The Bristol Project

Talking about work on a city-centre industrial estate
“You have to have somewhere in this area where people can work. And not everybody can sit and work in an office. Not everybody is good at that type of thing. You know, IT and selling insurance and banking and that type of thing. And you need hands on people. You need somebody who can mend a lorry.”
Introduction

The futures of work that have stimulated public and policymaker attention over the past decade tend to be technologically-driven and focus on ‘high skill’ work. The attention paid in recent years to high tech and remote workers produces a particular, narrow vision of the future, excluding those not necessarily engaged in the knowledge economy – for example, routine workers on industrial estates.

Processes of local urban transformation, viewed as regeneration, often overlook work, while drastically and rapidly impacting the lives of workers. While “levelling up” initiatives for the provision of new investment and infrastructure are organised along regional lines, highly local prosaic and place-specific factors tangibly shape how workers view the future of their work and the firms or industries that employ them.

Bristol, the site of this study, is characterised as a ‘Good Work Winner’ – with a higher than average provision of Good Work.¹ Yet this is not a universal experience, highlighting the need for approaches which allow for and recognise granular experience of transition.
Introduction

Through an in-depth case study of St. Philip’s Marsh Industrial Estate in Bristol, this study suggests that a place-based approach allows us to consider more closely the potential political consequences and challenges of everyday futures of work as they unfold in communities up and down the country. Trading estates are an unsung but numerous part of the country’s social, geographic and economic landscape – ecologies of industry and innovation that rarely get thought of as such. They are home to concentrations of small and medium-sized enterprises that often play a vital role in the skilled trades, supply chains and services that underpin and power the local ‘everyday economy’, as well as regional industrial clusters.²

The type of work performed on St. Philip’s Marsh – being largely of a routine character – is often seen as most at risk to automation, an issue of vital concern to those interrogating futures of work. However, three threats identified here imply that new channels and infrastructures of representation are needed to ensure the voices of working people are incorporated when developing futures of place which have impacts for futures of work.³
Original advertisement for *Yesterday’s Island*, a musical about the story of St. Philip’s Marsh.
Section 1
Our study

The empirical material upon which this report is written was collected as part of the “Bristol Model” programme funded by Research England and the Office for Students and based at the University of Bristol.

This programme features a suite of projects each bringing together a team of six undergraduate students, a research associate and a principal investigator. This has the aim of including students in knowledge production processes, gaining valuable research skills along the way. The student research assistants were recruited with the use of a Widening Participation methodology.

At the centre of our study were twenty in-person interviews with community stakeholders, workers, and business owners. Our outreach to, and recruitment of, participants rested upon more analogue methods, including pounding the pavements in and around the industrial estate to flyer and strike up conversations. The place-based nature of work in St. Philip’s Marsh meant that the participants we contacted initially quickly ‘snowballed’ to produce further interviewees. Given the varied knowledge and positions of the interviewees, a semi-structured protocol was adopted, requiring a high level of attentiveness to each person’s perspective, responding to what they felt was most significant.

Prompts like, “how has your work changed in recent years?”, “how do you expect your work to change in the coming years?”, and “what do you know about proposed changes to St. Philip’s Marsh?” were used to stimulate conversation. Eight of the interviewees identified as women, and twelve identified as men. They ranged in age from twenty-four to sixty-four. All but two of the interviewees identified as British and white, while one identified as Black and Ghanaian, and another as British-Indian.

In addition to formal interviews, the team spent over 150 hours on the Marsh, observing the environment, having informal conversations, taking photos, and making field notes. They also accessed and reviewed online archival resources like oral history websites and newspaper clippings. The research team attended meetings with various stakeholders, including representatives of both the university and the city council who were actively engaged in consultations around the redevelopment of the area.
**Our study**

## In-person interviewees

<table>
<thead>
<tr>
<th>Pseudonym</th>
<th>Age range</th>
<th>Gender</th>
<th>Job title/role</th>
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<tbody>
<tr>
<td>Andy</td>
<td>50s</td>
<td>Man</td>
<td>Business owner</td>
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<tr>
<td>Atiyah</td>
<td>20s</td>
<td>Woman</td>
<td>Manager</td>
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<tr>
<td>Brian</td>
<td>60s</td>
<td>Man</td>
<td>Bricklayer</td>
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<td>Chloe</td>
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<td>Cory</td>
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<td>Devon</td>
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<td>Keith</td>
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<td>Man</td>
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<td>Kirk</td>
<td>20s</td>
<td>Man</td>
<td>Artist/Entrepreneur</td>
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<td>Maria</td>
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<td>Shayla</td>
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<td>Syed</td>
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<td>Man</td>
<td>Shop steward</td>
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<tr>
<td>Tina</td>
<td>40s</td>
<td>Woman</td>
<td>Business owner</td>
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"What will be incredibly useful for everybody would be to get as many people involved in the conversation, that are actually down on St. Philip’s Marsh in whatever guise... I am asking everybody who is working down there in any way, shape, or form doing this kind of thing is please encourage people to be honest about what they want – this is not the council type of consultation where there is a pre-set decision"
Painting from a 1991 vision for the Marsh, now kept in the local nursery, showing a marina and football grounds, shops, a light railway and a ferry.
Section 2
St. Philip’s Marsh industrial estate

Located in Bristol City Centre, St. Philip Marsh’s history is marked by change, transition, and contested futures. Sitting by the River Avon, the land itself is a floodplain and for centuries served as a rural marshland available for rough grazing.

By the end of the 18th century, the land had been carved up into more modest fields. Amongst the first industries to establish themselves on the Marsh during the Industrial Revolution were glassworks and brickfields, both of which provided material for Bristol’s expansion. A dock located at the northwest corner of St. Philip’s facilitated the shipping of finished bricks across the city.

The Marsh became an island when the Feeder Canal was installed in 1809, with various bridges onto the land constructed since. Maps of the Marsh show the emergence of residential properties around the middle of the 19th century, indicating a small community living and working there, most commonly in the brickyards. Although open grazing land was maintained on the Marsh over the next few decades, several streets with terraced houses – along with churches and pubs – were built to accommodate a rapidly growing residential population. St. Philip’s Marsh Nursery School, originally built in 1921, was at the heart of the community.
St. Philip's Marsh industrial estate

In the mid-twentieth century, much of the housing was demolished as part of “slum clearance schemes” to make way for the industrial infrastructure of today. This consists of large warehouses for waste management, cement mixing companies, oil vendors, and the like. The Marsh was designated as an employment area and members of the tight-knit residential community were displaced and became distributed across other parts of the city.

Indicative of the closeness of the community are the reunions of the early 1980s, which produced a musical about the story of St. Philip's Marsh, *Yesterday's Island*. This premiered at the Bristol Hippodrome in 1984 and was then invited to return in 1987 for an extended run. The show was performed as recently as 2016 at a Christmas celebration in what was then the Royal British Legion building on Meriton Street.

Abacus Bristol Ltd is a long established family business providing skip hire and waste management for 28 years. At their site in St. Philip’s Marsh they accept waste brought to them from local labourers as well as seeking out new and innovative recycling solutions, maximising diversion from landfill.

Hanson concrete, based in St. Philip’s, supply the majority of the larger developments in the city and recycle used water.
Over the decades, many diverse visions of the future of the Marsh have been put forth and debated. One such vision was painted in 1991 on two large sheets of plywood by those displaced by the slum clearances and shows the Marsh with a marina and football grounds, shops, a light railway and a ferry. This dream, created by people who had lived and worked on the Marsh, never came to fruition and the tension between competing imaginations persists.

This report’s findings reflect an ever-evolving process of imagining new futures, emphasising why it matters who gets the privilege and power of these reimaginings.

Land use on the Marsh was debated again when, in 2017, a plan for a diesel generator plant to be installed across from the nursery school was met with a community campaign expressing grievance. Following hundreds of objections from local people, the plans were eventually rejected by the council. A similar, less successful, fight took place just a few years later when a commercial and industrial waste storage company intended to buy the same site across from the nursery. In 2020, a group of University of the West of England architecture postgraduates produced a plan and a series of renderings for the redevelopment of the Marsh with objectives including, “encourage physical and mental well-being in a post-industrial site”, “assist the area in maintaining its USP and increase employment opportunities”, and “provide low-carbon renewable energy sources”. The students produced a sleek video showing brightly coloured images of pedestrian-friendly streets along the glistening blue water of the Feeder Canal.

Today, the area is subject to major transformation as part of the Temple Quarter regeneration plans. The development is amongst the most extensive city centre schemes in the United Kingdom with the creation of approximately 10,000 homes and 22,000 jobs over 25 years. An executive summary prepared in 2021 explained that investment would “unlock the potential to redevelop St. Philip’s Marsh creating new, sustainable neighbourhoods where housing sits alongside business and workspaces”.

Four first year Masters of Architecture students chose to work with the St. Philip’s Marsh area as a project in Master-planning and developing areas to reach their full potential with a focus around community requirements.
St. Philip's Marsh industrial estate

More specifically, St. Philip's is imagined as a place for “Creative and High Tech Innovation” nurturing a “creative and knowledge-based economy of small and medium-sized businesses”. The University of Bristol’s Temple Quarter Enterprise Campus is an integral part of this plan. The campus consists of several distinct facilities including a main academic building, open-air square, various research centres, and student residences.

Construction is underway on phases of the plans related to Temple Meads station and some of the Enterprise Campus buildings are already operational. Although plans for St. Philip’s Marsh are longer term, smaller and shorter-term shifts are already apparent, consistent with changes in other industrial estates across the UK.

Established enterprises and industries are being augmented or replaced by new artisan and craft businesses like breweries, coffee roasteries, workshops for creative arts, and event spaces. As St. Philip’s is set to go through yet another reimagining, it is vital to query whose vision is being implemented and whose may be being abandoned.

To do this we must focus our attention on a broader array of anxieties and tensions that occupy the space between the workplace and the wider “place” within which work is grounded and granted its context.

Blind Owl Coffee has been roasting since 2018. The roastery and shop on Feeder Road has become a small hub enjoyed by coffee enthusiasts and newbies alike. (Photo: Ashley Carter Images)

Based on Albert Road, the Tapestry and Taproom by PROPS is Bristol’s first disability focused craft brewery. It supports adults with learning difficulties to achieve their full potential in the community.
Identifying and characterising shocks

The pace of change – and the sometimes-complicated interplay between the positive and negative aspects of the shifts afoot – means that today there is a broad range of risks and threats faced by the workforce of St. Philip's Marsh, marked as it is by the prevalence of routine occupations of both a ‘skilled’ and ‘unskilled’ character. Moments of transition, change, or reinvention, are important opportunities to steer towards fairer futures of work, especially through potential mechanisms to facilitate worker voice and engagement.

This project identifies three primary shocks that the workers of St. Philip's Marsh are contending with:
1. Automation,
2. Regeneration, and
3. The Clear Air Zone.

1. Automation

Employment located in industrial estates tends to represent the kind of “routine” work widely seen as facing substitution (displacement of the whole job, or some tasks from it) or augmentation (changing the skills requirements of work, by either increasing or decreasing discretion) by contemporary technologies. Such work is also associated with a loss of the sense of security and status previously associated with skilled and unskilled manual labour.

Literature covering the relationship between automation risk and political change considers, on the one hand, anticipation or risk of material hardship and insecurity through industrial or technological change, and, on the other, the vitality of a sense of belonging in the midst of diminishing social status and worth. Previous Institute for the Future of Work (IFOW) publications have documented a correlation between perceived automation risk and electoral outcomes, including Brexit and the General Election of 2019. IFOW proposed that the impacts of automation on workers are shaped along a spectrum from labour market “inclusion” to labour market “exclusion”. Some ‘insider-outsider’ approaches suggest that people’s experience in the labour market ranges from having secure and good quality work (“included”) to being long-term unemployed (“excluded”), with various stages in between.
St. Philip's Marsh industrial estate

Changes driven by technology were identified as a source of anxiety for some workers and firms. Although many of the firms on St. Philip’s Marsh faced similar barriers to investment in new productivity-raising technologies as others in the UK; we did find a few instances of automation being introduced. Chloe, who works at a small early-stage company of about twenty employees, explained that her employer had purchased a machine to carry out a warehouse process that was previously “done by hand”. In relation to worth and status, Chloe herself did not feel any risk to her employment; she differentiated herself from the part-time workers who lost their jobs, characterising her full-time marketing/customer-facing role as secure.

“A lot of temporary staff were let go, because I think they’re on zero-hour contracts and there were no more shifts”. This change requires “one full time person”, who has “specialist knowledge of this machine”.

Another interviewee, Duncan, is a district manager for a well-established company with locations around the city, including one centrally located on the Marsh. He described the automation process.

“We used to have to do everything manually… but then we went to the next step where we would enter information into a computer, and now we’re at the stage where they don’t have to do anything. They just tell the system there’s a vehicle ready to load”

With the introduction of a geofence around the perimeter, the shipping office can allocate orders automatically, cutting fulfilment time from ten to five minutes.

“There was a lot of resistance at the start to these changes, it’s taken a lot of persuading to let them [employees] know it’s nothing to do with getting rid of people”
2. Regeneration

As well as being home to many routine jobs, in many cities and towns, industrial estates have come to provide cheap, plentiful and adaptable space for entrepreneurs, creatives and artisan producers, as well as land ripe for acquisition by housebuilders and new mixed-use developments. These trends present a mixed picture for industrial estates. On the one hand, we see the revitalisation of estates in line with new craft industries that in some cases, such as brewing, rediscover and reinvent trades that return to the foundation of these local industrial clusters. These also contribute to the profile of existing employment in new forms of work that, despite superficial differences with many of the trades and professions associated with industrial estates, contain plenty of scope for the common articulation of shared issues and visions of good work.

St. Philip's Marsh industrial estate

Duncan explained that these technological interventions change the nature of work done onsite, whereby workers “utilise their time better”. Instead of making products themselves, workers are onsite mainly for compliance purposes, monitoring and performing maintenance. However these changes also demonstrate transformations in terms of skills required; with potentially related implications for worker sense of identity.9

What these stories show is that the implementation of autonomous technologies in the workplace seldom lives up to hyperbolic expectations of robots stealing human jobs. Bristol is a recipient of high levels of investment in tech ventures.10 However, the reality for workers in most cases is gradual changes which augment and substitute tasks in the context of an environment where substantial investment in productivity-raising technologies is difficult to finance and align with well-established business models. Automation represents only one shock among many and was typically lower in the order of priorities when discussing the landscape of perceived risks and threats that workers felt they were facing in St. Philip’s Marsh.

As we will see, anxieties about technological and industrial change were often interlaced with a broader array of concerns arranged around a general sense that the social and economic life of the industrial estate was shifting in ways that workers and businesses did not feel they had any influence over.

Sean, Planner

“If we got it right, we end up with a mixed-use community down on St. Philip’s Marsh which is modelling and living on how you decarbonize a city in real terms that is bringing through the values and the skills and the hard core commitment of people, from all sorts of backgrounds to just having a better life and recognizing part of that is a smaller carbon footprint in a lot of cases...”
St. Philip's Marsh industrial estate

On the other hand, regeneration can be bound up with processes of perceived gentrification and the imposition of planning initiatives that meet recognised societal needs for housing or a greener environment. The risk is that these threaten to displace workers and businesses that have had little say in the matter and find themselves, their work and their industries treated as a problem to be solved by local authorities or developers – especially where a city-centre location means that the estate is seen as a source of pollution or other environmental concerns.

St. Philip's Marsh exhibits many of these tendencies. Although on the surface of things, Bristol does not fit neatly into the geographical, political and cultural classification of the so-called “left behind” spaces of industrial change commonly perceived as the target of the “Levelling Up” agenda, pockets like St. Philip's Marsh more closely resemble other areas of the country where shifts like industrial rebalancing, reshoring and the green transition present both risks and opportunities.

Simon, Business owner

“You have to have somewhere in this area where people can work. And not everybody can sit and work in an office. Not everybody is good at that type of thing. You know, IT and selling insurance and banking and that type of thing. And you need hands on people. You need somebody who can mend a lorry”

Whilst residents may be consulted in changes and transitions impacting their locales, workers in each area are less often asked for their input on transformations affecting the places where they will likely spend much of their waking and working lives. It is important to see work and workers constituting communities, and workers themselves as citizens within a set of civic relationships, in order to grant them voice over the changes that are afoot in cities and towns around green transitions, shifts in urban land use and other factors.

The types of work performed on the Marsh are diverse. However, workers were aware of the place-based and material requirements of their work.

This specificity signposts how a one-size-fits-all approach to local economic regeneration, and relatedly, the future of work, does not capture the particular ways in which workers face threats to their status and security, and the place-based character of these concerns.
Business owners and workers expressed frustration when faced with the prospect of a compulsory purchase order, or imposed relocation plan. One rumour circulating suggested that most of the businesses based in St. Philip’s Marsh would be relocated to the port hinterland around Avonmouth, on the outskirts of Bristol, with all the difficulties this would imply for trade and travel. As district manager, Duncan explained, “that wouldn’t really make sense”. Instead, he wants to be involved in “negotiation”.

Such a location shift would be significant for the workforce of the Marsh.

“We’d be saying to the council, “Yep, we’ll move but you give us another piece of land to move into and that would be agreed and then we want you to pay 50% of building a new plant, you know”

Tina, Business owner

“Many workers will struggle. A lot walk to work, they need local work”

It is clear that much of the routine work performed on St. Philip’s Marsh is dependent upon a particular geographic formation. As processes of urban renewal imagine and implement new futures for place, existing land use and associated work can be lost, generating geographic ‘frictions’ (adjustment costs) for those who must transition into new roles. To reduce inequalities, such frictions require some mitigation. Just as workers should be considered a stakeholder alongside residents of an area, planners and policymakers also ought to consider aiding the transition of workers with the provision of support equivalent to those subject to processes of housing reallocation.

“A lot of people that are on relatively low wages can’t travel very far, they want to live locally”

Sean, Planner
3. The Clean Air Zone

Regulation can drive a technological shock, by forcing innovation which renders some methods of production – and in turn, jobs – obsolete. This was manifest in the experience of St. Phillip's Marsh. The green transition, and net zero initiatives more specifically, are a particular flashpoint in how workers and businesses perceive change locally. St. Philip's was included in an expanding Clean Air Zone proposed by Bristol City Council which covers most of the city centre. When the Clean Air Zone was initially announced, a Facebook page was created for business owners and workers on the Marsh to discuss it.

“Everyone gets together” “four times a year” to “chat about it” and raise awareness around “things that are in the pipeline” to “develop a long-term plan”

Many of the business owners in the industrial estate have grown concerned that the enforcement of such a zone would “completely kill all industry and commerce” (Simon) in the area.

“Business owners have been talking about the annoyance of the Clean Air Zone because it affects a lot of business down here – it will have a detrimental effect on them because obviously they have diesel vans”

Workers themselves would also be subject to the Clean Air Zone fines.

“My employees walk to work, but they’re gonna be in a Clean Air Zone so if they want to travel it’ll cost them £9 just to get from their homes to somewhere outside”
The Clean Air Zone will impact workers on two levels. First, many of the businesses have high transport needs. They require continuous shipping of materials or products by lorry and, as the interviewees explained, these lorries would become the target for fines because they are fuelled by diesel rather than a cleaner alternative. The costs of replacing these vehicles are considerable, so the business is likely to have to make decisions to respond accordingly, either by cutting costs that may impact workers, or by relocating outside of the Clean Air Zone (if possible), potentially inconveniencing their workers past the point of reasonability. Second, the workers themselves could encounter financial penalties should they commute to their workplace on the Marsh in a vehicle from outside the Clean Air Zone or be travelling in and out of it otherwise.

Overall, the potential monetary impact of the Clean Air Zone threatens the sustainability of workers’ employment on the Marsh.

“Most people think that St. Philip’s Marsh is a wasteland, very few people know how to get on to it… and yet, you’ve got recycling, recycling of vans, automotive, you’ve got craft industries, you’ve got high tech, you’ve got events, you’ve got a whole raft of different activities. It is still dominantly a blue-collar employment zone. And they are all elements that, if you look at any rational, modern city, notion you’ve got to have in the city centre, because if you take your recycling way outside, split it up and then distributed it, just incurs a massive carbon footprint. Whereas if you concentrated it in the centre… your carbon footprint is much smaller, your ability to recycle and reuse in the immediate area is much higher”
In instances in which plans had been made available, business owners and workers expressed concern and worry. This uncertainty extends to workers’ sense of job security.

We found that access to relevant and correct information about planned changes to St. Philip’s Marsh varied across actors and stakeholders. The fractious nature of information dissemination on the Marsh led to an environment rife with rumour, confusion, and frustration. A lack of transparency and information about local changes also restricts the ability of workers to plan their transitions, as needed, into new work.¹²

Simon, Business Owner

“This [rendering] in particular shows the main road as a pedestrianised area. Pedestrian zones, cafés, and bars and shops there. There’s that bridge. Where’s my company? Where’s my yard in there? What gives somebody the right to sit down and do this? Without any sort of consultation, any thought to the fact that, you know, we employ 12 people here”

Tina, Business Owner

“I don’t know what I stand at all… I’ve had no communication from (the council), so I don’t know where I stand. Will I just find out the day before or? I’ve held the licence for five years, so I’m hoping the communication will come. Because it is our income, so it is a bit worrisome really”

Gary, Manager

“I’m aware that there are plans to develop the area and I am aware that this branch falls within the target area, but how it would affect us specifically, I don’t know, because I mean surely if there are people occupying the properties you can’t just tell them to go. Can you?”

Tina, Business Owner

“I think a lot of people are going to lose their jobs… and a lot of them walk to work, they need local work. So, I do think there will be quite a few issues of lost wages; it’s gonna be quite brutal”

How fit are systems for transition?
St. Philip's Marsh industrial estate

The lack of consultation and communication over these shifts has led to workers and businesses feeling increasingly disenfranchised.

The recently organised Neighbourhood Forum in the area has worked to inform residents in surrounding communities about proposed changes with the hope of proposing alternatives. Amongst the concerns of organisers is the exclusion of workers from such circuits of information and consultation.

Maria, Administrator

“It hasn’t helped, I don’t think, having these threats…it does make us feel that there’s a complete disregard really for who we are, who comes here and what we do. But that wouldn’t happen in Clifton [an expensive neighbourhood in Bristol]”

Sean, Planner

“If you start taking account of where people work, which you would need to do on St. Philip’s Marsh, there isn’t necessarily a mechanism for including that”

The Neighbourhood Forum could provide an infrastructure to mediate future efforts to raise the voice of workers on St. Philip’s Marsh. However, this is not currently deemed to be part of their remit or purpose, inviting reflection on how to mediate worker voice through transition.

Atiyah, Manager

“I guess in my experience with gentrification or regeneration, whatever you want to call it, is that it’s always going to happen and people with power always win. But it’s important to have conversations with them, about how it affects different stakeholders and regions and stuff”

Tina, Business Owner

“You know, and the ways to go about sort of, finding out what’s going on – employers might know and keep it very vague with the employees. They probably don’t want them all leaving and looking for other jobs just yet, but they’re not saying…”
Conclusion

Our case study of St. Philip’s Marsh demonstrates how the future of work is being shaped by factors that sit outside the workplace within a wider tapestry of place, geography and community.

Workers are subject to multiple, interacting shocks which transform conditions for work. These can drive adjustment costs for workers, which may be material or social. Workers do not always have clearly defined mechanisms to shape, contest or negotiate these changes. Whilst greater worker voice at the level of the firm will inevitably be necessary to contest and coordinate the future of work as it is felt in the workplace, our work suggests it is also important to ensure the needs of workers from across the economy are represented in broader processes of economic redevelopment and place based transformation required to imagine and shape better futures of work.

Prevailing anxieties around security, status and opportunity cannot be addressed solely through material means of compensation and amelioration but must be met with a response that attends to the emotional, social and political dimensions of work, identity and belonging. Enabling workers to have a greater say and agency touches upon both material and non-material forms of recognition in the workplace and community as a whole. This would challenge common divides in policy making between workers, residents and business owners and points to a more inclusive and collaborative approach. It is only in doing so that planning initiatives and transition schemes can identify and respond to local challenges, unlock local potential and can secure the full and broad local consent needed to be a success.
Endnotes


3 For previous work considering the need to better consider local interests when developing future of place, future of work interventions see: The Grimsby Project: We Need to Talk About Work.


11 Geography is one of three core frictions identified in processes of labour market transition, as well as information and skills. See: Petrongolo, Barbara, and Christopher A. Pissarides. “Looking into the black box: A survey of the matching function.” Journal of Economic literature 39, no. 2 (2001): 390–431

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