Delivering Industrial Transition in PAS

Aligning Skills, Employers and Place

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Executive Summary

Portbury, Avonmouth and Severnside (PAS) have long been central to the economic growth of Bristol and the wider West of England. As a major port and logistics gateway, PAS underpins national imports and exports, energy infrastructure, manufacturing and resource recovery. It is both economically strategic and environmentally complex - a landscape of industry, estuary, villages and transport corridors shaped by roads, rail and river networks.

Yet despite its strategic importance, PAS has often been overlooked in the wider Bristol narrative. Its industrial sprawl, fragmented geography and mobility constraints have limited visibility and, at times, hindered long-term local workforce attachment. The area combines nationally significant economic assets with communities that experience transport isolation and uneven access to opportunity.

This context is now shifting rapidly. Alongside long-established industrial clusters, PAS sits at the centre of the West of England's industrial decarbonisation agenda. The Local Industrial Decarbonisation Plan (LIDP) identifies major energy, infrastructure and resource transition projects that will reshape the area over the coming decade.

With the launch of the West of England Growth Strategy in September 2025, the Severn Estuary Growth Zone was designated as one of five regional growth zones. In combination with the LIDP and associated strategic initiatives, this marks a critical inflection point. Multiple regional narratives now converge on PAS - industrial decarbonisation, clean growth, logistics expansion and regeneration. The opportunity is significant, but so too is the risk of fragmentation. Without deliberate coordination, parallel strategies may duplicate effort rather than accelerate delivery.

New investment, new technologies and new stories are emerging - alongside long-standing strengths that have not always been surfaced.

This report examines how PAS can translate both its historic industrial role and its accelerating transition into long-term workforce capability - ensuring employers, education providers and communities are positioned not only to respond to change, but to shape it.

The findings are clear: industrial transition is underway at pace. What must now catch up is coordination, visibility and access infrastructure - particularly around workforce mobility and place-based skills alignment.

Core Findings

1. Industrial transition is multi-project and phased - but skills overlap is significant.

LIDP projects span hydrogen, heat networks, alternative fuels, offshore wind, nuclear and carbon capture. While timelines differ, there is strong convergence around shared technical skill families - mechanical installation, electrical commissioning, plant maintenance, process safety, digital monitoring and quality assurance.

Investment in these transferable capabilities represents a low-regret strategy that enables multiple projects and supports adaptable careers over time.

2. Hydrogen demonstrates the power of alignment - and the need for agility.

Hydrogen activity in the region shows how quickly actors can align when convening, curriculum agility and value-chain visibility are present. At the same time, funding and market volatility demonstrates the need for flexibility. Industrial transition will not be linear; it requires a dynamic response model.

Hydrogen provides the precedent - The LIDP provides the scale - PAS provides the place.

3. Transport functions as labour market infrastructure.

Transport is consistently cited as a primary recruitment and retention barrier. Varying shift patterns, unreliable rail services, first/last-mile connection gaps, and car dependency significantly constrain access to employment.

In PAS, transport is not simply an infrastructure issue; it is a workforce participation issue. It shapes who can access work, sustain employment and progress. Industrial transition strategies that do not address mobility constraints risk narrowing, rather than widening, access to opportunity.

4. Employers are already delivering substantial training — but it is under-recognised.

Many PAS employers have developed significant in-house training, including health and safety certification, plant and licence training, leadership development and technical compliance upskilling.

However, this training is often not fully accredited, not captured in regional intelligence, and not connected into FE/HE progression pathways. The system under-recognises employer capability as part of the skills ecosystem. Greater visibility and coordination could unlock existing capacity.

5. “Green skills” require clearer and more consistent language.

Employers rarely use the term "green skills" spontaneously. When asked, they associate with language around environment, compliance, sustainability and regulatory obligation. Across the spread of interactions, the term feels abstract and/or unfamiliar.

However, when framed in operational terms - efficiency, compliance, cost control, process optimisation, system performance - the underlying message aligns closely with what policy describes as green skills.

Therefore there is need to:

- normalise the term "green skills" through consistent use and association with local policy and institutional definitions - which are rooted in practice (operational).
- anchor it in practical industrial language that resonates with employers and workforce realities.

Decarbonisation resonates most when grounded in competitive capability and industrial performance rather than abstract environmental framing. Visibility is key to deepening understanding.

Cluster-based approaches that reflect live/tangible industrial systems are more effective than generic "green economy" narratives. Cluster interaction can aid sector innovations awareness.

6. Inclusion and place matter.

PAS combines major industrial assets with communities facing transport barriers, confidence gaps and limited visibility of opportunity. Employer training rooms, community hubs and local networks represent underused infrastructure for engagement, foundational skills and modular pathways into technical roles.

Industrial decarbonisation must be accompanied by inclusive workforce access if it is to deliver long-term regional benefit.

Strategic Conclusion

Collectively, these findings point toward the need for structured coordination across employers, education providers and public bodies - aligning industrial ambition with workforce capability, access and visibility.

The recommendations that follow set out a place-based approach to deliver this alignment at scale.

Full recommendations are presented in Section 8.