The productivity push

Powering the UK's performance with five digital capabilities

The productivity challenge

UK productivity has disappointed for more than a decade. This is not the technical preserve of economists; it's a predicament that weighs on business competitiveness, living standards and the UK's standing in the world. Questions around how we can boost productivity have commanded countless column inches over recent years—but little progress has been made. And with kickstarting economic growth and growing labour supply limitations in the spotlight, the onus today is on the executives and boards of UK companies to boost output per worker. This does not mean working people harder—many employees are already feeling fatigued and overwhelmed as we move from one crisis to another. Instead, it means using technology to help people work smarter. And we must act fast—neither companies nor the country can afford to wait.

So, what's the solution? **Impactful new research from Accenture and Frontier Economics finds that by building five digital capabilities, UK companies could add £33 billion to national output in 2030.** This means adding 1.5pp to growth—more than doubling the forecast rate of economic expansion. Spanning the value chain, these capabilities are enabling leading organisations to adopt and exploit a new wave of technologies, such as machine learning and extended reality, which help workers overcome the time, distance and knowledge gaps that weigh on productivity.

Realising this potential is not a walk in the park. These capabilities rely as much on human ingenuity as they do on technology—so creating a culture of change to enable employees to reimagine their work and investing in upskilling cannot be overlooked. Organisations and their delivery partners must also overcome a vicious, failure-inducing cycle that impedes digital transformation projects: weak ambition, anaemic investment and tentative delivery. But by confronting and dismantling these barriers, organisations can unlock the power of digital to boost competitiveness and drive growth.

Figure 1: **Five digital capabilities**

Capability	01 **High-performance processes** Raising performance through more intuitive, data-driven management processes.	02 **Intelligent operations** Driving employee engagement and productivity through data-enabled, flexible operating models.	03 **Rapid innovation** Reimagining what you make and how using the combined power of data and digital.	04 **Customer-led design** Improving the customer experience through technology platforms that combine human and AI-powered insights.	05 **Physical asset optimisation** Increasing asset reliability, boosting profitability and reducing risk through self-optimising operations.
% Total GVA impact	37%	27%	14%	13%	9%
Key areas of opportunity	Financial services; Public administration and defence; Professional services	Agriculture, forestry and fishing; Construction; Education	ICT; Arts, entertainment and recreation; Utilities	Wholesale and retail trade; Health; Accommodation and food services	Manufacturing; Construction; Transportation and storage

How to turn digital potential into productivity

Across all industries, expectations of business continue to grow to deliver better products, services and content, but more sustainably. To provide their people with agency and purpose—as well as salaries which keep pace with the surging cost of living. And to maintain the speed and scale of business transformation sparked by the COVID-19 pandemic.

Meanwhile, economic headwinds are gathering pace: UK productivity is weak and may even be in decline.[i] Little wonder that 81% of the 325 UK executives we surveyed earlier this year said they expect the next three years will represent the most challenging operating environment they've faced.[ii]

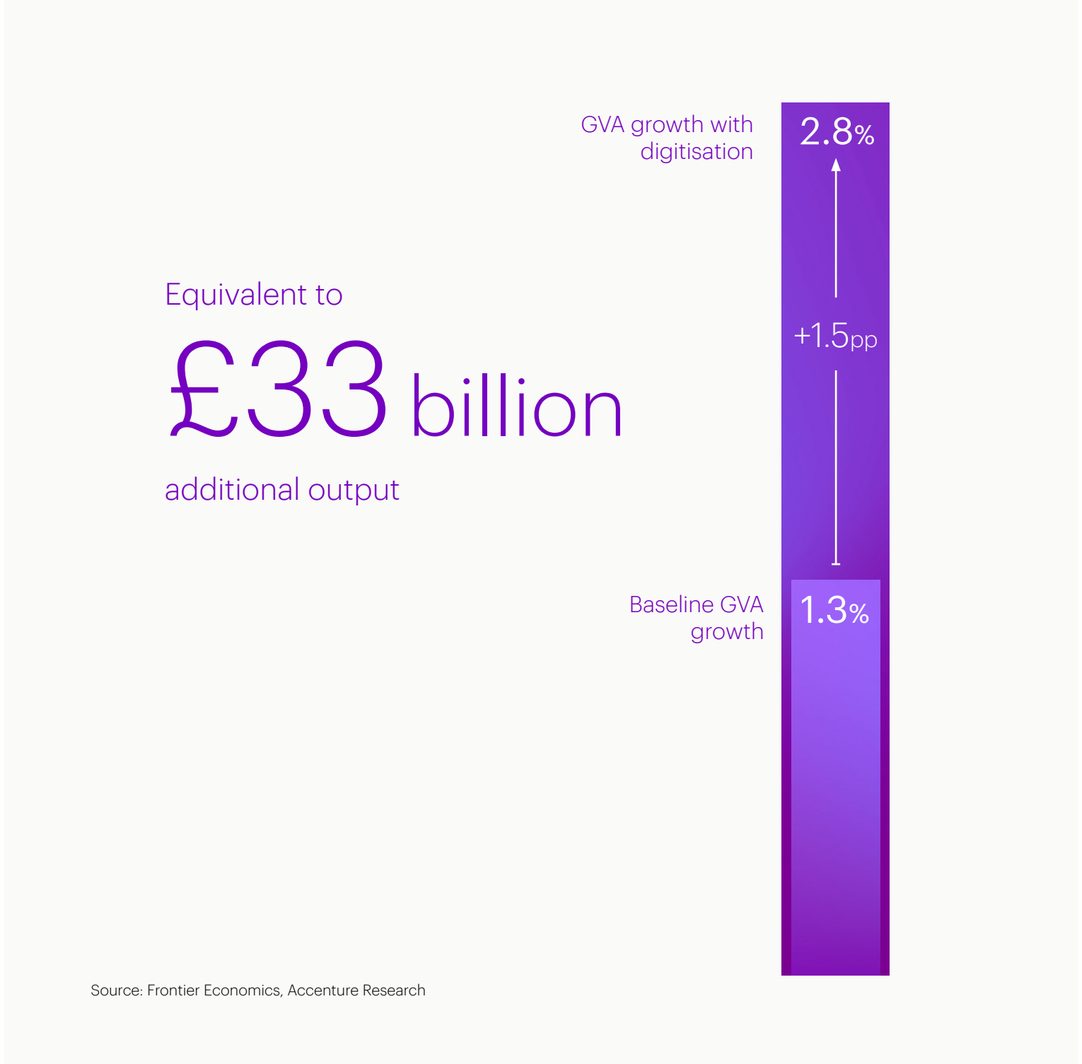
Boosting competitiveness is critical if UK businesses are to meet this challenge. Cutting costs, especially in today's high-inflation environment is one option, but this needs to be weighed against the renewed drive for resilience following recent (and ongoing) supply chain and energy shocks. Actually, a more pragmatic solution is boosting employee productivity. This doesn't mean working your people harder—the adrenaline rush of recent high-energy sprints has faded. As we move from one crisis to another, many employees are feeling overwhelmed and fatigued. Instead, businesses must ask how they can help their people work smarter.

Digitisation is a rich potential source of efficiency. From call centre staff using artificial intelligence (AI) to better understand customer needs to engineers identifying a machine malfunction faster by studying its digital twin, to new hires getting up to speed quicker through extended reality training, digitisation can—if backed by commensurate investment in training—save your people time. Time that can be spent doing more and higher value-added activities.

But why then, despite massive investment in digital over recent years, have promised productivity gains failed to materialise? Research from the OECD pinpoints a lack of complementary digital capabilities as one cause.[iii] It finds that a group of highly productive 'superstar' organisations moved quickly to build the capabilities needed to translate investment into adoption and unlock the power of digitisation. Moreover if slower-moving competitors fail to adapt, they may miss out on the productivity premium the superstars enjoy as a new wave of advanced technologies appear.

Working with Frontier Economics, we designed a model to quantify the impact of mitigating these digital capability gaps between companies. We asked what would happen to national competitiveness if all UK businesses built five digital capabilities across the value chain: high-performance processes; intelligent operations; rapid innovation; customer-led design; and physical asset optimisation. **Our analysis finds that this would more than double UK gross value added (GVA) growth in 2030: from 1.3% on current estimates to 2.8%.** And at a time when real wages are falling, it's notable that 74% of these returns accrue to labour in the form of higher wages commensurate with the higher value-added activities these workers can take on.

The potential of digitisation to drive productivity has disappointed for too long. A recent study found that 97% of executives believe digital transformation efforts are failing to drive new growth.[iv] As UK businesses look beyond the current economic doldrums, the five digital capabilities we've identified present an opportunity to sustain the entrepreneurial spirit stimulated by the pandemic and boost national competitiveness.



Source: Frontier Economics, Accenture Research

Economic headwinds become a gale

UK businesses are under severe pressure. Energy and transportation costs have risen, supply chains are gummed up, the labour market remains tight (for now), sterling has dropped sharply and inflation is hovering around a 40-year high, sending the cost of finance soaring. With the Bank of England forecasting a recession lasting well into 2024 and consumer confidence at its lowest since 1974, executives are understandably concerned.[v, vi]

Data from the November Accenture/S&P Business Outlook finds that net +18% of UK private sector firms forecast activity to increase over the next 12 months. This is the lowest since the survey began in October 2009, and continues a decline from +28% in July and +56% in February. Respondents also reported a negative outlook for profits: falling to -13% over the quarter, from -2% in July and +24% in February. This, in turn, has seen companies further rein in their CAPEX (-6.9%) and R&D investment (-8.0%) plans.

Brexit and the COVID-19 pandemic have undoubtedly added complexity, at least in the short term. **The widely applauded response to the pandemic raised expectations of how quickly and efficiently businesses could reinvent themselves.** But in the shadow of the Ukraine war, hopes that business would be able to maintain its pace of transformation feel increasingly unrealistic.

Supply chain delays[vii]

66%

Proportion of businesses surveyed by SAP which have experienced delays in production of goods/delivery of services.

Job vacancies[viii]

1.27million

job vacancies in 'historically tight labour market.'

Inflation[ix]

10%

Expected rate of inflation for 'the next few months.'

Tech investment is falling short

It's worth noting, though, that competitiveness concerns precede the recent shocks to the UK economy. In the decade to 2020 following the financial crisis, UK output per hour (a measure of labour productivity) grew by 7.4%, compared with 9.4% in the G7 and 12.6% across the OECD.[x]

This relative underperformance can be explained in part by low levels of business investment. In the late 1990s, business investment in the UK was on a par with France, Germany and the US at approximately 10% (as a proportion of GDP). Today, while other countries have stepped up their investment levels, the UK has broadly maintained its low level of investment and is now lagging behind global competitors.[xi] UK investment in information and communications technologies (ICT) is similarly weak at just half the rate of France and the United States.[xii]

This shortfall highlights a clear solution. A new wave of technologies, from machine learning and digital twins to cloud computing and extended reality, is helping companies overcome the constraints that held back economic and societal growth and development. These technologies allow companies to push past existing boundaries by compressing time (e.g. gaining new skills or prototyping), distance (both physical and cultural) and knowledge (i.e. discovering new ideas).

A recent Accenture paper found that those companies which stepped up their tech investment during the pandemic are growing revenues five times as fast as peers who did the opposite.[xiii] Investment in digital therefore offers an opportunity for bold, innovative UK companies to boost their competitiveness.

Figure 2: **Labour productivity; % growth in output per hour 2010-2020**

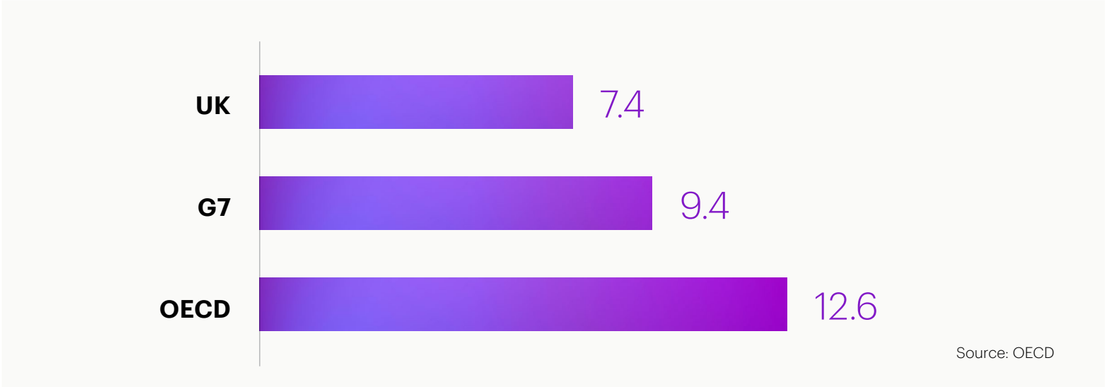
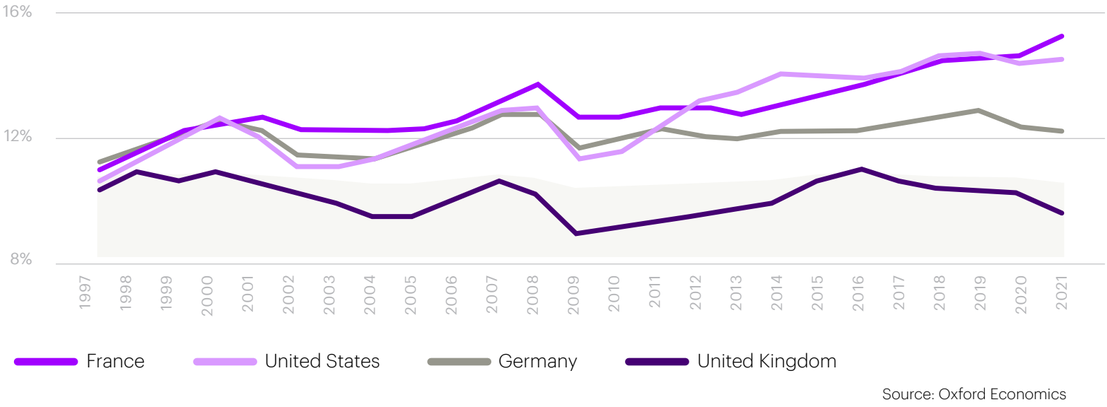


Figure 3: **Business investment; % GDP; 1997-2021**



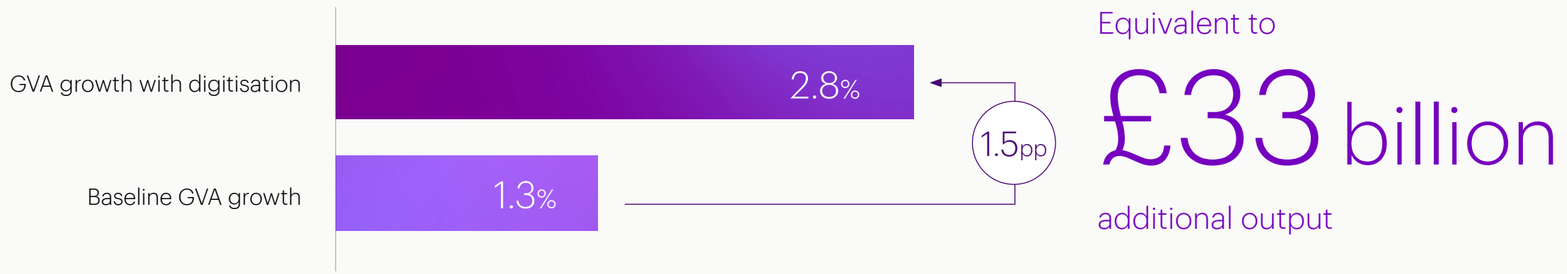
How digital adoption and exploitation impacts productivity

Investment is only one half of the digital transformation equation. The other half is adoption—a critical driver of change which is too often overlooked.[xiv] A company can buy the most advanced system or machine available, but if it's not being used it won't boost competitiveness. **The full potential of technology can only be realised when matched with relevant human skills.** This potent combination enables new capabilities that unlock worker productivity—both physically and cognitively.

To estimate the potential returns to the organisations that build the five key digital capabilities—high-performance processes; intelligent operations; rapid innovation; customer-led design; and physical asset optimisation—we worked with Frontier Economics to understand their potential to drive worker efficiency (see Appendix for further detail). **Pervasive development of these capabilities could produce big rewards of up to £33 billion in additional output in 2030, equivalent to an increase in UK GVA growth from 1.3% to 2.8%** (see Figure 4).

More importantly, given the current context of falling real wages, most of these potential returns accrue to labour. Our model shows that the gross operating surplus (GOS) of UK companies could be £8.7 billion higher in 2030. This means that the remaining 74% of the GVA increase goes to wages due to worker time being freed up to tackle higher value-added activities—and being paid more as a result.

Figure 4:
UK businesses harnessing digital capabilities to augment their workers could unlock £33 billion in additional GVA in 2030



Source: Frontier Economics, Accenture Research

Why the impact of digitisation might be even greater

The £33 billion potential boost to GVA is significant. To put it into context, this figure is more than double what the UK government estimates a free trade agreement between the UK and the United States could generate—an increase in trade between both countries is estimated to generate £15.3 billion in approximately 15 years.[xv]

However, the true figure may be higher for several reasons:

New technologies (or uses of existing technologies) may emerge over the forecast period.

Some tasks or even roles can be automated, freeing up even more worker time for higher value-added activities.

Technology can drive productive efficiencies in the ways in which capital and labour are used in tandem (i.e. Total Factor Productivity).

There are capabilities beyond the five that we modelled that could be digitised.

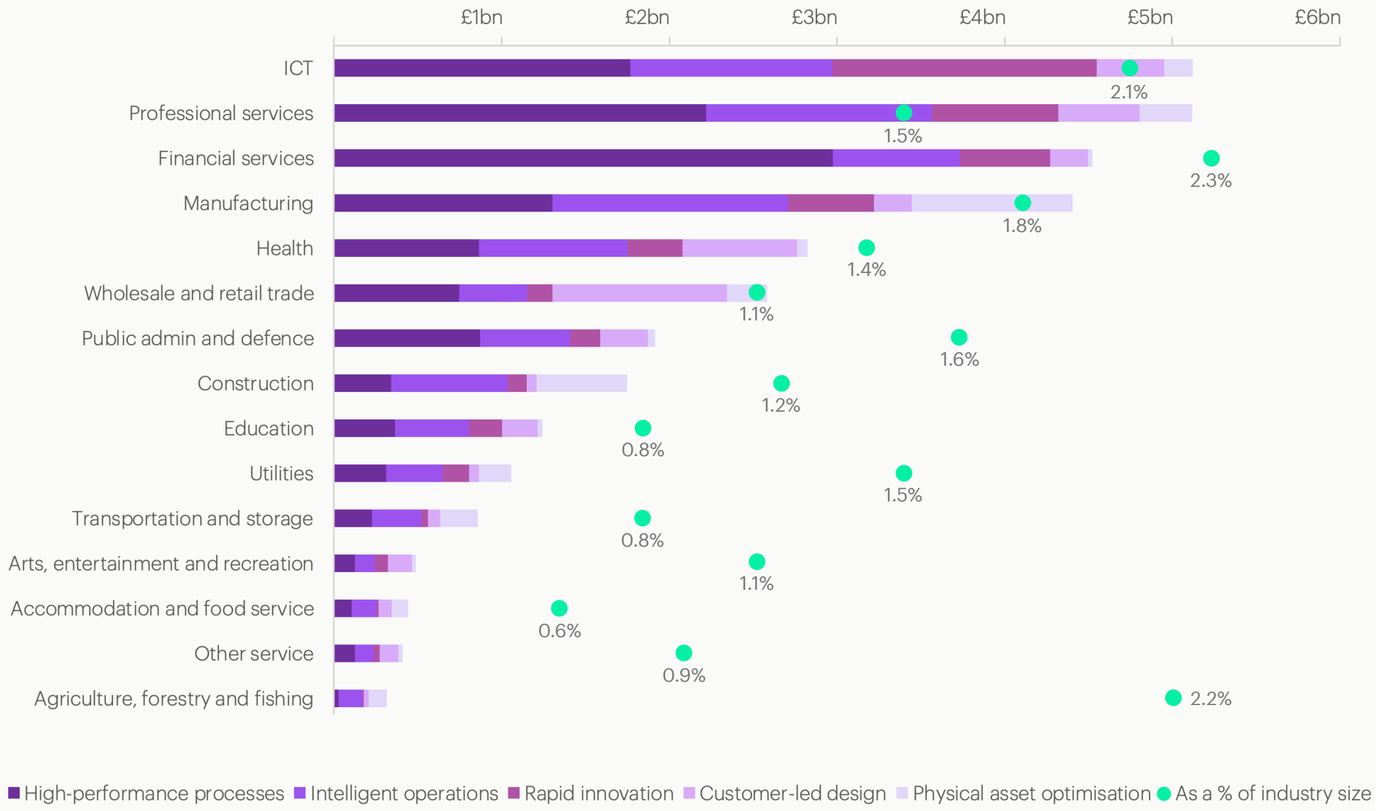
Some of the UK's largest industries have the most to gain

At a more granular level the model shows that the impact of technology adoption isn't uniform across industries (see Figure 5).

The overall size of the impact is largely explained by the size of the industry (e.g. the current GVA of professional and administrative services is much larger than accommodation and food service activities). **Even accounting for size though, some of the largest industries in the UK—financial services (2.3%), ICT (2.1%) and manufacturing (1.8%)—could see the biggest increases in GVA.**

We also see significant variation in terms of GVA uplift by digital capability. This is explained by the mix of job roles within different industries. For example, companies in manufacturing rely heavily on fixed assets (such as machinery) so could benefit relatively more from physical asset optimisation. By contrast, companies in industries pushing the digital frontier forwards, like ICT, stand to gain relatively more from rapid innovation.

Figure 5:
Additional GVA growth in 2030 by industry and digital capability; overall (GBP billion, 2022 prices) and as a share of industry GVA



Source: Frontier Economics, Accenture Research

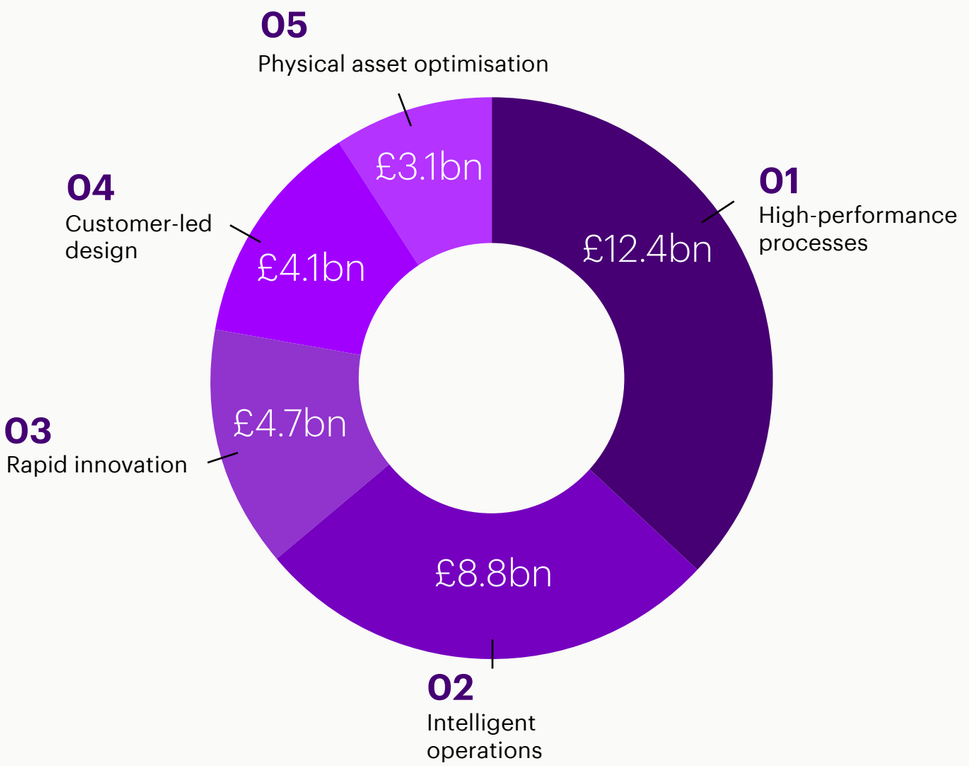
A closer look at the five digital capabilities

Our model covers the broad value chains of most UK companies—from how new products and services are developed to how customers interact with them.

High-performance processes are the capability with the strongest potential to drive enhanced competitiveness across UK businesses (£12.4 billion), which reflects the importance of services to the UK economy. This is followed by intelligent operations (£8.8 billion) which offers comparatively strong potential to boost competitiveness across all industries.

By contrast, physical asset optimisation (£3.1 billion) offers a much smaller potential uplift. Some industries could benefit significantly from building this digital capability, but they account for a relatively smaller share of UK economic output.

Figure 6:
Additional GVA growth in 2030 by digital capabilities (GBP billion)



Source: Frontier Economics, Accenture Research

01 High-performance processes

Driving performance through more intuitive, data-driven management processes.

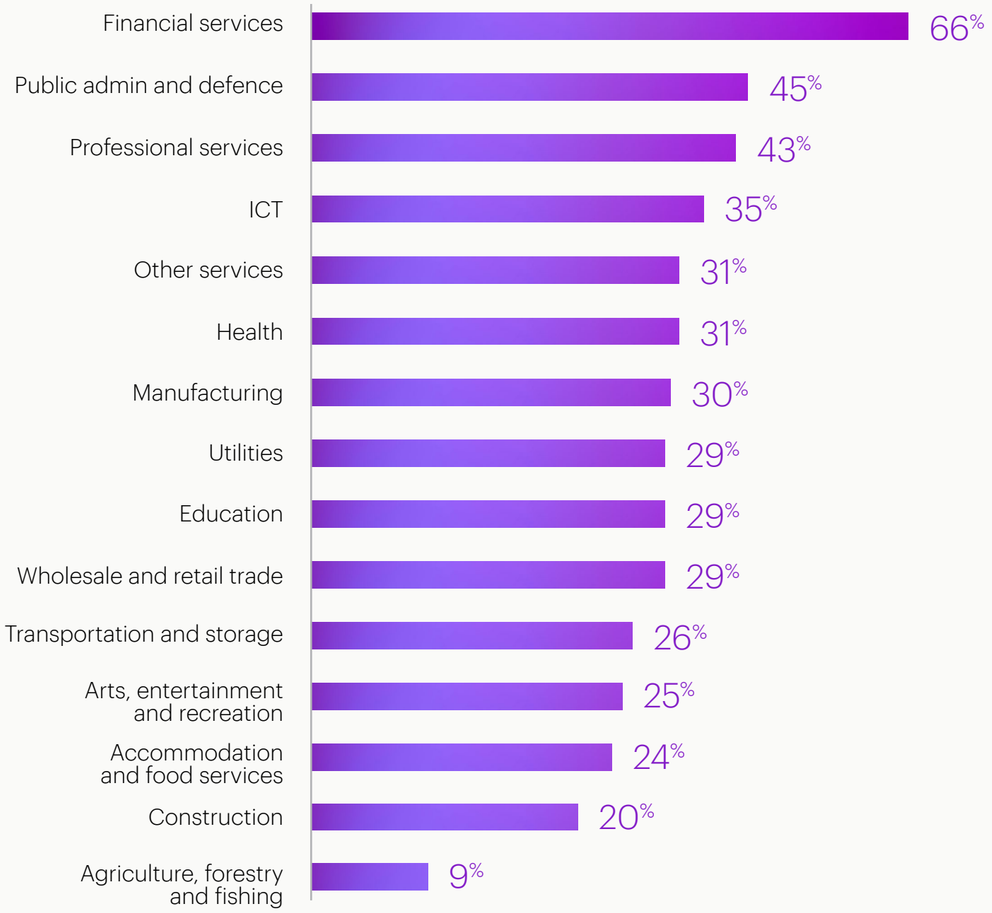
Management processes govern how things get done. They determine how an organisation interacts with its different business units. They improve the flow of data—relating to everything from employees and suppliers to marketing and manufacturing—to improve interactions between people, processes and technology. For example, human capital management systems can boost efficiency in everything from employee communications to payroll.

To drive higher performance process management, leading organisations mine process data and judiciously automate to ensure consistent performance. This offers a host of benefits from better resource management and more efficient operations to reducing mistakes and better-quality customer service.

Industry view

Companies in knowledge industries, which rely on information flowing quickly and seamlessly across business units, stand to gain the most from building this digital capability. In financial services, this area accounts for 66% of total GVA gains, followed by public administration (45%), professional services (43%) and ICT (35%). However, it also offers significant efficiency gains for companies in less knowledge-intensive industries, like manufacturing and utilities (30% and 29% respectively).

Figure 7:
Proportion of total industry GVA growth in 2030 associated with high-performance processes



Source: Frontier Economics, Accenture Research

Capability in action

A global bank was struggling with high operating costs and low profitability in its car loans business. It identified inefficiencies in the approval process at car dealerships: the process was lengthy, manual and involved high commission rates. Up to 50% of applications were rejected due to manual errors or the failure of the applicant to meet financial requirements.

The bank engaged Accenture to reduce back-office costs and improve the efficiency of its auto loans process by integrating the entire origination process. We developed a new digital business experience which virtually eliminates manual transactions, redundancies, paper and human errors. It also allows all key stakeholders to view the status of the application in real time from anywhere (via a mobile app).

These new capabilities helped the bank grow car loan sales by 50% as well as reduce total costs by double-digits (in percentage terms).[xvi]

02 Intelligent operations

Driving employee engagement and productivity through data-enabled, flexible operating models.

From marketing and logistics to procurement and production, business operations are increasingly recognised not simply as costs of doing business but as key drivers of revenue growth. This evolution is underpinned by the adoption of new technologies that drive efficiency and insights and boost worker capabilities. For example, digital procurement systems can mitigate risk, inform decision-making, boost sustainability and reduce costs.

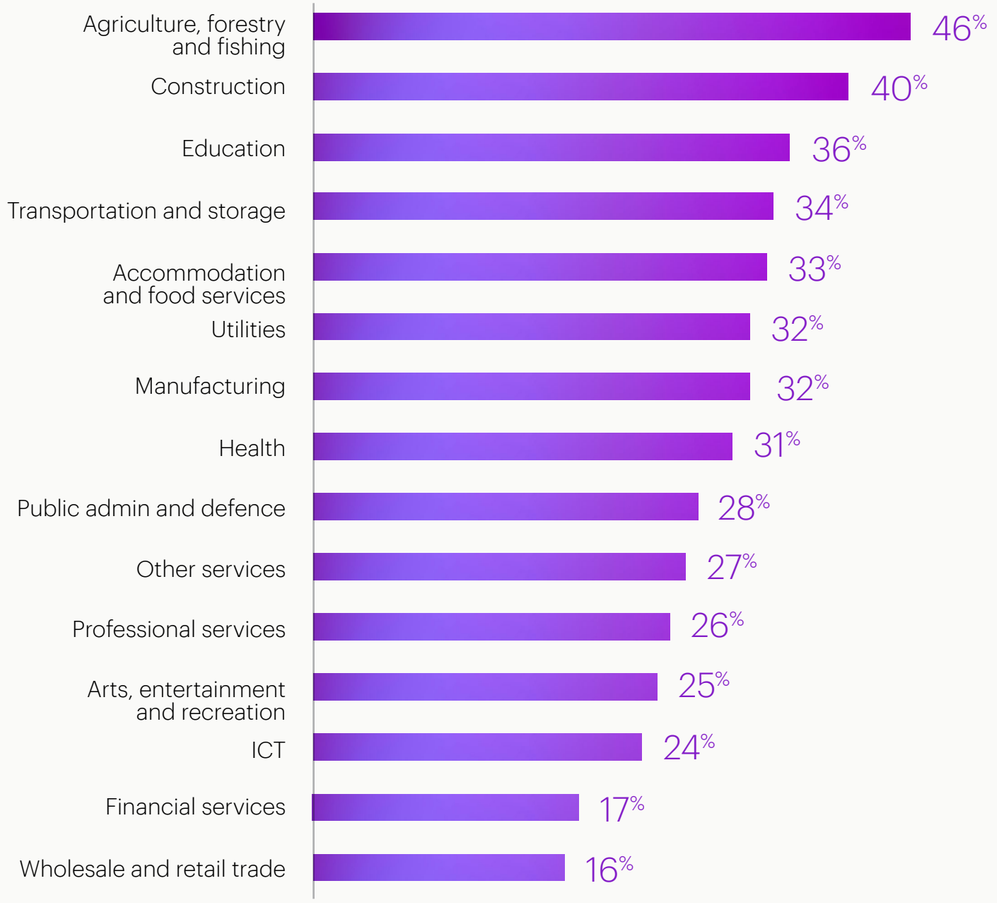
An Accenture study which segmented companies into four levels of digital operational maturity found that the most advanced—the 'future-ready' organisations—enjoy a 2.8x corporate profitability premium and 1.7x higher efficiency compared with peers. These organisations are differentiated by their adoption of digital practices including scaling with AI, agile 'human + machine' workforce strategies and the pervasive use of analytics to drive better decision-making.[xvii]

Industry view

Intelligent operations accounts for 27% of the potential gains in GVA from our digitisation model. Among the UK's larger sectors, the GVA gains in manufacturing—£1.4bn or 32% of total industry uplift—reflect the potential of technologies like robotics to boost efficiency on assembly lines. The relative increases in efficiency associated with this capability are also the largest in agriculture, forestry and fishing (46%), construction (40%), education (36%), transport and storage (34%), and accommodation and food services (33%).

Figure 8:

Proportion of total industry GVA growth in 2030 associated with intelligent operations

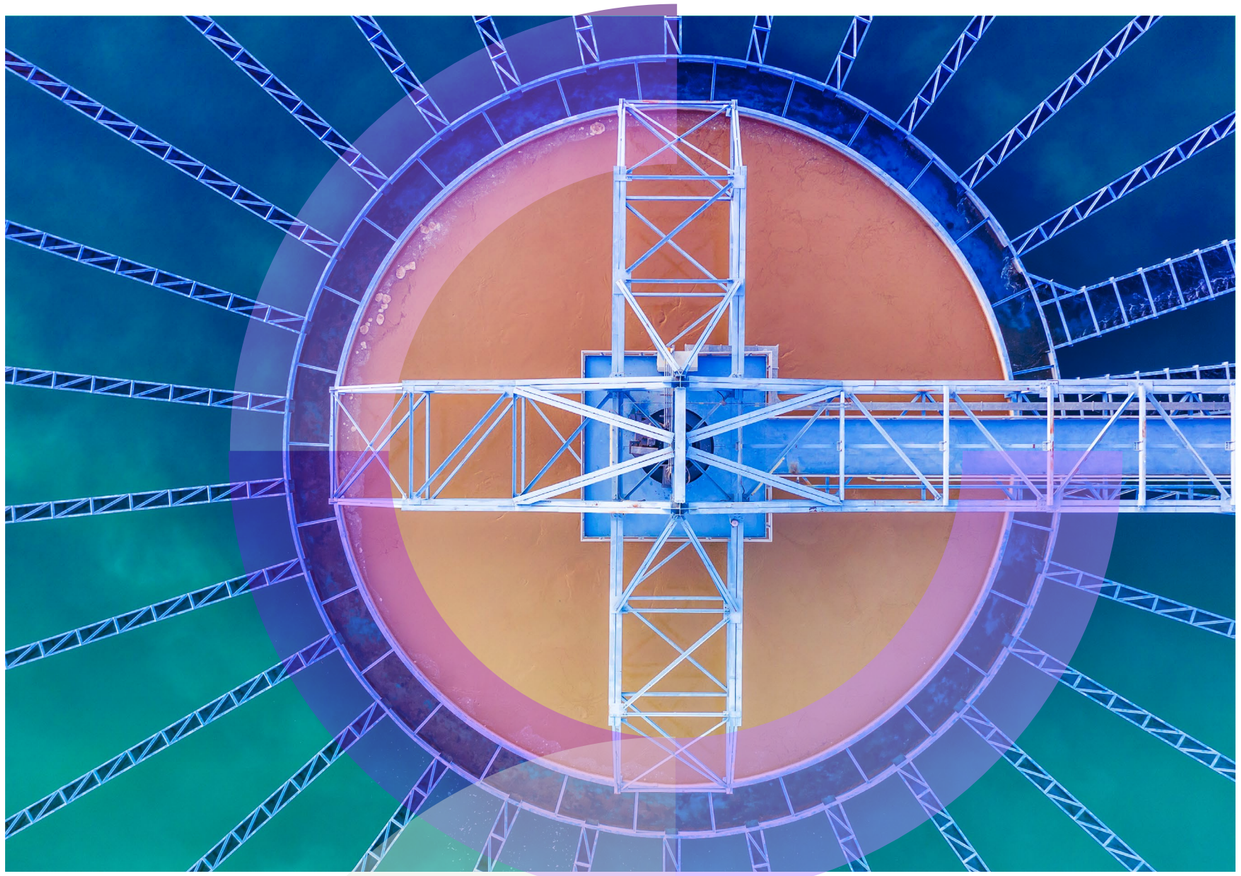


Source: Frontier Economics, Accenture Research

Capability in action

Thames Water serves 15 million people across London and the surrounding area and schedules over 700,000 repair and maintenance jobs a year. However, contact centre and field teams didn't have a complete view of the available information due to a fragmented legacy IT estate. This had a negative impact on customer service.

Thames Water engaged Accenture to design and implement a single data-driven, end-to-end solution consolidating 13 existing systems across the customer services, work scheduling and dispatch, and field engineer teams. Previously manual processes are automated to improve accuracy and efficiency of the field engineer work schedule and provide clear visibility of all work in the system to enable data-driven decision-making. The impact on customer experience is impressive: key customer touch point success rates rose from 63% to 96%, and complaints are down by 70%.[xviii]



03 Rapid innovation

Reimagining what you make and how using the combined power of data and digital.

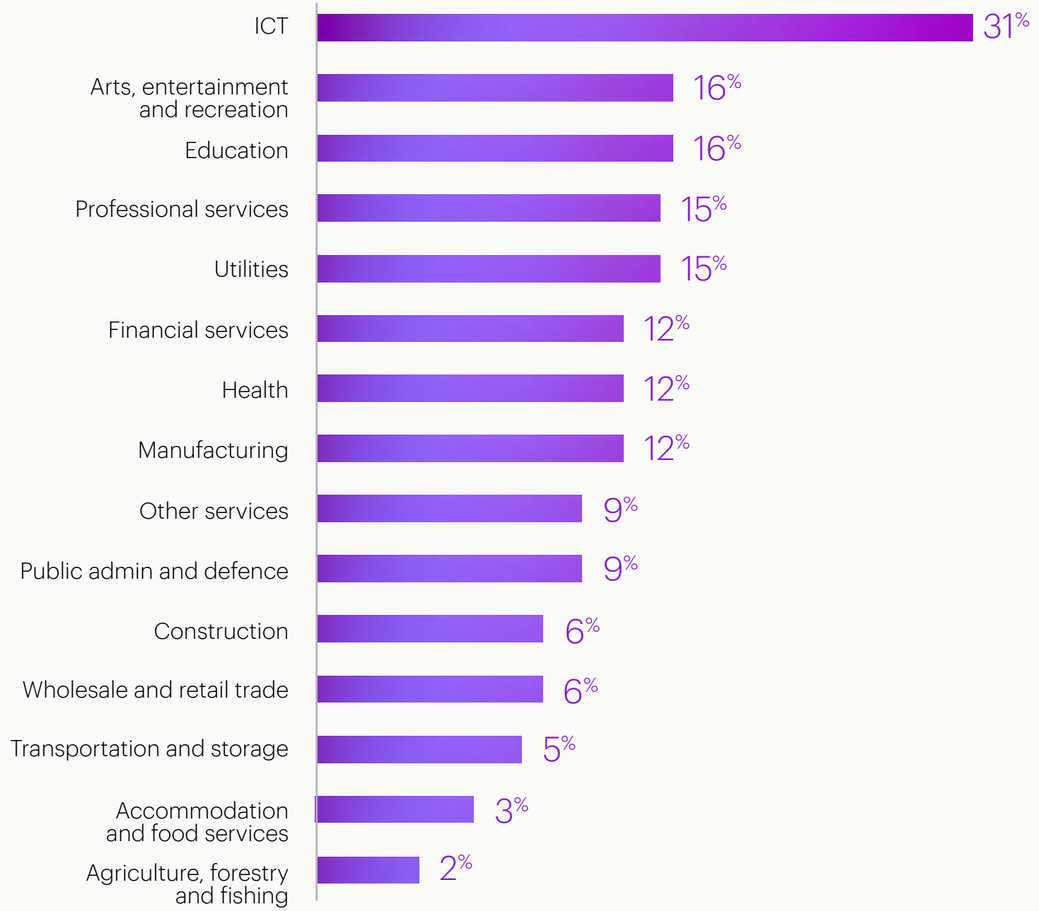
Companies can turbocharge innovation to improve speed-to-market across the product lifecycle, from design and engineering, sourcing and supply to manufacture, service, return and renewal. And they can do this while boosting resilience, productivity and sustainability. For example, digitising engineering and product data, and building full digital twins underpinned with AI, can reduce time-to-market by up to 40%.[xix]

However, as a percentage of GDP, UK spend on R&D (1.7%) has stagnated over the past 20 years, well below levels in France (2.2%) and Germany (3.2%).[xx] Accenture analysis found that only 22% of large industrial organisations globally are successfully scaling digital innovation—i.e. they translate successful digital proofs of concept into growth and profitability.[xxi]

03 Industry view

In our model, rapid product and service innovation accounts for 14% of total GVA uplift. This more than doubles to 31% (or £1.6 billion) in ICT. Companies in this industry not only drive the technology frontier forward but stand to benefit most from technologies which support rapid experimentation and prototyping like 3D printing and extended reality. Digital twins and robotics could also help to boost GVA in industries like utilities (15%) and manufacturing (12%).

Figure 9:
Proportion of total industry GVA growth in 2030 associated with rapid innovation



Source: Frontier Economics, Accenture Research

Capability in action

BMW produces 2.5 million vehicles per year, of which 99% are custom. To boost the precision, speed and efficiency of its planning processes, BMW is working with software company Nvidia to build a digital twin. In this photorealistic ‘future factory,’ people and robots work together and engineers collaborate in a shared virtual space.

The platform boosts worker efficiency in several ways. For example, it allows people in different locations to work together in a virtual setting to plan and optimise details of a process or production system before they’re implemented. This also makes it easier to discuss and integrate changes with suppliers. Implementing any changes live should speed up decision-making by allowing production planners to visualise the entire planning lifecycle in every factory.[xxii, xxiii]

04 Customer-led design

Improving the customer experience through technology platforms which combine human and AI-powered insights.

At a time when consumer choice has never been higher—and the cost of switching to a new brand never lower—customer experience has become a vital source of differentiation. However, many businesses are struggling to keep pace. A recent Accenture study found that a staggering 92% of UK executives think their customers are changing faster than their businesses can keep up.[xxiv]

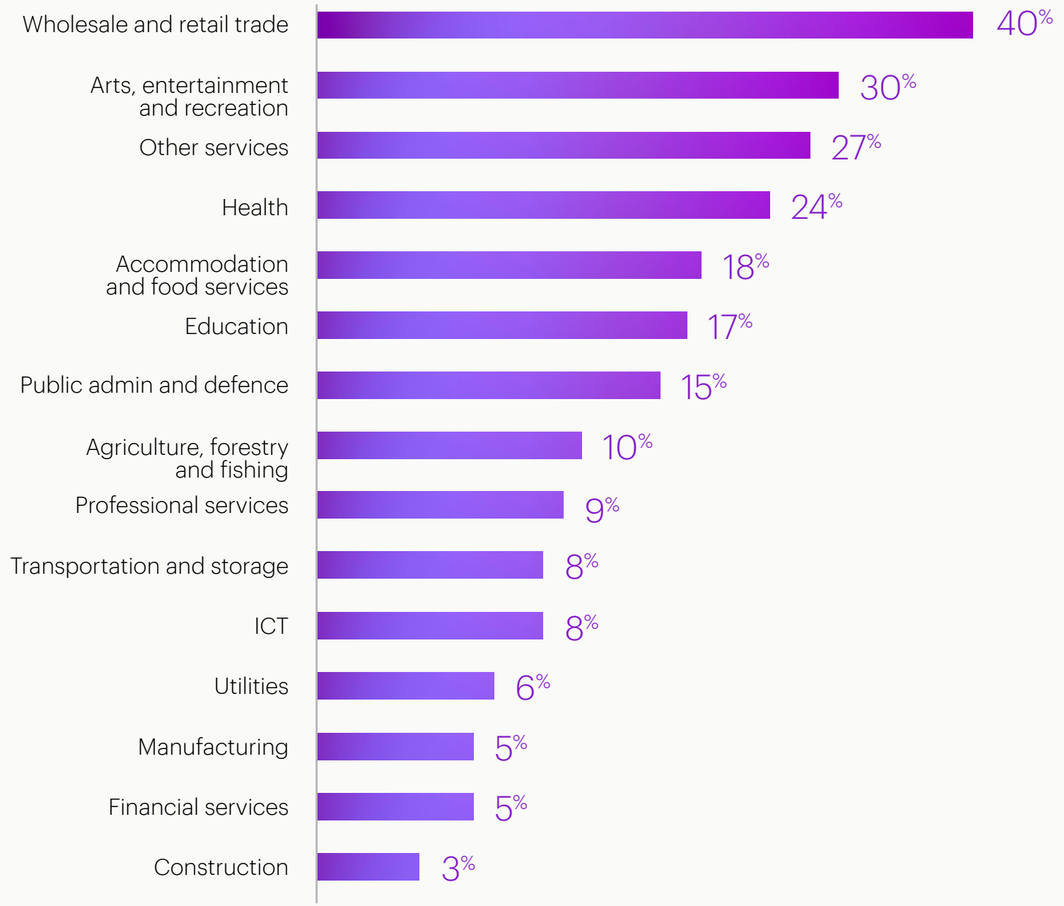
The digitisation of customer experience can narrow this gap by helping organisations understand their customers better—and respond to their needs and wants more quickly. For example, layering AI over a robust, unified customer data platform helps agents offer more personalised, precise and empathetic care—and helps chatbots surface better recommendations.

Industry view

Customer-led design accounts for just 13% of the potential gains in GVA. However, this climbs significantly in tertiary (customer-facing) industries. For example, this capability accounts for an outsized proportion of the total uplift in wholesale and retail trade (40%), arts, entertainment and recreation (30%) and health (24%). In these industries, workers using tech like AI can optimise recommendations, offer individually tailored experiences and reduce friction in the customer journey.

By contrast, the relative impact of customer-led design in secondary industries like construction (3%) and manufacturing (5%) is much lower.

Figure 10:
Proportion of total industry GVA growth in 2030 associated with customer-led design



Source: Frontier Economics, Accenture Research

Capability in action

A global pharmaceutical company wanted to drive growth across its global footprint. It pinpointed the need to improve marketing efficiency through greater messaging consistency, maximising the reuse of assets and reducing costs. However, this had to be achieved within the complex regulatory and compliance environment of life sciences.

The company partnered with Accenture to build a fully personalised, data-driven, experience-led marketing capability. This was deployed in 40 markets with the ability to surface more than 200 pieces of content at any given time through an ‘always-on’ global delivery framework. The impact includes a 3-5% uplift in revenue through greater speed-to-market and cost savings of £30 million over three years.

05 Physical asset optimisation

Increasing asset reliability, boosting profitability and reducing risk through self-optimising operations.

Too many companies still rely on reactive physical asset management: an asset works until it doesn't, at which point it is fixed or replaced. The result is unplanned downtime, leading to disappointed customers and higher maintenance costs.

By contrast, digital (or intelligent) asset management—underpinned by technologies like the internet of things (IoT) and data analytics—streamlines workflows and delivers more resilient operations. It moves the company onto a more proactive footing, helping to solve underlying problems—rather than treating symptoms—and reduces both costs and environmental impact along the way. Companies working with Accenture and SAP in this area have improved maintenance productivity by up to 25% through standardised processes and increased the speed of workflow execution by up to 30%.[xxv]

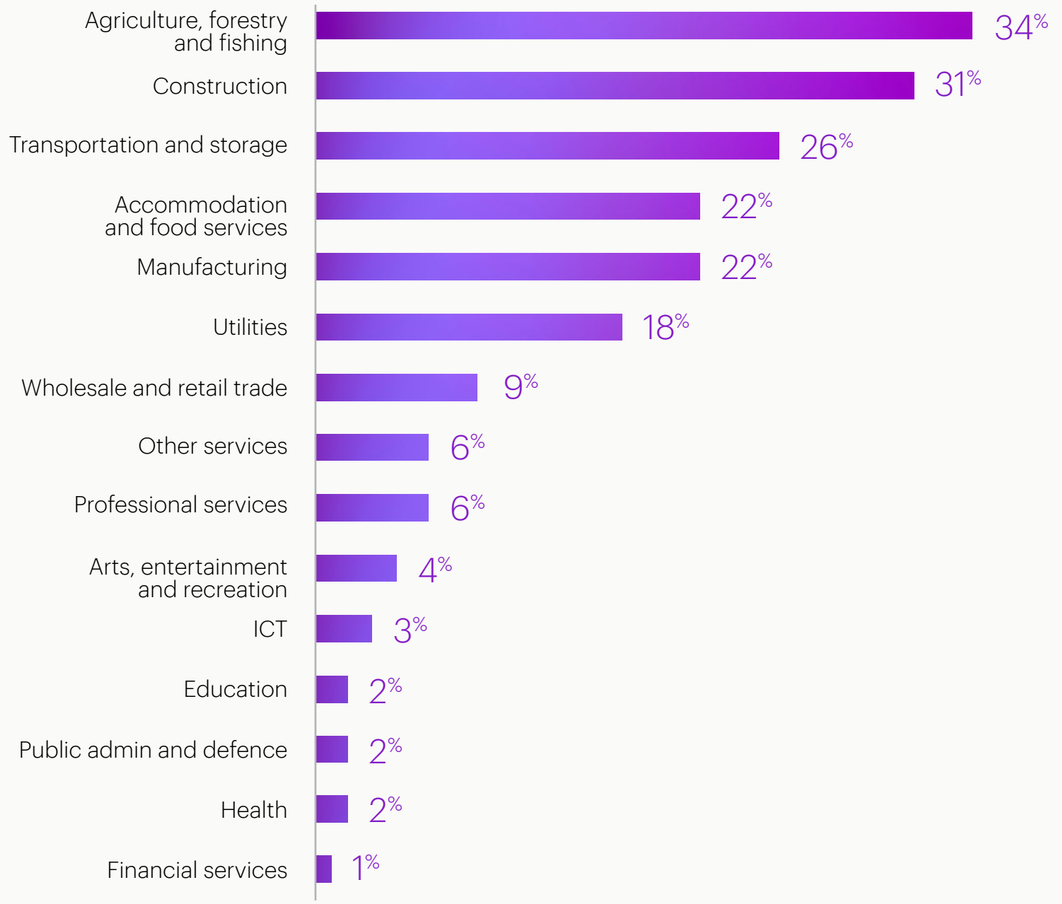
Industry view

At 9%, the uplift in GVA associated with physical asset performance is the smallest of the five digital capabilities included in our model. However, this naturally increases for more asset-intensive industries. It accounts for a third of the uplift in agriculture, forestry and fishing (34%) where unplanned asset downtime might result, for example, in shortened harvest periods and therefore reduced output. Construction (31%), manufacturing (22%) and utilities (18%) are other industries which stand to gain significantly more than average from building this capability.

This approach was developed in collaboration with Frontier Economics

Figure 11:

Proportion of total industry GVA growth in 2030 associated with physical asset optimisation



Source: Frontier Economics, Accenture Research

Capability in action

Coriance is a French energy company that supplies heat to residential, social and commercial buildings, and sells electricity to state-owned utility EDF. The company wanted to improve efficiency to fund investments in renewable energy production. For example, engineers had to manually enter data into complex spreadsheets, making it impossible to analyse power meter data from one centralised location, let alone use it to improve asset performance, increase power production or adjust it to avoid problems.

Coriance engaged Accenture to digitally upgrade and modernise its operations. This included the development of an intelligent data visualisation dashboard—a predictive platform which gives engineers real-time insight into all aspects of asset performance across Coriance's power plant systems. This helps the company to optimise asset performance as workers can quickly spot and act on opportunities for operational improvement and cost savings, and it immediately flags discrepancies at substations and heating networks.[xxvi]

Three barriers to realising the potential of digital

The business (and economic) case for building these five digital capabilities is clear. The key question is what's holding organisations back from seizing the opportunity to maximise the potential of digitisation and boost competitiveness?

Our extensive work on digital transformation across the UK and beyond highlights three key barriers to overcome.

Ambition

Many UK leadership teams and boards simply don't understand the art of the possible when it comes to digitisation and are therefore failing to set the ambition needed. Too often, digital expertise—and the capacity to fully grasp its potential—remain siloed in the IT department or niche operational capabilities. By contrast, leading organisations develop enterprise-wide digital transformation strategies informed both by the value peers achieve with digital and their approaches for doing so. This allows them to set direction for their businesses and people built on informed ambition.

Investment

The old delivery model of high upfront costs, distant returns, weak execution and fragmented accountability is rightly challenged by investors. The once fashionable alternative proof of concept model rarely delivers meaningful impact as changing a business at scale is hard to do. We see successful organisations building 'value roadmaps' informed by real examples. These give the staged outcomes and scope needed to build confidence while informing investments and risk, and retaining clarity, on the path to a scaled end point.

Delivery

The success of digital transformation is patchy—it seems good in-house leadership is not enough. Indeed, research indicates that just one-in-eight companies meet their own expectations when digitising business processes and services.[xxvii] This is often because investments in upskilling, relative to those in technology, are deprioritised. We see organisations tackling this execution risk by looking not at what potential partners promise, but at what they have done to ensure investment leads to adoption and efficiency gains. We also see clients moving away from theoretical best of breed approaches; they increasingly recognise that when they fragment accountability, they are left carrying all the delivery risk.

In truth, many companies face a vicious circle of productivity paralysis where failures in each of these three areas reinforce a position of weak ambition, anaemic investment and tentative delivery. But when the cycle is reversed, they unlock bold ambition, strong investment and confident delivery.

Learn more

We'd be delighted to discuss our findings in more detail with you—and to consider the art of the possible in the unique context of your organisation.

Ultimately though, whoever you choose to partner with, the time for bemoaning the UK's stagnant productivity is over. Executives and boards must finally realise the untapped potential of digital to boost not only the competitiveness of their organisations but also living standards and the UK's standing on the world stage.

To understand how Accenture can help your business build and strengthen each of the five digital capabilities, follow the links below:

High-performance processes
Driving performance through more intuitive, data-driven management processes.

Intelligent operations
Driving employee engagement and productivity through data-enabled, flexible operating models.

Rapid innovation
Reimagining what you make and how using the combined power of data and digital.

Customer-led design
Improving the customer experience through technology platforms which combine human and AI-powered insights.

Physical asset optimisation
Increasing asset reliability, boosting profitability and reducing risk through self-optimising operations.

Modelling methodology

1.
Identify work activities to augment

- We assume that enhancing work activities that are both important and require a high level of proficiency (top 10%) within a given occupation ('IHP occupations') lead to a significant boost in productivity.
- Using the O*NET database, we classify 384 occupations out of 968 as IHP occupations.

2.
Assess the digitisation impact

- We examine the extent to which the abilities to perform an activity can be augmented by digitisation at three levels: low (50%), medium (75%) and high (100%).
- This allows us to calculate an 'enhanceablility ratio' for all activities within each of the IHP occupations.

3.
Estimate efficiency gains

- Based on the frequency of a given work activity that workers within specific occupations typically perform (from O*NET), we estimate the efficiency gains in terms of time savings.

4.
Allocate gains to five capabilities

- Five digital capabilities are identified as being both important for productivity and ripe for transformation.
- We then assess the proportion of efficiency gains across the five capabilities by job roles.

5.
Translate efficiency gains into output

- We use a standard economic growth model modified to include technology as a factor of production to convert the time savings into additional GVA gain.
- We derive Gross Operating Surplus from the GVA gain using standard deflators sourced from the OECD.

		Time saved per working day
Statistician	**Example activity: 'Analyse data or information' is 67% enhanceable.** An ability of deductive reasoning is highly enhanceable, while written comprehension is medium.	**2 hours 15 mins**
Rail-track operator	**Example activity: 'Handling and moving objects' is 39% enhanceable.** An ability of multilimb coordination has low enhanceability.	**43 mins**

Converting time savings across all occupations, we estimate the UK GVA increase in 2030.

£33 billion
annual GVA gain

This approach was developed in collaboration with Frontier Economics

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