



West Yorkshire Economic Recovery Plan - Summary

**West
Yorkshire**
Combined
Authority

Working in
partnership
with the



**Leeds City Region
Enterprise
Partnership**

August 2020

Introduction

UK Government has already demonstrated that it understands the value of investing in West Yorkshire, as evidenced by the recently agreed £1.8bn devolution deal, the biggest ever of its kind.

This follows our success in delivering the largest Local Growth Deal in the UK for Leeds City Region, generating £4 private investment and £10 in GVA for every £1 of public money.

Whilst the challenges facing the region as a result of COVID-19 are stark (a cost of £2.4bn to the Exchequer in 2020 alone), by realising our plan, built on our strengths and overcoming our challenges, we can begin to achieve the levelling up of the economy the Government has set as its target.

Summary of Asks	Rescue (6-12 months) - Acting now	Re-imagining (1-2 years) Setting the aspiration for the future	Resilience (2-5 years) Delivering future prosperity	
Action Area 1: Good Jobs & Resilient businesses	<ul style="list-style-type: none"> • Employment support for 30,000 people • Operational support for 9,000 business 	<ul style="list-style-type: none"> • Digital hardware and cybersecurity • ActEarly North • Health accelerator programme • Innovation driven entrepreneurs • Made Smarter programme 	<ul style="list-style-type: none"> • Healthtech innovation pathways • Flexible strategic business investment fund • Green business support • Innovation Deal 	
	£70m	£287m	£166m	
Action Area 2: Skills & training	<ul style="list-style-type: none"> • 10,000 adults re-trained • Green & digital skills • Health and social care workforce opportunities 	<ul style="list-style-type: none"> • 3,000 Apprenticeship/work placements • Virtual careers infrastructure • 100% digital pilot • Skills utilisation pilot • Enterprise Skills & start up support • Careers destinations & work placements • Support for long term unemployed 	<ul style="list-style-type: none"> • Flexible skills fund 	
	£65m	£100m	£300m	
Action Area 3: Accelerated Infrastructure	<ul style="list-style-type: none"> • Shovel-ready energy efficiency schemes • Utilising vacant urban space • Extension of Towns Fund 	<ul style="list-style-type: none"> • Skills capital investment programme • Pipeline of low carbon / climate investments • Health tech capital schemes 	<ul style="list-style-type: none"> • Digital infrastructure programmes • Flooding Programmes • Health tech innovation hub 	
	£75m	£94m	£243m	
Total	£210m	£481m	£709m	£1.4bn

This is an economic recovery plan for the people of West Yorkshire

It is focussed on supporting jobs for people in resilient businesses, on helping people get the skills they need to get jobs, and on infrastructure so people can access opportunities. The recovery vision at the heart of this plan is to grow a more inclusive, resilient, sustainable economy with more productive businesses, better levels of skills and entrepreneurialism, less inequality, and better environmental sustainability.

The economic recovery plan forms part of a holistic approach to regional recovery, alongside plans for our five local authority areas of Bradford, Calderdale, Kirklees, Leeds and Wakefield, and plans for health, transport, culture and tourism. It recognises our places are unique, but also interconnected, with the core city of Leeds a critical centre for jobs in the region. It is the result of collaboration with partners through the West Yorkshire Economic Recovery Board, partners committed to leading by example in promoting health, wellbeing, culture, inclusivity and diversity, and working together to further these values by fostering our long-term regional partnerships, based on extensive knowledge of the region and its places (see section 4).

The plan sets out what is required at a regional level to deliver a successful recovery, what we can offer distinctly to national recovery and what we need from Government, in a clear and costed plan of action across three stages of rescue, re-imagining and resilience. This initial £1.4bn action plan will need to adapt as the situation develops, and we will use local intelligence to inform any updates.

West Yorkshire Economic Recovery Plan - Plan on a Page

1. Vision

To grow a more inclusive, resilient, sustainable economy with more productive businesses, better levels of skills and entrepreneurialism, less inequality, better environmental sustainability.

2. Goals

Inclusive Growth

Wellbeing, connectivity and accessibility, relevant and transferable skills and good work

Sustainable Environment

Capitalise on pro-environmental behaviours, accelerate shovel ready programmes to tackle the climate emergency

3. Action Areas

Rescue 6-12 months

Acting now – supporting communities, saving key industries & getting people into jobs, infrastructure projects ready to go

Re-imagining 1-2 years

Setting the aspiration for the future – skills & retraining, supporting growth industries, low carbon infrastructure and transition

Resilience 2-5 years

Delivering future prosperity – skills & career pathways, innovation, stronger communities, greener environment

Good Jobs & Resilient Business

Skills & Training

Accelerated Infrastructure

4. West Yorkshire Propositions

Health tech

Build on city region strengths (industry, R&D + public), delivering investment opportunities, jobs & better health outcomes

Skills & Digital / made smarter

Cementing existing strengths in digital and manufacturing, addressing digital skills and access gaps, infrastructure pipeline

Entrepreneurship

Unlocking entrepreneurs from diverse communities, building on MIT REAP, reuse of empty spaces, innovative start-up, training

Transition to Net Zero

Tackling climate emergency, build on clean growth strengths, infrastructure opportunities, jobs and skills for the future

Our West Yorkshire recovery offer for levelling up – inclusive growth and sustainable environment

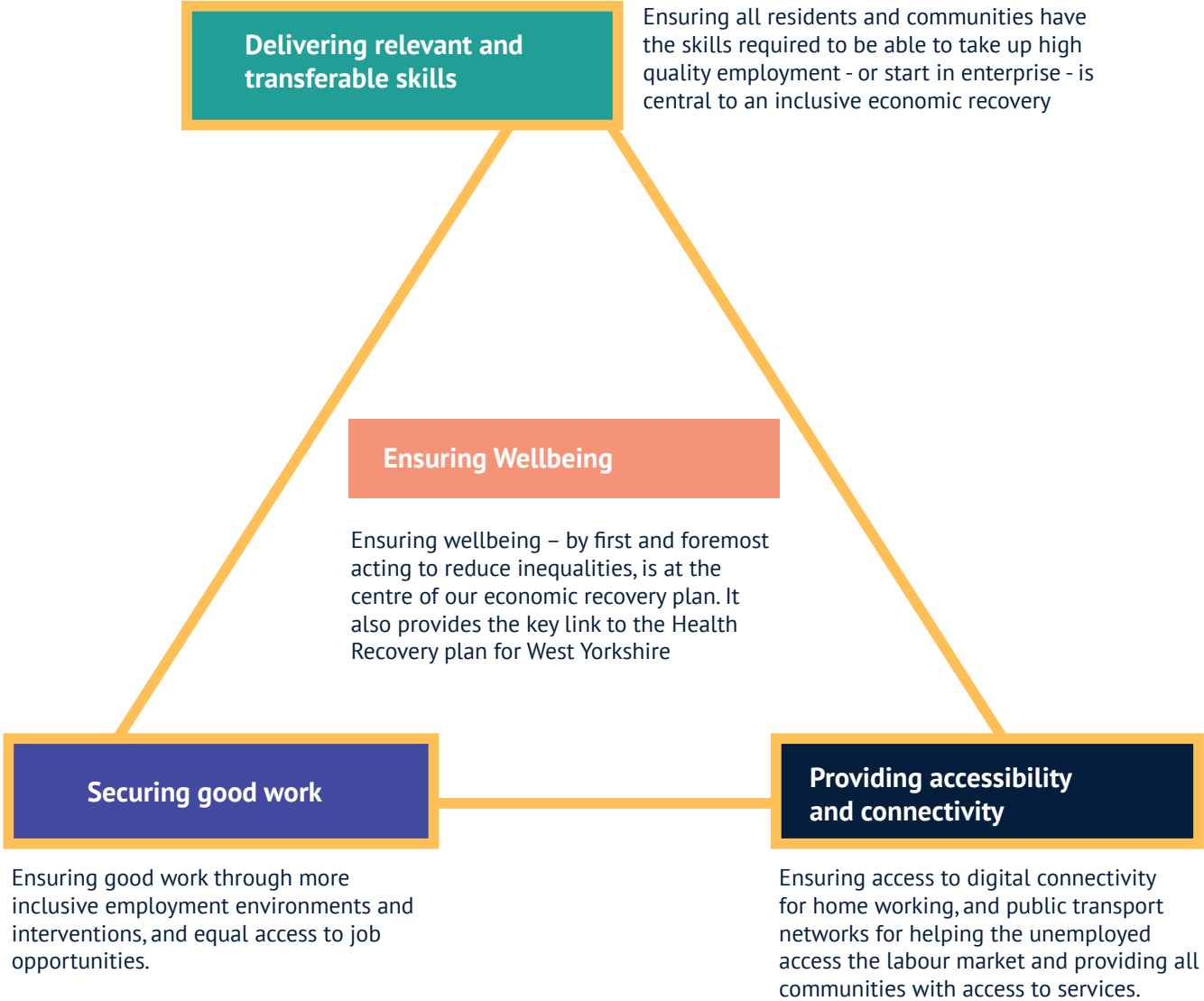
Our West Yorkshire plan recognises that COVID-19 recovery is not about returning to how things were, but about setting the direction for our economic future. In doing so, we are clear on two goals that must be at the heart of recovery for all our people and places – reducing inequalities and setting in motion the transition to a net zero carbon economy.

Key inclusive growth success measures:

increasing the numbers of people in good quality work, numbers of innovations for social good, diversity of entrepreneurs, wellbeing metrics, digital inclusion

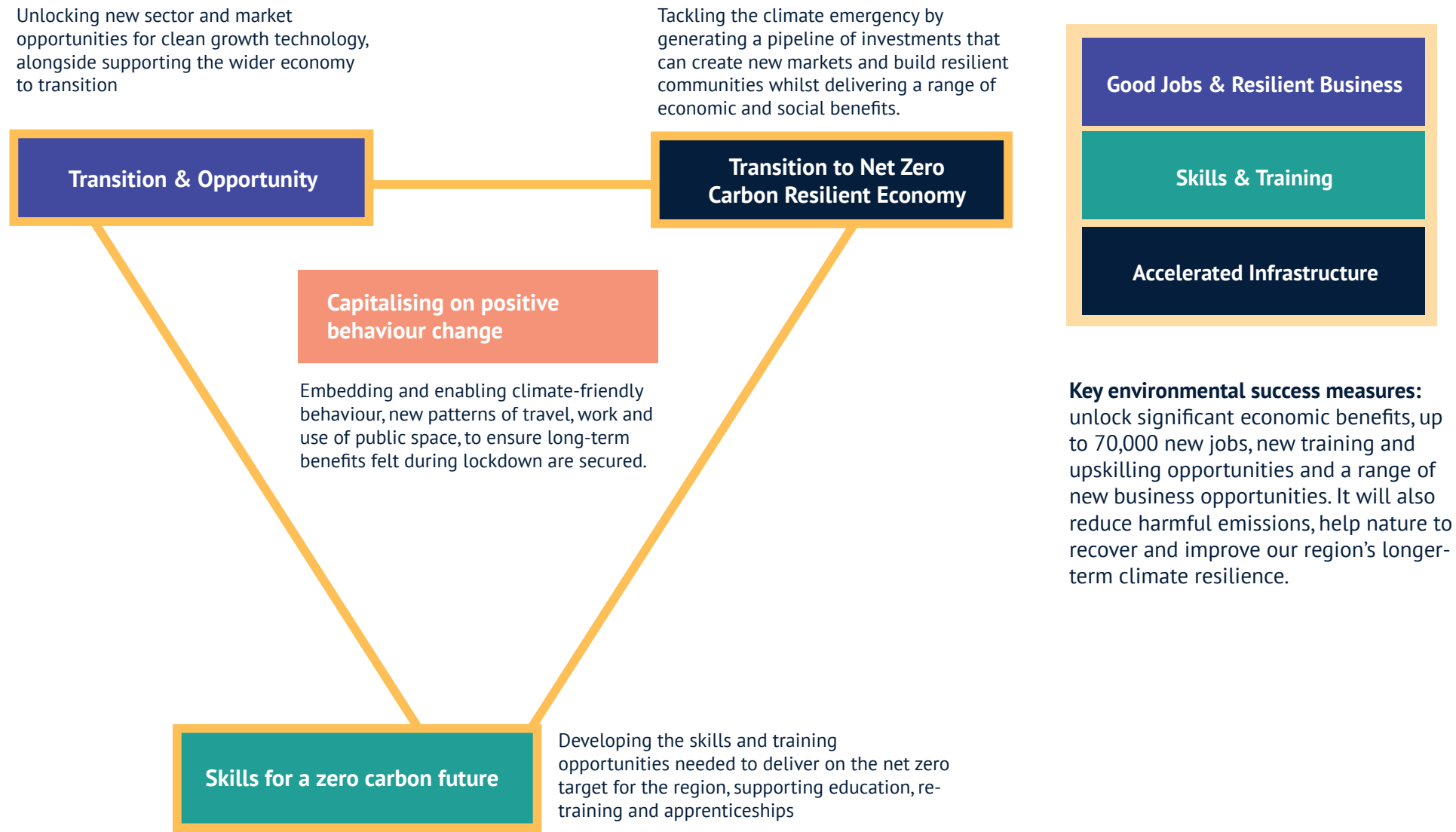
Key environmental success measures: unlock significant economic benefits, up to 70,000 new jobs, new training and upskilling opportunities and a range of new business opportunities. It will also reduce harmful emissions, help nature to recover and improve our region's longer-term climate resilience.

Inclusive Growth & the Economic Recovery Plan



Key inclusive growth success measures: increasing the numbers of people in good quality work, numbers of innovations for social good, diversity of entrepreneurs, wellbeing metrics, digital inclusion

Sustainable environment & the Economic Recovery Plan



Priority Areas for Action - Good Jobs, Skills and Infrastructure

For each action area the plan focusses on the Must Win Battles that will unlock the vision over the rescue (short), re-imagining (medium) and resilience (long) phases of recovery. These phases are distinct, and require different interventions, but each is important. This is supported by detail of what Government need to focus on, what can be delivered at West Yorkshire level and what further costed interventions are required. Summaries provided below, with further detail over the following pages.

Rescue 6-12 months

Acting now – supporting communities, saving key industries & getting people into jobs, infrastructure projects that can be delivered now

Re-imagining 1-2 years

Setting the aspiration for the future – skills & retraining, supporting growth industries, low carbon infrastructure and transition

Resilience 2-5 years

Delivering future prosperity – skills & career pathways, innovation, stronger communities, better environment

1. Good Jobs & Resilient Business

- Depending on the scenario, our economy could shrink by £12bn in 2020, threatening jobs and businesses now and productivity in the long term
- In rescue, we need Government to support the safeguarding of our existing Good Jobs, and we will locally support businesses and individuals to get back to work. (Asks £70m)
- In re-imagining, we have opportunities to support new and growing strengths, and to boost entrepreneurialism in our communities (Initial asks £287m)
- In resilience, we can make jobs healthier and greener, with Government backing regional infrastructure

2. Skills & Training

- Depending on the scenario, we may be facing unemployment levels up to 14.7% in 2021
- In rescue, we need Government to support financial support to the unemployed and to training providers, and regionally we will focus on retraining and skills for education leavers (Asks £65m)
- In re-imagining, we will build the regional skills offer for the future labour market (Initial asks £100m)
- In resilience, we need to see implemented the recommendations of the Future Ready Skills Commission (Initial asks £300m)

3. Accelerated Infrastructure

- 64% of people expect to work from home more after COVID-19
- In rescue, we need Government to take the rapid decisions needed to unlock our shovel ready capital projects, and we will support communities to utilise existing space (Asks £75m)
- In re-imagining, we can begin our work to healthier, digital and greener places, utilising our strengths in clean tech and MMC (Initial asks £94m)
- In resilience, we must secure the future prosperity of our communities, including through flood resilience (Initial asks £243m)

Priority 1: Good Jobs and Resilient Businesses

Must win Battles: Rescuing and building resilience across strategic regional sectors, Support the unemployed back to work, Deliver levelling up through increased productivity and good work, Making supply chains more resilient, Increasing digital & innovation driven entrepreneurialism

Rescue 6-12 months	Re-imagining 1-2 years	Resilience 2-5 years
Government need to focus on: Financial support to the unemployed, finance to safeguard jobs and businesses in the most affected sectors, sorting the post-Brexit trade relationship with the EU and other nations	Government need to focus on: Providing patient capital for investment in industry and innovation, setting trade policy goals	Government need to focus on: financial incentives to support industrial transition, unlocking key long-term infrastructure projects for the North e.g. NP Rail
<p>At West Yorkshire level we will deliver:</p> <ul style="list-style-type: none"> • Employment and apprenticeship brokerage & links to skills and training • Re-training for people on furlough/at risk of redundancy (see skills section) • Business Support and access to advice to get SMEs in the region operational safely • Supply chain programmes to help businesses to access new supply chains, particularly in health • Support those trading internationally as part of the city region's major role as a UK manufacturer and service provider as we prepare for new trade relationships • Stimulate innovation and investment, and support new digital ways of working • Creative catalyst programme to support creative industries accelerate and grow 	<p>We will deliver (subject to funding):</p> <ul style="list-style-type: none"> • Regional support for businesses seeking investment to grow, innovate or explore new market opportunities particularly to grow jobs in areas of regional strength – like health and clean growth tech. • Support for retraining in sectors/occupations with growth potential (see skills section) • A Good Work Standard for West Yorkshire, focussing on commitments that drive positive employment and productivity • Inward investment and skills packages to support on-shore and re-shore of industry that can unlock good jobs • Support to build innovation driven start up and scale-up enterprises (including social enterprises), particularly in disadvantaged communities 	<p>We will deliver (subject to funding):</p> <ul style="list-style-type: none"> • Support and access to finance to grow jobs and productivity in growth sectors • Deliver a coordinated West Yorkshire innovation ecosystem • Help businesses to develop more resilient supply chains, working to reduce carbon footprints of trade • Skills brokerage service to stimulate demand from employers • Support for those looking to become exporters, or to explore new opportunities beyond UK markets • Mission based challenges for solving key social and environmental issues • Support businesses to grow back greener to maximise new business opportunities and increase good jobs.
Government ask: £60m to deliver employment support for 30,000 people (to 2025) £10m to support schemes for more than 9,000 business to get back operating safely, productively and innovatively, safeguarding 25,000 jobs in West Yorkshire in the process	Government ask: £220m for a wide-ranging entrepreneurial revolution, £20m Made Smarter programme, £10m for ActEarly North, £15m for skills packages to create new jobs, £20m Digital Enterprise, £2m health accelerator	Government ask: £30m flexible strategic business investment fund for growth sectors. £1.3m for green business support, £35m Healthtech, £100m Innovation deal

Note: Given the uncertain nature of COVID recovery, we will need to add and refine as impacts become clear. We urge Government to engage with us on this process.

Priority 2: Skills and training

Must win Battles: Prevention of NEETs and youth unemployment, Address inequality of access to learning, Building a strong skills offer for the West Yorkshire labour market, Improved skills utilisation in the workplace

Rescue 6-12 months

Government need to focus on: financial support to the unemployed, supporting job retention, financial support to the education and training sector, national job guarantee scheme, free up ESF funding in order to maximise local investment, top-up AEB for L3 and digital entitlements and offering careers support and advice to all adults

At West Yorkshire level we will deliver:

- **Employment Brokerage** to support those at risk of redundancy or unemployed
- **Adult re-training / upskilling courses** to help people retrain quickly whilst in work
- **Coordination of Apprenticeship and work placement support for employers**
- Careers tools for summer **graduate and school leaver programmes**
- **Digital skills** programme
- **STEM skills / green recovery** programme
- **Health workforce planning** programme
- **Inclusive/ flexible skills fund** to address barriers to entering/ progressing in the workplace to support childcare, training, housing and transport costs

Government ask: e.g. £30m for 10,000 adults re-trained over lifetime of the plan, £10m for green skills partnership, £10m for digital skills partnership £15m for health and social care workforce and support for LT unemployed with complex health needs.

Re-imagining 1-2 years

Government need to focus on: skills system reform, including alignment of skills funding including NRS, NSF and SPF, supporting transitions and well-being of young people & long term unemployed, capital investment

We will deliver (subject to funding):

- Apprenticeship and work placements to **stimulate individual and business demand**
- **Upskilling / re-training** in emerging sectors
- **Strategic and responsive commissioning of Adult Education Budget** for 21/22 onwards, focussed on areas of unemployment need
- **Education/careers targeting disadvantaged learners**, extended to EY and primary and build resilient virtual careers support
- **Skills and capacity building for entrepreneurs** – focussed in communities
- **Pilot approaches to High Performing Working Practices**
- **Digital/STEM/Green/HSC Skills Partnership delivery** with workforce fund to support re-training / upskilling and new entrants

Government ask: £3m for skills utilisation pilot, £35m FE/post-16 implementation funding, £20m for careers destinations & work placements, £5m virtual careers infrastructure, £17m 3,000 Apprenticeship/work placements, £10m Enterprise Skills programmes & start-up support, £10m 100% Digital roll-out.

Resilience 2-5 years

Government need to focus on: skills system reform, including alignment of skills funding including NRS, NSF and SPF high quality employer led technical training including digital, increase AEB funding

We will deliver (subject to funding):

- **Work with Government to implement** the Future Ready Skills Commission recommendations
- **Adaptive regional support** for community skills and training needs
- **Deliver entitlements and commission 'test pilots'** as part of AEB strategy to ensure equal access
- **A coordinated employment, skills and health offer** for long-term unemployed

Government ask: Devolve work and health programmes, adults and careers funding, £300m flexible skills fund (see also rescue)

Note: Given the uncertain nature of COVID recovery, we will need to add and refine as impacts become clear. We urge Government to engage with us on this process.

Priority 3: Accelerating Infrastructure

Must win Battles: Levelling up the City Region, Post Covid Ready Places, Resilient Communities, Accessibility and Connectivity to Communities, Addressing New Challenges

Rescue 6-12 months

Government need to focus on: rapid decision making on capital spend, facilitating regions to deliver infrastructure projects, protecting key culture assets, financial support for social infrastructure (including the third sector), support places which are adapting at pace

At West Yorkshire level we will deliver:

- **£52m of our core plus proposition of shovel ready projects and delivery of the £67m Brownfield Housing Fund allocations** – linked to protecting jobs and local job creation, supporting supply chains
- **Provide support to help communities and businesses utilise suitable vacant space** for temporary and transitional use
- **Support for broadband access across the most deprived parts** of the city region
- **Facilitating regional social-infrastructure**, including a regional social prescribing pilot
- **Support for short-term green infrastructure initiatives**, including cycling and walking
- **Support shovel ready nature recovery and energy efficiency** retrofit programmes

Government ask: £50m for shovel ready energy efficiency schemes, £25m extension of Towns Fund and vacant space pilot to support places undergoing rapid change, including arts and cultural activity.

Re-imagining 1-2 years

Government need to focus on: longer term funding programmes to deliver capital and green infrastructure pipelines, re-working the Green Book appraisal programme, devolve greater infrastructure decision making

We will deliver (subject to funding)

- **Develop a net zero carbon pipeline of projects** (including energy efficiency, GBI), implementation plan and skills offer
- **Utilising the rail network** to rapidly deliver full fibre broadband & 5G mobile coverage in rural areas
- **Identify and/or develop a suitable framework** to stimulate and advocate MMC home building programmes
- **Deliver inclusive urban design**, building on learning from district Streets for People pilots to produce high quality places to live
- **Join up and maximise the opportunity** between infrastructure requirements and local skills and training opportunities
- **Deliver flood schemes** with Yorkshire Water.
- **Deliver a skills capital** programme

Government ask: £680k develop an initial pipeline of low carbon / climate investments, £3.3m skills programme. £80m skills capital investment, £10m healthtech capital

Resilience 2-5 years

Government need to focus on: funding future community resilience, including flood alleviation, zero carbon housing programmes to provide long term regional capital programmes, delivering major national infrastructure to the benefit of West Yorkshire

We will deliver (subject to funding)

- **Accelerating delivery** of Flood Risk Management schemes
- **Ensuring a long-term future proofed housing pipeline** that delivers on the needs of West Yorkshire
- Using the ABCD model, **support capital projects to develop and maintain** community hubs
- A West Yorkshire Long Range Wide Area Network (LoRaWAN) to **deliver smart city solutions for the region**
- Rollout a 100% Digital West Yorkshire programme to **support digital access and skills support**

Government ask: £108m Digital Infrastructure, £126m Flooding Programme (2021-2027) and £5m for schemes delivered with Yorkshire Water, £3m Health innovation hub.

Note: Given the uncertain nature of COVID recovery, we will need to add and refine as impacts become clear. We urge Government to engage with us on this process.

WY Kick-start Recovery Propositions – 4 distinct propositions to boost national recovery

WY Proposition 1: Health Innovation (£60m)

Why West Yorkshire?	The Ask
<ul style="list-style-type: none"> • National leadership and spending power – the decision-making centre for national policy and c.£130bn in funding • Industrial strength - there are substantially more value-adding med-tech firms here than in any other LEP area • Strength in innovation - some of the most accessible and forward thinking routes for businesses into the NHS • World-leading Research and Development - investing £100m plus for medical technology research, 8.9% of medtech patents submitted by UK • Strength in Data - distinctive longitudinal patient population cohorts (e.g. Born in Bradford) and the unique 'Leeds Care Record' 	<p>Levelling up - the rebalancing of public R&D spend to unlock private investment (£540m needed in Yorkshire and Humber to level up per person spending (Nesta, 2020)), starting with £35m for our Healthtech Strength in Places proposal.</p> <p>Act Early - initial investment to unlock a new £10m institution of people-powered, data linked population laboratories to co-produce, implement and evaluate novel early life interventions to prevent disease, improve health and reduce inequalities, including a digital skills programme for young people.</p> <p>The place for healthtech & health innovation - £15m commitment to support the infrastructure needed for West Yorkshire internationally as the centre for health tech.</p>

WY Proposition 2: Lives Transformed by Digital (£158.9m)

Why West Yorkshire?	The Ask
<ul style="list-style-type: none"> • Unrivalled digital strengths - fastest growing digital sector in the country prior to Covid-19 (employment growth of 48% between 2015 and 2018) • Coordinated leadership – regional Made Smarter Board and Digital Board have identified key digital priorities, building on our existing assets and strengths • Delivery in progress - a new digital voucher scheme focused on remote working and cybersecurity for micro and smaller businesses, 100% digital pilot in Leeds, WY superfast broadband 	<p>Made Smarter Adoption Pilot - £20m to further scale up and exploit / capitalise on opportunities particularly linked to the region's manufacturing strengths.</p> <p>Digital Enterprise - £20m to scale the already successful programme delivering digital support to SMEs, including to meet demand for hardware and cybersecurity investments.</p> <p>Digital skills and exclusion -£10.5m over 3 years to roll out the successful 100% digital inclusion pilot in Leeds across West Yorkshire.</p> <p>£108.4m digital infrastructure fund – to unlock multiple shovel ready projects - Rural Gigabit Voucher, West Yorkshire Rail Network Fibre Delivery, Extension to West Yorkshire and York Superfast Broadband, West Yorkshire Long Range Wide Area Network (LoRaWAN).</p>

3. WY Kick-start Recovery Propositions – 4 distinct propositions to boost national recovery

WY Proposition 3: Entrepreneurs (£340m)

Why West Yorkshire?	The Ask
<ul style="list-style-type: none">• Building on our diversity - One in nine (11%) business owners/directors is from a minority background in West Yorkshire, reflecting our area's diverse population• A vibrant scale up ecosystem - with more scale ups in the wider Leeds City Region than anywhere in the North• Innovation Driven Entrepreneurs – the region has been through the globally recognised MIT REAP programme – with a unique focus on solving societal challenges leading to two pilots ready for delivery – LEAP and BUILD• Capacity to do more - 7 universities, 91,000 students and 30,000 graduates, 10,000 new businesses formed each year, but only 1.4% of GVA spent on R&D	<p>Kickstart Start-Ups: £20m to deliver an entrepreneurial revolution, beginning in the short-term with easily accessible entrepreneur support, with the long-term aim of doubling of annual start-ups (20,000) with £10m of skills support.</p> <p>Unlocking Innovation Driven Enterprise - building on the above, £200m for targeted and focussed support for high growth potential pre-start entrepreneurs (including seedcorn investment) and £100m for a LCR Innovation Deal.</p> <p>Transforming empty spaces - £10m funding to unlock capacity and support for identifying and utilising suitable vacant space for use by entrepreneurs, building on the findings of the WY One Public Estate Temporary Use commission and the role particularly of culture</p>

WY Proposition 4: Transition to Net Zero Carbon (£192m)

Why West Yorkshire?	The Ask
<ul style="list-style-type: none">• Job opportunities - Climate investments can support 42,000 good jobs in West Yorkshire rising to 71,291 by 2050 (LGA 2020)• Industry strengths - West Yorkshire has unique strengths in low carbon transport, clean agri-tech, construction and circular economy that could support 40,000 jobs by 2036• Climate challenges - Around 11 million tonnes of carbon produced annually, 1 million tonnes through energy intensive industry in West Yorkshire, and a range of energy inefficient, hard to treat housing stock and high levels of fuel poverty, Over 63,000 homes and more than 27,000 businesses with flood risk	<p>Stage 1 - £50 million to accelerate over 25 schemes (£30m energy efficiency schemes improving 3500 homes, £20m for over 150 public buildings by 2022).</p> <p>£680k to develop an initial pipeline of climate investments (including White Rose Forest, nature recovery)</p> <p>Stage 2 – Commence delivery of the pipeline (see stage 1) including £131.1m to support range of flood alleviation programmes over 6 years.</p> <p>Maximising economic opportunities - £10m - develop a skills programme and £1.3m to deliver a net zero business support packages to over 150 businesses + energy and carbon intensive industry support.</p>

Delivering Impact – A plan based on evidence, with measures for success

Our plan is founded on extensive knowledge and intelligence of our region. It builds on our strengths, tackles our challenges, and understands the impact of COVID-19 on our places. We will monitor progress against our priorities through a range of indicators, aligned with our overall vision and goals to take account of economic, social and environmental measures.

Building on our strengths

- An internationally significant economy with output of £55.4 billion and a workforce of 1.1million people.
- 7 universities, 91,000 students and 30,000 graduates
- A highly diverse population, 18% BAME backgrounds (14.5% nationally), with 11% BAME business owners.
- UK's largest regional finance centre, with strengths in professional and digital services
- More manufacturing jobs than anywhere in the north (with specialisms in textiles, furniture, chemicals, machinery)
- More value-adding med-tech firms than any other LEP area, unique strengths in low carbon transport, clean agri-tech, construction and circular economy that could support 40,000 jobs by 2036
- Fastest growing UK digital sector, growing creative industries clustered around the arrival of Channel 4, and nationally significant cultural assets

Overcoming our challenges

- Underinvested in as a region, in particularly on infrastructure and R&D.
- Although increasing, productivity is persistently below national levels (86% of the UK average), with implications for earnings and prosperity
- Labour market - Strong recent improvement but employment rates remain below UK levels, with disadvantaged groups most at risk of being out of work.
- Jobs and wages - Higher level occupations have been the main source of job growth in recent years, but 21% of jobs pay less than the Living Wage Foundation's Living Wage rate and 29% of employees are not in good quality work.
- Deprivation - More than 1 in 5 people (517,000 people) live in areas amongst the most deprived 10% in England. Relative levels of deprivation have got worse between 2015 & 2019.
- Environment - Around 11million tonnes of carbon emitted annually, with 1 million

Impacts of COVID-19 to date

- Currently 130,000 Universal Credit claimants (84% increase in April/May) and an estimated 344,000 people on furlough
- Economic output down by up to 90% across some sectors in Q2 of 2020, (March Leeds city centre footfall down 90%; Leeds station down 95%; bus smart card use down 92%)
- 1/3 businesses say disruption to their supplier base poses a risk to their business operating successfully as lockdown eases
- Independent Training Providers anticipate a 70% drop in learners from September
- Around 3/4 of businesses expect social distancing to be in place for 3-12months
- 22% of businesses expect the move to home working to be in place permanently
- Recovery scenarios of GVA contracting between £5.8 billion and £12.1 billion in 2020 (22% fall in GVA), with potential further contractions in 2021.
- Recovery scenarios of between 30,000 and 58,000 jobs potentially lost in 2020 with levels potentially suppressed to Q3 2025.