

The legacy of Engine Shed

Understanding the impact of the civic professional hub

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Executive summary

Engine Shed is a civic professional hub located adjacent to Temple Meads rail station. Designed to bring together organisations from across the public, private and voluntary sectors, it has hosted a diverse mix of tenants including local government, business incubation support, start-ups and scale-ups. Engine Shed will close in December 2026 as the University of Bristol consolidates its innovation and enterprise activity within the new Temple Quarter Enterprise Campus (TQEC).

The Brunel Centre was commissioned by the University of Bristol to evaluate the impact of Engine Shed across its 13 years of operation (2013-2026). This report explores its contribution to the region and considers lessons that may inform future activity at the university's new TQEC, as well as the wider innovation district of which it forms a part.

Engine Shed was established as a space for professional collaboration with a civic mission. The concept emerged through collaboration between the university's tech incubator, SETsquared Bristol, and civic leaders across the city. The project was made possible by the support of Bristol City Council (BCC) and the University of Bristol; BCC provided the initial capital investment, while the university secured grant funding to support its operation.

Over its lifetime, Engine Shed served as a workplace, venue and convening point within the region. It accommodated a range of tenants, provided flexible workspace and meeting facilities, organised and hosted events, and commissioned projects with charity partners. Rather than focusing on a single sector, Engine Shed deliberately brought together organisations from local government, business support, charities, start-ups and scale-ups,

spanning a broad mix of industries. When fully occupied, this diverse mix of organisations and activities created a buzz and energy that was central to its character. This was frequently described by the research participants who informed this report as one of Engine Shed's most valuable features.

Its location and appearance were also important to its success. The heritage building's 'industrial chic' refit gave Engine Shed a distinctive identity rooted in the city. Its location alongside Temple Meads station provided easy access and convenience for meetings, events and networking, making it an attractive venue for hosting external stakeholders, including investors, politicians and policymakers.

The evidence included in this report shows that Engine Shed played a distinctive role within Bristol's civic and innovation ecosystem by acting as a hub for collaboration, knowledge exchange and innovation. This role depended on active curation and relationship-building rather than simply providing shared workspace. Engine Shed developed extensive networks across the city, going well beyond having an open-door policy. A variety of tenants and charities were invited into the space, and partnerships were formed with a breadth of organisations. In doing so, Engine Shed contributed to broader ambitions for inclusive economic growth.

The evidence suggests that Engine Shed helped to attract investment into the region through investor engagement, support for inward investment and business relocation, and by hosting government ministers and other senior decision-makers. Through its business support and incubation activities, it also helped firms to start, grow and scale. More broadly, it created opportunities for people and organisations from different parts of the city to meet, interact and exchange ideas. This facilitated the formation of both formal and informal networks, and supported organisations to access investment, expertise, partnerships and new markets.

Engine Shed also played an important intermediary role within the West of England's innovation ecosystem. Its central location, perceived neutrality and collaborative culture helped to lower barriers between organisations and sectors. As a result, it helped to establish and support institutions in the region that continue to support innovation activity while also directly raising the region's profile externally.

A commitment to inclusion formed an integral part of Engine Shed's approach. Inclusion was not viewed as a separate activity, but as an economic imperative that could help diversify the entrepreneurial pipeline. Charity

partners were invited into the building as tenants, on occasion through corporate-subsidised memberships. Between 2014 and 2019, the Engine Shed Enterprise Fund also enabled budget surplus to be invested in activities intended to broaden participation. For instance, charity partners that had established links to community groups were commissioned, in an effort to reduce barriers to engagement with both the university and the wider innovation ecosystem.

Looking ahead: Bristol Temple Quarter and the Enterprise Campus

In September 2026, the University of Bristol opened the Sloane Robinson building, which acts as the flagship facility within the new TQEC. Located within Bristol Temple Quarter, a major, long-term redevelopment area with close proximity to Temple Meads station and the city's professional services cluster, the TQEC forms part of a wider programme of urban and economic development.

At the heart of the Sloane Robinson Building is a desire to build on the university's research strengths, hosting an extensive research and teaching programme focused on emerging technologies, while also supporting a new business school. The building is also home to Bristol Innovations Zone (BIZ), which aims to support research commercialisation and strengthen partnerships between the university and external businesses. The building also offers a new civic proposition, including open-building access, and spaces for social ventures and co-created research. This reflects an ambition to embed the university campus within the city and the emerging Temple Quarter innovation district.

Many of the factors that contributed to Engine Shed's success, including collaboration, neutrality and active relationship-building, cannot be delivered by a single organisation acting alone. The findings of this report therefore have relevance beyond the University of Bristol and offer wider lessons for anyone seeking to foster collaboration across sectors and places. Accordingly, the implications of the report are divided into three stakeholder groups: the University of Bristol, the West of England's civic professional community, and general reflections for organisations considering similar approaches elsewhere.

1. The University of Bristol

   Curation, not only co-location – Engagement in Engine Shed was facilitated through a diverse set of activities. It hosted a variety of events, established partnerships with a breadth of organisations, and actively

invited tenants into the space. All of these steps beyond an 'open door' forged interaction and connections. The curation of an inclusive innovation space became self-reinforcing and helped to define the building's role within the city as a neutral, open and inclusive space.

Embedding of civic outreach and mission – Engine Shed was explicitly created with a civic remit, and its founding depended on public, business and university partners treating that remit as central to the goals of the organisation. Through the use of neutral branding, and without defining itself too rigidly, it allowed the space to serve different functions to a variety of users. This supported people to use the space, who otherwise may not have engaged with the university. Sustaining a civic contribution depends on deliberately embedding this mission into governance, culture and resourcing and cannot rely on location alone.

2. Civic actors in the region

A convening function that space alone cannot replace – Engine Shed was a neutrally branded intermediary that delivered a well-resourced, neutral convening function. This allowed it to play a role as an "incubator of incubators", bringing together professionals from across the business support ecosystem. This function is inherently difficult to sustain without deliberate support and often requires forms of partnership to effectively deliver.

Sector-agnostic support – The Enterprise Campus and Bristol Innovations Zone (BIZ) will focus on supporting deep tech businesses. This specialisation looks to build on the university's research strengths while supporting organisations with significant growth potential. Engine Shed was less selective in the organisations it supported, providing both formal support, such as accelerator programmes, and informal support, including mentorship and advice. Ensuring all organisations can access the appropriate support infrastructure to grow will be critical for the region, ensuring a diverse set of sectors can benefit whilst also ensuring a healthy innovation pipeline.

A heritage asset for Bristol – The building itself is a tangible asset for the city; a listed building with a connection to Isambard Brunel. While new developments offer office space, housing and improved amenity, heritage assets can anchor redevelopment sites and improve overall take-up.

3. Professionals working in start-up, innovation or business support ecosystem

   Leadership – Operating as a subsidiary, Engine Shed prioritised independence, autonomy and experimentation, with frequently positive results. Collaboration depended heavily on individual champions who built relationships across organisational boundaries, often by finding a single well-placed contact rather than engaging whole institutions. This ability to move at speed helped to build trust across partners.

   Finances – Engine Shed relied on the initial support of the city council and ongoing input from the University of Bristol. As such, they were able to experiment. Shifts in funding priority changed Engine Shed's capacity, and highlight that while independent brands offer benefits, they can make sustaining long-term capacity more challenging.

   Culture – Engine Shed was 'inclusively exclusive' – access was mediated through networks such as events, membership and incubation support, but neutral branding and a deliberately mixed community of tenants kept entry frictionless and welcoming. This underscores the need for civic spaces to be not only accessible, but specific about which communities they serve.

Introduction

Engine Shed was established to foster inclusive growth through support for entrepreneurship and innovation. This independent report examines the factors that enabled it to fulfil this mission and assesses the legacy it leaves behind.

Engine Shed is a civic professional hub; a shared physical space and collaborative network serving local businesses, community organisations, university researchers and public sector actors. It is located within Station Approach, a Grade I listed building adjoining Bristol Temple Meads station. Since opening in 2013, it has provided office space, fixed-desk rentals, event facilities and a coworking lounge while also building and maintaining partnerships across the city.

Established with an initial loan from Bristol City Council (BCC) and operated by a subsidiary of the University of Bristol, Engine Shed was designed as a convening hub. It became home to SETsquared Bristol, the university's technology incubator, while tenants have included a diverse mix of organisations – public sector bodies, charities, start-ups and established businesses.

The environment in which Engine Shed has operated has changed since its opening. Developments within the Temple Quarter alongside wider changes to regional governance, including the West of England Combined Authority (WECA) gaining Established Mayoral Strategic Authority status, have reshaped and matured Bristol's physical and institutional landscape. Understanding this environment is important context for the university's activity in the area and the corresponding vision for both Engine Shed and Temple Quarter Enterprise Campus.



A view of BTQ from the Sloane Robinson Building. Source: Julian Preece Photography

The report maps the range of functions performed by Engine Shed since its establishment, including its roles as a civic professional hub, coworking space and business incubator. It draws on qualitative evidence collected through a survey, roundtable discussions, interviews with key stakeholders, and document and literature reviews. Together, the insights explore Engine Shed's history and development, the factors underpinning its activities and the outcomes it achieved.

The report concludes by considering the implications of Engine Shed's closure for Bristol at a time of significant change in the city's innovation infrastructure. The opening of the Sloane Robinson Building marks an important milestone in the redevelopment of the Temple Quarter and the expansion of the University's presence in this part of the city. While the closure of Engine Shed leaves a heritage space vacant, it also leaves a legacy of relationships, networks and shared values that continue to influence the city's innovation ecosystem.

Discussion of methodology and limitations

The report draws on qualitative evidence collected through a survey, roundtable discussions, interviews with key stakeholders, and document and literature reviews. Together, the insights explore Engine Shed's history and development, the factors underpinning its activities and the outcomes it achieved. The five sources that make up the evidence base for this work include:

- **A survey of Engine Shed users** (n=49). Participants were recruited through Engine Shed's social media channels, communications shared by current and former Engine Shed employees, and a QR code displayed on a message board in the building[1] .
- **Two roundtable discussions** (n=6 and n=7). Participants were recruited by invitation by current Engine Shed staff and selected to represent a range of perspectives, providing a diverse sample of space users, including University of Bristol employees, business owners, third sector representatives, partner organisations, and current and former tenants.
- **Ten semi-structured interviews with 'expert' informants.** Participants were selected based on their direct professional involvement with Engine Shed, including current and former Engine Shed employees, the founder of a former partner organisation, and former Bristol City Council staff.
- **A review of academic literature.** This reviewed research, findings and concepts relating to innovation districts, coworking spaces, civic universities and business incubation.

[1] The survey received 36 complete responses and a further 13 partial responses (total n=49). Partial responses were retained to maximise neutrality of responses and minimise bias from the exclusion of less engaged participants. Where survey findings are presented, the relevant response base is reported for each question.

- **A document review**. This drew on materials relating to Engine Shed's history and activities, including historical impact reports, annual statements and blog posts.

The study adopts a qualitative research approach, drawing on multiple methods of data collection and analysis. Evidence from the survey, roundtables, interviews, literature and documentary reviews have been triangulated to develop a comprehensive understanding of Engine Shed's activities, impacts and legacy.

The analysis is informed by the British Academy's *Measurement Framework for Social and Cultural Infrastructure* (2025). The framework emphasises the need to consider the provision of services alongside their effects on individuals, communities and wider systems. Consistent with this approach, the report examines both the strengths and limitations of Engine Shed's activities, exploring the outcomes it generated, the factors that enabled its activities, and the challenges and constraints it faced. In doing so, the report seeks to provide an evidence-based assessment of Engine Shed's contribution and identify lessons that may inform future efforts to support inclusive and sustainable growth across the region.

Limitations

The evidence gathered includes many different viewpoints across Engine Shed's users, budget holders and operators. Nonetheless, the study has several important limitations.

First, participation in the survey was voluntary and the sample is therefore self-selecting. Individuals with stronger connections to Engine Shed may have been more likely to participate, which may influence perceptions of the space and its activities.

Second, the roundtables were held within Engine Shed itself after its closure had already been announced. The setting may have influenced participants reflections by priming affection and leading to more positive recollections of the space.

Third, it is difficult to attribute specific outcomes solely to Engine Shed. Many of the reported impacts emerged through interactions with Engine Shed, its tenants, partner organisations and the wider innovation ecosystem. This is in part due to Engine Shed's role as an independent convening space, bringing together a range of actors. As a result, findings should be interpreted as evidence of contribution rather than direct causation.

Finally, the study does not include a counterfactual. It is therefore not possible to determine what outcomes might have occurred in the absence of Engine Shed or whether the same outcomes could have been achieved through alternative approaches.

The report also discusses the role of financial input in facilitating and/or expanding many of Engine Shed's activities. However, the study does not consider alternative uses of available funds. Consequently, it cannot draw conclusions about whether resources were allocated in the most effective way, nor compare Engine Shed's performance against other potential interventions.

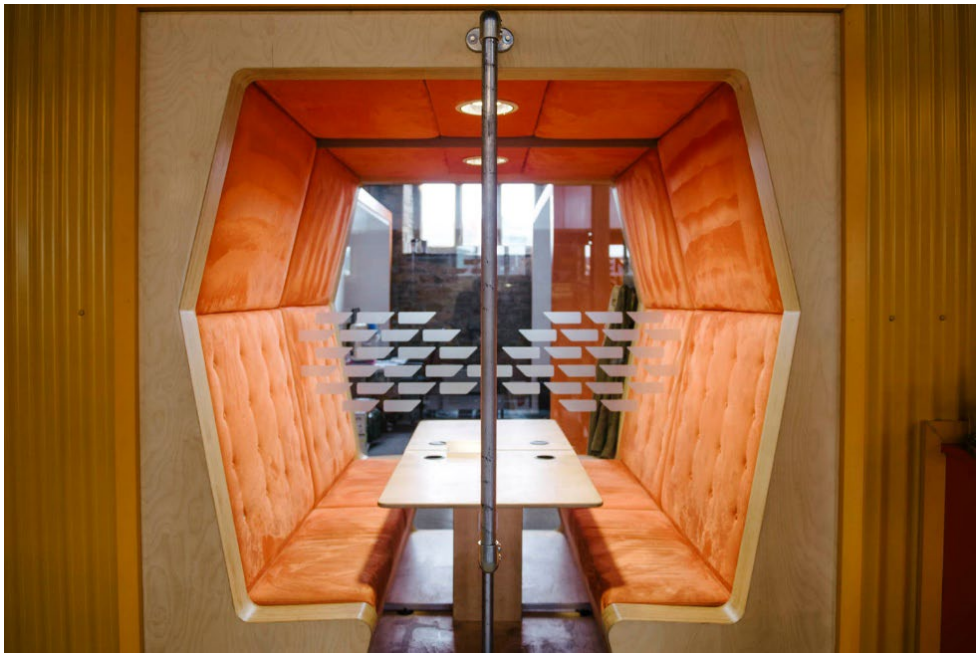
The history of Engine Shed

Engine Shed opened in 2013 as a collaboration between a subsidiary of the University of Bristol and Bristol City Council. At the time, development within Temple Quarter was still in its early stages and focused largely on temporary and interim uses of space. Against this backdrop, the vacant building at Station Approach was identified as an opportunity to create a new hub for innovation, enterprise and collaboration within the city's professional community.

The origins of Engine Shed can be traced to discussions among civic-minded people who shared an interest in strengthening Bristol's innovation ecosystem. Nick Sturge, Director of SETsquared Bristol (operated at the time from a university building in Clifton), had been floating an idea for a collaborative workspace that would bring together incubators and organisations supporting tech, creative and low-carbon industries. Initially proposed under the working title '*Creative Harbour*', the concept sought to provide a shared environment where businesses, entrepreneurs and support organisations could connect and collaborate.

In 2012, SETsquared Bristol was informed that it would need to relocate from its existing premises in Clifton as the building was being taken by another university department (Sturge, 2026). Rather than closing down or moving to another individual office space, this development acted as a catalyst for the launch of Engine Shed. The *Creative Harbour* conversations had already brought Sturge into contact with potential collaborators. BCC's economic development team (then called 'Bristol Futures') suggested relocating to a vacant building on station approach. Together, SETsquared and Bristol Futures put together a successful bid for the council to borrow £1.9m and use

it to open Engine Shed (BCC, 2017). Following a refit, the new 'industrial chic'[2] space opened in 2014.



Engine Shed's member lounge. Source: Engine Shed Archive

The building had previously housed the British Empire and Commonwealth Museum, which entered voluntary liquidation in 2013. The empty space was owned by the Homes and Communities Agency (HCA, a central government body) and managed by BCC, creating an opportunity for it to be repurposed as part of the emerging vision for Engine Shed.

Around the same time, several organisations which would become Engine Shed's first tenants were seeking centrally located workspace (see Table 1). For these organisations, its location, partnership model and focus on collaboration provided an attractive space, combining the opportunity to work in central Bristol with networking opportunities, credibility and buzz.

[2] Participant C, RT1

Table 1: Initial tenants at Engine Shed

Organisation	Founded	Previous office	Purpose
West of England Local Enterprise Partnership (West of England LEP)	2011	South Gloucestershire Council, Yate	The UK's Cameron-Clegg coalition government (2010-15) launched LEPs in England to boost regional economic development. They were comprised of private and public sector actors and had grant funding capacity. (MHCLG, 2023)
Invest Bristol & Bath (IBB)	2012	Sub-prime offices opposite Temple Meads	IBB was launched as a collaboration between the Local Authorities in Bath, Bristol and South Gloucestershire. Its aim is to attract inward investment, helping businesses locate in the region.
Webstart	2014	N/A; Founded in Engine Shed	Webstart was a tech incubator aimed at very early-stage businesses, offering angel investment and support for short cohorts.
Bristol Futures	2011	Bristol City Hall	Bristol Futures brought together BCC's inward investment, economic development, sustainability, innovation and international relations work

The aims

BCC, then the region's principal government actor and led by a newly established mayoral administration, was seeking to promote greater cooperation between organisations across the city.

Engine Shed was located within the newly assigned (2012) Temple Quarter Enterprise Zone, which offered business rates[3] relief and a Local Development Order designed to encourage investment and development within an underutilised part of Bristol. From BCC's perspective, the project supported its wider economic development objectives by promoting the region, fostering business collaboration and contributing to the development of the Enterprise Zone.

[3] Business rates are a tax paid by most non-residential buildings, based on the value of the property

The financial model

Engine Shed benefitted from favourable financial conditions, particularly during its early years. The building, owned by the HCA and controlled by BCC, was let to the Science Research Foundation[4] (SRF) on a peppercorn rent and initially without a service charge.

A strong base of founding tenants, many recruited through existing professional networks, provided sufficient income to repay the BCC loan, employ staff, and support additional outreach and growth activities with budget surpluses. At the same time, the SETsquared programme benefitted from UKRI Higher Education and Innovation Fund (HEIF) support (UKRI, 2026), allocated via the university, which was used both to deliver incubator services and pay rent to SRF.

These favourable conditions were partly the product of timing and circumstance, but they also reflected a deliberate commitment by both BCC and the university to the project. Together, these arrangements gave Engine Shed greater flexibility and freedom to operate without needing to maximise revenue.

As a result, Engine Shed was able to support a larger staff team and a more expansive programme of events, partnerships and projects than would otherwise have been possible. Interviewees described how this financial headroom enabled a culture of openness and generosity, which helped create connections across the city's innovation ecosystems. As one participant observed:

> So we'd be generous with the space, we'd be generous with money. You know, in theory, you can't [officially] come in here unless you're a visitor or tenant or a member of the lounge, [but really] it doesn't matter, [entry requirements weren't enforced]... And what that meant is that people were then generous to us. So we kind of had this

[4] The SRF was a wholly owned subsidiary of the University of Bristol. It ran both the SETsquared incubator and Engine Shed. Its main income sources were HEIF funding paid to SETsquared, and rent revenue from Engine Shed. It was operated independently, with fiscal oversight from its board of governors (including the University of Bristol) and strategic direction from an Advisory Board comprised mainly from the private and charity sectors. See diagram on page 40.

> unofficial ambassador network, completely unofficial ... it was chaotic in that respect, but hugely fruitful.[5]

On opening – Engine Shed's functions

When Engine Shed opened in 2013, it combined several functions within a single space. These included a lounge area, rentable desks, offices and dedicated event facilities. Access to the lounge was provided through a membership model involving a range of partner organisations, including the four universities in Bristol and Bath, the Institute of Directors, Business West, the Royal Society of Arts and the Institute for Chartered Accountants. Membership opportunities, sometimes subsidised by corporate partners, were also extended to charities and social ventures whose activities aligned with Engine Shed's values, like inclusion organisation Babassa.

Office space was occupied by a diverse mix of organisations, including local start-ups, many of which had previously participated in the SETsquared incubator programme. Through this combination of facilities, programmes and tenants, Engine Shed brought together entrepreneurs, researchers, investors, businesses, public sector organisations and civic actors within a single location.

Early enthusiasm for this model led to proposals for an Engine Shed 2 (BCC, 2017). Designed to increase both the capacity and impact of the space, the plans were approved by BCC's planning committee in 2018 but were ultimately not progressed due to budgetary constraints. During the same period, the university was developing plans for what would become the new Temple Quarter Enterprise Campus.

Importantly, Engine Shed was never intended to be a permanent fixture. The Station Approach building suffered from significant structural challenges (that have become more consequential and expensive to repair in recent years), and the project operated as a long-term temporary project. Nevertheless, between 2013 and 2019 Engine Shed's operating model remained broadly stable, with leadership continuity (one additional staff member was taken on to run scale-up activities through funding from

[5] Interview 4

Business West, the university and the LEP) and a series of commissioned projects.



Engine Shed's front entrance. Source: Engine Shed archive

A period of change, 2019-2021

Between 2019 and 2021, Engine Shed experienced significant changes to its operating environment as longstanding tenants moved to more permanent premises, changes in leadership at the university led to funding reprioritisation, and the COVID-19 pandemic disrupted the events and desk hire industries.

Changes in tenancies

One long-term shift resulted from the growth and institutional development of several key tenants.

In 2017, the Local Enterprise Partnership function was absorbed by the West of England Combined Authority (WECA), a regional governance body with a much wider remit to deliver planning, transport and skills for the greater Bath and Bristol area (SGC, 2017).

During its first mayoralty, WECA had its office within Engine Shed. With its promotion to Combined Authority status, WECA grew into a major regional

institution, increasing its staffing and operational requirements. It subsequently relocated to dedicated offices nearby and now occupies its headquarters in nearby Redcliffe. The IBB team, while originally set up as a collaboration between Local Authorities, became part of WECA, and left Engine Shed at a similar time.

TechSPARK – a non-profit organisation dedicated to the West of England's technology sector and a key early tenant - retains a presence in Engine Shed, but now has its primary offices in the adjacent Temple Studios.

These changes reduced the number of anchor tenants located within the building. Although Engine Shed continued to function as an active coworking and meeting space, research participants noted that its user base became less diverse than during its early years.

Changes in finances

Engine Shed's financial position has also changed significantly during its operation.

Firstly, ownership arrangements for the building changed. The building had been owned by the HCA, but reverted to Network Rail around 2019. While remaining the tenant, Engine Shed became responsible for maintaining the external fabric of the building, adding substantial maintenance costs to its operations.

Secondly, changes in University leadership led to a reprioritisation of HEIF resources. New leadership of the university's research and enterprise team deprioritised Engine Shed's activities, reducing the level of funding available to support Engine Shed's projects and activities.

Thirdly, the COVID-19 pandemic created further challenges. Under national lockdown conditions, demand for events, desk space and office accommodation fell sharply in 2020, reducing income. Although the university provided support that enabled the organisation to avoid redundancies and keep Engine Shed solvent, the disruption reduced Engine Shed's capacity to take on new staff members and fund projects as they had in their early years.

Institutional churn

The period also saw substantial turnover within the leadership of both Engine Shed and SETsquared Bristol, with four Engine Shed directors and three heads of SETsquared.

Given the importance of individual relationships and networking to Engine Shed's operational model, this churn has had both operational consequences and reduced the outward-facing profile of Engine Shed in spite of the work done by the post holders during this period.

Taken together, these developments point to both the opportunities and the inherent vulnerabilities and risks associated with collaborative, multi-stakeholder projects. Engine Shed's early success was underpinned by strong partnerships, perhaps delivering more than zero-sum gains for the city. But as these conditions changed, sustaining the same level of activity became more challenging. This highlights how long-term institutional commitment, stable funding and favourable external conditions are needed to sustain collaborative approaches to innovation and economic development.

The characteristics of Engine Shed

This section sets out the features identified as important to Engine Shed's effectiveness. The evidence suggests that impact arose not solely from the building or brand itself, but from its specific activities, design choices and ways of working that shaped how the space was used.

Former Engine Shed employees attributed its success to three pillars: spirit, place and activities[6]. Each is believed to have contributed to the overall sum of activity within the building. These three pillars align closely with the findings of our broader corpus of research, reflecting themes from our roundtables, interviews, survey and review of academic literature. They provide a useful framework for understanding the factors that supported Engine Shed's impact.

Spirit

A place's spirit is shaped by its physical design, staff, accessibility, the composition and attitude of its users, and the activities that take place within it. The literature reviewed for this study highlights the importance of the atmosphere or 'feel' of a place in fostering collaboration, knowledge exchange and innovation (Storper and Venables 2004; Spinuzzi, 2012; Merkel, 2015). Consistent with this, research participants in this study frequently referred to the distinctive character of Engine Shed, highlighting several features that they considered central to its success.

[6] Interview 5

A civic professional hub

Engine Shed's spirit was rooted in a purpose that was clearly defined, while remaining sufficiently flexible to accommodate a wide range of activities and users. This purpose can be characterised as 'civic professional'. The space was dedicated to supporting business growth and economic performance, reflected in its housing of business incubators, the LEP and IBB. At the same time, it maintained a strong emphasis on inclusion, continuous outreach to city actors and an open-door policy.

This combination resulted in what can be described as an 'inclusively exclusive' environment. Entry to Engine Shed was mediated rather than gated, with most users accessing the space through member organisations or partnerships. This helped ensure that users were actively engaged in the city's civic, economic or innovation ecosystems, increasing the value of the connections and informal interactions that took place within the space.

One research participant, a charity partner, suggested that this balance was central to Engine Shed's success. While maintaining openness to community organisation and different types of users, the space also benefitted from a degree of curation that preserved its distinct purpose and ensured that it remained attractive to those seeking high-value collaboration and engagement:

> It's the fact that this space is something that is distinct and specific for the innovation space. I think the danger is, if you make it too porous, it's not really clear what that space is for. There's a lot of spaces to do community gathering and to come together. But I think [it's] quite a unique space, which is for people really looking to collaborate at the highest end, which does feel a little bit more invited and curated... [At the same time, it's] also open to community organisations. It's got to also retain the kind of people you want to have those conversations with. And if they don't feel it's right for them because it's too diffuse, then you lose another significant part of that[7].

A clearly defined purpose also helped foster a constituency of users, and an atmosphere characterised by activity, opportunity and collaboration. This type of 'buzz' is widely recognised as an important feature of coworking spaces, helping to facilitate the exchange of complex, uncodified

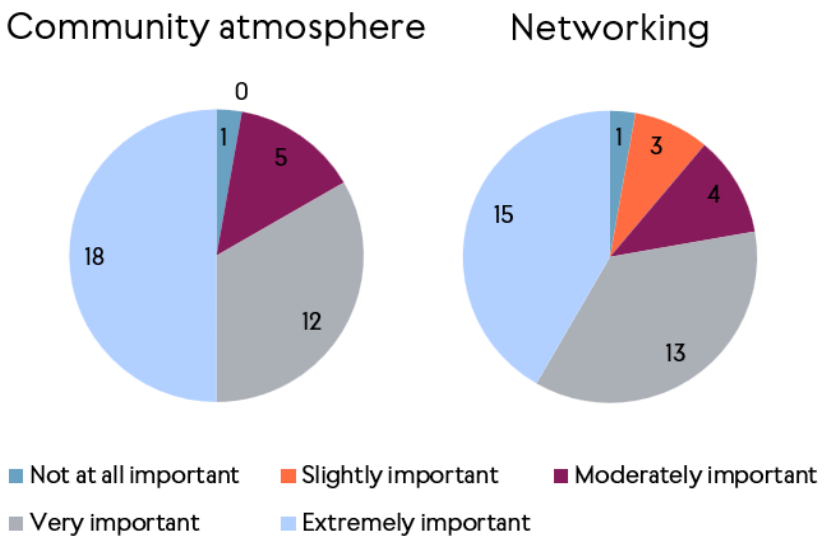
[7] Participant 7 RT2

knowledge, and encourage socialisation and collaboration through face-to-face interaction (Storper and Venables, 2004).

Participants noted the importance of the mix of tenants using the space. As one participant stated: 'you've got some experts in residence, and then you've got an accelerator, and then you've got investors wandering through, and fellow entrepreneurs, and the whole thing just gains a life of its own'[8]. This diversity also lent credibility to other users of the space, creating opportunities for new start-ups to connect with potential investors and clients, while enabling charities to engage with government officials.

These findings were further reinforced within the survey, with a large majority of participants rating aspects like community atmosphere and networking as important or very important (Fig. 1).

Fig. 1: How important are the following aspects of Engine Shed to you? (n=36)



Engine Shed's mix of tenants was supported by its underlying financial model. Its relatively low outgoing rent, combined with income received from tenant organisations, allowed them to operate a loss-making lounge space while sustaining the collaborative environment described above.

[8] Participant C RT1

Survey findings (n=42) reinforce that the membership model and lounge space were significant. 24 respondents (57%) reported accessing Engine Shed through a membership organisation (which did not make the same financial contribution as members or tenants). Only five respondents paid directly for lounge access and eight were tenants. This highlights how the membership model facilitated a diversity of users and underpinned Engine Shed's collaborative atmosphere.

Culture of openness

Beyond the diverse mix of clients, participants described a culture of openness that began as soon as they walked through the door. The first point of contact with the space is with the reception team, who were praised several times during the roundtables as integral to 'what made this a successful space', providing a 'warm welcome, and for many people, the very first point of contact with the University of Bristol'[9].

It was clear that the reception set the tone of Engine Shed, and reduced participants' apprehension about whether it was a space 'for them'

> When I first came here, I did feel a bit like, you know, err SETsquared, [tech start-ups], all of these things, you know, it wasn't my world. And they [the reception team] recognise you, they greet you, they help with things, and I think it's in part because of them that the place has the character [it has][10].

This apprehension was shared by other participants, who nonetheless felt that Engine Shed was a welcoming place, a 'bridge to muggles'[11] who weren't affiliated with the university.

It was clear that the culture of openness demonstrated by the reception team was shared throughout its leadership and operations. 'Ultimately it comes down to the people who are [running the space]. What they did was a lot of leaning into a more collaborative cross culture, wanting to engage and wanting to do things'[12]. The organisation's composition, with diverse membership including all four universities, demonstrated 'there's no

[9] Participant 4 RT2

[10] Participant 2 RT2

[11] Participant 1 RT2

[12] Participant 3 RT2

favouritism for any university... but also any corporate, all the legals and the accountants... it's very, very on the level'[13]. Participants praised the consistent commitment to these values, including 'what they did when the "cameras" were not on them'[14], which built long-term credibility within the city.

The credibility then afforded Engine Shed the ability to act as a convening space, and to provide leadership with its operations and commissioning activities:

> what Engine Shed brought was leadership. It brought the ecosystem together in a centre point around Bristol's historic building that was extremely well networked, so both transport wise and human being wise. And that leadership had a willingness to listen and open doors. And not just open doors, but go into other doors they hadn't gone into before, in the community.[15]



Engine Shed's extravaganza. Source: Julian Preece Photography

[13] Participant C RT 1

[14] Participant 7 RT2

[15] Participant 3 RT2

Taken together, the diverse mix of users, welcoming staff and institutional commitment to fairness and outreach created the 'spirit' which gave the space credibility and ensured it remained vibrant and attractive for future users.

Place

The physical space and location of Engine Shed played a foundational role in shaping how it was perceived and used. Its location adjacent to Bristol Temple Meads station, the South West's busiest rail interchange, provided exceptional connectivity, while the organisation and design of the space created a visual language that reinforced its role as a hub for innovation, collaboration and economic development.

An industrial chic interior

Engine Shed was situated in a unique heritage building; the site has been part of Bristol's economic and industrial history since the opening of the Great Western Railway terminus in 1840. Users of the space even had access to Isambard Kingdom Brunel's boardroom (where we held the roundtables for this study), creating a link between the city's industrial past and contemporary innovation activity.

The 2013 refit introduced an 'industrial chic'[16] aesthetic, with repurposed shipping containers and exposed lightbulbs. The result was a space with a 'start-up' visual language that reflected the entrepreneurial and innovative character that Engine Shed sought to foster. As one participant observed, the building's distinct design rooted it firmly within the identity and history of Bristol: 'a bit like a train... really eclectic. The design anchored it in the city'[17]

The internal layout also supported Engine Shed's collaborative objectives. With its prominent open-plan lounge that was relatively modest in size, the space encouraged informal encounters and spontaneous conversations, often termed 'water cooler moments' by roundtable participants. Survey evidence supports this interpretation. Seven responses to an open-text question on whether Engine Shed boosted inclusion (n=36) highlighted the

[16] Participant C RT1

[17] Interview 6

role of the physical layout in facilitating interaction, communication and exchange. This finding is consistent with evidence that shared spaces such as cafés, event venues and circulation areas go beyond 'amenity', contributing directly to collaboration and knowledge sharing by creating opportunities for face-to-face interaction (Storper and Venables, 2004).

However, the benefits associated with a historic building were accompanied by operational challenges. Several participants highlighted the limitations of the Victorian roof and ageing infrastructure, including poor insulation, fluctuating temperatures and recurring maintenance issues. One interview participant described the building as 'end of life'[18]. From an operational perspective, these issues placed additional demands on the Engine Shed team and diverted resources from its core activities. Evidence suggests, however, that the building's character and atmosphere outweighed its practical shortcomings, suggesting that these issues had little effect on its overall use:

> It was photogenic. It was a cool space to be in. On many other terms, it was terrible. The roof leaked, it was freezing in winter, it was too hot in summer. But actually, nobody cared about that because it was just a nice, cool, busy space to be in. And so, people are quite forgiving if they like the environment.[19]

A central location

Engines Shed's location was a significant advantage. Situated alongside Bristol Temple Meads, it provided convenient access for visitors travelling from elsewhere in the UK while remaining readily accessible to those based within the city. Unlike many alternative venues, it did not require an additional journey beyond the region's principal rail station.

For Bristol residents, Engine Shed provided a convenient place to work, hold meetings or spontaneously encounter people within their professional networks on the way in and out of the train station. For start-ups and smaller organisations, it offered a space and prestigious location that projected credibility and a centrality which they might have been otherwise unable to afford. For Engine Shed tenants, the proximity to the train station was useful

[18] Interview 2

[19] Interview 6

for commuting purposes and created additional opportunities for networking and engagement with visitors travelling through the city.

Due to both its centrality and neutrality, Engine Shed was an attractive venue for high-profile dignitary visits and events[20]. Practical advantages, including direct travel from London, were complemented by the symbolic value of the venue. Engine Shed's emphasis on collaboration between city actors, and its focus on entrepreneurship and regional economic development provided an appealing setting for policy discussions and public announcements. Participants noted that these visits typically reflected the open culture and collaborative ethos of the space, with local stakeholders often invited to engage directly with visitors rather than access being restricted to a small group of organisations.



Brunel's Boardroom within Engine Shed. Source: John Craig Photos

[20] Visitors included Vince Cable MP (former leader of the Liberal Democrats), Mark Carney (Prime Minister of Canada and former Governor of the Bank of England), Michael Heseltine and Nick Clegg (both former Deputy Prime Ministers), Sajid Javid (former Chancellor), Lady Woolf (former Mayor of City of London), Dame Ann Dowling (President, Royal Academy of Engineering), Liz Truss (former Prime Minister) and Prince William (BCC, 2017).

Activities

The third component of Engine Shed's success was the activities run within it. Engine Shed hosted its internal events, co-hosted functions such as Silicon Gorge and the Bristol Tech Festival, provided space for partner programmes, including SETsquared's Advisor in Residence and Investor in Residence schemes, and let its facilities to external organisations.

The partnership model was an enabler of this activity. By bringing together multiple organisations within a single space, Engine Shed enabled partners to deliver a diverse programme of events and draw on their respective networks, expertise and sources of sponsorship. As one interviewee observed, the 'freedom of having multiple organisations in one building allows you to pull in the strengths and values of each organisation.[21]

Table 2 illustrates the breadth of partner organisations that held events in Engine Shed. These activities played a significant role in increasing footfall and acted as a key mechanism through which relationships and networks at Engine Shed were established and strengthened. Participants also highlighted the value of these events for Engine Shed staff in finding and creating opportunities and collaborations:

> We would meet people in here because they'd come to an event, somebody else's event in the space. We could have a conversation and there'd be an idea for

Table 2: Selection of events held at Engine Shed

Partner Organisation	Attended an event with this organisation (n=36)
SETsquared	29
TechSPARK	25
Invest Bristol and Bath	17
Business West	15
NatWest Accelerator	11
British Business Bank	11
Innovate UK Business Connect South West	10
Babassa	9
Barclays Eagle Labs	7
ACH	6
Digilocal	5
My Future My Choice	4
Geovation	1
None of the above	6

[21] Interview 7 (1)

> doing something... and we could say, “yes, we'll do it”.[22]

In its early years, Engine Shed also encouraged the development of new initiatives through the Engine Shed Enterprise Fund. These projects were typically delivered by external actors, either commissioned by or working in partnership with Engine Shed, rather than by Engine Shed staff directly. This provided tangible evidence of the open and collaborative culture the building was designed to facilitate, creating a supportive environment in which new ideas could be explored and tested:

> That spirit of innovation allowed you to put forward some ideas. To be honest, the first couple just fell flat on their face, but the fact that you could do it and you had permission to do it, there was a sort of safety in numbers, safety in entrepreneurial culture and innovation culture. [23]



Stand-up with ‘Brunel’ in Engine Sheds Event Space. Source: Julian Preece Photography

[22] Interview 7 (2)

[23] Participant 6 RT2

Conclusion

Engine Shed's achievements stemmed from the unique combination of its tenants, leadership and operating model, physical environment, central location and programme of activities. The three factors discussed in this chapter, spirit, place and activities, were closely interconnected and often mutually reinforcing. Together, they contributed to an environment that fostered collaboration, knowledge exchange and innovation, and helped establish Engine Shed as a distinctive hub within Bristol's civic and innovation ecosystem.

Understanding the impact of Engine Shed

Engine Shed's impact aligns with its role as a convening hub. Across interviews, roundtables and survey responses, participants consistently described its impact in terms of the partnerships and connections it enabled. Organisations across the region's innovation ecosystem benefitted from the ideas, relationships, initiatives and institutions that it helped to support.

Taken together, the evidence gathered for this study highlights the productive role Engine Shed played as a form of social and cultural infrastructure within Bristol's civic, business and innovation communities. To support assessment of this role, the report draws on the British Academy's *Measurement Framework for Social and Cultural Infrastructure* (2025). The framework defines social and cultural infrastructure as an asset that is broadly accessible, enables a range of downstream activities, and contributes to the development of relationships, identity and creative expression. The evidence gathered for this study suggests that Engine Shed fulfilled each of these functions.

The framework also recognises that the impact associated with social and cultural infrastructure is not always immediately observable or easily quantifiable. As a result, multiple sources of evidence – including qualitative insight and testimonies – must be incorporated as part of the overall measure (British Academy and Bennett Institute, 2025).

This approach is particularly relevant in the case of Engine Shed, where organisational boundaries were often blurred and outcomes frequently emerged through collaboration between multiple partners. While this makes

it difficult to quantify or directly attribute to a single organisation or investment, it also reflects one of Engine Shed's defining characteristics; it reaffirms the space's ability to bring together multiple actors in ways that supported collaboration.

Engine Shed's founding ambition was to boost 'growth, innovation and inclusion' in the West of England (Sturge, 2026). These three themes provide a useful lens through which to assess its impact. The three themes reflect the activities and outcomes described by roundtable and interview participants and are also reflected in the survey's open text responses. The conclusions drawn, however, should be interpreted with consideration of the limitations of the evidence base (see the methodology and limitations section) and the characteristics of those who participated in the research.

Contribution to growth

Engine Shed contributed to business growth and employment in the West of England by supporting organisations to establish, develop and scale their activities in the region. Rather than simply acting as a workplace, Engine Shed functioned as a platform through which organisations could access investment, expertise, partnerships and new markets. The evidence suggests that this contribution occurred through three main mechanisms: by curating an investment offer that made it easy for businesses in the city to gain visibility; by creating a space for start-up businesses to let office space and benefit from incubator activities; and by creating a place where people from different parts of the city could interact and network.

Attracting investment into the region

Engine Shed and its partners advocated for the region and supported bringing investment and initiatives to the city.

Invest Bristol and Bath (IBB) were an important component, with a direct remit to support and attract investment into the region. By being situated in Engine Shed, IBB were able to directly evidence the entrepreneurial buzz within the city, which helped to sell the city to prospective inward investors. As one roundtable participant noted:

> There's nothing better when you're with an investor and saying, "oh, it's a really connected city and everyone wants to work together"... to

> be able to say, "oh, let me just introduce you to this random person" [as you're walking around Engine Shed]... it's a live example.[24]

Another participant built on this, stating how coordinating visits within Engine Shed supported hosting investors:

> They [Investors] like to come in as a group and they like it to be curated. They don't just walk in through the door. They want you to set something up so they can access a community... they want to be introduced to a stable of businesses, not one business at a time. They like to group their visits, they like to group together, they like to co-fund projects.[25]

Through flexible arrangements, Engine Shed also acted as temporary office space for those considering relocation to the region.

> The reason they landed here was, partly the connections they made in Engine Shed, but it was also partly that between Engine Shed and IBB, we gave them free desks for four months... Now there are hundreds of people [working for the company in Bristol].[26]

Roundtable participants also recognised the role Engine Shed played in supporting inward investment bids for the city, often directly curating relationships with organisations looking to build and develop new ventures, such as the Oracle Cloud Accelerator. Situated in Bristol from 2017 until 2019, at the time it was 'the only cloud accelerator that Oracle had outside of the US'[27]. The Oracle Cloud Accelerator supported 11 start-ups in Bristol over two cohorts. By working with employees at Oracle, the Engine Shed was able to evidence the strength of the research and development (R&D) base within Bristol, supporting the case to situate the accelerator within Bristol, then providing the space to host it.

During the city's bid for the Channel 4 Creative Hub[28], Engine Shed convened conversations to create an offer that emphasised the 'rebellious,

[24] Participant B, RT1

[25] Interview 7 (1)

[26] Participant B RT1

[27] Participant B RT1

[28] The bid was part of a wider reorganisation by Channel 4, which saw their HQ move to Leeds and the establishment of Creative Hubs in Bristol and Glasgow (Channel 4, 2018). Engine Shed contributed towards an inward investment campaign by Invest Bristol and Bath. The bid also enjoyed political support from city mayor Marvin Rees and the first WECA mayor Tim Bowles.

independent, inclusive'[29] nature of the city; also 'a lot of the things that you think about Engine Shed'[30]

Supporting business growth

Beyond the frequently mentioned benefits associated with the greater collaboration enabled by Engine Shed, it provided tangible benefits to businesses both directly, through affordable workspace in its coworking and lounge areas, and indirectly through programmes run by its tenants, including the SETsquared programme and Webstart.

SETsquared Bristol

SETsquared Bristol, a tech start-up incubator and business support programme launched by the University of Bristol in 2002, was one of the most significant programmes associated with Engine Shed, where a number of its key functions were housed. Businesses participating in the programme could access support virtually or rent desk space within Engine Shed, while clinics such as Entrepreneurs in Residence, Lawyers in Residence and Meet the Founder (formerly Investor in Residence) were delivered in the building.

Since its inception, SETsquared Bristol has achieved substantial economic impacts. It has supported companies to raise over £742 million in investment. Between 2019 and 2024, the businesses supported through the programme generated 1,044 jobs and £535 million in Gross Value Added (GVA) (SETsquared Bristol, 2024).

The programme has also demonstrated strong performance on inclusion measures. As of 2024, 43% of its founders and C-suite were women, 19% were people of the global majority and 7% were people with known disabilities — all figures substantially above tech sector averages (SETsquared Bristol, 2024). These findings are consistent with the qualitative evidence gathered for this study regarding Engine Shed's contribution to inclusive entrepreneurship.

These findings are also complemented by a commissioned report undertaken by Zeta Economics (2015), which quantified the direct, indirect,

[29] Participant B RT1

[30] Participant B RT1

induced and catalytic impacts of Engine Shed. Using a proprietary local impact model, the study estimated that Engine Shed generated £7.9 million of net additional GVA in its first year of operation.

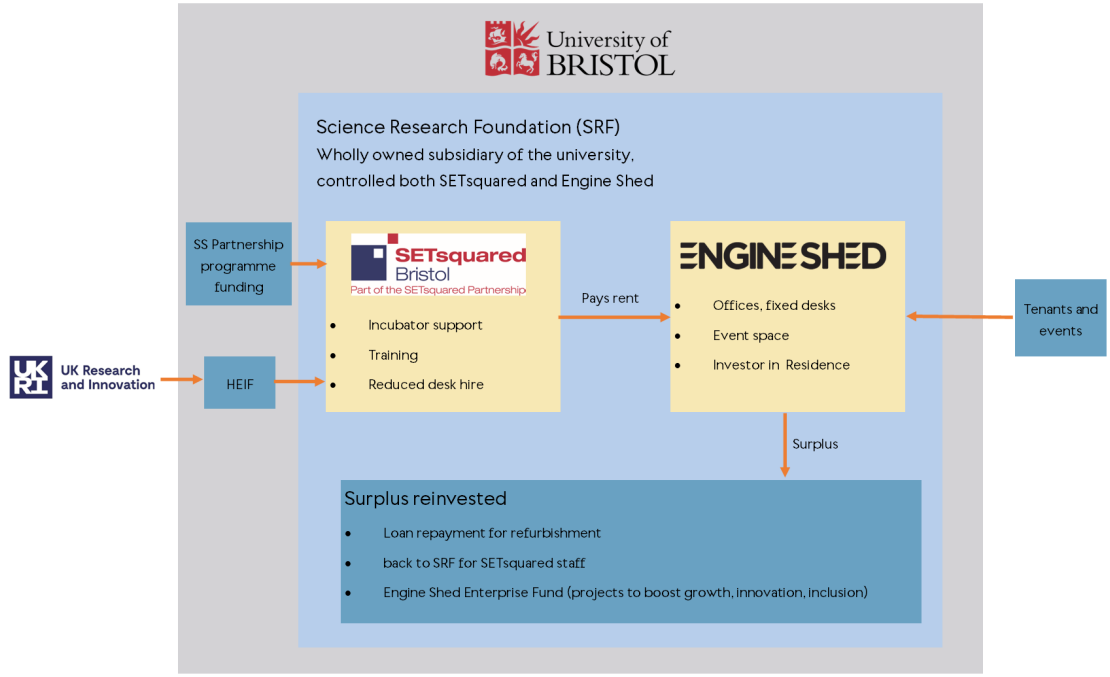
The relationship between Engine Shed and SETsquared Bristol was mutually reinforcing. Businesses could take subsidised desk space through the incubator, with many staying on after completion. Interview evidence suggests that, prior to the COVID-19 pandemic, 'most of the tenants on the upper floor were SETsquared companies'[31]. This generated revenue for the space while allowing residents to continue to benefit from the wider support ecosystem.

This relationship was supported by an escalating rent model. Desk space was initially subsidised for early-stage businesses, with rental costs increasing annually until reaching commercial rates. This approach reduced barriers to entry for new ventures while encouraging progression towards commercial maturity. At the same time, it provided Engine Shed with a pipeline of growing tenant organisations and a source of rental income.

Much of the economic evidence presented above should be understood as evidence of SETsquared Bristol's impact rather than Engine Shed's alone. The programme benefitted from wider university funding and was based on an incubation model that predated Engine Shed. Nevertheless, the two were closely intertwined. Engine Shed's own founding was a direct response to SETsquared Bristol's need to find alternative office space, being vacated from its office space with no clear alternative premises (Sturge, 2026). While SETsquared's achievements cannot be attributed to the space alone, the scale and success of the programme were enabled, in part, by the facilities, community and support environment that Engine Shed provided.

[31] Interview 1

Fig. 2: Relationship between University of Bristol, SETsquared and Engine Shed



Easy-to-access support

A unique feature of Engine Shed was that much of the innovation support it provided was not narrowly defined by sector or technology or discipline. While the building housed specialist support programmes such as Quantum Technologies Innovation Centre (QTIC), SETsquared and the Oracle Cloud Accelerator, it also offered incubation support, networking opportunities, knowledge transfer and peer-to-peer learning that were open to a broad range of organisations. Through this mix of programmes and activities, advice and business support was intentionally accessible and non-exclusive.

Several roundtable participants highlighted the extent to which founders felt welcome at Engine Shed, even when their businesses did not align with established priority sectors or technologies. This enabled Engine Shed to support organisations that demonstrated significant growth potential, alongside high social or economic impact, but which otherwise might not have been viewed as a priority. One founder who described himself as 'a regular guy without a degree but with an idea' reflected on the role that Engine Shed played in his company's development:

> I joined the Webstart cohort and about six years later, exited. And I would say that that was in no small part down to Engine Shed. It really was core to everything we did, not just at the beginning when we were here, but actually throughout our whole journey.[32]

Another participant described an organisation supported by Engine Shed that had achieved considerable impact despite falling outside the criteria typically used by university-linked accelerator programmes:

> They don't fulfil any of the other gateway policies for the other university-based accelerators. [They] have facilitated over 300 million meals that have been given out across the country in the last 10 years and employ 130 people. And yeah, they're not in their priority area for the future.[33]

Similarly, a former tenant observed:

> I think the university kept us at a distance because we were a bit weird, but actually what it was, [was] a quite fast growth, inclusive operation.... The enterprise that we were involved in was scaling really fast and needed the support of SETsquared-style stuff, but we didn't fit the entry criteria.[34]

This evidence aligns with the Brunel Centre's Strategic Economic Audit of the West of England (2026), which describes a 'two-speed ecosystem' in which firms located within the digital, tech and creative clusters in the region can benefit from ready access to investors, advisers and specialist services, while firms in the foundational or non-tech sectors often face a fragmented and difficult-to-navigate support landscape. In this context, Engine Shed can be understood as helping to mitigate aspects of this two-speed effect by providing accessible support to firms operating outside established priority clusters, but which nevertheless contribute to the region's economic and social prosperity.

At the same time, several research participants cautioned against overstating Engine Shed's aggregate economic impact. One participant contrasted the challenges of supporting early-stage businesses with the economic value generated by scale-ups, comparing startups to puppies: 'they run around,

[32] Participant C RT1

[33] Participant B RT1

[34] Participant 1 RT2

they're excited, but the real work is in scale-ups... that's where real value is captured, employment happens, people go and do stuff'[35]. Another participant noted that universities may be better positioned to support more mature businesses, as start-up timelines are often much shorter than academic ones, and successful collaboration relies on durable relationships, for instance between academics and company CTOs[36].

Taken together, these observations suggest that one of Engine Shed's distinctive contributions was its ability to support organisations that sat outside conventional innovation-policy priorities. Rather than focusing exclusively on particular sectors or technologies, it provided a space where a wider range of founders and businesses could access advice, networks and practical support. Engine Shed's impact, then, is best understood not primarily through aggregate economic metrics, but through the organisations and individuals it engaged with, and the opportunities, support and space it offered businesses at a very early stage in their development. In that respect, Engine Shed provided an important service to Bristol's innovation ecosystem and business community.

Supporting the creation of networks

Many of the benefits associated with Engine Shed's culture of openness were realised through the networks it helped to create and sustain. Within our survey, evidence of networking was prominent, with a majority of respondents indicating that they had 'Exchanged market or business intelligence at the Engine Shed', 'Received a client referral from another business/ organisation' or 'Worked together with another business or service' through connections developed at Engine Shed (see Table 3). This finding is consistent with the roundtable and interview evidence presented throughout this report, and points to a culture of openness, collaboration and informal knowledge sharing at Engine Shed, facilitating opportunities for mutual support and business partnerships across the innovation ecosystem.

[35] Interview 4

[36] Interview 2

Table 3: Which of the following actions have you performed at, or as a result of, Engine Shed? (n=36)

Statement	Yes, I have
Exchanged market or business intelligence	30
Worked together with another business or service	27
Received a client referral from another business/organisation	22
Mentored, coached or supported another business	20
Discovered or applied for funding	16
Successfully raised funding	12
Connected with business support	12
Been involved in university spinout or research commercialisation activity	12

As a roundtable participant noted, the potential to collaborate was a core reason why they chose to work within the space, stating 'you walk in and it feels like this opportunity to meet people and meet businesses, and that's what I wanted to do, as well as having a space to showcase what we did'[37]. Before Engine Shed opened, these opportunities were perceived to be more limited, as one interview participant noted:

> [I] moved to Bristol in 2005. And my intention in Bristol was to start a new company and start doing stuff in the tech world. And I found Bristol very difficult to navigate, to find good people to work with, to find the people and the places... Almost every company I met ... every founder was thinking they had to move to London to be successful... One of them, I always remember, it was going to break up their marriage.[38]

[37] Participant 1 RT2

[38] Interview 4

This, like much of the evidence we have shared throughout the report, suggests that many of the outcomes associated with Engine Shed emerged from the relationships and networks developed through the space. This was partly due to the deliberate curation of the space, which brought together entrepreneurs, businesses and organisations that were open to collaboration and exploring new opportunities.

The breadth of relationships developed through Engine Shed (see Table 4) reaffirms its role as a hybrid organisation operating at the interface of university, industry and government (Etzkowitz and Leydesdorff, 2000). Survey respondents reported meeting individuals at Engine Shed that would become highly influential in their organisation's development, including their 'first cornerstone angel investor', 'at least three individuals on the spinout's advisory board', mentors and 'local Members of European Parliament'. These examples illustrate the diversity of relationships facilitated by the space and their importance for business development, access to expertise and investment, and wider ecosystem connectivity.

Table 4: Since joining Engine Shed, has your organisation developed new relationships with any of the following? (select all that apply) (n=36)

Other businesses	22
Business support organisations	16
Local government	15
University researchers	14
Investors	12
Social enterprises	11
University students	7
None of the above	7
Trade associations	6

One important component of Engine Shed's success as a networking and convening space was the commitment to openness and outreach of its leadership. Research participants described the Engine Shed and SETsquared

directors and staff as well-networked within the city. Importantly, these networks were consistently used to connect and engage with others, rather than gatekeeping relationships or controlling access to opportunities. One participant highlighted a culture that prioritised collective benefit over organisational self-interest:

> Dozens and dozens of ministers have come through this building as they get off the train... Often, they [Engine Shed] would invite all of us to be involved in that. And actually, that's not a common thing.[39]

Establishing Bristol's reputation externally

Multiple roundtable participants noted that 'more needed to be done to raise the profile of the city'[40] and that 'we [Bristol] weren't really being recognised on the national stage'[41]. Roundtable discussions suggested that part of the issue was that the city lacked cooperation between actors. One participant reflected on the competition between institutions and how this undermined collective efforts to promote the region, noting that 'the universities were in competition with each other. The local councils were in competition with each other. It all has a negative effect on economic growth and entrepreneurship. No one wants to pile in where there's just in-house squabbling'[42].

Participants recognised the role Engine Shed played in encouraging greater collaboration by 'bringing the ecosystem together in a centre point around a historic Bristol building'[43]. There has been sustained effort across leaders across the city's government, businesses and civic organisations to respond to this perception. From Bristol One City, Universities and Colleges West, Invest Bristol and Bath, Visit West, Connect West and the historic role of the LEP. Engine Shed provided a focal point in which different organisations could collaborate and present a more coherent regional identity.

Importantly, this identity was not simply communicated to external audiences, but could be experienced directly. Participants suggested that

[39] Participant B RT1

[40] Interview 3

[41] Participant F RT1

[42] Participant D RT1

[43] Participant 4 RT2

Engine Shed provided a physical manifestation of Bristol's innovation brand; a place where entrepreneurs, investors, businesses, universities and public-sector organisations could interact in a shared environment. Respondents highlighted the role this played in building the city's profile nationally, by hosting ministerial visits, supporting inward investment, attracting businesses to relocate to the city and strengthening the city's reputation. In this regard, Engine Shed functioned both as innovation infrastructure and as a physical expression of Bristol's entrepreneurial spirit, helping to sustain a place-specific identity for Bristol.

> When you see university brochures, they'll say come to Bristol because it's vibrant and it's creative and things happen here and it's a different feeling. What these guys created at the Engine Shed was that... live what you're selling internationally. Be part of our inclusive, creative culture, and live and breathe it[44].

Contribution to innovation

Engine Shed played an important intermediary role within the West of England's innovation ecosystem, guided by its culture of openness and collaboration, and a broader principle of acting in the interest of the region. This ethos helped overcome institutional silos and encourage collaboration between actors in the region, while its central location and non-partisan neutrality were ideal for hosting visitors and boosting the region's profile externally.

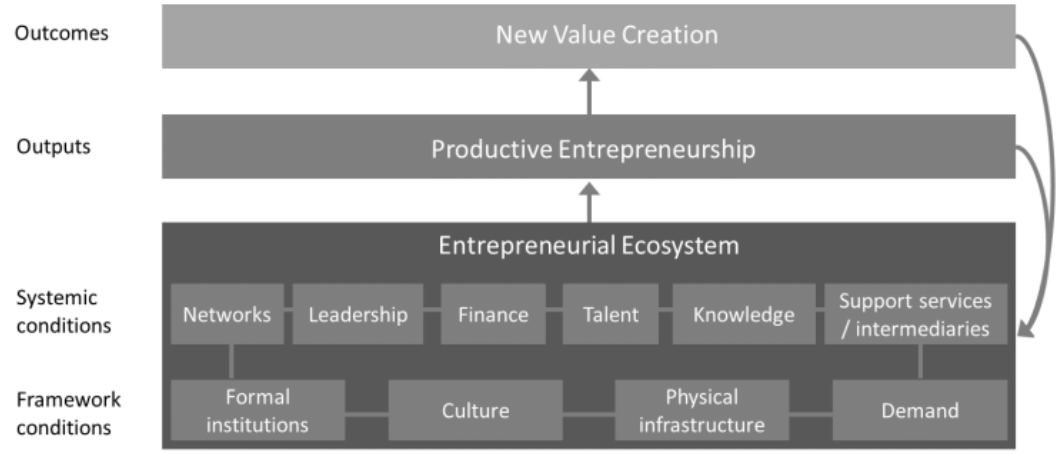
Building the entrepreneurial ecosystem

For the purpose of this report, the entrepreneurial ecosystem refers to the network of organisations, institutions and relationships through which entrepreneurship and innovation in Bristol and the West of England is supported. The literature highlights the role that intermediary organisations play in facilitating collaboration between actors in such an ecosystem. This rarely occurs from co-location alone, but often requires dedicated entities with their own staff, culture and a degree of independence to coordinate

[44] Participant A RT1

activities, convene stakeholders and reduce barriers to knowledge exchange (Etzkowitz and Leydesdorff, 2000).

Figure 3: Visual representation of entrepreneurial ecosystems



Source: Entrepreneurial ecosystem measurement framework by Stam (2015)

As Engine Shed was established through a partnership involving local government, universities, entrepreneurs and businesses, collaboration was embedded within the operating model, allowing it to act as an intermediary organisation. Engine Shed created opportunities for interaction across organisational and sectoral boundaries. This collaborative culture, referenced by multiple participants, was motivated by a desire to strengthen the wider ecosystem rather than advance narrow institutional interests.

> We didn't have an ego. We didn't have any political sway. It was just what's best for the West of England.[45]

Three initiatives that emerged directly from the Engine Shed community illustrate how this collaborative culture translated into durable institutional outcomes, with clear benefits of pooling resources across organisations:

[45] Participant D RT1

Silicon Gorge, a pitching competition for tech businesses seeking equity funding, emerged after several organisations running separate competitions decided to combine their efforts. As one participant explained:

> The reason it [Silicon Gorge] originally came about was there were numerous pitch competitions happening in the region and Webstart, TechSpark, SETsquared and Engine Shed came together and said "rather than running ... all of our own, why don't we just join up and bring our resources together" and it's been there ever since.... Those companies now employ over 1500 people and have raised over 480 million pounds. And they're all businesses, many of which were at the time, tiny, tiny startups.[46]

Connect West, formerly the Bristol and Bath Network, functions as an 'incubator of incubators', bringing together professionals from across the region's business support ecosystem to discuss shared challenges and opportunities. Participants include techSPARK, Barclays Eagle Labs, Science Creates, the University of Bristol Innovation team, InnovateUK and Cool Ventures. Initiated by Nick Sturge, subsequently managed by NatWest and now operated by WECA, Connect West represents a durable institution that emerged from the collaborative environment fostered by Engine Shed, and is dedicated to boosting the performance of the region's businesses.

Science Creates (formerly Unit DX) is a business incubator focused specifically on 'deep tech'. Through the Bristol and Bath Network, the founders of Unit DX came to Engine Shed and were able to access advice, expertise and support from Engine Shed staff, partners and other regional actors, while the University of Bristol acted as an equity partner. One participant reflected:

> In some respects, what Unit DX was setting up is a competitor to SETsquared ... a competitor of what they were doing. But they very much have an attitude of, "well, actually, if we all work together in a more collaborative way, the challenges are of a size and a scale that none of us individually are going to be able to deal with."[47]

Together, these examples suggest that Engine Shed's collaborative culture not only lowered barriers to collaboration for individual users but also supported the creation of durable new institutions that exist independently

[46] Participant B RT1

[47] Participant B RT1

of Engine Shed today, and continue to play a key role in supporting innovation activity within the city and the broader region.

Contribution to inclusivity[48]

A visible commitment to inclusion and outreach was a prominent part of Engine Shed's purpose from its foundation. Inclusion was not treated as a separate objective. Rather, the organisation's three pillars, growth, innovation and inclusion, were seen as mutually reinforcing, with broadening participation viewed as an essential component of economic development. As one interviewee explained:

> So stuff around inclusion, i.e. diversifying the talent pipeline —the need was to create a productive workforce, tapping into the talent in different bits of the city, was an economic imperative, not a "we've got to do the right thing" thing.[49]

Diversifying entrepreneurship

Central to Engine Shed's inclusion work, particularly during its early years, was the Engine Shed Enterprise Fund.[50] This used budget surplus to commission projects and support initiatives aimed at encouraging entrepreneurship among diverse, sometimes underrepresented groups, and connecting school children with the world of work. Participants described a culture that enabled projects to be approved and delivered quickly, with feedback from Engine Shed's advisory board greenlighting projects at pace, often in response to ideas and needs identified through conversations taking place within the building:

[48] The evidence below primarily summarises material from the roundtables, comprised of those running inclusion programmes with Engine Shed rather than intended beneficiaries, who are unlikely to be within the sample due to data collection design.

[49] Interview 5

[50] Diverse Workforce for the Future, Teacher Work Experience (with Teach First), Engine Shed on Tour (with Boomsatsuma), Learning Ships (with My Future My Choice), Platform 14 (with Room 13, St Paul's Carnival, UWE, AgeUK, The Architecture Centre and others), Tech Tours for Schools (with Ultraleap and BJSS), STEAM Tours (with what is now Science Creates Outreach) — Source: (Sturge, 2026)

> That spirit was quite important, of trying different things and being able to do things rapidly... because most of all those activities that happened were really stimulated by conversations in here by people who use the space.[51]

Engine Shed provided memberships to aspiring young entrepreneurs who had participated in partner programmes, supporting them to start their own businesses. It also contracted community organisations to deliver an enterprise programme for refugees, the majority of whom were women (ACH, 2019). Its focus on the future workforce included housing tenants working on apprenticeships and creative education, as well as partnering with charities to introduce primary school children to the world of work. These initiatives were typically delivered through partnerships with organisations that already had strong relationships with the groups they sought to reach.

Schemes such as the Breakthrough Bursaries, run by SETsquared Bristol, were established to improve access to business support and office space for entrepreneurs from ethnic minority backgrounds. This was a direct response to the underrepresentation of these groups among successful applicants to the incubator (ACH and Up Our Street, 2018). Since the scheme was established in 2019, participating businesses have raised a combined £9 million in funding (SETsquared, n.d.).

Engine Shed also developed durable relationships with charity partners, which were invited and, in several cases, supported to take space within the building. On at least one occasion, Engine Shed employees facilitated arrangements through which corporate organisations subsidised memberships for third-sector partners, boosting the range of actors within the space. These programmes reinforced Engine Shed's credibility by demonstrating a financial commitment to its publicly stated values, while also reinforcing the culture and purpose of the space within the city.

Engine Shed was able to fund much of this outreach because of the favourable financial conditions under which it initially operated. Following the COVID-19 pandemic, reduced capacity and higher overheads left less scope to accommodate other organisations and required Engine Shed to prioritise its core functions under more challenging financial circumstances.

[51] Interview 5

Supporting the university's local civic engagement

Universities' civic engagement beyond their core functions of teaching and research is often described as their third mission. In the UK, this concept has evolved through the civic university agenda, which emphasises the contribution universities make to the places in which they are based. This agenda reflects the principle that universities should be judged not only on their global research excellence, but also on their contribution to their local areas (Goddard, 2009). This principle has subsequently been formalised in frameworks such as the Knowledge Exchange Framework, which considers universities' commitments to local growth and regeneration, public and community engagement, and working with the third sector.

A consistent theme that emerged across the roundtables and interviews was the inclusivity of Engine Shed as a brand. One participant said that they 'always thought of it as a civic space rather than the university space'[52]. Others described Engine Shed as a safe space in which they felt invited and welcome. This contrasted with some participants' perceptions and experiences of universities in the area as elite, closed institutions that were not accessible to them.

Participants suggested that Engine Shed helped to change how the universities operated and were perceived within the city:

> I would happily go into Engine Shed and feel safe amongst people that somewhat were like me, but not always like me, but that was okay because entrepreneurs are a really great mixed bunch.[53]

Evidence from the survey complicates the picture and suggests that rather than acting as a fully independent outpost to the university, Engine Shed's user base was primarily drawn from those already within the university's ambit. 32 of 42 respondents asked 'Was Engine Shed your first point of contact with the University of Bristol?' had engaged with the university before engaging with Engine Shed, while only 3 respondents didn't know it was university affiliated. Most respondents had first heard about Engine Shed through word of mouth or as part of a membership offer, suggesting that awareness of its services often depended on existing networks and relationships.

[52] Participant 1 RT2

[53] Participant 3 RT2

While there was still a significant minority (7) who either hadn't engaged with the university before Engine Shed, this didn't reflect the majority of respondents to the survey. It should be noted that the survey, which was collected from existing lounge users and through LinkedIn, is unlikely to have reached those who accessed outreach programmes. There is also a clear difference between engagement with an institution and feeling that it is 'for you'. However, it does suggest that Engine Shed's role as an outpost shouldn't be overstated.

Nevertheless, the community partnerships developed by Engine Shed and the experiences reported by roundtable participants suggest that its activities, particularly during its earlier years (up to 2019), supported the development of the University of Bristol's civic agenda. In Goddard's (2009) terms, Engine Shed can be understood as one of the university's principal civic instruments of the past decade: an arm's-length, distinctively branded and city-facing presence through which the university engaged with people and organisations beyond its traditional boundaries.

An inclusive culture enhanced effectiveness

One consequence of Engine Shed's approach to outreach and inclusion was that it reinforced its role within the city as a neutral, open and inclusive space. This was supported not only by Engine Shed's clear and consistent messaging about its purpose and values, but also by the financial outlay committed to demonstrating those values and putting them into practice. This openness is said to have defined the character of the space, with one roundtable participant illustrating this through their experience of bringing children to Engine Shed:

> [Engine Shed] didn't mind the kids... They're making a racket building the model boats. And I was thinking, someone's going to complain soon... You would've have been thrown out in any other space.[54]

This commitment and attitude made the space more accessible, but its significance also extended beyond the groups directly supported through outreach programmes. Its openness established Engine Shed as a place with distinct rules and a culture that supported its wider functions as a multi-actor convening space. From outreach users to local government, universities and established businesses, this cemented Engine Shed's perceived apolitical

[54] Participant D RT1

neutrality and provided an environment in which people from different organisations could meet outside their usual institutional settings, and where informal interactions and water cooler conversations could occur. This helped to establish Engine Shed as a useful setting for cross-stakeholder collaboration and relationship building.

Engine Shed's approach to inclusion contributed to its impact in two related ways. First, its outreach activities broadened participation by creating routes into the innovation ecosystem for groups that might otherwise have faced barriers to engagement. Second, the inclusive culture associated with these activities helped to create a space that users from different sectors and backgrounds regarded as welcoming and comparatively neutral. Inclusion was therefore not simply an additional strand of Engine Shed's activity. Rather, it reinforced the characteristics that enabled Engine Shed to perform its wider role as a civic and convening space within the city.

Looking ahead: Bristol Temple Quarter and the Enterprise Campus

This section brings together our understanding of what made Engine Shed unique and effective, situating it within the evolving landscape of Temple Quarter and the University of Bristol's role within the innovation zone.

Bristol Temple Quarter

Bristol Temple Quarter (BTQ) is an economic redevelopment zone in central Bristol. Covering approximately 135 hectares around the city's principal rail interchange and adjacent to the city's professional services cluster, the area includes underused industrial land and brownfield development opportunities. One of the most significant developments within BTQ has been the University of Bristol's Temple Quarter Enterprise Campus (TQEC), located immediately to the east of Bristol Temple Meads station.

Since its designation as an Enterprise Zone in 2012, BTQ has become the focus of a long-term programme of economic development and regeneration. WECA describes it as 'one of the UK's largest regeneration programmes', to produce 'a mixed-use innovation district' (WECA, 2026). The regeneration programme aims to support economic growth, attracting '£1.6bn annual income to the city economy' (BCC, 2023). It has secured £95m of central government funding for transport upgrades including a new east entrance to Bristol Temple Meads station.

While the first phase of regeneration is focused on the immediate area surrounding Bristol Temple Meads, the overarching '30-year plan' includes

the longer-term redevelopment of St Philip's Marsh (BTQ LLP, 2026). Achieving this vision will require addressing a range of challenges, including site viability, public transport connectivity, fragmented land ownership and flood risk.



Map of Bristol Temple Quarter. Source: Bristol LLP

Delivery of the regeneration programme is overseen by a partnership between BCC, WECA, Homes England and Network Rail (BTQ LLP, n.d.). Although the university is not a formal member of BTQ LLP, it is a key lynchpin and delivery partner within the area. Both Engine Shed and the new TQEC are located within Temple Quarter and have contributed to the district's development as a centre for innovation, research and enterprise.

The plans for BTQ reflect many of the characteristics associated with innovation districts. These are compact, transit-accessible, mixed-use environments that bring together anchor institutions, businesses, entrepreneurs, researchers and investors (Katz and Wagner, 2014). They often comprise start-ups, incubators and accelerators. The development of BTQ has sought to create these conditions by combining new employment space, research facilities, business support, housing and transport infrastructure within a single urban area.

Temple Quarter Enterprise Campus

The new campus, a £500m development, opened in September 2026 at the heart of the initial BTQ regeneration. Its centrepiece is the Sloane Robinson (SR) Building, the largest in the university's estate.

The SR building provides teaching space for up to 4,600 students and brings together activity in business, innovation and digital technologies. Facilities include specialist dry labs, active learning spaces, the Bristol Rooms, coworking and events space, and the Bristol Innovations Zone (BIZ), which supports entrepreneurship, research commercialisation and collaboration between the university and external partners. The BIZ has a particular focus on frontier technologies and high-growth sectors, including quantum and photonics technologies, often referred to as ‘deep tech’.

The remainder of TQEC consists of The Sheds, the Bristol Dental School and the micro campuses in Barton Hill and Hartcliffe & Withywood. The Sheds is dedicated to digital and creative media research and currently includes the Bristol Digital Futures Institute and MyWorld programme. Bristol Dental School opened in 2023 and updates the university’s training space for dentists. The micro campuses, opened in 2020 and 2025, offer courses, library access and coffee mornings to the communities in their respective areas.

The Enterprise Campus has been conceived as a long-term commitment to Temple Quarter and will expand alongside the rest of the innovation district. The university has long-term plans to partner with industry, public sector organisations and cultural partners to develop the TQEC as opportunities emerge.



The Sloane Robinson Building. Source: University of Bristol TQEC website

Viewing the closure of Engine Shed and opening of the Enterprise Campus and the Sloane Robinson Building as an evolution of the university's presence in Bristol Temple Quarter, we can identify three distinctive changes that will materially affect the role the university plays within the area:

- **A change in scale** – The transition from Engine Shed to the Sloane Robinson Building sees the university's innovation function move from a dedicated 2,800 sqm building to a 38,000 sqm building within a wider campus.

- **A change of governance** – Engine Shed has been run by the Science Research Foundation Limited (SRF), a wholly owned subsidiary of the University of Bristol. SRF operated independently of the university, with self-contained finances. The Sloane Robinson Building is instead embedded within the university and forms part of its broader estate.

- **A change in logic** – Engine Shed was a curated coworking and civic hub that was sector-agnostic and inclusion-oriented. The Sloane Robinson Building is broader in function, encompassing research, enterprise and public access, but has a narrower enterprise focus, which is directed towards deep tech.

Each of these shifts has a clear rationale, with the university seeking to establish a distinct and expanded offering within the new campus that can support regional innovation and enterprise activity. These shifts also reinforce that Temple Quarter Enterprise Campus is not a scaling of Engine Shed and its activities, but rather a new offering within the evolving Temple Quarter innovation district. Engine Shed's legacy cannot be assumed to transfer with the move. While some functions and partnerships developed through Engine Shed will transfer across institutions and buildings, others were closely linked to Engine Shed's original design and may be harder to recreate elsewhere.

It is also important to recognise that Engine Shed's role within the ecosystem was dynamic: not all of its original functions were still being carried out by the time of its closure, following changes to its finances and operating model.

This matters for how the recommendations should be read. The conditions identified as central to Engine Shed's earlier success, including financial headroom, anchor tenants, the Enterprise Fund and sustained outreach, relate mainly to the period from 2013 to 2019 and were a result of how Engine Shed was established. Several had lapsed well before closure.

The opening of TQEC and closure of Engine Shed therefore raises two important questions:

1. Which functions of the Engine Shed should the Enterprise Campus look to sustain, given its expanded remit?

2. Which elements of the Engine Shed have been lost as a result of its operational changes over time? Are these functions missed within the innovation ecosystem and which actors are best placed to address these gaps?

These questions provide important context for the recommendations that follow. This report has shown that Engine Shed's effectiveness rested on collaboration and a sense of collective ownership across multiple organisations. Many of the recommendations are, therefore, not directed solely at the university or the new campus. Instead, they are relevant to multiple actors across the ecosystem, including the university, regional government, business support organisations, development agencies and regional businesses. This reflects one of this report's central findings: that collaboration across actors sustained Engine Shed's impact and will continue to be important in shaping the future development of the Temple Quarter.

It is also worth considering not only which of Engine Shed's recent activities will transfer over, but also opportunities to recover elements of its earlier impact that had ceased following changes to its occupancy and capacity.

To help structure the implications, they are organised around three main audiences, each with distinct interests and remits to effect change:

- **The University of Bristol**, which will be interested in how the Sloane Robinson Building and TQEC can be most effective and how institutional learnings from Engine Shed can be carried across to the new campus.

- **Civic actors within Bristol**, who will be interested in the report's insights into the city's economic activity, and in the opportunities and changes arising from Engine Shed's closure and the opening of the SR Building.

- **Professionals working in start-up, innovation or business support ecosystems**, who will be interested in the compositional elements of Engine Shed's model and the outcomes they supported.

Implications for Temple Quarter Enterprise Campus

The TQEC will become the University of Bristol's primary anchor within Bristol Temple Quarter, building on the legacy of Engine Shed. As it takes on this role, an important lesson from the literature on innovation districts and coworking spaces is that neither the presence of an anchor institution nor the co-location of tenants within a shared building is sufficient, in itself, to generate collaboration or civic value. Achieving these outcomes depends on deliberate design and sustained institutional commitment.

Two conditions identified through this research stand out as particularly important to how Engine Shed translated its presence into impact. First, Engine Shed actively curated a culture of collaboration. Second, it functioned as an open civic anchor rather than an exclusive university asset. The following sections consider each in turn and their implications for the Enterprise Campus.

To better understand the implications of the transition, Appendix 1 identifies where the functions of the Sloane Robinson Building and the Engine Shed overlap and identifies the changes to the offering. This helps to identify both the opportunities and risks they present and provides context for the recommendations that follow.

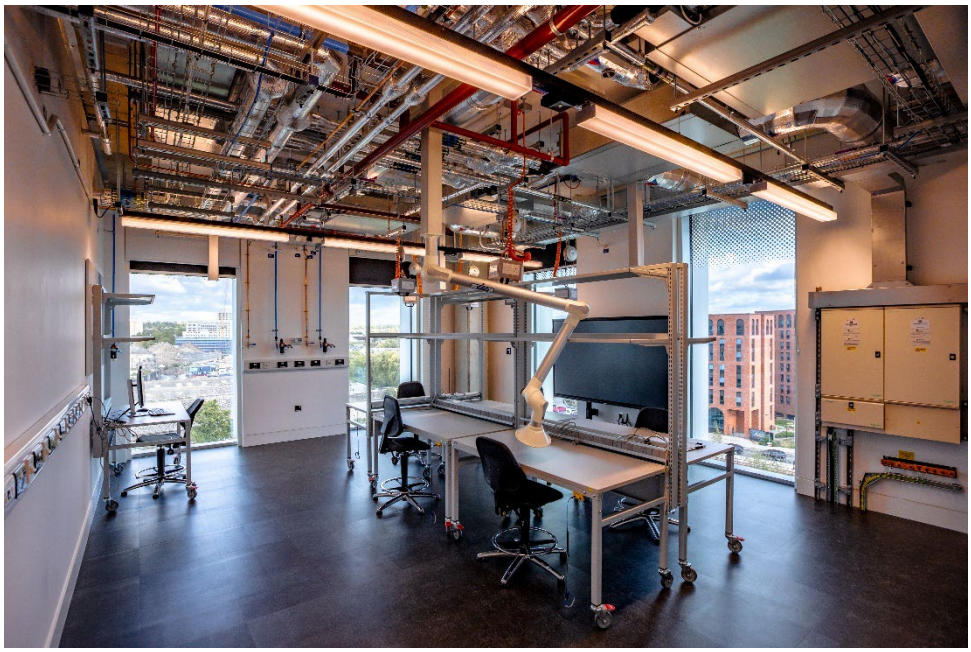
Curation rather than co-location

The literature and the primary evidence collected through this study indicate that the value of convening spaces such as Engine Shed comes from active curation rather than co-location alone. Simply placing organisations in the same building does not, by itself, produce collaboration between them. Hosting and relationship brokerage requires deliberate and sustained input from staff. Our research participants consistently attributed the connections, advice and shared learning they gained at Engine Shed not only to the space itself, but also to the consistent work of its staff in bringing people together and upholding a set of shared, neutral principles.

As BIZ begins to offer office space and dry labs to deep tech businesses, this same curation cannot be assumed to happen automatically. SETsquared will continue to provide incubation and entrepreneurial support, but the activity curated by Engine Shed extended beyond SETsquared's remit. This included

mentorship, informal advice and connections to potential clients, customers and industry.

Recommendation: The University of Bristol should consider how they can support the curation of a strong community within BIZ, ensuring the network effects of co-location are realised. The location and facilities of the Sloane Robinson Building alongside the expertise, networks and remit within BIZ and SETsquared should be harnessed to build a diverse community, across researchers, start-ups, funders, professional service organisations and established businesses.



Dry Rooms located within BIZ. Source: Julian Preece Photography

Creating the informal 'water cooler' encounters described by participants may present a different challenge within the Sloane Robinson Building. The building has been designed to bring a broader mix of people through its public areas — including students, members of the public and residents — than Engine Shed's more selective catchment.

To encourage serendipitous meetings, existing activity across the city's innovation ecosystem could be built upon, helping to connect different groups and organisations. Engine Shed was able to curate diverse interactions by meeting people and making proactive invitations. Going beyond an open

door was central in establishing the building as a place to meet new and existing connections. This outreach could include organisations working in deep tech, as well as a broader range of organisations, including those in the Voluntary, Community, and Social Enterprise (VCSE) and cultural sectors, which play an important role in place-making and supporting social infrastructure.

While the presence of these different groups may create opportunities for interaction, it will not necessarily mean that meaningful connections occur. How the building operates in practice will become fully apparent once it is in use. Then, it will be important to understand whether the shared and civic spaces are enabling people from different organisations to interact and assess the quality and value of informal encounters in the building.

Recommendation: The University of Bristol should look to identify how spaces within the Sloane Robinson building can be utilised by a variety of stakeholders outside of the university, acting as a form of urban social infrastructure. Shared civic spaces that host a variety of events and activities throughout the year should look to facilitate a sense of community and inclusivity within the innovation district and the broader region.

The Enterprise Campus as a civic anchor

The BTQ innovation district can be understood as an 'anchor plus' model within the literature, in which activity is organised around a major anchor institution, typically a research university (Katz and Wagner, 2014). In BTQ, the university's Enterprise Campus will fulfil this anchor role, sitting at the heart of the developing innovation district within close proximity of Temple Meads station, the existing professional services hub and future development within St Philip's Marsh.

Research on innovation districts highlights potential risks associated with different models of development. Katz and Nowak (2017), for example, find that anchor-plus districts depend on anchor institutions opening their assets outward and risk underperforming where campuses operate as enclaves. This aligns with findings from our research, wherein participants valued Engine Shed as a civic space that supported a broad range of entrepreneurship and innovation activity.

This suggests that the university should take an active role in ensuring that the Enterprise Campus is 'of the city', taking deliberate steps to share the

facilities, expertise and convening power that the new campus brings to the region. In doing so, the Sloane Robinson Building can play a key role as a civic asset for both Temple Quarter and the wider region. Critiques of innovation districts, including concerns about displacement and the limited evidence for spillovers from co-location alone (Pareja-Eastaway and Piqué, 2011; Rapetti et al., 2022), further reinforce the importance of deliberate design and activity rather than designation.

Where Engine Shed was successful in this regard, the principles underpinning its civic role were institutionalised into all aspects of its work, across its structures, strategies, incentives and allocation of resources. Evidence from the roundtables and survey suggests that this helped to embed these principles into the organisation's wider culture. Current initiatives delivering the Civic University Agreement for Bristol, such as the Business Catalyst Collective (which seeks to build confidence in local entrepreneurs) and the universities micro campuses, are already contributing to this activity. Consideration should be ongoing of how the principles set out in the Civic University Agreement can be embedded within the operation of the Enterprise Campus.

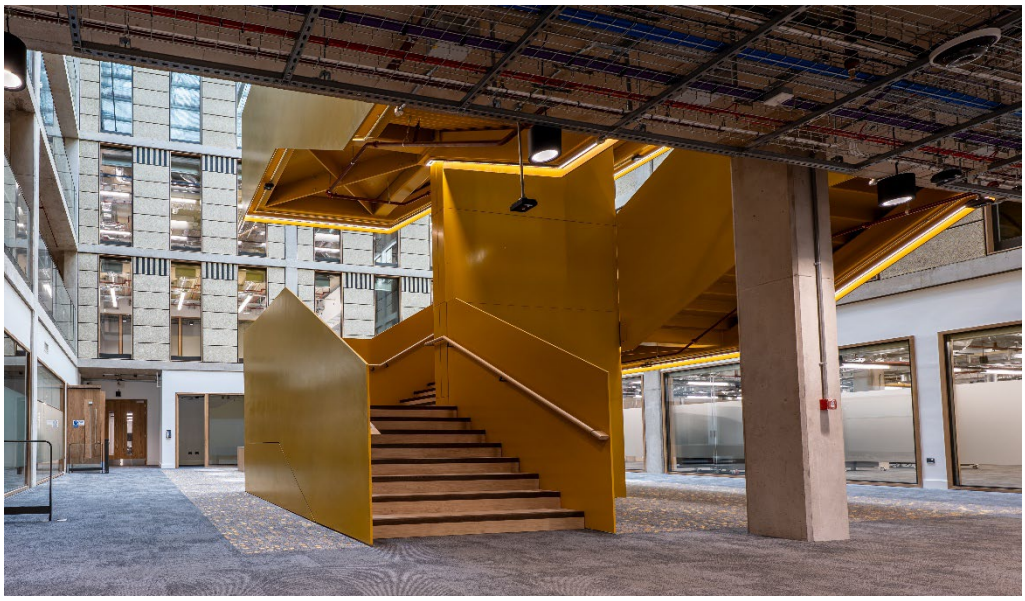
Another theme that emerged from the research was a perception among several participants that the university was viewed as 'exclusive' and an 'ivory tower'. Participants recognised that Engine Sheds neutral branding created a space for those who had not previously felt universities were for them. An important aspect of ensuring Engine Shed was used as a civic asset was through its active approach to community partnership, actively inviting organisations in to use the space. By responding and listening to partners' needs, Engine Shed was able to build trust. Sustaining this trust - built across communities both within Engine Shed and the university's micro-campuses in Barton Hill and Hartcliffe & Withywood - will be critical to ensure civic value is delivered through the new TQEC.

A separate theme that recurs within the literature on anchor institutions is that 'other' channels exist through which large, spatially immobile institutions can benefit their local areas, including procurement, employment and progression practices, and the use of land and assets (CLES, 2017). These areas were not directly explored through the primary data collected for this study, but given the scale of the new campus, are relevant considerations.

Preston provides a well-documented UK example. Between 2012/13 and 2016/17, deliberate changes to anchor-institution procurement increased the proportion of participating institutions' spend retained within Preston from

5% to 18.2%, and within Lancashire from 39% to 79.2% (CLES and Preston City Council, 2019). The participating anchor institutions included the University of Central Lancashire. This illustrates how the wider activities of anchor institutions can provide additional routes through which local businesses and communities benefit from their presence, potentially boosting local (re)development.

Recommendation: To maximise the opportunities created by the Enterprise Campus for the city and wider region, it would be advantageous for the university to set out clearly the role the Enterprise Campus will play in supporting the development of the Temple Quarter Innovation District. This could consider areas including community outreach and partnership, procurement and estate decisions, education and skills, and innovation and entrepreneurship, helping to ground the campus within the area and inform its contribution as Temple Quarter develops over the longer term.



The Sloane Robinson Building golden staircase. Source: Julian Preece Photography

Implications for the ecosystem

Successful entrepreneurial ecosystems rely on systemic conditions such as networks, leadership, finance, talent, knowledge, support services, alongside wider conditions including institutions, culture, and demand (Stam, 2015). This framework is important in understanding Engine Shed's impact because the value it provided extended beyond the building itself to the networks,

leadership, intermediary functions and exchange of knowledge it supported. Examples from successful innovation regions similarly highlight the importance of institutional culture, alongside physical assets and investment in research (Saxenian, 1994).

Engine Shed contributed to several elements of Stam's framework. For example, through its convening and intermediary role in the development of networks, as well as the leadership it provided and knowledge brokerage it enabled. However, an entrepreneurial ecosystem depends on multiple actors mutually supporting and interacting with one another. The functions previously performed by Engine Shed are therefore likely to be distributed across the Enterprise Campus and other organisations within the wider ecosystem, rather than transferred to a single organisation or location. In the following sections, we identify some of the unique functions that Engine Shed performed and consider where gaps may emerge following its closure. Stam's (2015) framework is used here descriptively rather than causally to help understand these functions and their relationship to the wider ecosystem, rather than to establish a causal relationship between them and particular outcomes.

A neutral convening space for innovation

Throughout the research, participants highlighted the importance of Engine Shed as a neutral space that did not carry the branding of a single institution. This reflected its founding, which brought together a range of organisations around a shared mission to support inclusive economic growth within the city. It also reflected how Engine Shed was resourced, which allowed it to be '*generous*' with both its space and the time of its employees. Together, these characteristics contributed to a strong affinity for the Engine Shed brand, which approached collaboration, inclusion and innovation in equal measure.

This enabled Engine Shed to act as an intermediary, bringing together different organisations and perspectives while providing an event space regularly used by organisations from across the city. In this way, its neutrality supported a wider culture of collaboration across the ecosystem, including by bringing different actors together around complex, multi-stakeholder projects such as Silicon Gorge.

The benefits of convening largely accrue to the organisations and individuals brought together, rather than to the convenor itself. This means the wider benefits of the ecosystem can exceed the direct return to the organisation

providing the function, making it difficult to sustain without subsidy. Although institutions such as TechSPARK, Silicon Gorge, Science Creates and Future Space provide aspects of this connective role, the loss of Engine Shed creates a clear risk of a gap in formal coordination and convening.

Engine Shed's physical space supported this role, but its brand was also important in establishing it as a 'civic professional' hub and fostering a culture of openness. This distinction matters more now than it did when Engine Shed opened in 2013. Bristol's coworking provision has grown substantially, particularly since 2020, meaning that physical workspace is more widely available. What is less readily replaced is a resourced convening function, and it is this that is most at risk following Engine Shed's closure.

Recommendation: Core actors across Bristol's entrepreneurial ecosystem should consider how the convening role previously played by Engine Shed can be sustained, helping to determine which organisation(s) can occupy the role of a civic professional hub for the city. This may involve a combination of organisations, networks and physical spaces and should be envisioned as a partnership, rather than through ownership by a single organisation.

Sector-agnostic entrepreneur support

BIZ has developed a specific focus on supporting deep tech organisations, building on the university's research strengths in areas such as quantum computing, photonics, semiconductors and AI. This reflects a broader emphasis within the UK innovation landscape on supporting high-growth businesses with significant scale-up 'unicorn' potential. University-backed innovation investment also follows a financial model that reinforces this focus. Individual spinouts are often loss-making, with institutional returns dependent on a small number of high-value successes rather than steady returns across a broad portfolio, closer, as one interviewee described it, to 'betting on the horses'[55].

There is, therefore, a clear strategic rationale for greater specialisation. However, this also has implications for the wider entrepreneurial ecosystem. Sector-agnostic and pre-seed support may be particularly vulnerable as resources are reallocated and concentrated on businesses with greater investment potential. Although such support may generate limited direct financial returns for the institutions providing it, evidence on the Engine Shed

[55] Interview 2

shows that it can deliver real value to the broad range of businesses and entrepreneurs it supports and contributes significantly to the local economy through local job creation.

Coworking spaces can be particularly important in helping entrepreneurs to access early-stage and pre-seed support, acting as a bridge between informal networks and more structured business support, such as Local Growth Hubs (Fai and Tomlinson, 2026). Coworking spaces can therefore be seen as one of the key mechanisms enabling entrepreneurs to access support during the process of starting a business, often through bottom-up skills provision (Wang et al. 2026). This bridging role has become particularly significant as funding pressures have reduced the capacity of Local Growth Hubs to provide proactive, face-to-face engagement, with WECA's current offering predominantly delivered online.

Our research reaffirms the importance of this bridging function, with Engine Shed combining co-location with informal support, incubation activities, connections and networks across a broad mix of organisations. Multiple participants described benefiting from both informal advice and mentorship at Engine Shed and more formal programmes, such as Webstart. They also stressed the value of sector-agnostic, pre-seed support in maintaining a broad pipeline of new businesses. Several identified examples of businesses that had benefited from Engine Shed but 'would not have fit the entry criteria'[56] for university support. This is consistent with wider research conducted by the Brunel Centre, which identifies well-connected business ecosystems around the region's technology and creative clusters. However, businesses outside of these sectors have greater difficulty accessing equivalent support. This challenge is particularly relevant given the importance WECA's growth plan places on the everyday economy.

Bristol's coworking market has expanded substantially since the COVID-19 pandemic, with 69 coworking spaces reported across the city (Coworking Café, 2026), creating more opportunities for geographical flexibility. But these spaces do not necessarily offer the same combination of convening, support, networks, events and routes into the wider innovation ecosystem that Engine Shed offered.

Some of this informal support could be provided through Bristol's existing coworking spaces, particularly where they are connected effectively to local support schemes. However, without coordination or partnership between

[56] Participant 1 RT2

these different elements, there remains a risk that the bridging role previously played by Engine Shed becomes fragmented or is not fully replaced.

Recommendation: To retain the benefits of Engine Shed's role as a bridge into the wider innovation ecosystem, WECA should work with local incubators, training providers, the university and community coworking spaces to develop a clear proposition for entrepreneurs and businesses outside the deep tech sectors. Aligned with WECA's focus on the everyday economy, this should connect formal business support with informal networks, mentoring and opportunities to enter the wider ecosystem, ensuring that businesses outside established technology clusters can access the support they need to start, grow and scale within the region.

A heritage asset for Bristol

The Engine Shed's building on Station Approach is an important part of Bristol's heritage. Its association with Isambard Kingdom Brunel shouldn't be overlooked; it reflects the city's wider development and industrial history, alongside landmarks such as the Clifton Suspension Bridge, SS Great Britain and Great Western Railway. The building also forms part of one of only nine Grade I listed railway stations in the UK, and the only one in the South West. As Temple Quarter develops, there is historical, social and economic value in retaining and making use of existing heritage assets. As one participant described it, these spaces provide a form of 'free heritage'[57].

The building has already adapted to changing uses, from a working railway terminus to a museum and, most recently, office space. As the surrounding area undergoes further development, its next use will need to balance adaptation with the preservation of the characteristics that give the space its historical and civic value.

The nature of the listed building has posed significant challenges for its upkeep, and continued maintenance and investment will be required to secure its long-term viability. These requirements may constrain the space's commercial viability in the short-term. However, the building's value extends beyond the financial return available to its operator. Retaining and maintaining

[57] Participant 5 RT2

an important heritage asset can also contribute to the character, identity and wider appeal of Temple Quarter and the city.

Evidence from comparable regeneration schemes illustrates how this does not require the building to become self-sufficient on commercial terms. Rather, heritage assets can contribute to wider placemaking. Centre for Cities' analysis of the regeneration of King's Cross Coal Yard (2022), for example, found that some heritage refurbishments were loss-making when considered in isolation. But when viewed as investments in placemaking, the uplift in demand and value across the wider site is demonstrated, helping to de-risk other developments. While there remain inherent costs and risks in adapting a complex Grade I listed building, this comparison illustrates the importance of considering the building as a historically significant asset that can support broader regeneration ambitions of the area.

Recommendation: The evidence from this study indicates that the Engine Shed building is a valuable heritage asset for Bristol and the wider region; it is recommended that a plan is developed to protect this asset into the future.



Heritage details within Engine Shed. Source: Engine Shed Archive

General implications

Engine Shed emerged from a particular set of circumstances in Bristol, including the availability of the Station Approach building, the presence of SETsquared Bristol, strong civic leadership and support from Bristol City Council. However, the evidence from this study identifies several broader lessons about leadership, funding and organisational culture that may be relevant to other places seeking to bring together government, higher education, incubators, businesses and other organisations to support innovation.

Leadership

Anchor individuals are important to institutions: collaboration between organisations was often enabled by individuals who acted as champions, built relationships across organisational boundaries and connected people who might not otherwise have interacted, breaking down sectoral, institutional and social siloes. This can be particularly important in a city the size of Bristol, where strong personal networks can facilitate collaboration across the ecosystem. However, reliance on key individuals can also create vulnerabilities when people move on. Maintaining institutional and contextual knowledge, while bringing new people into established networks, is therefore important for their long-term resilience (SQW, 2018).

Find a 'person sized' hole in institutions – rather than seeking to establish relationships with entire organisations, Engine Shed often focused on finding a 'person sized' route into an organisation: an individual who could act as a conduit and connect the wider network with colleagues in less externally facing areas of their organisation[58]. This suggests that effective collaboration can depend as much on identifying people with the willingness and capacity to build relationships as on formal institutional partnerships.

Autonomy enables speed, speed creates trust – Engine Shed's relative autonomy enabled its team to make decisions and respond to opportunities quickly. This encouraged initiative and allowed relationships with external partners to develop through action as well as discussion. For organisations

[58] Interview 5

performing a convening role, having sufficient autonomy to act on opportunities quickly can be an important component of building trust.

Finances

Financial support can enable experimentation and security – Engine Shed's activities were underpinned by financial support that allowed it to employ a relatively large team, provide lounge membership on sub-commercial terms and experiment with initiatives such as the Enterprise Fund. This reduced the need for every activity to generate a direct financial return and enabled Engine Shed to pursue activities intended to benefit the wider ecosystem. Such a model depends, however, on funders recognising and valuing the benefits that may accrue beyond the organisations they are directly supporting.

Relying on discretionary funding makes sustaining capacity more challenging - The reprioritisation of HEIF funding in 2019 represented a significant challenge to Engine Shed's operating model and illustrates the risks associated with reliance on discretionary subsidy. Funding priorities can change in response to institutional pressures, leadership changes or the competing demands and capacity of subsidising bodies. This creates a particular challenge for neutral convening spaces, whose value may be distributed across multiple institutions and organisations, and therefore difficult for any single funder to capture. Those advocating for convening spaces similar to Engine Shed need to be explicit about the benefits of neutrality, negotiating long-term funding arrangements that reflect the space's wider benefits while ensuring funders are comfortable with providing sufficient autonomy for the space to maximise its convening role.

Culture

Independent branding has clear benefits– Engine Shed benefitted from an identity that was not strongly associated with any single institution or sector. Its neutral branding helped to ensure that users were less likely to approach the space as a university, government or tech venue. This was, in part, curated by a leadership team that recognised how neutral ambiguity reduced the likelihood that users felt it 'wasn't for them'. This also enhanced its attractiveness for dignitary visits.

Having a mix of tenants and institutions is a compounding advantage – Engine Shed actively sought a varied mix of tenants, partners and visitors, and minimised barriers to entry. Externally-hosted events were relatively straightforward to organise in the space, while the Engine Shed team also used their connections to bring organisations into the building that aligned with its wider purpose, going further than being an 'open door'. This created a mix of local government, incubators, businesses, entrepreneurs and other users within the same space, increasing opportunities for connections between them. When fully occupied and housing local government alongside incubators and lounge users, the space was at its most varied and, arguably, its most successful.

Prioritise frictionless access - Engine Shed generally prioritised accessibility and use of the space over exclusivity or revenue. Lounge access was facilitated through partner organisations and parts of the building operated with relatively few physical barriers to entry, like key cards. Although this approach created a small number of practical challenges, its open-door policy contributed to the buzz of the space and informal interaction within the building.

'Inclusively exclusive' space – Engine Shed was intended as a convening space primarily for people involved in Bristol's civic and professional community, including local government, business executives and entrepreneurs. At the same time, wider networks, charity partnerships and commission projects were used to broaden participation and connect this community with other parts of the city. This created an 'inclusively exclusive' space for the city's civic professional community, with the combination of a clear purpose and relatively open routes into the space becoming central to Engine Shed's identity and success as a convening hub.

Conclusion

While undertaking this research, many people expressed a clear sense of attachment to Engine Shed. They had a clear sense of connection to the building itself, its staff, commissioned activities and businesses founded, closed and sold. As one participant from a partner organisation reflected, describing messages received since the closure was announced: 'I've had many emails from people saying how much they will miss the space, and so that's really lovely to hear.'[59] For its users, Engine Shed was a valued and distinctive civic professional space, built on a view that the city's challenges were too large for any single organisation to address alone. In adopting this approach, Engine Shed helped build an innovation ecosystem that supported inclusive growth, and served as a convening place for some of the most significant developments in Bristol over the past decade.

As the city enters a new chapter, with ambitious development under way across Temple Quarter, the collaborative and civic approach taken by Engine Shed will be critical to sustaining an inclusive innovation ecosystem. Given the University of Bristol's prominence within Temple Quarter and its role anchoring the area's innovation activity, delivering this in partnership with the wider city, rather than the university alone, will need to be at the core of the Temple Quarter Enterprise Campus.

While the external environment has shifted significantly since Engine Shed was founded in 2013, there are core learnings that can be taken from its approach that will benefit the development of the Temple Quarter. Importantly, the networks of people and organisations formed over the past 13 years will remain; it is therefore a collective responsibility to ensure that the culture that grew within Engine Shed remains embedded across our institutions.

[59] Participant 2 RT 2

References and Appendices

Appendix 1: Understanding the transition from Engine Shed to the Enterprise Campus

Engine Shed Function	TQEC	Change	Implication	Relevant actor(s)
Incubation support	SETsquared services continue to be delivered. Other deep tech incubation services within the Uni (such as QTIC) are housed within BIZ.	More dedicated space, labs and offices for deep tech organisations are provided	SETsquared has a closer proximity to the university's wider innovation assets (e.g. Business School and Deep Tech businesses) with more provision being provided for deep tech businesses.	Bristol Innovations Zone (BIZ), SETsquared Bristol
Sector-agnostic entrepreneur support	BIZ membership and support is focused on deep tech companies.	Loss of the informal, peer-to-peer and formalised support Engine Shed provided to entrepreneurs outside priority sectors.	A dedicated, sector-agnostic proposition is needed elsewhere in the ecosystem	WECA, local incubators, University of Bristol, community coworking spaces
Coworking and lounge access	Paid members get lounge access; some open-access desks are available but shared with the public and students	The space is curated. The mix of users is likely to differ, since the open-access desks are shared	A curated events and community programme is needed to build a distinct identity for BIZ beyond desk access alone.	Bristol Innovations Zone (BIZ), SETsquared Bristol

Neutral convening	Public access areas exist, but the building's catchment includes students and the general public alongside professionals.	The selectively curated catchment that made informal encounters valuable is replaced by a broader, more mixed one.	Active monitoring of how the space is used post-opening will be needed to establish whether serendipitous encounters are still occurring as intended.	Bristol Innovations Zone (BIZ), Bristol Rooms
Events venue	Bookable rooms and event spaces available at commercial rates, with member discounts.	More diverse set of event spaces that will be offered at commercial rates	Facilities available will be significantly improved, allowing for broader use but may not be as easily accessible	University of Bristol estates/events management
Inclusion programmes	The Bristol Rooms will host charities, VCSOs and community organisations.	Inclusion/third-sector activity (Bristol Rooms) is separated from business and entrepreneurship activity (BIZ), rather than integrated as at Engine Shed.	Active connection between the two spaces will be needed, to continue the inclusion-innovation link Engine Shed promoted	Bristol Rooms, BIZ
Key university touchpoint	The SR building is prominent and centrally located	Shift from a neutrally branded space affiliated with the university to an explicitly University-branded space.	The university has a stronger platform to embed its Civic University Agreement commitments directly into the building's operating principles — but starts from a less neutral position with the city.	University of Bristol
Heritage asset	The building lease ends in 2028	The university's active use of, and connection to, a nationally significant Grade I listed building ends	A plan is needed for the building's future use	University of Bristol, Network Rail, BCC/WECA

Appendix 2: Participant perspectives

We asked survey respondents, roundtable participants and interviewees what they want to see from the Sloane Robinson Building and the TQEC. The results have informed our implications discussion. Many of the comments have been integrated into the design of the SR Building since its inception. The comments reflect the desire of the existing civic professional community to use the SR Building, and for it to become a utilised and successful space for the city, and are worth repeating directly:

Empower staff

'People make places.'

'Employ confident decision makers who know the strategic direction and are led by values so can surf uncertainty. Say yes quickly don't take so long to act that ideas atrophy'

'Ensure the 'front people' can answer questions and speak in a wide variety of registers.'

Flexible membership and a range of spaces

'Be really clear about what is meant by 'community' and 'communities' and develop a nuanced understanding of intersectionality. Understand the difference between provision and participation. Ensure the spaces are programmed and really well facilitated.'

'Engine Shed worked because it felt open, welcoming and accessible, with startups, scaleups, corporates, universities and the public sector all sharing the same space. Temple Quarter should build on that by remaining a neutral place that brings the whole innovation ecosystem together, rather than feeling like it belongs to any one organisation.'

‘The importance of 'water cooler' conversations. Without the easy to access lounge area that exists in Engine Shed, it will be difficult to replicate quick catch ups or meetings that happen regularly in Engine Shed.’

Enable autonomy

‘Sit in the liminal spaces rather than expect everyone to come to the university’

‘Don't try and do everything in house. Collaborate with specialist providers, particularly in the social economy sector’

‘Invest in the asset of a community for entrepreneurs managed by people with experience of entrepreneurial culture. Give it autonomy, avoid centralised control. Ensure it provides opportunities for students but is primarily for business people. This way students and business both benefit.’

Explore social ventures

‘social venture creation [is] an informal sphere where there might be space in the university's mind to do something - let's say that that's the space in which there is the realistic opportunity to have a sensible of conversation with the university, and that's the boundary of realism in this conversation.’

Appendix 3: Methodology

Methodology

AI transparency statement

Generative AI was not directly used in any of the research activities. Transcripts were automatically generated from interview and roundtable recordings and manually corrected before quotes were selected for the report. Material from the interviews and roundtables was manually coded and summarised without the use of AI.

AI was occasionally used in documentary research, but all material quoted is from identified reports rather than AI-generated summaries. Generative AI was not used to produce the initial report, but AI tools were used during editing to improve clarity and readability. Where AI tools were used within the production of the report, human discretion was used to ensure the content or meaning did not change.

Survey

The survey was open between July 17th and August 17th, during this time it was posted on Engine Shed's LinkedIn profile, the Brunel Centre LinkedIn profile, shared on LinkedIn by several current and former employees, and sent directly by both Engine Shed and Brunel Centre employees to relevant individuals. A link to the survey was printed out and placed in Engine Shed, and responses were manually solicited from Engine Shed lounge users on several days. Given these recruiting pathways, responses should provide a good sample of Engine Shed's current user base and those engaged with its activities and online presence.

For the purposes of the 'inclusion' section, it is unlikely that the survey respondents include many of the subjects of Engine Shed's outreach projects, either (former) children or refugees, due to the professional user base of LinkedIn and lack of ongoing projects during the period the survey was open.

A total of 9 respondents were declared themselves university employees, which will have increased the proportion of responses who have used or accessed university services.

The survey received a total of 49 responses with an average response time of 12 minutes. Of these, 36 responses were to each question, while 13 were partial responses. When survey data is used in the report, the response base is listed.

Organisation

Ascent Maths	Assembly West	BBRC	Brightmine (part of the Relx Group)	Business West (3)
Career Voyage	Department for Business, Innovation, Science and Trade	DeskLodge	Elixel Ltd.	Enterprise with Purpose
Exhale	Future Space	Futures West	Health Innovation West of England	Homelink / Propflo / LFL consulting
Kubla ltd	Luminex	My Future My Choice	NCC	New Local
One Big Circle Ltd	Penny	Pointer Consultancy Group Ltd	Ponda	QantX
Self-Employed/techSPARK	SR2	Stantec	'The Fellowship' and 'Our People Places and Practices'	RSA(6) University of Bath
University of Bristol (3)	Visit West	VK Labs Ltd	West of England Mayoral Combined Authority	None (5)

Roundtables

The roundtables were held on July 10th in Brunel's Boardroom inside Engine Shed. Participants were chosen and invited by Engine Shed staff. The first

roundtable focussed on Engine Shed's business activities, and participants were from private businesses or other incubators dedicated to boosting business performance. The second roundtable focussed on its civic outreach, and participants were chiefly from third sector organisations.

A full list of participant organisations can be found below:

Participant	Organisation and description
Participant A	Western Training Partnership (WTPN) – Engine Shed tenant, coordinates apprenticeship services including the apprenticeship levy.
Participant B	techSPARK – former Engine Shed tenant. Non-profit organisation dedicated to boosting the West of England's tech industry.
Participant C	Founder of a business in the Webstart cohort – formed the business in Engine Shed.
Participant D	Oggadoon – Engine Shed tenant, marketing agency
Participant E	A charity which runs outreach to primary school students and has hosted events in Engine Shed.
Participant F	University of Bristol research commercialisation team.

Participant	Organisation and description
Participant 1	Boomsatsuma - project partner and former tenant. Education provider focussed on creative economy.
Participant 2	Royal Society of Arts – a charity and membership organisation dedicated to promotion of the arts. Fellows have access to Engine Shed.
Participant 3	Independent – participant worked with an Engine Shed partner
Participant 4	Babassa – Community enterprise company, carried out a range of engagement practices with disadvantaged youth in the city.
Participant 5	University of Bristol – works in partnerships, events and commercialisation of social science research

Participant 6	BBRC – Regional finance organisation with a focus on delivering projects with social action.
Participant 7	Charity working with refugee services and social inclusion.

Interviews

Interviews were conducted between June 22nd and August 7th. Interview participants were manually selected for their involvement as current or former employees of Engine Shed or a partner organisation.

A full list of interview participants can be found below:

Participant	Organisation
Interview 1	Engine Shed
Interview 2	University of Bristol (former) – Research and Enterprise Team
Interview 3	University of Bristol – Innovation
Interview 4	Webstart incubator (former)
Interview 5	Engine Shed (former) (2)
Interview 6	Bristol City Council (former)
Interview 7	Bristol City Council (former)
Interview 8	West of England Combined Authority
Interview 9	University of Bristol

Literature review

The literature review was performed by Dr Armagan Gezici ahead of the roundtable.

Analysis

Data from the roundtables and interviews was recorded, electronically transcribed and manually corrected. Verbatim quotes have been used with

minor adjustments, limited to removing word repetitions and verbal tics, to aid comprehensibility and readability. Individuals have been anonymised, but organisations disclosed in line with the Brunel Centre's ethics policy.

Roundtable data was thematically coded using an inductive approach. Headings stemmed from document analysis and interview data, but were chosen after data collection due to their suitability. Interviews were recruited and questions designed with prior knowledge of participants and tailored to specific areas of inquiry. Interview material was analysed and used according to relevance and was not generally coded. Survey data was mapped onto codes developed during the roundtables.

Quotes were selected to maximise brevity and clarity from across the survey, roundtable and interviews. Where there was disagreement between sources, the report has included conflicting perspectives and to ensure that the narrative reflects the range of views expressed during data collection.

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