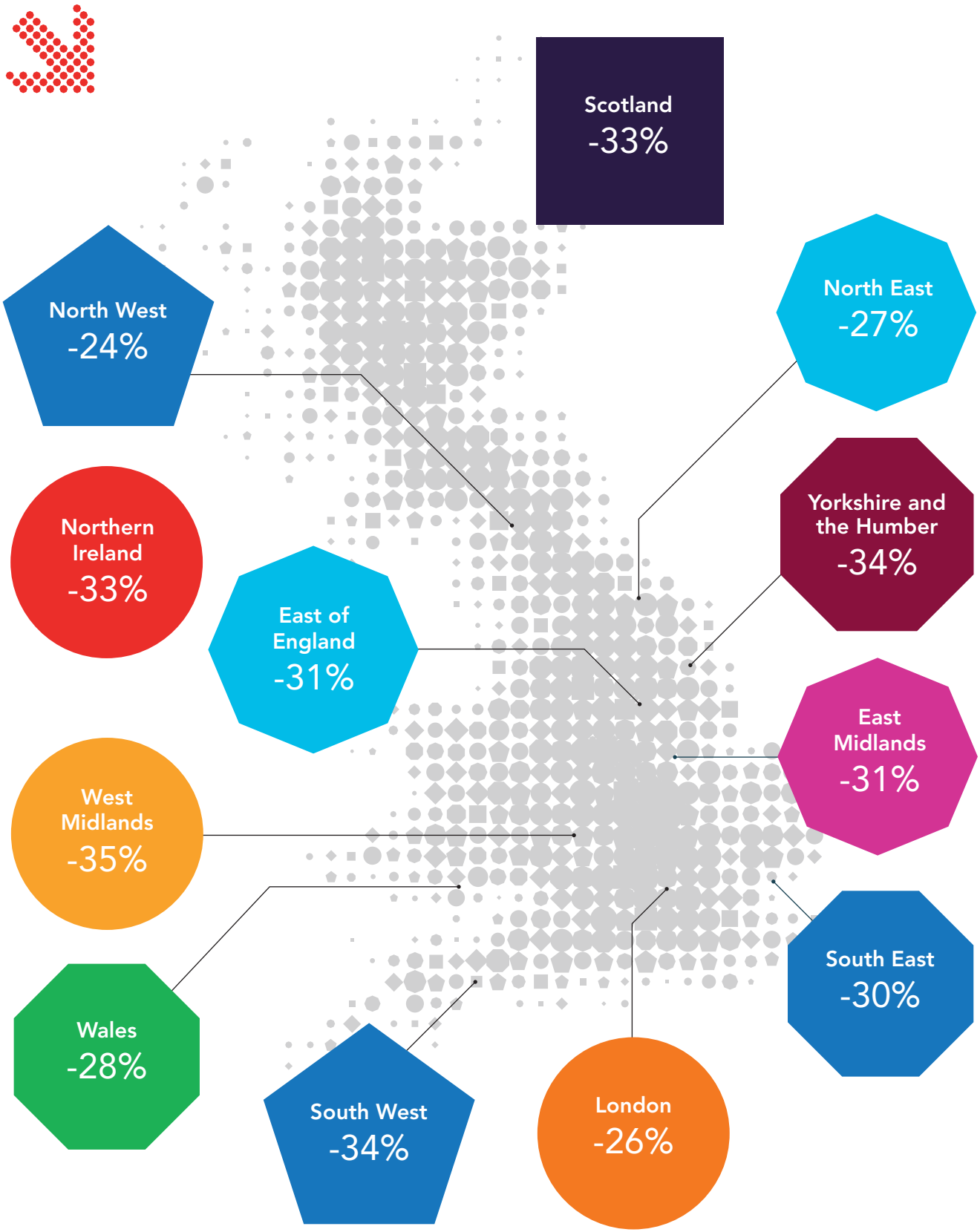
Those workers based in London are most worried about losing their job, with 33% either very or fairly worried, compared to just 17% of those based in Wales, where job security is perceived to be highest. This begs the question of whether the pandemic will hit the jobs market in the capital hardest, or whether certain industries concentrated there will be worst impacted? It is also possible that strong trade unions in Wales – membership which, at 30.5%, is higher than in England – and a larger public sector workforce have served to reinforce the confidence of workers there[5].

2. ONS, Employment in the UK: June 2020
– https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/bulletins/employmentintheuk/june2020
3. ONS, Labour market overview, UK: June 2020
– https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/bulletins/uklabourmarket/june2020
4. Learning and Work Institute, Emergency exit: How we get Britain back to work
– https://learningandwork.org.uk/resources/research-and-reports/emergency-exit-how-we-get-britain-back-to-work/
5. Wales Centre for Public Policy, *The Value of Trade Unions in Wales*
– https://www.wcpp.org.uk/wp-content/uploads/2019/10/190821-WCPP-report-value-of-trade-unions_final-clean.pdf

New analysis from labour market economists Emsi looking at changes in job postings across UK regions from February to May 2020 suggests that some local economies could suffer more than others when it comes to unemployment. While all regions saw a significant fall in job openings, the South West, Yorkshire and The Humber and the West Midlands saw a much more significant drop, likely driven by a greater reliance on industries most impacted by the Covid-19 lockdown.

With different UK regions being impacted more than others, each will also have nuanced needs when it comes to recovering their economy. Taking account of regional variation and leading a highly localised response will be crucial to levelling up the UK.

## Percentage decline in job postings by region



Young people are one group particularly affected by the shrinking jobs market. According to the Resolution Foundation, a third of 18-24-year olds have lost work due to either furloughing or job loss, with a high proportion working in sectors such as hospitality or non-food retail, forced to shut during the lockdown[6]. Data from the ONS shows that the number of 18-24-year olds claiming unemployment benefits rose from 235,000 in March to 523,000 in May – the single biggest uplift seen across all age brackets[7]. Unsurprisingly, our research echoed this, with young people much more concerned about their job security.

We also know that those from lower socio-economic groups and underprivileged backgrounds, already at higher risk of unemployment or low-skill levels prior to the crisis, have been further disadvantaged. When compared with those from higher socio-economic groups, those within the C2DE bracket are more likely to have been told that they will lose their jobs, further exacerbating that divide.

18-24-year olds claiming unemployment benefits rose from

**235,000**

in March to

**523,000**

in May

6. Resolution Foundation, *Young workers in the coronavirus crisis* – https://www.resolutionfoundation.org/app/uploads/2020/05/Young-workers-in-the-coronavirus-crisis.pdf

7. ONS, UK labour market: June 2020: Claimant count by age group – https://www.ons.gov.uk/employmentandlabourmarket/peoplenotinwork/outofworkbenefits/datasets/cla02claimantcountbyagegroup

## Training and upskilling provides a lifeline back into employment

Until recently, organisations competed for people in a jobs market where there were not enough trained and qualified people to satisfy demand. Today we face rising unemployment and a record fall in job vacancies, meaning it is now people battling to find work.

Within this context, there will be a need for people to completely retrain, expand their skillsets or upskill to cover a greater breadth of duties. When asked what they believe would help them to find a new role, UK adults are clear about the value of education. Undertaking job specific training (31%) comes second only to financial support from the government (32%). Undertaking training in digital skills (26%) and broad workplace skills (19%) as well as work experience or a job placement (25%) follow closely behind.

Looking specifically at those currently out of work, the need for further training and development is only more evident: 36% of those who are unemployed would turn to job specific training and 30% training in digital skills.

**31%**

of adults are clear about the value of training

However, a fifth (18%) of all workers – and 25% of those unemployed – are unsure of the skills or qualifications they need. From a special analysis of UK job postings this year, undertaken for this report by Emsi, it's clear that not only are the types of jobs and occupations changing, but the skills needed to deliver them as well. Without all of this insight, how can people effectively ensure they are fit for a rapidly changing labour market?

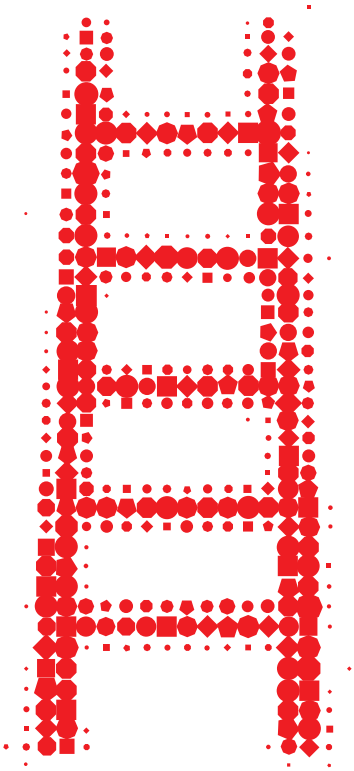
This highlights the need for fast-paced interventions in order to re-shape our education system and ensure it meets the needs of today's learners and satisfies the demands of the jobs market. We need to see a focus on developing the skills that employers are actively looking to bring into their workplace. And, with some industries such as hospitality and travel facing a long-term downturn, we need to establish skills bridges; building platforms to transition people from industries with low employment to those where there are more opportunities.

Analysis of UK job postings carried out by Emsi found that opportunities in health and social care, teaching and agriculture grew from February to May 2020, meanwhile upcoming large-scale projects could open up more roles in transportation and infrastructure. While some of these changes in the job market might be temporary, some could reflect structural change as we return to the new normal – only time will tell. What is evident is that there will be a need to identify common, transferable skills and provide short training interventions to fill any skills gaps.

## Increase/decrease in top 20 skills requested in job postings between February and May 2020

| Skill | Change |
|---|---|
| Personal Care | +15% |
| Learning Disabilities | +11% |
| Autism (Therapies) | +2% |
| Mental Health | +1% |
| Nursing | +1% |
| Teaching | -2% |
| Welfare | -3% |
| Pharmaceuticals | -7% |
| Empathy | -12% |
| Python (Programming Language) | -12% |
| Amazon Web Services | -14% |
| Software Engineering | -15% |
| Risk Analysis | -16% |
| Java (Programming Language) | -18% |
| Software Development | -19% |
| Leadership | -19% |
| Integration | -19% |
| Mentorship | -20% |
| Automation | -20% |
| Risk Management | -20% |

Personal Care
+15%



Risk Management
-20%

30%
decrease overall in all UK job postings from February to May 2020

**Top three occupations advertised by employers during lockdown – comparison from February 2020 to May 2020** (data from Emsi UK)

1. Welfare Professionals

2. Caring Personal Services

3. Teaching and Educational Professionals

**Occupations which saw the biggest fall in postings:**

89. Leisure and Travel Services

90. Other Elementary Services Occupations

91. Food Preparation and Hospitality Trades

92. Sales Supervisors

## Lower skilled and lower waged to be most badly impacted by Covid-19

Although we don't yet have any official data on the actual impact the crisis is having on job changes within particular industries, what we do have is a few clues from a number of datasets that indicate where the greatest losses might be. For instance, in terms of GDP, by far the biggest decline from February to April was in the accommodation and food services sector, which fell by 40.9% – which is unsurprising, given the total shutdown of restaurants, pubs, bars and cafés from 20th March. Big declines were seen in Other service activities, which amongst other things includes hairdressers and which fell by 20.5%, and Construction, which dropped by 18.2% respectively.

We can also glean some insights by looking at the change in employer hiring activities over the lockdown period. According to our Job Posting Analytics, the biggest declines in internet job advertisements from 23rd March through to mid-June were in Accommodation and food services and Wholesale and retail trade, which fell by 44% and 40% respectively.

If these figures give us some indication of where job losses are likely to occur, it seems highly likely that there will be a disproportionate impact on those at the low wage, low skill end of the spectrum. For instance, accommodation and food service activities, which has seen the largest decline in both GDP and job postings, is not only the lowest paying of all sectors, with an average wage of just £16,509, but around 86.7% of jobs within the industry require only a Level 1 or 2 qualification. Wholesale and retail trade, which is the biggest employing sector in the country with around 4.8 million jobs before lockdown, is another case in point. With 72.7% of jobs in the industry requiring Level 1 or 2 qualifications, and with an average salary of just £23,975 (compared to £29,826 across all sectors), the 40% decline in job postings in this sector again tends to indicate that it may well be the low skill, low wage end of the spectrum that is being hit particularly hard.

Accommodation and food services sector fell by

**40.9%**

Andy Durman,
Managing Director,
Emsi

"This economic crisis has put into stark perspective the importance of 'human skills', such as leadership, empathy and mentorship, in helping workers find a path back into the workforce – in many cases in new sectors of employment. This is coupled with increasing demand for digital capabilities and technical job-specific skills across the board. The crisis has shown the need to re-define the skills we most value with a focus on emotional intelligence, digital skills and inclusivity.

"It is difficult for us to accurately define our underlying universal skills that make us employable, and this is a particular barrier to moving from one industry to another. A consistent framework is needed to define these skills and those essential to specific occupations so that people can understand which industries they are best equipped for, based on their skills and experiences, and adapt to an ever-changing labour market."

## Digital skills development and flexible, accessible learning models must be prioritised

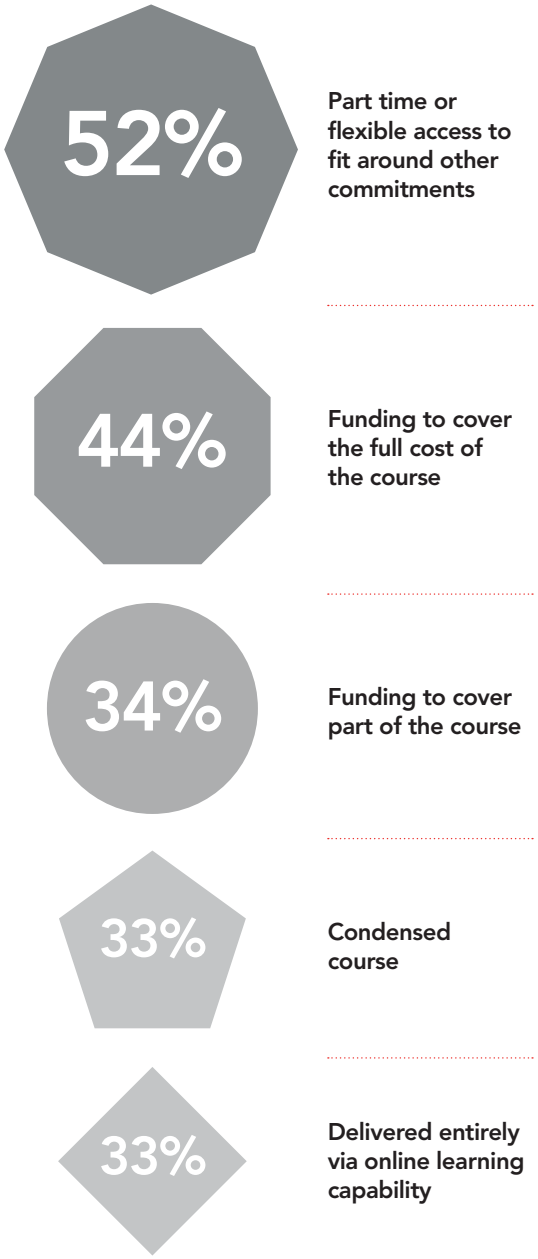
When looking at skills needs across the UK population, industry and job specific skills are ranked most highly (40%), followed by leadership and management (32%) and advanced digital skills (30%). Interestingly, those currently unemployed recognise the need for digital upskilling most starkly, with 22% citing a need for basic digital skills; 35% for advanced digital skills and 37% for data handling and analysis skills (compared with 12%, 30% and 28% respectively for all workers).

Even before the crisis there was a distinct lag in digital skills development. It has now become more important than ever to fill this skills gap, with Microsoft reporting that two years' worth of digital transformation has taken place in the space of two months[8]. As we emerge from the pandemic, we are likely to see high growth amongst digital infrastructure industries, leading to the need for further development in both basic and specialised digital skills.

As well as re-shaping the skills needed, the accelerated use of technology has created an irreversible shift in the way people learn and work. 40% of workers who responded to our survey specified that their top requirement when selecting a course was the ability to learn entirely online. Part time and flexible access courses are also cited as requirements for more than half of both workers (58%) and those currently unemployed (52%).

We need to see a shift away from purely focusing on longer, full time courses and apprenticeships, instead developing flexible learning that can be delivered at a time and place to suit all. The pandemic has already proven that offering training and assessment online is possible and successfu across many subject areas. It is essential that we now see greater use of technology to deliver skills training and relevant adaptations to the regulations around accreditation and qualifications to build flexibility into the system that endures long after the Covid-19.

**The top requirements sought by all UK adults when looking for a training course:**




8. Microsoft, 2 years of digital transformation in 2 months – https://www.microsoft.com/en-us/microsoft-365/blog/2020/04/30/2-years-digital-transformation-2-months/

## Adult education is poorly regarded and self-funding is a stumbling block

The focus from government on apprenticeships as the main skills-based route into employment, means many people are not aware of the opportunities offered by alternative qualifications. 30% of students and 28% of those unemployed told us that they did not know what training courses are available. Added to this, we have a culture in the UK that means people don't tend to invest in their own training.

Affordability was cited as the biggest barrier preventing further upskilling. While 30% of all workers stated that they cannot afford to pay for training courses, this rises to 59% amongst the unemployed. Worryingly, 28% of all workers and 43% of those currently unemployed do not know how to access funding to pay for a course.

If we are to create a healthy economy and prosperous future, we must rebuild trust in education and reignite people's confidence in learning as a route to progression. Existing funding must be better used to provide short term support to get people back into work via learning, with a single-minded focus on a good job as the end destination. We should better promote the current loans system to increase take up, selling the long term benefits to people's careers and incomes.

**Barriers to skills development are pertinent amongst both those working and those unemployed:**

can't afford to pay for training courses

don't know how to access funding to pay for courses

don't know what training courses are available

**Amongst unemployed people:**

can't afford to pay for training courses

don't know how to access funding to pay for courses

don't know what training courses are available

**The current skills policy landscape is hindering critical adult education and not working to support those most in need**

Government funding within our current skills system is not best aligned with the needs of either employers or individuals. Chronic underfunding and a restrictive, complex methodology have resulted in a skills policy landscape that is hard to navigate and has limited access and usability.

City & Guilds Group's "Sense & Instability" report published in 2019 shines a light on the specific ways in which skills policy and funding for post-19 education should be adapted and re-evaluated in order to better meet the needs of people, businesses and the economy. With unemployment rapidly rising, there has never been a more critical need for this re-evaluation as we seek to bring millions of displaced workers back into employment over the coming years.

## 1. The Adult Education Budget

- This fund has remained underspent and underutilised for the last five years, showing it is not fit for purpose. Learner eligibility criteria is complex and restrictive, and the fund does not support any learning above Level 3, at a time when technical level skills at Level 4 and Level 5 are in short supply.
- The qualification offer is not always supportive of employers' needs and the Community Learning aspect, requiring match funding, has resulted in reduced delivery with many learners unable to afford the contribution.
- The size and shape of the learning and accreditation offer does not match learner and employer need, a problem highlighted in the City & Guilds and NOCN 'Close the Gap' report published in 2019.

## 2. The National Skills Fund

- Announced as part of the November 2019 Conservative Manifesto, this £3 billion skills fund has received very little mention since and clarification on the use and allocation of the funds are yet to materialise.

## 3. National Retraining Scheme:

- This new programme to help adults retrain into better jobs has so far concentrated on offering upskilling to low-skilled/low-paid individuals in a limited range of skills domains.

## 4. The Apprenticeship Levy:

- The apprenticeship levy is likely to be significantly underspent as apprenticeship starts have plummeted by 47.9 % between March and May 2020.

If this funding remains underspent and difficult to access, we run the risk of people slipping further away from the jobs market, losing vital chances to retrain and reskill. With a third of people stating that financial support from the government – such as funding for a training course – would help them find a new job, it's vital that we re-prioritise existing funding and create a system that supports post Covid-19 retraining and reskilling needs.

# 2 The cure: Short, sharp interventions to support retraining and reskilling back into employment

Despite the problems with the skills system, this is not the moment for a complete rethink. We don't have the luxury of time for consultations and new legislation. We need decisive action and creative thinking to quickly develop skills solutions that can help large numbers of people retrain and reskill, at all ages and stages of their careers, often into entirely new industries.

## Our call to action

City & Guilds Group is calling for action across three key areas, which should be included in a national Skills Recovery Plan. These recommendations make use of existing funding and are intended as short-term interventions to reduce the impact of a severe recession, capitalise on the digital revolution and drive skills development for recovery.

3

# Our recommendations

**Target government funding into pre-employment programmes to help stave off a lost generation of workers:**

- **Make immediate use of the promised National Skills Fund**
  - The £3 billion National Skills Fund should be used immediately to support post-Covid-19 skills needs for people who have Level 3 or higher skills but find themselves unemployed. With unemployment predicted to reach 4.5 million by the end of the year this fund will provide much needed retraining support to reduce the benefits burden. It could be directed through education providers (bricks and mortar or new digital delivery models) or directly to individuals by introducing a Singaporean-style skills credit for those unemployed to access learning.
  - The National Retraining Scheme should continue to provide training below Level 2 for low skilled and unemployed people, shifting the funding from supporting the set up to focusing on the end beneficiaries.

- **Flex the apprenticeship levy to better support employers and job seekers**
  - The Government should extend the current period to access funding for apprenticeship training from two years to three years to allow employers to take on apprentices when there is a real job at the end. The levy should be extended to be used on traineeships that can provide a vital route into employment as well as skills training and access to employers where apprenticeships aren't yet available.
  - Any underspent levy should be made available to pay apprentice wages in the short term. This will incentivise employers to take on apprentices during the downturn in the economy, allowing Government to meet its apprenticeship pledge.

- **Introduce a skills credit through additional tax relief**

Employers should be incentivised to take on long-term unemployed and those disproportionately disadvantaged by Covid-19 through a tax relief system. The credit will act as a short-term incentive for employers and tax breaks would be offset by a reduction in universal credit claims and lower unemployment. Additionally, all big infrastructure projects receiving funding must come with targets for taking on apprentices and / or job creation, with specific targets set by government.

- **Review and reform adult education funding, re-prioritising existing funding to support people back into work**

Existing funding is often only available to support in-college learning and is not always responsive to employers' and individuals' needs. The eligibility criteria of existing funding pots, such as the Adult Education Budget, must be broadened to ensure they support more flexible, bite-sized and online learning offers that will help people of all ages quickly back into employment. FE loans, currently difficult to access and poorly marketed, should be reformed to increase awareness and better support employed individuals to gain new skills or change career.

- **Push digital transformation further by encouraging employers and education providers to work together to maintain the widespread adoption of online learning and enhance digital funding**

The last few months have seen a seismic shift in the way education is delivered and assessed digitally. Online learning assists with social distancing but more importantly provides access to education for those who can't get to a physical location or need more flexibility in both time and place. However, significant investment is required into broadband infrastructure across the country to make this a reality for all. The Government should extend the support for additional equipment offered to schools to the FE sector so that more people can access learning remotely. This needs to be prioritised for low income groups to ensure equality of access.

- **Use government policy and communication levers to encourage collaboration with employers and learning providers to create 'Lifelong Learning and Employment Hubs' and promote recruitment into growth sectors**

The £3 billion National Skills Fund should be used immediately to support post-Covid-19 skills needs for people who have Level 3 or higher skills but find themselves unemployed.

- Lifelong Learning and Employment Hubs must be based on cohesive collaboration, bringing together local employers, training providers and governments to offer people a range of tools and services to help them directly into employment. These will include a diagnostic service to match skills with available jobs; identification and credentialing of transferable skills; provision of short and longer-term courses to fill skills gaps and get people into work; connections with colleges, training providers and universities in the area to help with more substantial intervention; as well as tangible opportunities for employment with local employers. They will provide a much-needed focus on creating the skills that the local labour market needs in a post Covid-19 world, operating flexibly to accommodate all those displaced from work. The National Skills Fund should be used to part-fund these hubs, alongside employer investment and localised allocation of the Adult Education Budget.

- A national careers and recruitment campaign should also be launched by the Government to target workers displaced from sectors in decline, as well as young people looking to enter the jobs market, and direct them to growth sector opportunities. Existing Careers and Enterprise Company, DWP and Job Centre Plus budgets should be channelled into 'skills bridge' programmes that ensure people are given adequate careers advice and support to assess their own skills and understand the skills they need to transition into growth sectors.

City & Guilds Group

## About City & Guilds Group

Our vision is for a world in which everyone has the skills and opportunities to succeed. We support over four million people each year to develop skills that help them into a job, develop on that job and to prepare for their next job.

As a purpose-led organisation, we're proud that everything we do is focussed on achieving this purpose.

Through our assessment and credentialing, corporate learning and technical training offers, we partner with our customers to deliver work-based learning programmes that build competency to support better prospects for people, organisations and wider society. We create flexible learning pathways that support lifelong employability, because we believe that people deserve the opportunity to train and learn again and again – gaining new skills at every stage of life, regardless of where they start.

Our foundation activities amplify our purpose by helping to remove barriers to getting into a job, celebrating best practice on the job, and advocating for jobs of the future.

Emsi

## About Emsi

Emsi's goal is to help local, regional and national economies function more effectively through helping people and organisations make better decisions relating to the world of work. Through a unique integration of a variety of labour market data sources, we create a detailed and holistic understanding of workforce supply and demand down to the local level.

## Methodology

Unless stated otherwise, all quantitative data cited in this report is taken from a survey commissioned by City & Guilds Group and undertaken by YouGov in June 2020. Research was undertaken amongst a sample of 2080 adults between June 10th-11th. All figures have been weighted and are representative of UK adults (aged 18+). The survey was carried out online.

Additional analysis of UK job postings and how demand for skills and occupations changed between February and May 2020 was provided by economists at Emsi.

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