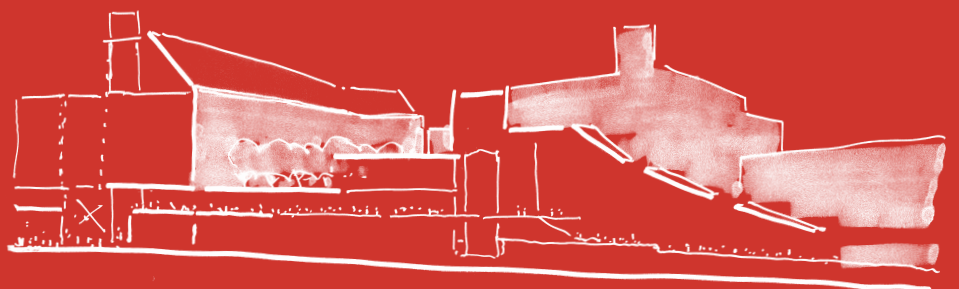


The British Library Extension

January 2022

Economic Value and Knowledge Quarter Uses Statement



ARUP

The British Library and SMBL Developments Ltd

Economic Value and Knowledge Quarter Uses Statement

A study for the British Library Extension



Artist's impression of the British Library Extension
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Contents

1.1 The British Library: a national institution in the heart of London	13
1.2 The Knowledge Economy in Camden today	14
1.2.1 Outstanding business growth.....	15
1.2.2 Sharing the benefits of growth with the local community.....	16
1.2.3 Generating value for the economy	17
1.2.4 The heart of the knowledge economy	17
1.2.5 Economic resilience during changing times.....	21
1.2.5 Economic implications of the Covid-19 pandemic	21
1.3 The impact of British Library on the Knowledge Quarter, London and beyond.....	22
1.3.1 The British Library Business and IP Centre (BIPC) today: providing valuable support to London-wide and national entrepreneurs and SMEs	22
1.3.2 Providing space for academic research, personal escape, and cultural enrichment	24
1.4 A vision for the British Library Extension: shaping opportunities for wider, more diverse and local communities	26
1.4.1 The New Development: <i>Living Knowledge</i> eight-years strategy	26
1.4.2 BLE responding to the objectives and fulfilling the potential of the British Library, the Knowledge Quarter and Camden.....	29
1.5 Creating accessible new spaces for learning, community and commerce to reach communities beyond usual sets of users.....	31
1.5.1 Learning from other libraries: creating engaging hubs and civic spaces.....	31
1.6 Contributing to an evolving and inclusive knowledge economy.....	32
1.7 Creating jobs, growth and resilience for a strong and diverse economy.....	33
1.7.1 The BLE is creating a wide range of jobs as an anchor knowledge institution.....	33
<i>Option 1 Additional jobs: Office-led occupation.....</i>	<i>34</i>
<i>Option 2 Additional jobs: Lab-led occupation</i>	<i>35</i>
1.7.2 Growing the local economy: additional GVA and spent on local services and retail	36
<i>Additional GVA from new jobs.....</i>	<i>36</i>
<i>New jobs supporting local services and retail businesses.....</i>	<i>37</i>
1.8 A highly connected new development.....	37
1.9 Qualitative economic benefits assessment from selected initiatives.....	38
2.1 Social and community aims of the British Library	45
2.2 Objectives in the local area	47
2.3 Demographics.....	49
2.3.1 Population.....	49
2.3.2 Age structure	49

2.3.3. Deprivation and income inequality	50
2.4 Skills and education	52
2.5 Health and wellbeing	53
2.6 Life Expectancy.....	54
2.7 Environmental quality	56
2.8 Culture and heritage	58
2.9 Key challenges facing the local community.....	60
2.10 Key strengths to support in the local area.....	62



Artist's impression of the British Library Extension
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EXECUTIVE SUMMARY

Project Description

This report has been prepared to support an application for planning permission for the following development proposals:

The Proposed Development would involve extending the northern aspect of the existing British Library to provide library accommodation; commercial space designed to cater for knowledge quarter uses (including life sciences, cultural, scientific and heritage collections and data sciences); retail space; and the Crossrail 2 works at basement level.

The Proposed Development would provide a gross internal area (GIA) of up to approximately 97,000m². The new library accommodation and the Alan Turing Institute and public circulation, including a public foyer, would be provided at approximately 10,000m² in addition to a replaced BLCC and BL tank farm and other library infrastructure. Approximately 76,000m² (GIA) would be provided for commercial space together with retail. Infrastructure related to Crossrail 2 would be provided at approximately 4,300m² (GIA), plus a shaft descending between basement levels 2-7. With respect to Crossrail 2, the Proposed Development would provide the main civils and structural elements of the Euston St Pancras Station eastern shaft and passenger subway tunnel. There will be adaptations to existing library operational areas, including the loading bay.

The Proposed Development would be 'car lite' with five wheelchair-accessible car parking spaces, four operational spaces for maintenance vehicles and a single minibus bay. The BLCC and the Story Garden are located within the Site. In order to facilitate the construction of the Proposed Development, the BLCC would be relocated and a new community garden would be created within the Site.

This report assesses the economic impact of the proposals with a particular focus on the KQ economy uses in line with emerging planning policy expectations.

Executive Summary: Overview

The British Library is a national knowledge and research institution with far-reaching benefits for education, commerce and tourism. The British Library Extension (BLE) at the St Pancras campus is a unique opportunity to achieve something of national and local significance. While expanding capacity for the British Library nationally, the BLE will strengthen its local impact by providing spaces to support local people and create local economic prosperity. The BLE will:

- Create **shared spaces**, designed for all, supporting an environment for learning and participation
- Build on successful programmes for **community and school engagement**, to bring world-class facilities and expertise into the hands of local residents and businesses.
- Create space for a unique ecosystem of **science and research alongside business and commerce** to turn ideas into innovations.
- Provide a **new headquarters** for the Alan Turing Institute, the national centre for data science and artificial intelligence.
- **Connect the Library** site to a faster and larger public transport network as part of the new Euston St Pancras Crossrail 2 station.

This report identifies these benefits, and quantifies them where possible, to demonstrate the commitment and ambition of this development.

✓ More than **3,000 new jobs**

✓ Over **£2.5 billion** in additional economic value to the local area*

✓ Around **£53 million** additional spending in Camden**

✓ High **quality jobs** in research, science and technology

✓ Supporting the delivery of new **public transport infrastructure**

✓ New spaces to provide **support for small businesses**

✓ **Flexible spaces** available to the community

Creating jobs, growth and resilience for a strong and diverse economy

The BLE will create around 53,000-55,500 sqm of conventional and affordable office, incubator and lab-enabled spaces to businesses to start up, build networks and grow. Additional library spaces, including a new foyer and a new home for the Alan Turing Institute, will be open to all.

Contributing to an increasingly inclusive knowledge economy

The high-quality and dynamic spaces will attract a mix of science, research and commercial businesses, making the BLE a place of invention and economic growth, of city-wide and national significance. The BLE will help the Knowledge Quarter be more inclusive through its enhanced programmes to support SMEs. A Compact arrangement will encourage occupiers to support work placements and apprenticeships and to develop programmes of engagement with local schools.

Benefits for local Camden communities

The BLE will also help those living close to the library to prosper, delivering significant economic and social benefits to the local area, including Somers Town. It has been designed to be *‘welcoming, outward-facing and socially inclusive by inviting a diverse range of visitors and encouraging them to feel a sense of pride and ownership over the community spaces’* as well as providing strong social value through flexible spaces available to the community. By aligning the BLE’s programmes and initiatives with existing successful programmes, the development is set to generate growth in jobs and the economy with more opportunities for local schools, residents and workers to share in the benefits.

Summary

The local economic impact of increased jobs, economic value and local spending for Camden businesses will strengthen the Knowledge Quarter and provide new opportunities for Camden residents. The creation of an open environment, programming and employment opportunities for Somers Town and wider Camden residents will support economic inclusion. The BLE is truly about ‘transforming lives through knowledge.’

* based on a central density scenario, local net gross value added, 2020 £, real prices, over a 10-year period after completion of the extension (2031 – 2040)

**local spending in Camden, 2020 £, real prices, over a 10-year period of operation after completion of the extension (2031 – 2040)

Executive Summary

The British Library is a national knowledge and research institution with far-reaching benefits for education, commerce and tourism. It also sits at the heart of a diverse community—actively engaging the Somers Town residents and the Knowledge Quarter businesses and institutions, representing some of London’s more innovative science and research organisations.

Now, a once-in-a-generation transformation is being planned to extend the British Library’s (BL) site in London to make it the most open, creative and innovative institution of its kind anywhere in the world.

The British Library Extension (BLE) at the St Pancras campus is a unique opportunity to achieve something of national and local significance. While expanding capacity for the British Library nationally, the BLE will strengthen its local impact by providing spaces to support local people and create local economic prosperity. The BLE will:

- Create **shared spaces** that are genuinely designed for all, supporting an environment for learning and participation
- Build on successful programmes for **community and school engagement**, to bring world-class facilities and expertise into the hands of local residents and businesses.
- Create space for a unique ecosystem of **science and research alongside business and commerce** to turn ideas into innovations.
- Provide a **new headquarters** for the Alan Turing Institute, the national centre for data science and artificial intelligence.
- A significant part of the new Euston St Pancras Crossrail 2 station that will **connect the Library site to faster and larger public transport** network across London.

The BLE is a key mechanism to delivering social and economic benefits in Camden, London and beyond. This report identifies these benefits, and quantifies them where possible, to demonstrate the commitment and ambition of this development.

Improved built environment and place-making



Opening up the BLE – making the site more permeable and attractive as a space to commune

Space for learners and local residents to connect



Reaching out into the community to share the benefits of the British Library’s offer



Enhance existing community and school programmes

Space for business to grow and innovate

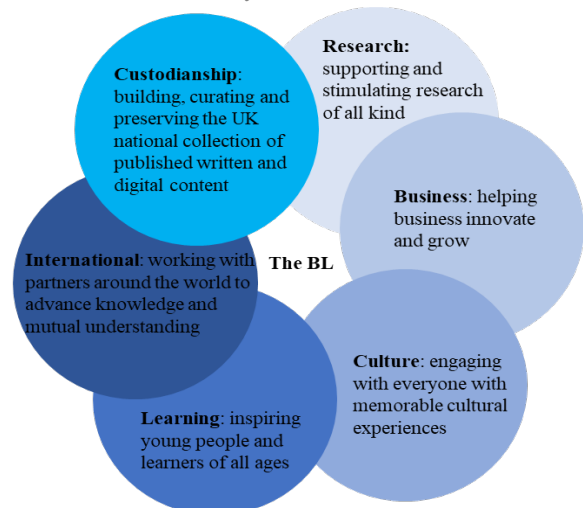


Business support, start up space, affordable workspace and labs for science and innovation



A platform for business to engage learners and the community

Current role of the British Library



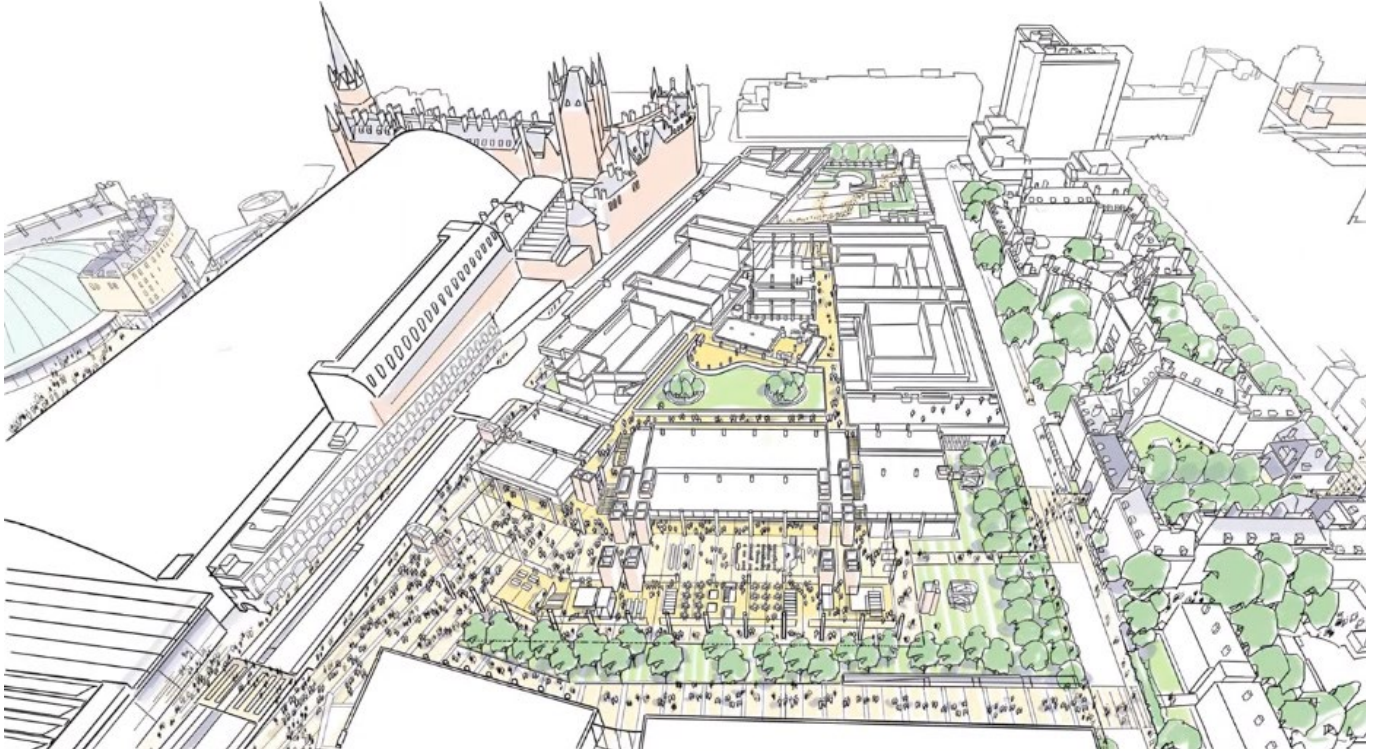
Vision statement from ‘*The British Library: Our Community Story*’

“From its inception, the library’s project has recognised the importance of engaging and connecting with those in its immediate neighbourhood and raising the British Library’s social and economic impact in the local community. By ensuring that its St Pancras campus is highly visible, accessible and relevant to local residents and businesses in the local community the transformations will seek to attract a wider audience from the local community, enabling inclusion and involvement for local people and promoting greater economic regeneration and long-term employment in the area.”

Executive Summary

An exceptional opportunity to expand the British Library

The British Library Extension offer



The British Library truly is an institution for all—democratising space for learning, creativity and commerce. In line with *St. Pancras Transformed*, the BLE will build on that legacy by creating high quality public spaces, more than 10,000 sqft of gallery, learning and business spaces, and commercial space for business and research.

The **public realm** will make the site more permeable and accessible, creating spaces for the local community and visitors to relax, engage and find calm in greenspace.

The **British Library spaces, including the foyer** will create informal and formal places of engagement and learning. Building on the BL's existing programmes of curation and engagement, the extension will create designated spaces for programmes and events.

The **business space** is not a 'typical office.' It includes mixed-use, lab-enabled space as well as traditional office space. The shared and communal spaces will create opportunities for all businesses to engage with one another and generate a value-added network.



Executive Summary

The socio-economic context of the British Library

The British Library is a powerful national institution situated in a local area with significant deprivation and socio-economic challenges.

Significant asset internationally, nationally and locally

Over 75% of the British Library visitors are from the UK, and among these UK visitors, 60% are from London



Substantial and growing number of visitors

1.5 million visitors to the British Library in 2019, which is an 11% increase from 10 years prior



Highly specialised in knowledge-intensive business services (KIBS)

Compared to the national economy, the Knowledge Quarter has a concentration of jobs 9 times higher in Advertising and Market Research, 5 times higher in Information Services and 3 times higher in Scientific Research and Development.



Track record of supporting 1000s of entrepreneurs

4,500 participants in British Library's Business and Intellectual Property Centre's (BIPC) 'Innovation for Growth' business



Highly productive workforce

The average GVA per worker in the Knowledge Quarter is £87k, compared to £77k per worker in London



Fast-paced business growth in the KQ

Business growth in the Knowledge Quarter has outpaced Camden, London and the country as a whole, with + 88,000 jobs in the area over the past 10 years.



Fast growth in key sectors

The KQ is growing jobs faster in these sectors than the country as a whole and faster than sector trend growth: creative sector; professional and technical; health; local services.



Small but growing 65+ population

38% of neighbourhoods (defined by ONS LSOAs) in the Knowledge Quarter are in the 10% most deprived neighbourhoods in the England for Income Deprivation Affecting Older People.



Poor Living Environment

On average, the Knowledge Quarter neighbourhoods are in the 20% most deprived neighbourhoods in England for that domain.



Relatively strong educational attainment

'Education, Skills and Training' is the area's best performing area in the indices of multiple deprivation. Primary school children perform at or above average levels, apart from in reading, but secondary schools are underperforming.



Low healthy life expectancy

In this part of the borough, males on average can expect 11 fewer years of health than males living in the Camden on the whole, and females can expect almost 9 fewer years of health.



Growing prevalence of mental health issues

Highest mental health prevalence and highest incidence of new depression diagnoses in Somers Town compared to N.London CCG and England.



Poor air quality, and high rates of asthma and CPD*

Euston Road was in the top five most polluted roadways in London in 2017 – making it one of the most polluted places in the England.

**Chronic Pulmonary Disease*



Low access to green spaces

The ward has less public open space than both Camden and Greater London – just 5.6% of the total land area in the St Pancras and Somers Town ward was accessible to the public.



Executive Summary

The benefits of the BLE to the economy at national, city and local levels

The BLE: transforming the way the British Library engages with a wider and more diverse audience

The British Library already plays a very important role nationally, regionally and locally and extending the Library will build on that success to expand engagement at all levels. The site is currently at a tipping point, as physical spaces are reaching capacity.

The BLE will build momentum on the economic strengths of the Knowledge Quarter to deliver significant economic and social benefits to the local area. By aligning the BLE's programmes and initiatives with existing successful programmes, the development is set to generate growth in jobs and the economy with more opportunities for local schools, residents and workers to share in the benefits.

Creating jobs, growth and resilience for a strong and diverse economy

The BLE will be one of the largest investments in the Knowledge Quarter since the King's Cross regeneration scheme. It will create approximately 53,000-55,500 sqm* (NIA**) of conventional and affordable office, incubator and lab-enabled spaces (depending on options) to businesses to start up, build networks and grow. A new home for the Alan Turing Institute will create synergies with the Library as well.

Additional library spaces, including a new foyer, will be open to all, connecting its established and new visitors and traditionally under-served local communities in shared space.

*Lab-enabled space would reduce NIA for plans and utilities

**NIA are based on GIA area schedule prepare by Alinea.

The mix of commercial space with library and open and versatile curated spaces will add the following benefits in the central scenario (medium density and lab-led option):

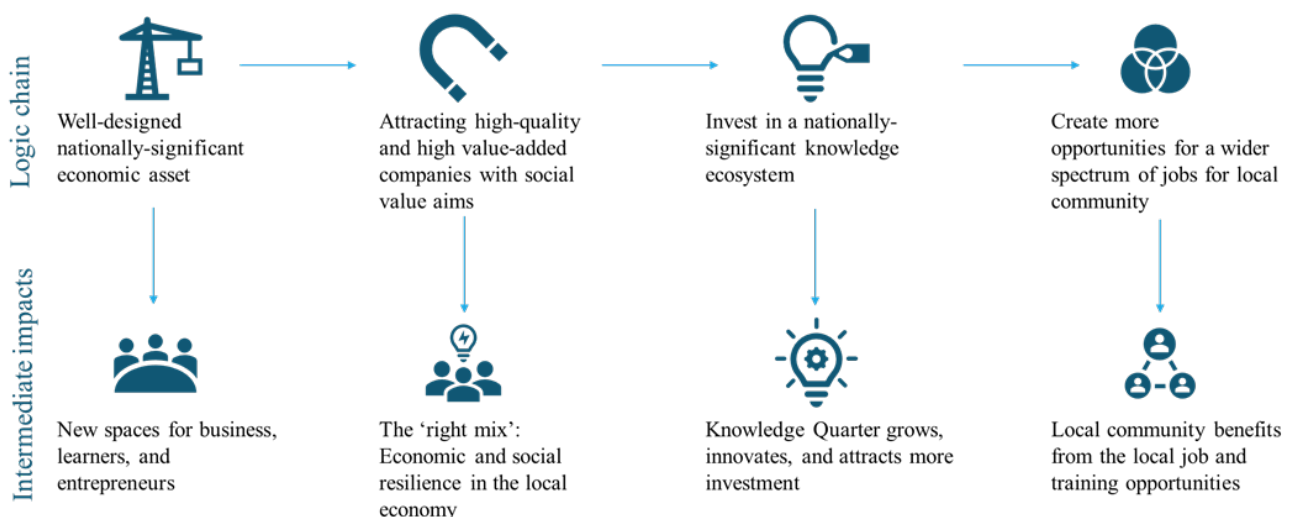
- Create 3,110 new operational jobs on-site, including many knowledge-intensive roles
- Increase local net GVA by £2.5 billion (2020 £, real prices, medium density) over a 10-year period after completion of the extension (2031 – 2040)
- Increase local spending in Camden by £53m (2020 £, real prices) over a 10-year period of operation after completion of the extension (2031 – 2040)

Contributing to an increasingly inclusive knowledge economy

By creating high-quality and dynamic spaces linked to the British Library, and located at the heart of the Knowledge Quarter, the BLE will attract a mix of science, research and commercial businesses that can learn from one another. 'Learning around the edges' of their specialism by working together kick-starts innovation and creates opportunities to commercialise ideas. In essence, the BLE becomes the epicentre of the Knowledge Quarter, a place of invention and economic growth of city-wide and national significance.

The BLE will help the Knowledge Quarter be more inclusive through its enhanced programmes to support SMEs. A Compact arrangement will encourage occupiers to support work placements and apprenticeships and to develop programmes of engagement with local schools.

Impact: logic chain



Executive Summary

The benefits of the BLE to society

The BLE is anticipated to not only create significant employment opportunities, support agglomeration and innovation, and boost local economic growth in the Knowledge Quarter, it will also help those living close to the library to prosper. It has been designed to support Camden Policy IDS19 to be ‘welcoming, outward-facing and socially inclusive by inviting a diverse range of visitors and encouraging them to feel a sense of pride and ownership over the community spaces’ as well as providing strong social value through flexible spaces available to the community.

Culture and Placemaking

The building itself, the entrances, and the green public spaces which will surround it will create new spots for people to visit and enjoy. This will support improved wellbeing and encourage active travel amongst visitors, employees and residents.

The BLE, and many of the events that take part inside, will serve the community, for example a flexible space within the Library that can be purposed for a variety of functions, designed with and for the community. This will support local activism, community cohesion and showcase local talent, in turn strengthening local identity and pride.

Education and Skills

New learning facilities will enable a wider range of programmes to be delivered, which can be

specifically tailored to the challenges in the Somers Town community. Providing access to free WiFi will reduce disparities in digital access, increasingly important for education and skill development.

Events and work placements hosted by the commercial occupiers could be targeted towards local people through the Compact, opening doors for school-leavers, and those seeking new careers.

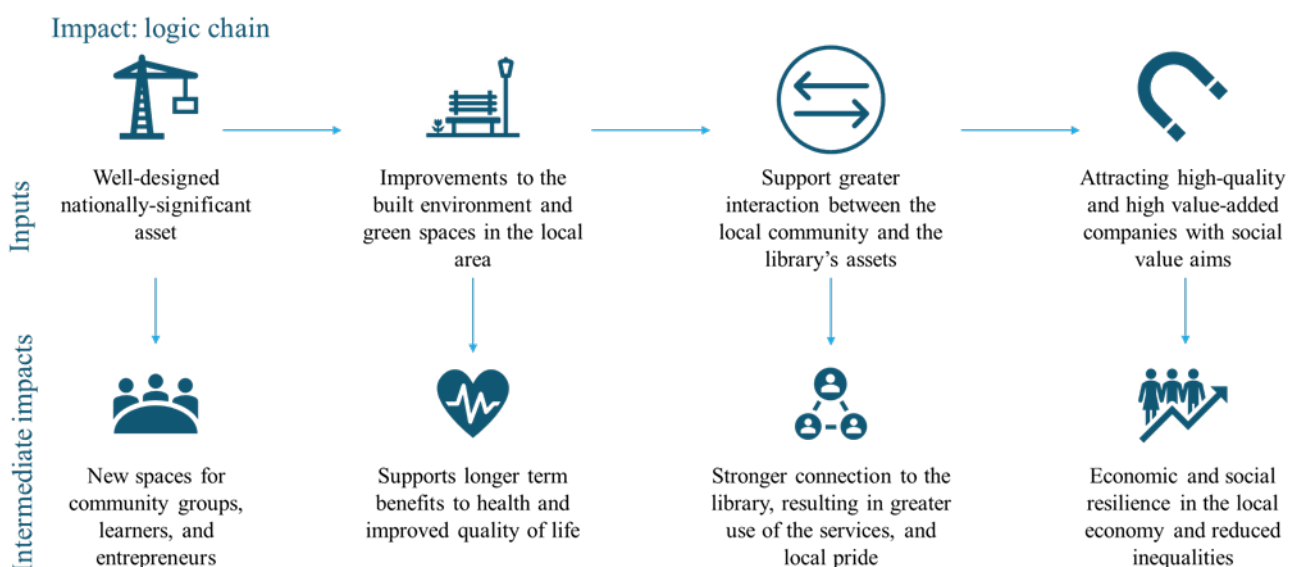
Business and Innovation

The construction and operation of the BLE will create new employment opportunities for locals. Coupled with the skills development on offer at the Library and the tenant Compact, it will become easier for local people to access employment opportunities in these cutting-edge sectors in a wide range of occupations.

The integration with Crossrail 2 will help locals travel more easily to jobs elsewhere in the city, broadening their employment opportunities.

The provision of free WiFi, affordable desk space, and accessible support from the BIPC will help foster entrepreneurship and grow local businesses.

Over time, as local businesses grow and educational outcomes are improved, income inequality between Somers Town and the rest of the KQ may begin to fall, helping to reduce income inequality and deprivation over time.



Executive Summary

Creating a Compact for social value impact

One important way that the BLE will encourage more socially and economically inclusive actions in the longer term is through the Somers Town Compact (STC). By funding a Compact Manager post, SMBL will support the development of a STC to actively encourage future occupiers of the commercial and retail space in the BLE to make a positive contribution and lasting legacy in Somers Town and contribute to the success and function of the Knowledge Quarter. The STC should ensure that the social value delivered within the design and construction periods is continued during occupation. The aims of the STC Programme are to:

- Improve the educational and employment prospects of local people,
- Enhance the health and well-being of the community
- Encourage wider community participation and inclusion in local initiatives
- Support the creation and maintenance of accessible, vibrant and sustainable spaces

The STC will provide a framework that will actively encourage occupiers to play a proactive, positive role in Somers Town, whilst supporting them to fulfil their own corporate ESG strategies. It will support an ecosystem of Knowledge Quarter uses and users. The Compact will be under-pinned by a Somers Town Compact Programme that will act as a ready-made programme of projects and initiatives in Somers Town for occupiers to contribute to.

Demonstrating that this model can be successful, driving tangible benefits for local residents and businesses alike, can set a new standard for delivering social value in London.

The benefits that the BLE will make to the local economy and local community are clear. The design of the building and the programming which has been planned around it will lead to benefits for Somers Town residents as well as Camden and the Knowledge Quarter more broadly.



ECONOMIC IMPACT

The purpose of the Economic Impact study is to prepare a high-level economic assessment of the study area to determine sector strengths, opportunities and projections into the future (drawing on existing available data) with a focus on the Knowledge Quarter economy. This data analysis, combined with case studies and benchmarks, will help to inform assumptions about the future use and economic impact of the Library and the proposed commercial uses within the wider area.



Artist's impression of the British Library Extension
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The British Library's economic impact today: baseline impact and context

1.1 The British Library: a national institution in the heart of London

The British Library (BL) has been an icon of the information age since its opening in 1973. It has been “like a coral reef whose exquisite structure as it grows proliferate[d] a living network of connections” (Sir Colin St John Wilson, architect of the British Library building). It is the country’s repository of knowledge; by the law of the United Kingdom, it receives copies of every book that is published in the United Kingdom and the Republic of Ireland, including all foreign books that are sold in the UK. But, it is a mistake to consider the British Library only as a repository of books. It is so much more.

The British Library aims to be a “city within a city” for research, inspiration and enjoyment while being very accessible to surrounding local communities. The British Library has six core public purposes set out in Figure 1.¹

These purposes are delivered through the institution’s physical space, knowledge networks, community programmes, and business support initiatives. Moreover, the British Library and its development partner SBL Developments Limited want to expand the proven impact of the library on sharing knowledge, building community and supporting the country’s economy. The British Library sits in the centre of London’s Knowledge Quarter, arguably home to the densest concentration of scientific, innovative and knowledge-intensive businesses and institutions anywhere in the world².

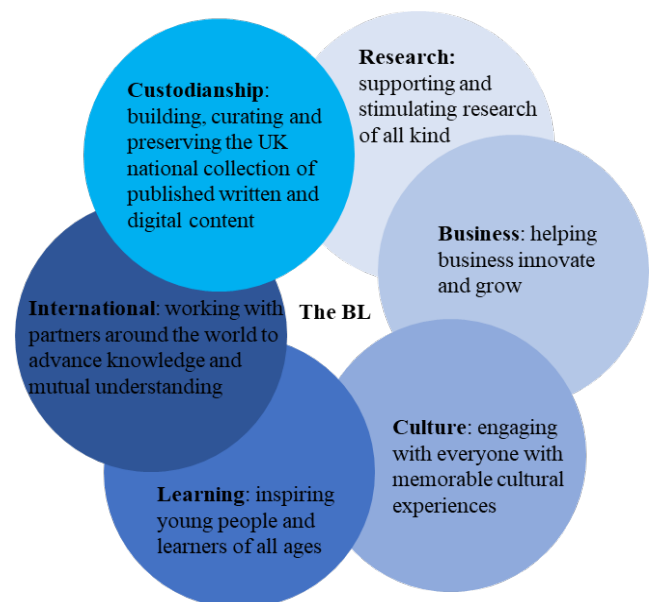


Figure 1: The British Library six core purposes

The impact of the British Library today

- ~1.7 million: the current number of visitors per year to the British Library (including paid exhibition, event and treasure visitors and readers)
- 11 percent: visitor growth over the past 10 years (2009 – 2019)
- ~250,000: the current number of visitors who attend events, talks or exhibitions requiring tickets each year
- 600,000 visitors came to the Treasures Gallery³ in 2019⁴
- 120,100 registered readers with over 400,000 visits per year in total
- A randomised survey showed that 53% of readers have been to the British Library in the previous year, 65% of people were repeat visitors, while for 35% of the respondents it was their first visit⁵ showing how the Library keeps attracting new readers over the years.

¹ Set out in the *Living Knowledge* 2015-2023 vision

² Knowledge Quarter Science and Innovation Audit (2019) [Summary Report](#), March 2019

³ Based on footfall

⁴ 2019: 12 months from March 2019

⁵ From a spot survey answers from 4,486 respondents from April 2016 to March 2020

Looking forward, the British Library wants to become the most open, creative and innovative institution of its kind in the world. It will do so in two ways: by providing its users technology-enabled civic spaces that combine creativity, versatility and commercial sustainability, and by creating a major new venue for London for exhibitions, events and cultural engagement at the Library.

With new development, the British Library aims to transform the way it engages with and becomes accessible to a wider and more diverse range of users. It aims to anticipate and better meet the changing needs of a range of growing audiences, surrounding communities, and wider national and international network of libraries. Together with SML, there is also a collective vision of a joint development that creates reciprocal benefits greater in impact than the sum of the individual elements:

- A cultural / educational programme of exhibitions and events that the new development creates the facilities for: from current average of 1.4 million visitors per year to a minimum 2 million visitors per year coming to the site and its extension, benefiting the area with more footfall and larger numbers of visitors spending time in and around the Knowledge Quarter. The extension is expected to draw a significant increase in visitors coming to paid exhibitions, events, Treasures Gallery and other visitors.

Table 1 Visitor number projections by type of visitor (Internal Analysis performed by the BL)

Visitor type	Visitor number per year		Percentage increase
	Current (average)	Future Projected	
Paid exhibition	141,500	257,800	82%
Events	60,700	109,200	80%
Treasures	552,800	732,900	33%
Readers	413,600	466,000	13%
Other visitors ⁶	287,600	457,400	59%
Total for site	1,395,800	2,023,300	45%

- The creation of space for around 80,000 sqm (GIA) of commercial space, including lab-enabled floorspace to host **2,000 – 6,900 jobs (with 3,110 jobs in the central scenario⁷)** new employment roles on the site in addition to the expansion of the library and the potential for businesses to locate and grow at the site in the centre of the Knowledge Quarter.
- A new home for the Alan Turing Institute, with potential to expand, and creating synergies between the Institute and the Library in the way knowledge and Information in the broader sense are created and disseminated in the 21st century.
- A new retail offer that will bring footfall and liveliness to the area, a critical part of placemaking.
- A new Library foyer that will present an open and welcoming face to all potential visitors and provide a ‘neighbourhood’ feel where local people are encouraged to enjoy the Library campus and its services. Accessibility and visibility from all points will attract increased pedestrian footfall across the site, enabling the Library to attract new audiences to its enhanced services and facilities.”
- A significant part of the new Euston St Pancras Crossrail 2 station that will connect the Library site to faster and larger public transport network across London

1.2 The Knowledge Economy in Camden today

The British Library in London and the application site sit at the heart of London’s Knowledge Quarter. The Knowledge Quarter covers a 1-mile radius from King’s Cross Station. This small part of London is incredibly dense with knowledge, creativity and opportunity. With over 29,000 businesses⁸ and 469,300 workers⁹ across

⁶ General visitors to the building not utilising a specific library space. This will include café’s, wi-fi users in the public area, BIPC users etc. It should be noted that no assessment has been made of potential use by commercial tenants etc in the future projection.

⁷ The central scenario being medium density scenario for the lab-led option (2)

⁸ Nomis, UK Business Counts, Enterprise by Industry and employment size band, 2019

⁹ Nomis, BRES safeguarded access, 2018

Camden, Islington and Westminster, this area hosts clusters of workers in education¹⁰; advertising and market research; motion picture / video and television production; publishing activities; creative, art and entertainment activities and scientific research and development. However, the application site is currently underutilised and underdeveloped to contribute to the Knowledge Quarter.

Knowledge Quarter Ltd is the body linking over 90 knowledge-based organisations in the district. The organisation aims to mobilise the assets available in the area to accelerate the pace of discovery, science and innovation at a national level, drive economic growth and help implement the new Industrial Strategy¹¹. An audit published in 2019 examined how the vision above can be delivered through three “theme” specialism: “Life Sciences”, “Cultural, Scientific and Heritage Collections” and “Data Sciences”. It found among other that close proximity in an urban setting facilitates open innovation between knowledge-based organisations and that place-based ‘network brokers’ have an important role to play in catalysing relationships.

The Knowledge Quarter Science and Innovation Audit (2018) demonstrates that the Knowledge Quarter has world-class science and innovation capabilities in life science, data science and cultural and heritage collections. The combination of scientific and knowledge-based strengths, commercial investment and an environment that attracts and retains talent is a significant asset for London and the UK. However, the Audit also identified gaps in the innovation ecosystem in the KQ which are space-related, including:

- Low availability and high cost of appropriate commercial sites and premises
- A dearth of innovation space, especially wet-laboratory space for Life Sciences start-ups and small businesses
- A lack of suitable move-on space in the KQ for companies wishing to expand their operations and/or take on additional staff
- A lack of business accelerators for start-ups and other small firms.

The success of the Knowledge Quarter comes with challenges to provide the space to grow and build on that unique and high-value innovation and learning environment.

1.2.1 Outstanding business growth

Sustained jobs growth since the 2007 – 2009 recession marks the Knowledge Quarter’s unique place in the growing London’s economy. The study area performed well in terms of jobs growth, with over 88,000 jobs created in the area over the past 10 years (2009-2018). The Knowledge Quarter stands out for creating new businesses too; it has experienced a 60% straight growth between 2010 and 2019, as compared to 55% in Camden, 53% in Inner London and 58% in the London region. Even as business growth slowed in London in 2017, neither Camden nor the study area were impacted.



Figure 2: Map of the Knowledge Quarter and member organisation located 1-mile from King's Cross (Source: Knowledge Quarter Science and Innovation Audit)

¹⁰ Top 1 employer in absolute number of employment when looking at 2-SIC Industries

¹¹ <https://www.knowledgequarter.london/sia/#sia-downloads>

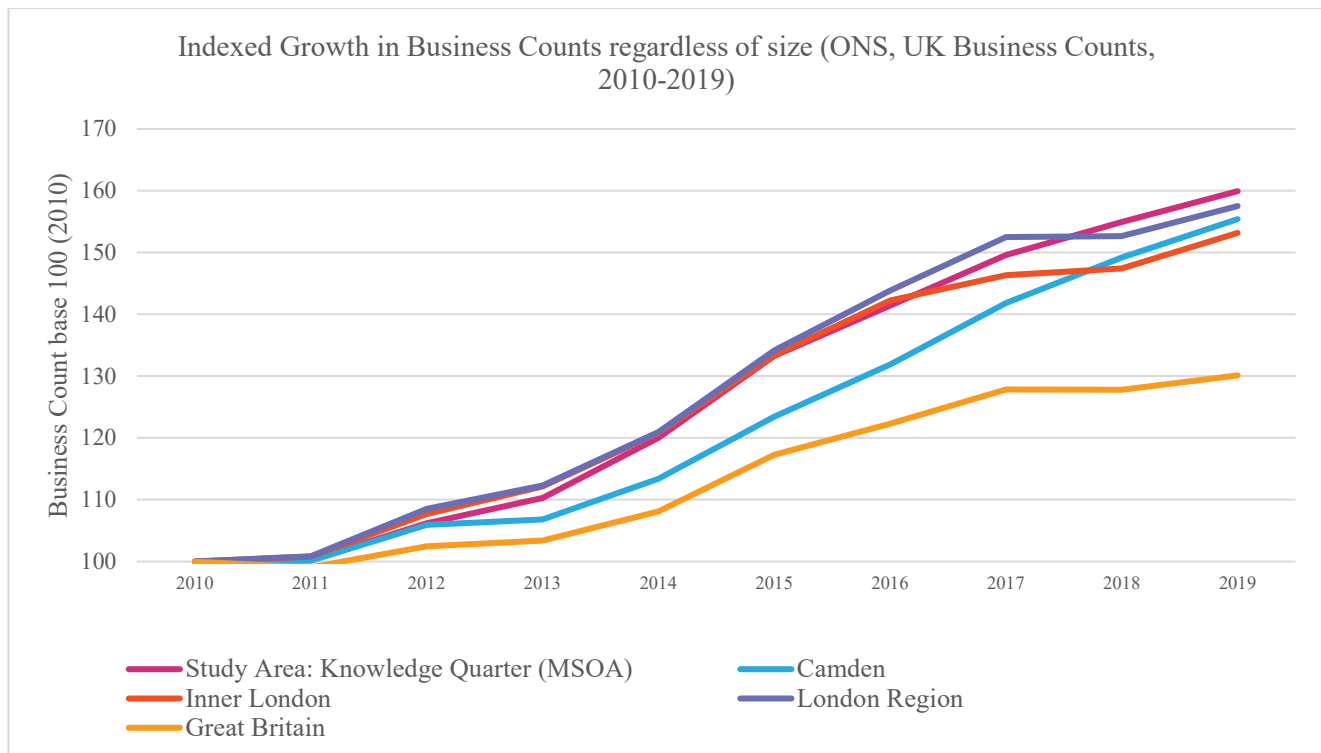
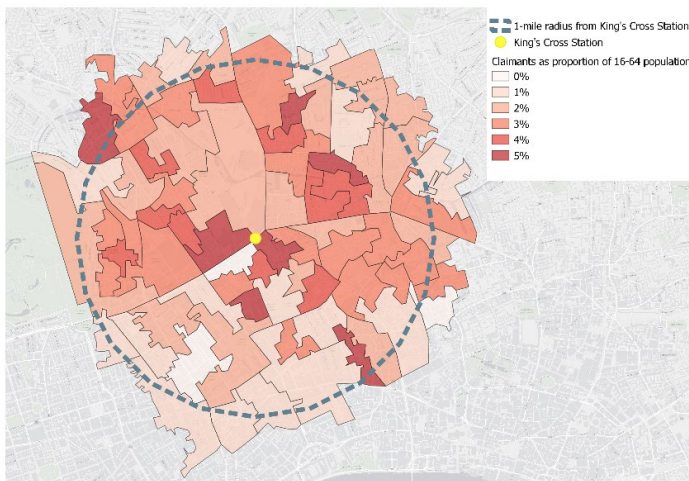


Figure 3: Indexed Growth in Business Counts regardless of size (Source: ONS, UK Business Counts, 2010 - 2019)

1.2.2 Sharing the benefits of growth with the local community

The benefits of growth in the Knowledge Quarter, unfortunately, have not reached all members of the local community. There is a higher unemployment rate in our study area (4.8%) than Camden, Inner London, Greater London or England¹². Looking at data from Claimant Count (December 2019) and Population Estimates (2019), proportion of claimants in total population aged 16-64 is overall higher in the North side of Euston Road however there are some pockets of very high claimant proportion (5%) right south of King's Cross Station. Comparing August 2019 and August 2020 data, there has been an average of 145% growth in the number of claimants, up to +400% in some LSOAs.



The Knowledge Quarter attracts highly-skilled workers and high value-added businesses, but those investments tend to attract workers from across London and beyond. Skills mismatch between local residents and businesses can make it difficult for those geographically closest to economic growth to realise the same opportunities.

¹² Nomis. Annual Population Survey, Economic Activity by Age, April 2019 – March 2020 with London Region (4.71%), Inner London (4.65%), England (3.95%) and Camden (3.82%)

1.2.3 Generating value for the economy

The Knowledge Quarter is more productive than London overall and Inner-London, the city's economic engine. Average GVA per worker¹³ -- a common measure of productivity -- is around £83,150, higher than Camden's, Inner London's and London Region's (at £82,300, £78,950 and £77,850¹⁴ respectively).

This high level of productivity is reflected in wages for workers in the area. Across all sectors, average salaries for all workers are higher in the KQ than in any of the comparator areas. However, gap between the median (middle salary) and the mean (average of all workers) showing greater inequalities. While this gap is relatively constant throughout all London areas, it speaks to the importance of future development incorporating well-paid jobs across the skills spectrum.

Table 2 Mean and median yearly salary averaged across all sectors¹⁵

Full time employment	Study Area: Knowledge Quarter		Camden		Inner London		London		England	
Yearly salary - median	£	37,590	£	37,360	£	37,280	£	37,230	£	28,570
Yearly salary - mean	£	45,530	£	44,880	£	45,040	£	44,980	£	34,190

1.2.4 The heart of the knowledge economy

Many places in London – and across the country – are growing, creating well-paying jobs and are productive. What sets the Knowledge Quarter apart from anywhere else in London or, indeed, the country is its ecosystem of businesses and institutions that can attract talent, share ideas, and spur innovation and creativity.

The density of knowledge and creativity is incredible. The KQ is 1-mile radius from King's Cross station, equivalent to just over 8km², therefore 0.006% of England's land area¹⁶. This area representing 0.006% of the national territory is home to 16% of national advertising and market research jobs, 15% of motion picture, video and TV programme production jobs and 10% of publishing activities. It is also home to almost 4% of national knowledge-intensive jobs as compared to 1.7% of total jobs in England.

Economists and civic leaders have touted the idea of 'clusters' in economic growth models for decades – the idea that dense populations of businesses in the same sector tend to be more productive, innovative and successful than less-specialised places. This, however, is only part of the story. Recent research has shown that the mix of the specialisms can have great impact. If you have a 'related variety' of businesses that are similar enough to learn from one another but different enough to not get caught in an echo chamber of ideas, exciting things can happen.

Related variety of specialisms can also create more resilient economies. Following the financial sector challenges of the Great Recession, many economists expected London to be hardest hit—given it has such a specialism in finance jobs. However, it was the related variety of London that insulated it from the worst of the economic downturn. Many specialisms—from arts and culture to advertising to medicine—all in one big ecosystem created an environment that was less acutely hit by financial shock.

Thus, the mix of specialisms of the Knowledge Quarter is crucial to considering its place with London's economy. Looking at Location Quotients (LQ)¹⁷ shows the specialisms of sectors in an area, compared to a wider area (for example, comparing the KQ to Greater London or England). A LQ of '2' means that the area has twice as many

¹³ 2018 GVA in 2020£ using BRES data for employment (2018) and GVA Income approach data (2017): Camden and City of London data used for the study area and Camden and London data is used for Inner London and London Region.

¹⁴ In £2020 prices

¹⁵ Table based on ASHE "Hourly pay – Gross (£) – for full-time employee jobs: UK, 2019" (ALL and LONDON figures) for mean and median salary and BRES, 2018 for employment count. Yearly salary calculated with 37.5 hours for 52 weeks.

¹⁶ England land area is over 130,000 km²

¹⁷ How to read LQ: Location Quotients show the relative employment specialism of a sector for a given area compared to the national, London and Inner London level. Normally, a LQ greater than 2.0 suggests some specialisation in employment in a sector, compared to the national, regional or sub-regional economy

jobs in that sector as it would if you compared it to the wider area's average. Usually a LQ of 2 denotes a specialism.

Table 3 below sets out the key strengths of the KQ, comparing its specialism against England, Greater London and Inner London—the capital's economic engine. On average over two-thirds of concentrated activities are in knowledge-intensive services, the types of jobs which have been largely growing England's urban economies and productivity over the last decade. Importantly, the KQ is home to a notable twelve sectors of specialism compared to the rest of the country. They span from creative, scientific, technological, professional and educational areas. Two of these sectors (73: Advertising and Market Research and 72: Scientific Research and Development) seem to benefit from the KQ effect, as opposed to only the Inner London and London effect. These are, therefore, the two “true” specialisms of the Knowledge Quarter, meaning that organisations in these sectors identify key benefits to locating in the area.

Table 3 2-digits industries LQ over 2 suggesting specialisation in employment

Industry 2-digits SIC codes		Knowledge Quarter	England	London Effect	Inner London Effect	KQ Effect
				LQ KQ (England basis)	LQ KQ (London Region basis)	LQ KQ (Inner London basis)
				Concentration	Concentration	Concentration
73: Advertising and market research	KIS ¹⁸	5.3%	0.6%	9.2	3.8	2.4
59: Motion picture, video and television programme production, sound recording and music publishing activities	KIS	3.4%	0.4%	8.7	2.8	1.8
58: Publishing activities	Less KI	2.5%	0.4%	5.8	2.2	1.5
63: Information service activities	KIS	1.4%	0.3%	5.1	2.3	1.6
90: Creative, arts and entertainment activities	Less KI	1.2%	0.3%	3.4	1.8	1.1
72: Scientific research and development	KIS	1.4%	0.5%	3.0	3.8	2.7
60: Programming and broadcasting activities	KIS	0.4%	0.1%	2.7	0.9	0.8
70: Activities of head offices; management consultancy activities	KIS	7.1%	2.8%	2.5	1.5	1.2
71: Architectural and engineering activities; technical testing and analysis	KIS	4.4%	1.7%	2.5	2.2	1.8
94: Activities of membership organisations	Less KI	2.1%	0.9%	2.5	1.6	1.2
91: Libraries, archives, museums and other cultural activities	Less KI	0.7%	0.3%	2.3	1.9	1.4
74: Other professional, scientific and technical activities	KIS	1.6%	0.8%	2.1	1.3	1.1

¹⁸ KIS: Knowledge Intensive Sectors and LKIS: Less Knowledge Intensive sectors. Both are ONS appellations referring for KIS to High-tech Knowledge Intensive Services, Knowledge Intensive Financial Services and Knowledge Intensive Market Services and for LKIS to Less Knowledge Intensive Services Less Knowledge Intensive Market Services and Other Knowledge Intensive Services

For every one job in England, there is ...

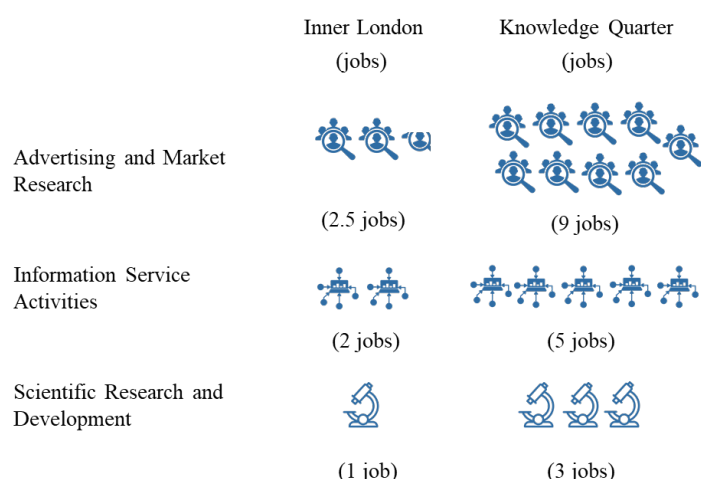


Figure 5: Number of jobs in Inner London and in the Knowledge Quarter for one job in England for 2-SIC Industries

This mix of sectors specialism hints that there is an ecosystem of knowledge and an infrastructure of institutions generating growth in this area. Analysis by Arup using ‘shift-share’ analysis attempts to parse out the drivers of growth. It shows:

- The number of jobs created in a place over time likely due to economic growth in the national economy
- The jobs created in a place over time likely due to growth in that sector, and finally
- The jobs created in that place over and above national and sector trends likely due to its competitive qualities that set it apart from other places – **the competitive effect**.

Looking now at performance by sector¹⁹, the first table below shows the sectors that have been overperforming both national and industrial trends, demonstrating the competitive effect of the Knowledge Quarter. In the “Local competitiveness” column, the figures show the number of jobs growth above the national industry job growth and therefore indicates a positive competitive effect. The table also highlights those sectors with high specialisms in dark green. This analysis shows correlation between high LQ (specialism) and high comparative effect.

The competitive effect is strongest in the KQ in four key areas:

- Creative sector jobs
- Professional and technical jobs
- Health jobs
- Local services jobs

Human Health activity local competitiveness is very high, no doubt supported by research institutes, hospitals and the Francis Crick Institute. And the ecosystem of professional services and head offices alongside advertising, television and film, and architecture demonstrates the key strength of knowledge and creativity-intensive jobs in the KQ. Alongside this, retail and food and beverage services have grown well above trend, demonstrating the need for complementary local services that support placemaking, entertainment and leisure. Looking forward, you would expect to see a complementary relationship between these high GVA-generating jobs and the highly valued local services jobs that accompany them.

¹⁹ *How to read shift-share*: Shift-share analysis evaluates employment numbers in sectors, and how they are changing over time in one location relative to national employment on the whole and national employment of that sector. The ‘Local Competitiveness’ factor from this analysis shows how much employment a sector in the HSPG region is growing more (or less) compared to the national economy and that sector at the national level. So, a high ‘Local Competitiveness’ factor means that employment in the sector at the local level is adding more jobs compared to the national jobs growth levels or the growth in the sector at the national level.

Table 4 Top 10 overperforming and underperforming 2-SIC industries in the KQ (2009-2018) Source: ONS, BRES (2009 and 2018 figures)

Industry	KQ jobs 2009	KQ jobs 2018	2009-2018 Comparative Change	National Effect	Industry Effect	Local Competitiveness	LQ (England basis)
	Jobs	Jobs	Jobs	Jobs	Jobs	job	LQ
86: Human health activities	8000	24000	16000	923	1385	15,538	0.7
73: Advertising and market research	14000	25000	11000	1616	1891	10,725	9.2
85: Education	27000	36000	9000	3116	1657	10,459	0.9
78: Employment activities	14000	26000	12000	1616	4493	9,122	1.6
56: Food and beverage service activities	23000	35000	12000	2654	5538	9,116	1.2
47: Retail trade, except of motor vehicles and motorcycles	22000	28000	6000	2539	-161	8,700	0.6
70: Activities of head offices; management consultancy activities	19000	33500	14500	2192	8747	7,946	2.5
63: Information service activities	700	6500	5800	81	253	5,628	5.1
71: Architectural and engineering activities; technical testing and analysis	14000	20500	6500	1616	3472	4,644	2.5
59: Motion picture, video and television programme production, sound recording and music publishing activities	11000	16000	5000	1269	2039	4,230	8.7

1.2.5 Economic resilience during changing times

The Knowledge Quarter underwent great change over the past decade. Looking at those sectors which had the least ‘competitive effect’ – where jobs were lost worse than national and industry trend – it tells a story of the KQ’s evolution. Some of those sectors of underperformance demonstrate the shift from industrial to knowledge jobs, with warehousing, postal, machinery repair, and waste land was transformed along with King’s Cross regeneration into a new growth area for jobs better suited to city centres and knowledge hubs. This shows the transition of the area from low value and land hungry jobs to higher value and worker dense jobs. However, key high productivity jobs in finance, legal and accounting were lost. Many of these activities have concentrated in the City of London and Canary Warf in the last 10 years, signalling a difference in the attractiveness of the area more linked to creativity, research and innovation.

Looking forward, the Knowledge Quarter must plan today to adapt both to risk of automation and more recently to the “post-Covid” era. Automation will reduce employment and change the nature of work in every sector, though some will be hit harder than others. Comparing the KQ’s highest proportion of employment with those with the highest probability of automation shows the risk-points for the area. Food and beverage and retail are among the highest employment sectors with the highest risks to automation. Continued investment in these sectors should be met with a commitment to developing quality jobs in the sector. The other key employment sectors, despite being on the lower end of automation risk, will still need to be accompanied by an upskilling of their employees, to ensure their future skills are relevant to future needs.

Table 5 Top 10 employers by 2-SIC industry in the study area (2018) ²⁰

	Job numbers	Proportion within KQ	Probability of automation (2017)
85: Education	36,000	7.7%	34.1
56: Food and beverage service activities	35,000	7.5%	62.9
70: Activities of head offices; management consultancy activities	33,500	7.1%	34.0
47: Retail trade, except of motor vehicles and motorcycles	28,000	6.0%	58.3
78: Employment activities	26,000	5.5%	42.8
73: Advertising and market research	25,000	5.3%	33.5
86: Human health activities	24,000	5.1%	34.0
69: Legal and accounting activities	22,500	4.8%	39.4
62: Computer programming, consultancy and related activities	20,500	4.4%	30.5
71: Architectural and engineering activities; technical testing and analysis	20,500	4.4%	34.1

1.2.5 Economic implications of the Covid-19 pandemic

Looking at Covid-19’s impact on employment groups and sectors, when the government imposed a first lockdown, London’s Tube and commuter rail journeys were down 95 per cent, while bus use fell by 85 per cent by the end of March 2020. Central London, which was more dependent on public transport than any other part of the country, saw economic activity stop almost entirely. As a result, the pandemic has attacked the most creative and sophisticated attributes of London: the dense mix of people, skills and sectors that together comprised the city centre’s vibrant ecosystem.

In a post-lockdown pre-vaccine or ever coming back pandemic metropolis, the central London economy’s dependence on density and productivity has become a threat to its ability to function. One of the most important benefits of increasing population and workplace density is agglomeration. Being close to other people and other firms makes everyone more productive as they can share inputs and outputs, find a job that better matches their skills, network with each other and create new ideas. Amenities are also important: shops, restaurants, theatres, opera houses, bars and sports events need a minimum level of density and footfall to be profitable. Their presence

²⁰ Nomis, BRES, 2018 and “Probability of Automation in England: 2011 and 2017”

together enhances the quality of life cities have to offer and provide jobs for (often higher value-added) service industries. However, today, these are the employment group and sectors that are the most at risk.

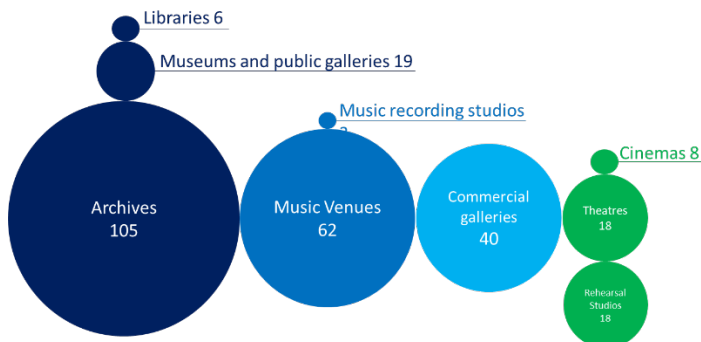


Figure 6: Number of culture venues in the Knowledge Quarter (data from GLA Culture Infrastructure Map)

The Arts and Culture industry in London is one of the most vulnerable sectors. Public gatherings and physical interactions are integral to how culture is experienced. Business models rely heavily on globalised, travel-dependent supply chains, both upstream and downstream, which is questionable in time of Covid. There are over 5000 people employed in (90) Creative Art and Entertainment sector in the Knowledge Quarter.

Covid-19 also accelerated trends which were already changing central London economy. Evidence was emerging prior to the pandemic of a reduction in commuting trips per person (when measured across all modes of transport) and of structural changes in employment because of growth in the ‘gig’ economy, plus more part-time and people home working for some days of the week thanks for improved communication technologies. The retail sector was also already starting to reshape, with increased share of e-commerce. There are almost 30,000 people employed in (47) Retail Trade Sector.

Prior to Covid-19, professional services and office-based work generated the largest elements of both employment and output in the Knowledge Quarter. Furthermore, there is a high degree of interdependency between the different sectors: for every 100 KIS office jobs, up to 46 are supported in the retail, hospitality and entertainment sectors²¹.

Despite uncertainties related to automation risk and the short and long-term impact of Covid-19, the economic strengths of the Knowledge Quarter are clear. The mix of key specialisms in an ecosystem of learning and creativity is undoubtedly a source of growth and prosperity for years to come. But, that growth can only be sustained through continued investment in the institutions, businesses and people that drive it. With the right strategies, that growth can also be more inclusive to ensure local communities benefit from the opportunities on their doorstep as well. The British Library is central to this mission, to act as a repository of knowledge and an engine of growth. Its continued growth and investment in entrepreneurship, research and community outreach can increase the prospects of good growth in London and Camden, creating jobs, sense of place, and space to meet and create.

1.3 The impact of British Library on the Knowledge Quarter, London and beyond

1.3.1 The British Library Business and IP Centre (BIPC) today: providing valuable support to London-wide and national entrepreneurs and SMEs

The British Library plays an important role in investing in entrepreneurs and big ideas that drive economic growth. Its series of programmes and initiatives reach out to diverse communities of learners, researchers, and businesspersons to help the get started and grow. The institutions and programmes play an important role in the Knowledge Quarter, attracting people with new ideas to work together to generate more knowledge and commercialise them. The current ecosystem of business support with research and readers contributes to the continued growth and attractiveness of the Knowledge Quarter.

²¹ Retail, hospitality and entertainment sectors 2-SIC codes considered: 45, 46, 47, 55, 56, 90, 91, 92 and 93

‘Helping businesses to innovate and grow’ is one of the British Library’s six core public purposes. The British Library Business & IP (intellectual property) Centre, or BIPC, provides targeted help to aspiring entrepreneurs and early-stage businesses and helps established SMEs to scale up. *“Democratising Entrepreneurship” (2018)* highlights the role of libraries as *“engines of economic growth,”* and BIPCs’ national network has helped to create over 12,000 new businesses between January 2016 - December 2018 providing almost 8,000 additional jobs, £78 million additional GVA, and a payback of £6.95 for every £1 of public money spent.

Between 2017 and 2019, almost 43,000 entrepreneurs²² have benefitted from the BIPC’s support in London. It provides:

- a comprehensive collection of databases and publications (mainly online),
- a physical reading room in the library, one-to-one advice sessions,
- inspiring talks
- a programme of practical workshops which are held either at the British Library or in other libraries in London or elsewhere in the country.

The BIPC runs four major programmes which have served 43,000 entrepreneurs in recent years. The full economic and social impact is not known, but the contribution to the Knowledge Quarter and the networks that reach out from it across the country is apparent.



Figure 7: The British Library today (Arup Analysis)

Programme 1. The Innovation for Growth (I4G) Scale-ups and Start-ups Programmes: tailored programmes for London based businesses that could be more appealing to local SMEs²³:

The I4G Scale up programme is a tailored three-month intensive business support initiative run by the British Library BIPC on a rolling basis, targeting specifically at London-based SMEs and scale-ups with an annual turnover of £100,000 or more. Every three months, 10-12 high-growth businesses are selected and given £10,000 worth of specialist support and tailored one-to-one advice. Due to Covid-19, the programme is currently running digitally and the one-to-one meetings with the consultants are by video conference. Since 2012, 540 businesses were supported, with turnover ranging from £100,000 to £30 million, with the average being £500,000. The programme is supported by the European Regional Development Fund and entirely free for businesses.

A second programme, run in parallel, is tailored to start-ups. It is a short course comprising of 4 workshops aimed at giving aspiring entrepreneurs the tools needed to begin researching their business idea. The workshops are open to anyone, and participants are free to pick and choose which of the 4 workshops they attend depending on their interest. In addition, the I4G team run a number of Start-up Stars events which are free to attend –Networking events, open to anyone much like the Start-ups days described below. In the past two years (2017-2019) over 4500 entrepreneurs joined the programme.

Programme 2. Start-up day: opportunities to meet young entrepreneurs in early stages from all around England

This is an annual event, run by the British Library BIPC, over a day with free talks, expert workshops and tailored advice designed to get business idea off the ground. This event is open to all (Londoner or not). Participants were ~40% from London and 60% from outside London between 2017 and 2019. As for the business cycles, most are “planning to start” or “setting up” across the two geographies. This shows “earlier” stage business than for the Innovation for Growth programme that showed a higher proportion of later stage businesses.²⁴

²² The participant figure is based on the assumption that the BIPC normally receive about a 60% feedback form return rate from our London events and around 40 - 50% from the National Network events.

²³ Figures based on a total of 2,882 feedback forms received from participants for the Innovation for Growth Programmes between 2017 and 2019

²⁴ Figures based on a total of 1,194 feedback forms received from participants to Start Up days (3 annual events) between 2017 and 2019

Programme 3. The National Network Programme: a national programme appealing to all including more deprived communities²⁵

This programme extends the British Library BIPC model to support libraries around the country²⁶. Sixteen libraries are part of this BIPC network.

Programme 4. Start-ups in London libraries: a programme in partnership with 10 boroughs promoting the value of the BIPC to wider communities

This is a programme of workshops and webinars on: “what next for my business idea?”, “get ready for business”, “Marketing Masterclass: part 1 and 2”. By partnering with ten London boroughs, Start-Ups in London libraries programme is developing a community of new and existing business owners, which is free to join and open to everyone and provide an introduction to how BIPCs can be helpful. This programme is not run by the British Library BIPC.

Impact and reach of the British Library BIPC’s programmes: reaching diverse communities

Programme 1: The Innovation for Growth (I4G) Scale-ups and Start-ups Programmes

Across the two I4G sub-programmes²⁷, only 2% of participants came from Camden (whether their residence or business location) between 2017 and 2019. Among those, over 75% were women. As for business interest, ¼ of Camden participants are setting up or have set up a business in the creative/ media/ publishing sector, making this sector the most appealing among all. This is well aligned with the KQ specialism. Overall, the programme could be more appealing to local start-ups and SMEs, providing them some preferential criteria to be selected for the I4G scale up for eg. or more promoting the I4G programme to local entrepreneurs.

Programme 2: Start-up day

Women are once again overwhelmingly represented (over 60% of participants), with a relatively younger participant base than for the Innovation for Growth Programme. There is also a relatively high proportion of Black or Black British London participants (¼ as compared to 41% white).

Programme 3: The National Network Programme

The difference between women *versus* men participation is less significant than for London events but still remains (55% women and 42% men). Participants are slightly older than the other programmes and the most deprived communities are well served by the network, with 22% of users drawn from the top 20% of the most deprived areas in the UK, where just 7% of individuals are typically self-employed.²⁸

Overall

Across all uses of the BIPC, women participants are very well represented, London participants are the most diverse in term of ethnic background, Start-Up Days are younger than the other programmes available, most participants are self-employed, in “planning to start” or “setting up” mode (with relatively more “new business: less than a year” for Camden participants to Innovation for growth programme), and are significantly more interested by the Creative / Media / Publishing sectors than any other sectors.

1.3.2 Providing space for academic research, personal escape, and cultural enrichment²⁹

The number of visitors at the British Library increased by 11% over the past 10 years (2009 – 2019), reaching over 1.5 million in 2019. While most people think of the British Library as a place for reading and research, visitors come exhibitions or events academic purposes and leisure.

²⁵ Figures based on a total of 13,810 feedback forms received from participants to National Network events between 2017 and 2019

²⁶ Building on this success, the British Library began in 2010 to explore working with local authorities and library service providers in other parts of the country. Business & IP Centres now operate in town and city libraries across the UK in Birmingham, Devon, Glasgow, Hull, Leeds, Liverpool, Manchester, Newcastle, Norfolk, Northamptonshire and Sheffield. Services are currently in development in Cambridgeshire & Peterborough combined authority and Nottingham, with new pilots to be launched in Brighton and Worcester.

²⁷ Data essentially coming from participants to the I4G start up programme

²⁸ https://www.artscouncil.org.uk/sites/default/files/download-file/9715%20BIPC%20report%20v20b%20single_0.pdf

²⁹ All data below coming from a spot survey answers from 4,486 respondents from April 2016 to March 2020

The reach and engagement of the British Library and its programmes

Reasons for visiting

- **Academic Research, Personal Escape and Culture:** these are the three top primary purposes for visiting 28%, 28% and 26% respectively³⁰.
- **125,000:** number of people who attended events, talks or exhibitions requiring tickets at the British Library from March 2019 to March 2020.
- **Over 600,000:** number of people³¹ who came to visit the Treasures Gallery during from March 2019 to March 2020.
- **120,000:** number of registered readers as of July 2020
- **Academic:** main reason for readers to come to the British Library (academic 60%, personal 26% and business 14%).

Usage frequency

- **65%:** proportion of British Library visitors being repeat visitors
- **35%:** proportion of British Library visitors being first-time visitors.

Reach of the BL

- **16,000+:** number of people using the British Library collection each day (in person and online).
- **78%:** proportion of visitors coming from the UK, with the rest from overseas.
- **60%:** proportion of UK visitors coming from London
- **13%:** proportion of UK visitors coming from the South East
- **Bloomsbury, Islington and Camden:** these are the densest areas where readers live, all of which are very close to the British Library
- **North London:** where most of the readers live as compared to the South

The British Library is a national institution located in a community. The reach of its programmes are, understandably, concentrated in Inner London, closest to the Library itself. But, as the maps below demonstrate, users come from across London and across the country. Thus, the British Library should be considered a national and international asset with special consideration for the benefits it brings on a much broader scale. In order for the British Library to expand its economic and social impacts, it must also expand its physical space and capacity.

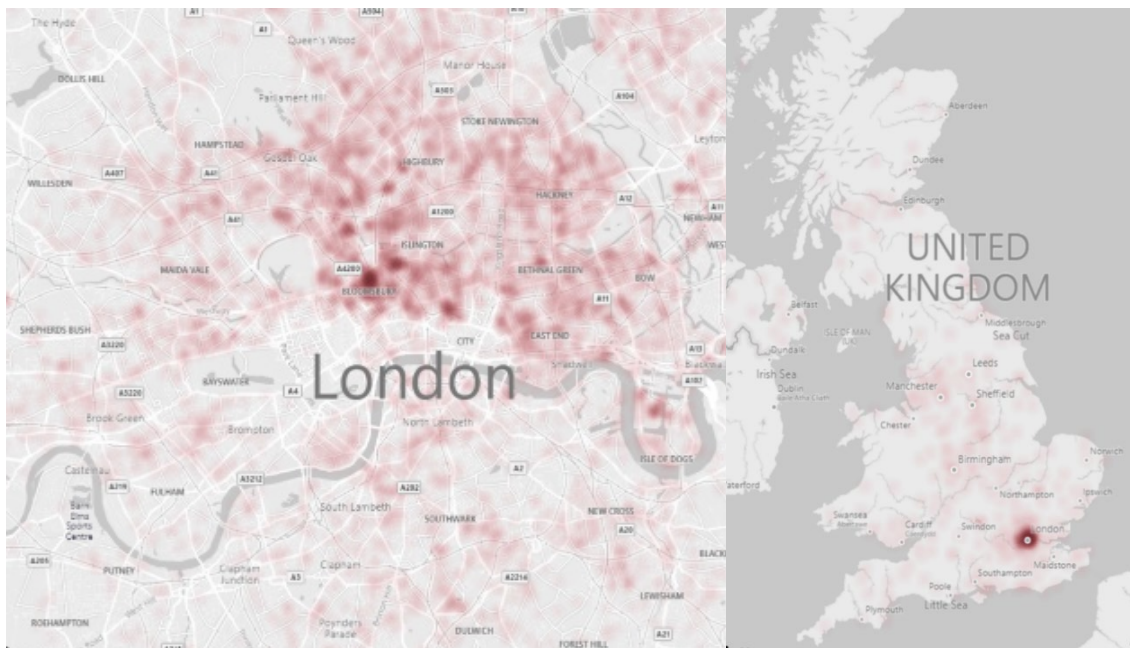


Figure 8: Heat map of location of residence place of the users of the BL

³⁰ Based on spot survey answers from 4486 respondents from April 2016 to March 2020 (source: BL)

³¹ Based on footfall

A new chapter for the British Library: plans for expanding space and impact

1.4 A vision for the British Library Extension: shaping opportunities for wider, more diverse and local communities

1.4.1 The New Development: *Living Knowledge* eight-years strategy

The British Library already plays a very important role nationally, regionally and locally and extending the Library will build on that success to expand engagement at all levels. The site is now at a tipping point, as physical spaces are reaching capacity for reading, research and business support programmes. While the BL's exhibitions are growing in popularity, the exhibition gallery is able to display only a fraction of the treasures held.

The British Library want to expand the site by developing a 2.8-acre plot in a once-in-a-generation opportunity to further harness the benefits of having a “city within a city” for research, inspiration and enjoyment in such a central location in London. The 100,000 sqft of new gallery, learning and business spaces for the library will make a significant contribution to the institution as well as the Knowledge Quarter.³²

The established requirements for the site—as set out in emerging site allocations IDS19 and KQ1—and the evidence of need—as set out in the baseline of this report—has set a clear scope and ambition for the BLE. The space reflects the current and future needs of the Knowledge Quarter and the knowledge-based economy that serves as the area's economic foundation. The space will complement and support other institutions and companies that contribute to the success of the innovation district, and it will enable and attract growth sectors in life sciences, digital and other high-tech sectors in a mix of workspaces for accelerators, start-ups, move on spaces and HQs.

The designs of the BLE have been carefully considered between the architects, engineers, economists and planners to deliver spaces that serve social and economic purpose. The design is based on need for interaction between business, researchers, education and the community. And the open and flexible spaces are shaped to provide multitudes of uses for a wide range of audiences, including the local community.

Employment and economic impact density scenarios and options (office-led and lab-led) were established based on the following:

- Area Schedule for Development Agreement dated from 5 July 2021
- Emerging site requirements set out in Policy IDS19 and KQ1
- Insight on potential tenant types and growth sectors in the Knowledge Quarter in this baseline study, the Knowledge Quarter *Science and Innovation Audit Report*, and *St. Pancras Transformed*.

As of July 2021, a total of 53,000 – 55,500 sqm³³ (NIA)³⁴ are set to be developed over one phase of development, with 2031 expected as the first year of occupation. The total floorspace will be divided in 10 levels (L11 is the roof) plus an upper and lower ground floors (UG and LG) and a basement (B1).

Two occupation options are under-review:

Option 1 includes both conventional and affordable commercial offices focussed on science, innovation and research uses, but no incubator nor lab-enabled offices (55,527 sqm NIA).

³² Case for additional library space for learning, gallery and business as set out in the St. Pancras Transformed Full Business Case (Version 2.8), January 2017.

³³ Incl. office spaces, retail and Alan Turing Institute, not incl. library spaces, nor the commercial lobby and reception, foyer and amenities

³⁴ NIA are based on GIA area schedule prepared by Alinea with 82,470 sqm GIA.

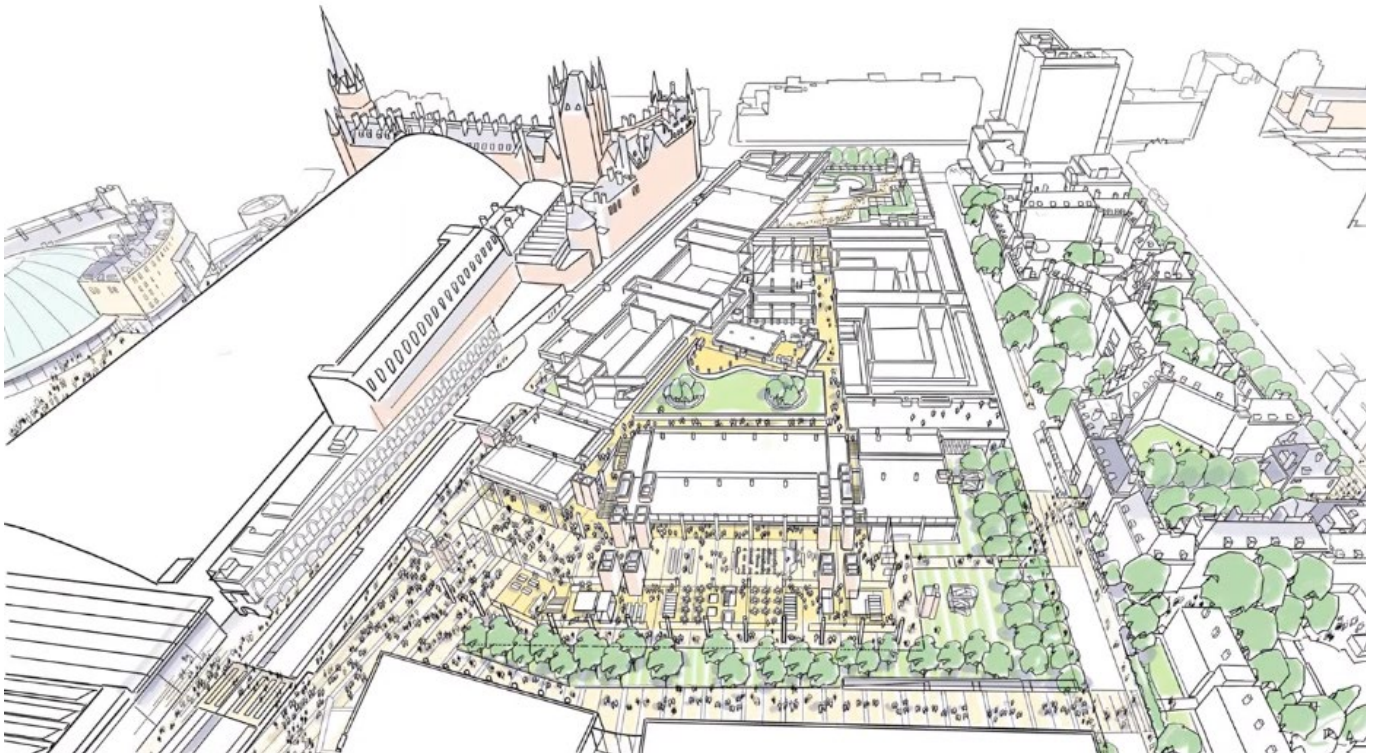
Option 2 includes incubator and several floors of lab-enabled spaces as well as commercial offices (53,173 sqm NIA).

The scheme includes the following, with floorspace areas by use set out in each option in Table 6 below:

- Open and flexible spaces for changing exhibitions and events
- Over 53,000 – 55,500 sqm (NIA) of commercial space, including offices, incubator and lab-enabled offices (depending on option)
- The new home of the Alan Turing Institute
- Welcoming and engaging public space that brings the inside out, sharing the library with visitors before they enter the threshold and a community garden which local residents will curate
- Retail space that contributes to placemaking and weave the library in with the urban fabric
- A publicly accessible foyer during opening hours for use by BL visitors, future commercial occupiers, and collaborative events and displays with the local community.

Table 6 Option 1 and 2 NIA surface per use

	Commercial Space				Retail	Alan Turing Institute (excluding library space)	Total
	Conventional Offices	Lab-enabled Offices	Affordable Offices	Incubator			
	NIA sqm	NIA sqm	NIA sqm	NIA sqm	NIA sqm	NIA sqm	NIA sqm
Option 1: Office-led							
L10	2,685						2,685
L09	4,840						4,840
L08	5,203						5,203
L07	6,716						6,716
L06	6,660						6,660
L05	6,660						6,660
L04	6,657						6,657
L03	6,653						6,653
L02			6,651				6,651
L01	1,248					1,018	2,266
UG							-
LG					536		536
Total	47,322	-	6,651	-	536	1,018	55,527
Option 2: Lab-led							
L10	2,285						2,685
L09	4,840						4,840
L08	5,203						5,203
L07		6,321					6,321
L06		6,268					6,268
L05		6,268					6,268
L04		6,265					6,265
L03		6,262					6,262
L02				6,260			6,260
L01	1,248					1,018	2,266
UG							-
LG					536		536
Total	13,976	31,384	-	6,260	536	1,018	53,173



With the new development, the British Library aims to transform the way it engages with and becomes accessible to a wider, more diverse and local range of users while consolidating its position as global player in the knowledge economy. Indeed, it is important to recognise that the British Library is a London and national asset but also shaping opportunities for local people. The transformed library will act as a getaway into the evolving network of researcher, spin-out firms and industries located in the Knowledge Quarter.

The British Library wants to become the most open, creative and innovation institution of its kind in the world by the time of its 50th anniversary in 2023 proving its users technology-enabled civic spaces that combines creativity, versatility a commercial sustainability. These spaces will include more exhibition spaces and galleries, new facilities for learners of all ages, improved public areas and accessibility, an enhanced offering for business users of the BIPC, a new entrance close to the Francis Crick Institute, a permanent home for the Alan Turing Institute, some environmental improvements (e.g., better connectivity) and extensive and flexible commercial accommodations for organisations seeking to locate and work in the Knowledge quarter.

This expansion is more than growing the physical space of the British Library. It is about reaching out to new parts of the business and innovator community and to create new spaces for engagement and learning that draw in new audiences. By bringing together new commercial space, multi-functional spaces and expanded library, the relationship between the learning and business communities is much tighter. By creating a major part of the new Euston St Pancras Crossrail 2 Station for the future, the development is securing even greater connectivity for the public and business community to the Library, as well as contributing to the wider benefits to London and the UK of the Crossrail 2 line. Additional retail and food and beverage offer will create new amenities for the community and visitors. This proposal will truly help democratize learning and culture to a much wider audience, expanding the reach and impact of the Knowledge Quarter on the whole.



Figure 9: The British Library tomorrow, including the BLE (Arup Analysis)

1.4.2 BLE responding to the objectives and fulfilling the potential of the British Library, the Knowledge Quarter and Camden

The British Library Extension programme will extend the reach and impact of the British Library. Importantly, though, it will help the Knowledge Quarter and LB Camden achieve some of their strategic aims. With a focus on good growth, economic opportunity and inclusion, learning, and quality spaces, this expansion is about contributing to the long-term competitiveness of a global knowledge centre in Camden. And, at the same time, the attention to the needs of local residents, workers and visitors highlights the BL's ongoing commitments to its neighbours and community.

Table 5 below shows a collection of visions and objectives from different BLE stakeholders related to economics are outlined below. These objectives are important benchmarks to consider when assessing the impact of interventions.

Table 7 BLE and partners objectives

Objectives	LB Camden	Knowledge Quarter (2025 Strategy)	British Library	British Library Extension: scheme response
EDUCATION AND SKILLS Learning and Aspirations	<ul style="list-style-type: none"> • Preserve and enhance a culture of lifelong learning • Every child should be able to access the pathway that is right for them, whether academic or vocational • Drive forward the recommendations of the Camden STEAM (Science, Technology, Engineering, Arts and Maths) Commission 	<ul style="list-style-type: none"> • Increase public access to members' knowledge, resources and collections, creating opportunities for exchange with local citizens 	<ul style="list-style-type: none"> • Inspiring young people and learners of all ages 	<ul style="list-style-type: none"> • Better meet the needs of surrounding communities • Access to British Library open to a wider and more diverse audiences • New facilities for learners of all ages with more exhibition spaces to engage with • Increased access to skill and training for local communities beyond the Library's usual user base • Connection with Somers Town
BUSINESS AND JOBS Business and Innovation	<ul style="list-style-type: none"> • Growth in Camden should be strong and inclusive – everyone should be able to access the work that is right for them • Helping those furthest from the labour market into rewarding work • Deliver high-quality flexible workspaces that can respond to our growth sectors and changing patterns of employment 	<ul style="list-style-type: none"> • Facilitate knowledge exchange and identify opportunities for openness, collaboration and networking between its members 	<ul style="list-style-type: none"> • Helping business innovate and grow, providing tailored support to local, regional and national businesses looking to “set up” or “scale up” 	<ul style="list-style-type: none"> • Enhanced offering for business users • New jobs and businesses creating opportunities for local people • Extensive and flexible commercial accommodations for organisations seeking to locate and work in the Knowledge Quarter adjacent to the British Library
KNOWLEDGE Knowledge Generation and sharing locally, regionally, nationally and internationally	<ul style="list-style-type: none"> • Growth in Camden should be strong and inclusive – everyone should be able to access the work that is right for them 	<ul style="list-style-type: none"> • “Transforming lives through knowledge” by identifying opportunities for openness, collaboration and networking between its members • Increasing the area's profile through advocacy and stakeholder engagement, both nationally and internationally 	<ul style="list-style-type: none"> • Building, curating and preserving the UK national collection of published written and digital content • Supporting and stimulating research of all kind • Working with partners around the world to advance knowledge and mutual understanding 	<ul style="list-style-type: none"> • Intensified and diversified knowledge economy through new spaces for jobs at the heart of the KQ (up to 6,900) • Providing a permanent home for the Alan Turing Institute • Position of the British Library as a global player in the Knowledge Economy consolidated: by anticipating and better meeting the changing needs of a range of growing audiences, including national and international networks of libraries as well as adding a substantial new business venue in the heart of the KQ.

1.5 Creating accessible new spaces for learning, community and commerce to reach communities beyond usual sets of users

1.5.1 Learning from other libraries: creating engaging hubs and civic spaces

The British Library Extension will be at the heart of the Knowledge Quarter. To fulfil that aim, the physical space design excellence must be paired with innovative programming and an institutional ethos aimed at economic and social impact. Learning from other libraries and institutions, the BLE will create the space and the programming to deliver a British Library that works for businesses, innovators and community alike.

The **BnF in Paris** reaches out to new audiences to make use of its collaboration spaces. On one side, new areas of event programming – formalisation of multidisciplinary conferences in a BnF people’s university, better coordination with the collections, strengthened partnerships, and the dynamism injected by events such as the BnF Festival – have been strengthened in order to ensure a more understandable relationship for the public. On the other side, “working group” rooms are available. These can be booked on the same day and up to one week in advance, for a maximum duration of 4 hours per day and 20 hours per month. Booking is made through the library [website](#) or through the [Affluence App](#) for last minute booking. Everyone who want to access these rooms can but needs to buy at least a 1 day reader’s card (3.90 €) or have a Pass BnF Lecture / Culture (15 €/ year).

Learning from the BnF, the BLE will have accessible spaces for collaboration that people can make feel their own as well as organise events and exhibition in its foyer spaces, open to all. Affordable room booking systems allow for more formal collaboration and meetings for a wider range of start-ups and SMEs. Whereas free exhibitions, events or festivals in the foyer / reception area, space that is shared users of all kind, could make unreachable community yet come for the first time.

The **Oodi Library in Helsinki** is arguably the most socially open library ever built. Oodi is a no-threshold community centre open to all. The building consists almost entirely of public space. Its design divides the functions of the building into three distinct levels: an active ground floor, a peaceful upper floor, and an enclosed in-between volume containing the more specific library functions. It is a place that welcomes small and large event organisers alike, featuring accessible event facilities with technologies suitable for a wide variety of events: literature events, public events (panel discussion, public lecture or seminar), music events, children events, film screenings, food-related events, pop-up events and events outside under the peak of Oodi³⁵. The open foyer area of the BLE has learned from Oodi Library. By being as open and accessible as possible, the BLE will engage wider and more diverse groups through programming a wide variety events in the public space.

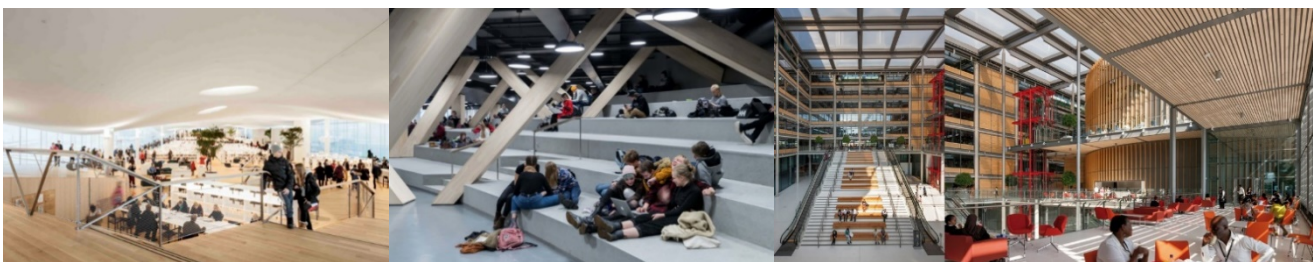


Figure 10: Oodi Library spaces open to the public, Helsinki (Finland) (left and middle); Brent Civic Centre (right)

Closer to home, the **Brent Civic Centre** is an excellent example of using open spaces in civic buildings to create a multi-purpose community hub. The large hall provides very affordable rooms for rent by business and community groups alike. The affordability of the space hire ensures it is accessible to a wide range of users and creates a sense of vibrancy in the building which may otherwise feel ‘traditional’ or even ‘intimidating.’

³⁵ <https://www.oodihelsinki.fi/en/services-and-facilities/organise-an-event/>

The economic impact of the British Library Extension

1.6 Contributing to an evolving and inclusive knowledge economy

The key benefit to Camden and the Knowledge Quarter of the BLE will be the increased investment in a national learning institution with local roots. The institution and the accompanying jobs and economic growth will be one of the largest investments in the knowledge economy since the King's Cross regeneration scheme. The knowledge economy involves services and production based on knowledge-intensive activities that contribute to an accelerated pace of technical and scientific advancement. This is not just about doing 'clever things,' but creating new ways to work cleverly. The key component of a knowledge economy is a greater reliance on intellectual capabilities (rather than on physical inputs or natural resources).

The knowledge economy is all around us, we nearly all take part as consumers. However, makers and shapers of the knowledge economy are concentrated in a very small number of firms and places. Unsurprisingly, a significantly high proportion of employment in the KQ are in Knowledge-Intensive Services (45% in KIS as compared to 20% in England). What makes the BLE extension a unique proposition for Camden is the mix of KIS and less KIS who will co-locate there. As set out in Section 1, the related variety of these businesses facilitates 'learning at the edges' – firms are similar enough that they can learn from one another and share common learning infrastructure, but they are different enough to not get stuck in an echo chamber of the same ideas.

However, there is an inherent challenge with knowledge-intensive growth – inclusivity. These sectors tend to require university or higher degrees. They can also be less prone to hire from working class backgrounds or different minority ethnic backgrounds, due to implicit and explicit biases. There is ongoing discussion about how to make the Knowledge Economy more inclusive. Recommendations from a Nesta report³⁶ suggests:

- Upgrade SMEs capacity and skills: "greatly accelerate the adoption of new methods and technologies at every level of the economy"
- Soft skills for all: "Reforming education to prepare the next generation for the labour market of the future not the past – cultivating the mindsets, skills and cultures relevant to future jobs"

Building on the first bullet point above, the BLE programme will support the Library's strategic business purpose by substantially extending the facilities and resources of Business & Intellectual Property Centre (BIPC). The BIPC have been playing a pivotal role in the UK SMEs and start-up since its creation. A 2011 Economic Evaluation by Androit Economics concluded that people who used the centre were four times more likely to succeed compared to those who did not. Internal forecasts from BIPC estimate that an increase in desks and incubator spaces will host and support an additional 75 SMEs / start-ups and 300 jobs per annum by 2023, a 25% increase on the current position and +£3.6m pa to the economy with limited displacement effect due to the already catalysing effect of the KQ and London as a whole.

On the second point above, the BLE will indeed deliver extensive new Learning Facilities in the development site, and additional new facilities in the main building, together with resource to run a greatly increased number of learning event. The benefit from increased learning has been calculated by an independent economic valuation of the British Library report commissioned in 2013 and referred in the BLE full Business Case produced by the British Library in 2017 following the Government Green Book methodologies. In the Oxford Economics report, the

³⁶ <https://www.nesta.org.uk/report/imagination-unleashed/>

economic value of learning from the new development was set to increase from £600k per year to over £1m with the extension.³⁷

The design and institutional ethos of the BLE, thus, has an important role in supporting innovation, how people and organisations share knowledge, and who works and uses the spaces. But, by taking learnings in programme and design as set out in Section 2, the BLE will create as open and inclusive an ecosystem for workers and businesses to grow. It will act as an anchor to the Knowledge Quarter, and the spaces are designed so that they can be flexible and respond to the changing Knowledge Quarter demands over time. The new jobs created will likely include a wide range of creative, professional services and scientific jobs that have great synergies with one another. For example, the design skills from architecture or advertising could generate new ways of design thinking or how ideas are shared in the scientific community. Or, more explicitly, consulting or other professional services could help fill knowledge gaps from growing organisations – all within the BLE.

Face-to-face contact, networking programmes, and informal meeting spaces will all be critical to fulfilling the potential of the BLE within the Knowledge Quarter, including occupiers of the BLE commercial space. This is how people will learn from one another, formally and informally, to create thick networks and build trust. This is how organisations share ideas, collaborate and support innovation.

1.7 Creating jobs, growth and resilience for a strong and diverse economy

1.7.1 The BLE is creating a wide range of jobs as an anchor knowledge institution

New commercial development within the BLE will create a wide range of benefits to the learning and innovation ecosystem in the Knowledge Quarter. The mix of commercial space with library and open and versatile curated spaces will:

- create jobs,
- increase local spending in Camden
- grow the economy.

The exact mix of space and who will occupy it is not known today, but the specification and the evidence of demand set out in Section 1.4.1 demonstrates that a mix of professional, scientific and creative businesses will make the BLE their new home based on space specification (office, lab-enabled spaces, incubator). There will be a focus on attracting Science and Research companies, start-ups and universities, all of which will benefit from direct proximity to the Frances Crick Institute and the Alan Turing Institute and the hub of the Knowledge Quarter.

Thinking to date is:

- Space on floors UG and 1 serve reception and amenity
- Space on floor 02 is allocated to an incubator, or to affordable offices (depending on occupation option)
- Space on floors 03 – 07 is allocated to conventional offices or lab-enabled offices (depending on occupation option)
- Space on floors 8-10 is allocated to conventional offices

Different density scenarios have been applied per type of space.

³⁷ British Library. (January 2017). St. Pancras Transformed Full Business Case. Version 2.8.

Office Density Options	
Conservative	12
Medium	10
Dense	8

Retail Density Options	
Conservative	20
Medium	14
Dense	10

Lab-enabled Density Options	
Conservative	50
Medium	25
Dense	10

Incubator Density Options	
Conservative	60
Medium	20
Dense	15

ATI Density Options	
Conservative	12
Medium	10
Dense	8

Library Density Options	
Conservative	125
Medium	87.5
Dense	50

Affordable office Options	
Conservative	10
Medium	8
Dense	8

Figure 11 Density assumption for additional job calculation, based on Employment Density Guide 3rd edition, 2015 and Arup Analysis

Three density scenarios (conservative, medium and dense) of additional job numbers have been created for the two occupation options:

- **Option 1:** Office-led occupation
- **Option 2:** Lab-led occupation, including commercial office, lab-enabled and incubator space

*Note: figures in the tables below might not sum due to rounding.

Option 1 Additional jobs: Office-led occupation

Scenario 1.1: Conservative

Type of space		Employment Density		Total FTE jobs created
Office	Conventional office	12	NIA sqm/job	3,940
	Affordable office	10	NIA sqm/job	670
ATI	Alan Turing Institute	12	NIA sqm/job	90
Retail	Retail	20	NIA sqm/job	30
Total jobs				4,720

Scenario 1.2: Medium

Type of space		Employment Density		Total FTE jobs created
Office	Conventional office	10	NIA sqm/job	4,730
	Affordable office	8	NIA sqm/job	830
ATI	Alan Turing Institute	10	NIA sqm/job	100
Retail	Retail	14	NIA sqm/job	40
Total jobs				5,700

Scenario 1.3: Dense

Type of space		Employment Density		Total FTE jobs created
Office	Conventional office	12	NIA sqm/job	5,920
	Affordable office	10	NIA sqm/job	830
ATI	Alan Turing Institute	12	NIA sqm/job	100
Retail	Retail	20	NIA sqm/job	40
Total jobs				6,910

Option 2 Additional jobs: Lab-led occupation

Scenario 2.1: Conservative

Type of space		Employment Density		Total FTE jobs created
Office	Conventional office	12	NIA sqm/job	1,170
	Lab-enabled	50	NIA sqm/job	630
	Incubator	60	NIA sqm/job	100
ATI	Alan Turing Institute	12	NIA sqm/job	90
Retail	Retail	20	NIA sqm/job	30
Total jobs				2,010

Scenario 2.2: Medium

Type of space		Employment Density		Total FTE jobs created
Office	Conventional office	10	NIA sqm/job	1,400
	Lab-enabled	25	NIA sqm/job	1,260
	Incubator	20	NIA sqm/job	310
ATI	Alan Turing Institute	12	NIA sqm/job	100
Retail	Retail	14	NIA sqm/job	40
Total jobs				3,110

Scenario 2.3: Dense

Type of space		Employment Density		Total FTE jobs created
Office	Conventional office	8	NIA sqm/job	1,750
	Lab-enabled	10	NIA sqm/job	3,140
	Incubator	15	NIA sqm/job	420
ATI	Alan Turing Institute	8	NIA sqm/job	130
Retail	Retail	10	NIA sqm/job	40
Total jobs				5,470

Overall, the BLE should create between **2,000 and 6,900 jobs with a central scenario (medium density scenario for lab-led option) at 3,110 jobs** on-site in direct employment for option 1. Regardless of the option chosen, this will be a significant impact on the local economy with the majority of these jobs in high value-added sectors. The second case – with only conventional offices – would create the most jobs. However, there is a trade-off between the total number of jobs and the types of businesses and organisations the BLE would like to attract. Traditionally, science and R&D spaces as well as incubators require a bigger footprint. So, they will create fewer direct jobs in the space, but they will generate a significant value to knowledge creation and innovation. Incubator activities could be “specialised,” for example in the media / creative / publishing industry or in Scientific Research and Development as there is clear concentration of such industry in the study area already and most of entrepreneurs and businesses making use of the British Library BIPC are interested in building their activities in these sectors.

Below are the type of jobs that will be created by industry sections:

Commercial Offices	Information and Communication
	Financial and insurance activities
	Professional, scientific and technical activities
	Administrative and support services activities
Lab-enabled spaces	Professional, scientific and technical activities
Incubator	Professional, scientific and technical activities
	Information and Communication
ATI	Professional, scientific and technical activities
Retail	Wholesale and retail trade

This shows the diversity of jobs being created on site. The diversity of sectors as well as the range of occupations will create a wealth of new job opportunities. The BLE will employ scientists, consultants, secretarial workers,

researchers, food services, administrative staff, designers, and janitorial and landscaping staff. The democratisation of opportunity within the British Library will continue through the breadth of opportunities for quality work.

In particular, the delivery of purpose-built spaces for the Alan Turing Institute as part of the Development Site located the ATI prominently at the heart of the KQ innovation and research network. One key additional economic benefit created is through the uplift of the overall economic impact of scientific research and data-related business activity through the KQ made possible by the ATI's new expanded location. This has been quantified by assessing the investment from the UK Government³⁸, with every £1 spent in new data sciences and research, an extra £0.2 p.a. is added to the UK Economy up to £0.35 p.a. post investment period. The ATI addition to the KQ is therefore worth 2.1m p.a post investment.³⁹

This report presents the traditional approach to estimating on-site employment potential for a site based on accepted benchmarks for employment density. However, given the new ways of working in a post-Covid-19 world, office employers in particular could expect to implement greater desk-sharing approaches, allowing employees to split their time to work from home and from the office. This would mean that whilst the number of on-site jobs would remain as presented above, the number employed by companies operating out of the BLE could be much more.

Note: All jobs, GVA and local spend estimates in this report have been based on the traditional employment density calculations have not taken into account working-from-home and desk-sharing trends likely to be in place by the time of occupation.

1.7.2 Growing the local economy: additional GVA and spent on local services and retail

Additional GVA from new jobs

The increase in direct employment means that economic output of the area will growth significantly. Gross Value Added (or GVA) is a common measure of economic output. By making assumptions of who might work in the BLE, this paper estimates the potential economic output growth of these additional jobs. This GVA section is based on the assumption that the development will be fully occupied in 2031; we assume that the building is delivered and fitted-out between 2029 and 2030, with occupation scaling up to full-occupancy in 2031.

In line with MHCLG guidance of accounting for the benefits of new jobs over a 10-year appraisal period (2031 – 2040), additional GVA from new jobs in the BLE is set out below.

Table 8 Additional GVA from new jobs across two options, and three levels of density

	Conservative	Medium	Dense
Option 1: Office-led occupation – 10-year additional GVA appraisal			
	Scenario 1.1	Scenario 1.2	Scenario 1.3
Gross GVA	£7.9 bn	£9.6 bn	£11.6 bn
Net GVA ⁴⁰	£5.6 bn	£6.7 bn	£8.1 bn
Option 2: Lab-led occupation – 10-year additional GVA appraisal			
	Scenario 2.1	Scenario 2.2	Scenario 2.3
Gross GVA	£2.3 bn	£3.5 bn	£6.0 bn
Net GVA	£1.6 bn	£2.5 bn	£4.2 bn

All prices are in £2020. Net GVA takes into account leakage, displacement and substitution effects.

³⁸ Rate of return to investment in science and innovation: a report prepared for the Department for Business, Innovation and Skills (Frontier Economics, 2014), p.69

³⁹ British Library. (January 2017). St. Pancras Transformed Full Business Case. Version 2.8.

⁴⁰ To convert gross GVA into net GVA, we assumed: 0.25% leakage, 0.25% displacement, 0% substitution and 1.25 as the multiplier in line with government guidance

New jobs supporting local services and retail businesses

New jobs will create a new market for local services and retail businesses. Workers and visitors will visit local shops, restaurants, pubs, groceries and services such as dry cleaners and salons. The impact on local businesses will be significant, given the scale of new jobs added. If each new worker will spend approximately 3 percent of their yearly gross salary on local services, it would create a big boost for businesses. Overall, the impact is presented as the total local spend benefit over 10 years, assuming a 3 percent of gross salary spent locally (2020 £, real terms).

Table 9 New job creation across two options, and three density scenarios

	Conservative	Medium	Dense
Option 1: Office-led occupation – 10-year additional spending by workers appraisal			
	Scenario 1.1	Scenario 1.2	Scenario 1.3
Additional local spend	~£83 m	~£100 m	~£121 m
Option 2: Lab-led occupation – 10-year additional spending by workers appraisal			
	Scenario 2.1	Scenario 2.2	Scenario 2.3
Additional local spend	~£35 m	~£53 m	~£94 m

1.8 A highly connected new development

The site will support the future creation of a new underground station for Crossrail 2 by connecting Euston and St Pancras, meaning new job opportunities at the site will be within a short distance of one of the most significant transport interchanges in the UK. This enhanced connectivity could bring an additional 26,000 people from across London within 30 minutes of the Library site via public transport, and an additional 163,868 people within a 45-minute journey. This connectivity will not only benefit people wanting to come and work at the new development, and visit the library, but will also increase the potential labour catchment for those living close to the application site, enabling residents of Somers Town to travel to further places, in less time than they can currently.

The latest economic studies for Crossrail 2 by PwC suggest that the benefit-cost ratio for the cross-regional scheme option is 1.8, indicating that for every £1 invested in infrastructure that supports Crossrail 2, £1.80 in direct public benefit can be expected, rising to around £2.00 when wider benefits are included in the calculation⁴¹. The study states that this benefit will be greater in areas which are currently under-served by public transport⁴¹. It is likely however that even at currently well-connected stations along the route, such as Euston, substantial economic benefits will result from the scheme.

⁴¹ Andrew Haylen, House of Commons Library, Crossrail 2 Briefing Paper, Number CBP 8481, 23 January 2019 <https://researchbriefings.files.parliament.uk/documents/CBP-8481/CBP-8481.pdf>

1.9 Qualitative economic benefits assessment from selected initiatives

This table outlines some of the qualitative, wider economic benefits that the BLE will bring to the local area.

Initiative/activity	Location	Project Stage	Initiative Description	Economic Impact
	<i>Where is this initiative or activity taking place</i>	<i>Which project stage will this initiative be active: existing/continuous; planning; construction; post-completion and operation</i>		<i>Based on the BLE or Camden objectives listed in Table 5 and derived economic impacts</i>
EDUCATION AND SKILLS: learning and aspiration				
Work placements and training	British Library and BLE	Construction phase	Provision of work placements and apprenticeships during the construction period and development of Employment and Skills Plan (construction) with targets for apprenticeships, work experience placements, training opportunities.	<ul style="list-style-type: none"> • Access to British Library open to a wider and more diverse audiences • Increased access to skill and training for local communities beyond the Library's usual user base • "Every child should be able to access the pathway that is right for them, whether academic or vocational" • Tackle youth unemployment / create aspirations in construction/development
Apprenticeships	BLE	Post-completion and operation phase	Apprenticeships made available each year in the completed development within a range of roles.	<ul style="list-style-type: none"> • Access to British Library open to a wider and more diverse audiences • Increased access to skill and training for local communities beyond the Library's usual user base • "Every child should be able to access the pathway that is right for them, whether academic or vocational" • Tackle youth unemployment / create aspirations in more KIS industries
STEAM Pledge	British Library	Existing / continuous	The British Library will continue its work with, and the applicant (SMBL) will sign up to, STEAM pledges.	<ul style="list-style-type: none"> • Promote STEAM economy in the KQ and the skills needed for the roles of the future • Encourage greater fusion in creative, digital and scientific education • Mobilise business resources to drive skills and careers education
Camden STEAM Commission objectives	British Library and BLE	Existing / continuous	Promotion of the Camden STEAM Commission objectives and other Camden initiatives such as Good Work Camden, amongst end users and occupiers.	<ul style="list-style-type: none"> • Promote STEAM economy in the KQ and the skills needed for the roles of the future • Encourage greater fusion in creative, digital and scientific education • Mobilise business resources to drive skills and careers education
Wi-Fi and study desks	British Library and BLE	Existing / continuous at the British Library, post-completion for the BLE	Provision of free Wi-Fi and study desks within the British Library	<ul style="list-style-type: none"> • Provide space for people to look for jobs • Wi-Fi and desk spaces open to all • Work on soft skills

BUSINESS AND JOBS: impact on the local economy and innovation				
Jobs for local communities	British Library	Construction phase	Significant number of jobs during the construction phase first targeted at Camden residents and then via Central London First	<ul style="list-style-type: none"> • New jobs and businesses creating opportunities for local people • Decrease unemployment in the local area
Increased spent in local services and retail by construction workers	Area surrounding the BL	Construction phase	Additional money spent by construction workers in the surrounding area during the construction period which will support surrounding local businesses.	<ul style="list-style-type: none"> • Increased customer base for local services and retail therefore increase revenue
Increased spent in local services and retail by future employees	Area surrounding the BL	Post-completion (or during if some parts of the development are ready to be occupied before full completion)	Additional spent by new workers (mostly in KIS jobs) in the surrounding area once the development is occupied which equates to over £50m for the central scenario (medium density for lab-led option) over a 10-year period (starting from 2030 assumed to be delivery year for phase 1) which will support surrounding local businesses	<ul style="list-style-type: none"> • Increased customer base for local services and retail • Increased KIS going hand in hand with increased need for “services” in the surrounding
Additional jobs in knowledge economy	BLE	Post-completion (or during – see above)	Creation and access to a diverse range, and significant number of jobs within the completed development.	<ul style="list-style-type: none"> • Increased employment in KIS and less KIS, as well as related services (eg. retail) • Participates to diversification • Spillover effect
Minimum salary for all employee	BLE	Post-completion (or during – see above)	Require London living wage as a minimum salary for all employees.	<ul style="list-style-type: none"> • Provide jobs that people can live off • Spending in the local area
Local recruitment target	BLE	During construction and post-completion	Target local recruitment through KXCSC, the Somers Town Job Hub and Good Work Camden.	<ul style="list-style-type: none"> • Tackle unemployment in surrounding more deprived areas • Better balanced benefits of employment growth in the area
Local businesses to supply goods and services	BLE	During construction and post-completion	Maximise the opportunities for local businesses to supply goods and services at the construction and end user phases.	<ul style="list-style-type: none"> • Increased local business activities • Synergies between local businesses and BLE
KNOWLEDGE: Knowledge generation and sharing				
Enhancement of the British Library BIPC	British Library and BLE	Existing / continuous	Help start-ups and micro businesses to grow and achieve success through the enhancement of the Library Business and Intellectual Property Centre by: <ul style="list-style-type: none"> a. targeting support for Camden’s businesses and start-ups through the offer of (i) affordable workspace to SMEs in tech and science and (ii) a robust business support network with support facilities, equipment and mentoring; and b. maximising the opportunities for local businesses to supply goods and services at the construction and end user phases. 	<ul style="list-style-type: none"> • Increased support for local SMEs / start-ups and entrepreneurs • Affordable workspace contributing to more inclusive Knowledge Economy and greater diversity of industries and services • Matchmaking between local businesses and service/business needs during construction and user phases
Tech and Science Incubator	BLE	Post-completion and operation phase	Exploring the potential of a tech and science incubator within the commercial area of the development to establish an ecosystem comprising: start-ups to mature corporate businesses. The incubator will provide communal equipment and access to mentors.	<ul style="list-style-type: none"> • Built on existing “concentrated” industries (high LQ and local competitiveness) • Synergies with surrounding institutes (Alan Turing and Francis Crick)

Conclusion

The BLE is a once-in-a-generation opportunity to transform the British Library and make it the most open, creative and innovative institution of its kind anywhere in the world while creating a long-lasting impact on the Knowledge Quarter with world class commercial space for businesses to trade, innovate and connect.

The BLE is a unique opportunity to achieve something of national and local significance. While expanding capacity for the British Library nationally, the BLE will strengthen its local impact by providing spaces to support local people and create local economic prosperity. The BLE will:

- Create **shared spaces** that are genuinely designed for all, supporting an environment for learning and participation
- Build on successful programmes for **community and school engagement**, to bring world-class facilities and expertise into the hands of local residents and businesses.
- Create space for a unique ecosystem of **science and research alongside business and commerce** to turn ideas into innovations.
- Provide a **new headquarters** for the Alan Turing Institute, the national centre for data science and artificial intelligence.
- Help bring forward a significant part of the new Euston St Pancras Crossrail 2 station that will **connect the Library site to faster and larger public transport network** across London.

The types of sectors that will be attracted to and occupy the commercial space will enhance the Knowledge Quarter's specialisms while allowing space for 'innovating at the edges.' The complementarity of science, creative and business supports an innovation ecosystem unique in London. In turn, the BLE will meet or exceed the expectations of Policy KQ1 that the floorspace provided will reflect the current and emerging needs of the knowledge economy, prioritising growth sectors and providing a suitable mix of workspace types.

The local economic impact of increased jobs, GVA and local spending for Camden businesses will strengthen the Knowledge Quarter and provide new opportunities for Camden residents. The creation of an open environment, programming and employment opportunities for Somers Town and wider Camden residents will support economic inclusion. The BLE is truly about 'transforming lives through knowledge.'

Economic Statement Appendix 1: Methodology for Economic Impact Assessment of the BLE

Estimating employment growth

Density scenarios and options were set up for office and retail employment, acknowledging that office employment will have a significantly higher impact on the final employment mix due to its allocated floorspace. For offices, SMBL had preliminary interest for Science and Research companies, incubators and universities so far. The demand for accommodation is coming from those companies that wish to be in the KQ, and more specifically a Life Science subset due to the proximity to the FCI and ATI.

Therefore three density scenarios for each of the two options presented (all office or lab-enabled space/incubator) were set up:

- Option 1: office-led
 - o 1.1 All office Conservative
 - o 1.2 All office Medium
 - o 1.3 All office Dense
- Option 2: lab-led
 - o 2.1 Lab-enabled and incubator Conservative
 - o 2.2 Lab-enabled and incubator Medium
 - o 2.3 Lab-enabled and incubator Dense

Employment numbers were then calculated using employment density guidelines (3rd edition, 2015)⁴². Employment density refers to the average floorspace (in m² NIA for office and retail and GIA for library accommodation⁴³) per full-time equivalent (FTE) member of staff. It is used as a measure of intensity of building use and an indicator of how much space each person occupies within the workplace.

Estimating GVA impact of employment growth

Average annual GVA growth is assumed at c. 2% - 4% depending on the sector, based on historical GVA per worker growth in the five years of the latest data (2014-2018). This was then discounted with 2% annual inflation. Net GVA was calculated using the following indicators from the Additionality guide⁴⁴:

- Leakage: medium – a reasonably high proportion of the benefits will be retained within the target area / target group (25%)
- Displacement: low – there are expected to be some displacement effects, although only to a limited extent (25%)
- Substitution: none – no substitution takes place (0%)
- Multiplier: multiplier for business development & competitiveness project on sub-regional (1.25)

Estimating additional local spending from employment growth

Looking now at total additional spent coming from new workers in the BLE, we assumed that each new worker will spend between 3% and 5% of its yearly salary on local services. Their yearly salary is taken from hourly pay – gross (£) for full time employee jobs in London in 2019 by industry sections and 2-SIC industry codes. As basis for salaries, both the mean and 70th percentile salaries were used.

⁴² Predicting employment density figures during the project appraisal stage is most accurate for new build (or recently constructed) properties and less accurate for older properties – [source](#)

⁴³ Industry standard to use GIA for cultural buildings

⁴⁴ Home and Community Agency (2014) [Additionality Guide Fourth Edition](#)

Economic Statement Appendix 2:

Geographies of the study

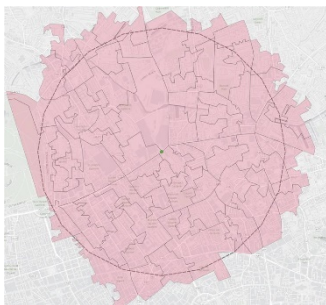
Geographies of the study

This report assesses the economic impacts of the British Library expansion based on the following:

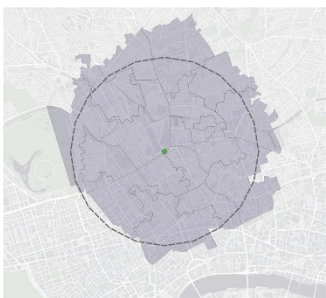
1. Base area: the Knowledge Quarter
2. Comparator area: LB Camden
3. Comparator area: Inner London
4. Comparator area: London Region
5. Comparator area: England

Comparator areas	Why these areas as relevant points of comparison?
Camden	Camden is the core local authority where the British Library sits in. The borough is supporting local residents and ensuring their needs are met.
Inner London ⁴⁵	Most of the Knowledge Economy (incl. universities and research jobs) is located in central business area therefore in Inner London boroughs and therefore this area is relevant to show specialisms in the KQ as compared to Inner London and/or alignment.
London Region	The region is the broad functional area and the political and planning authority.
England / Great Britain	The KQ is of national significance, therefore it is relevant to compare some of the indicators to national statistics and build analysis taking into account this national significance.

Details on the study area



The LSOA located on the bottom right corner was taken out on purpose as going relatively far off the study area down south. Otherwise all LSOAs in this map are fully or partially located within 1-mile radius from King's Cross (green point).



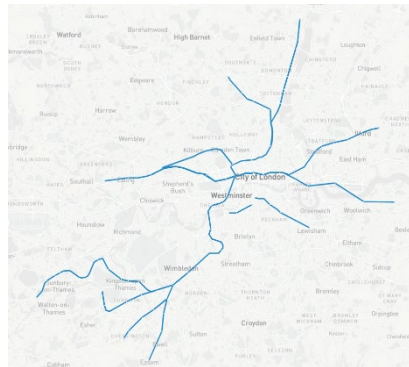
The MSOAs located on the bottom left and right corner were taken out on purpose as going relatively far off the study area down south. Otherwise all MSOAs in this map are fully or partially located within 1-mile radius from King's Cross (green point).

⁴⁵ Inner London boroughs are: Camden, Greenwich, Hackney, Hammersmith and Fulham, Islington, Kensington and Chelsea, Lambeth, Lewisham, Southwark, Tower Hamlets, Wandsworth and Westminster

Economic Statement Appendix 3: The British Library Catchment Area

The catchment areas look at how many people can reach the British Library within 30 minutes looking at different transport mode scenarios:

- 30 minutes walking distance
- 30 minutes cycling distance
- 30 minutes using current transport infrastructure
- 30 minutes using taking into account future transport infrastructure improvements. These future projects included just below. The approximation of frequencies is taken from publicly available business case documents.



Future transport projects included in the catchment area calculation

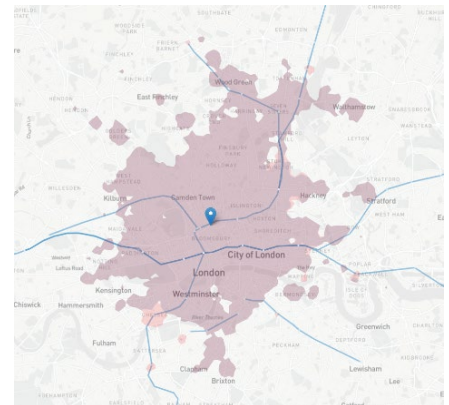
Bakerloo Extension - Simple Interchange M...	➤
Crossrail2 - Chessington to Mottspur (imp...	➤
Crossrail2 - Core (Reynes Park to Dalston) ...	➤
Crossrail2 - Epsom-Reynes (import)	➤
Crossrail2 - Hampton Court to Reynes Park...	➤
Crossrail2 - NW of Dalston (import)	➤
Crossrail2 - North of Dalston (import)	➤
Crossrail2 - Shepperton to New Malden (I...	➤
Elizabeth Ln - Abbey Wood>Acton (import)	➤
Elizabeth Ln - Seven Kings>Hanwell	➤
HS2 - Euston to Old Oak (import)	➤
Northern Line Extension - Simple Interchan...	➤

Impact of future transport infrastructure on the Catchment Area

The current catchment area is 1,352,532 people while the future catchment area (taking into account improvement/upgrade projects and 2021 population projections) is 1,379,294 people. Purple area is overlapping catchment (now and future). Pink area (near Chelsea for e.g.) is an area newly accessible within 30 min. Around 26,000 additional people will be able to access the library within half an hour (+2%).

The improved infrastructure will make a more significant difference looking at 45-minutes catchment area (+4% additional people).

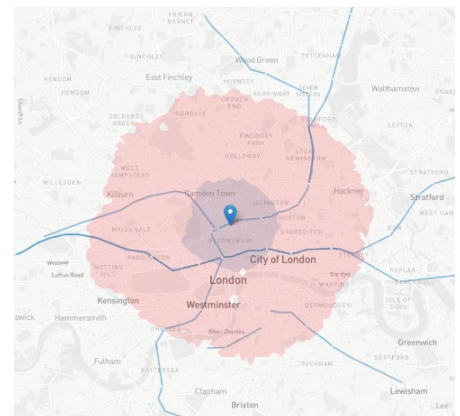
The planned new infrastructure does not influence significantly the public transport access to the Library, with South London being relatively hard to reach. The increased use of digital technology might help reaching communities living away from the physical Library and therefore expand its beneficial impact to wider London and national communities.



Public Transport catchment areas

Cycling catchment is larger than public transport catchment

The walking catchment area is 177,294 people while the cycling catchment area is 1,484,634 people. The cycling catchment is therefore higher than the PT catchment (current and future). This may have an impact on the need for physical amenities on the new site, such as providing bike parking or showers to encourage people to come.



SOCIAL VALUE IMPACT

This section looks at the potential impact of the new development on the lives of those people living closest to the library. The assessment will review the current needs of the local people and determine the key challenges and opportunities for the community. The planned interventions taking place at the library, both in the current and future building, will be detailed, with likely impacts on the community outlined. Any key challenges or opportunities which the current planned interventions may not be addressing will then be highlighted, with a set of associated recommendations. This report should be read alongside that of the Social Value Framework, which has been developed in parallel to demonstrate the social impact of the project through quantification. Whilst this report showcases the current context and suggests ways to respond, the Social Value Framework document outlines how the development is and will respond to local needs, and demonstrates the value that will create locally.



Artist's impression of the British Library Extension
© SMBL

Community-driven design: The story so far

2.1 Social and community aims of the British Library

The British Library already engages extensively with the neighbourhood, city and country, and it wants to further enhance its engagement by expanding the St Pancras campus.

In describing its social and community aims for the BLE project, the Library state:

“From its inception, the library’s project has recognised the importance of engaging and connecting with those in its immediate neighbourhood and raising the British Library’s social and economic impact in the local community. By ensuring that its St Pancras campus is highly visible, accessible and relevant to local residents and businesses in the local community the transformations will seek to attract a wider audience from the local community, enabling inclusion and involvement for local people and promoting greater economic regeneration and long-term employment in the area... In the next phase of our community engagement journey, we will work with our development partners (SMBL) to increase the depth of our engagement, playing an active and positive role in developing opportunities and bringing longer term benefits to the Somers Town and Camden communities. We will work with community groups from the outset to help us to shape what the Library, and this new development, can offer.”¹

The development will enable the Library to expand its offer of programmes, deepening its commitments to and connection with the local community. The Library wants ‘to be a good neighbour to the people living nearby, both during this development and well beyond’.² The library has already developed a list of new and richer programmes which it wants to test with the community. These are organised into thematic groups and include:

- Community engagement
- Environment and health
- Local history and heritage
- Local enterprise and entrepreneurship
- Building knowledge, skills and access to opportunities

These social and community aims build upon pre-existing work done at the British Library. As a result of the Library’s plans for expansion, it created a Community Engagement team with full-time staff which is dedicated to deepening the connections between Somers Town, Camden and the Library. The group is already actively in partnership with the community to deliver new programmes. Examples include:

- Providing the British Library building and open spaces for community use. This has included a Christmas Tree lighting, an Open Iftar event and a Sunday film club, all sponsored by local charities and community groups.
- Opening the Story Garden in 2019, in partnership with Global Generation. The garden responded to community preferences for additional open, green spaces expressed during the Library’s community engagement programme.
- Engaging over 1,600 Camden students in workshops and increasing the capacity in the Library’s existing building to host a greater number of students in the programme’s future.

¹ The British Library: our community story

² The British Library: our community story

- Offering exclusive events and benefits to locals. These include show and tell and building tours from a curator, private viewings of exhibitions, other exclusive events, and complimentary tickets for visitors to exhibitions.
- Supporting local community events such as Somers Town Festivals and small tea dances.
- Serving in an advisory role for the St Pancras Community Association's Board of Trustees, helping with a wide-range of subjects including organisational strategy, budgeting, and HR issues.
- Renting an office at the Somers Town-based organisation Training Link's office to further improve the Library's visibility and provide engagement opportunities to people who might not visit the main building.
- Participating in the local civic society, including contributions to the local debates on homelessness, local economic development, and community engagement.
- Providing space for research who come from the Camden area. 6,000 of the Library's readers come from Camden, of which 600 are from St Pancras and Somers Town ward and 750 from Kings Cross.

SMBL are committed to supporting the London Borough of Camden (LB Camden) in fulfilling their aims for the local area through the BLE.

"The Council is committed to creating an inclusive economy and emerging from this [Covid-19] crisis through economic and social renewal that is fair, just, participatory and sustainable."

They want to ensure that developments in the area will deliver real benefits to local communities and the local economy and addresses inequalities in the borough, and are seeking evidence of this to monitor the success of the extension.

2.2 Objectives in the local area

Table 10 Visions and objectives from BLE stakeholders shows a collection of visions and objectives from different BLE stakeholders related to people and community are outlined below. These objectives are important benchmarks to consider when assessing the impact of interventions.

Table 10 Visions and objectives from BLE stakeholders

Objectives	British Library Extension	British Library	Knowledge Quarter	LB Camden
CULTURE Community, culture and placemaking	<ul style="list-style-type: none"> improved public areas and accessibility more exhibition spaces access for a wider and more diverse audience improving connections with Somers Town 	<ul style="list-style-type: none"> engaging with everyone with memorable cultural experiences 	<ul style="list-style-type: none"> support work that improves our local environment, creating a great place for people to live, work and visit creating opportunities for exchange with local citizens 	<ul style="list-style-type: none"> Camden should be a clean, vibrant and sustainable place ensure public spaces are clean, attractive and safe everyone in Camden should be able to live a healthy, independent life create environments across the borough that make it easier to make healthy choices and take part in physical activity reduce crime and keep our citizens safe everyone should have access to Camden's cultural and heritage assets, and to have the opportunity to contribute to and enrich the borough's cultural life
LEARNING Education and skills	<ul style="list-style-type: none"> better meet the needs of surrounding communities new facilities for learners of all ages increased access to skill and training 	<ul style="list-style-type: none"> inspiring young people and learners of all ages 	<ul style="list-style-type: none"> increase public access to members' knowledge, resources and collections, creating opportunities for exchange with local citizens 	<ul style="list-style-type: none"> preserve and enhance a culture of lifelong learning every child should be able to access the pathway that is right for them, whether academic or vocational drive forward the recommendations of the STEAM (Science, Technology, Engineering, Arts and Maths) Commission
BUSINESS Business and innovation	<ul style="list-style-type: none"> enhanced offering for business users new jobs and businesses creating opportunities for local people extensive and flexible commercial accommodations for organisations seeking to locate and work in the Knowledge Quarter 	<ul style="list-style-type: none"> helping business innovate and grow 	<ul style="list-style-type: none"> facilitate knowledge exchange and identify opportunities for openness, collaboration and networking between its members 	<ul style="list-style-type: none"> growth in Camden should be strong and inclusive – everyone should be able to access the work that is right for them helping those furthest from the labour market into rewarding work deliver high-quality flexible workspaces that can respond to our growth sectors and changing patterns of employment

Understanding Somers Town: Social and community baseline

A baseline understanding of the social and community assets of the area around the proposed development can help to ensure that the development is tailored to the needs and existing strengths of the community. It allows for carefully designed interventions which will maximise their positive effects. This baseline analysis provides relevant data for multiple geographies (detailed below) and across time. Putting the data into these temporal and spatial contexts helps the reader to understand their significance.

This baseline study draws from a wide variety of sources to develop the social and community baseline analysis. This includes publicly available data including from the Office for National Statistics, findings from previous engagement work and research by other organisations.

The baseline uses data analysis for the following geographic areas show in Table 11:

Table 11 Study areas used in the Social Impact analysis

Study areas	Why these areas as relevant points of comparison?
British Library Immediate Area	The immediate area surrounding the British Library, this is defined as the LSOA/MSOA (dependant on data availability) that contains the British Library, and Somers Town.
Knowledge Quarter	The area defined by the Knowledge Quarter / “20-minutes neighbourhood” with the British Library at the centre (based on KQ data and secondary data sources such as Nomis)
Camden	Camden is the core local authority where the British Library sits in. The borough is supporting local residents and ensuring their needs are met. This is used as a comparator.
Inner London ¹	Most of the Knowledge Economy (incl. universities and research jobs) is in the Central Activities Zone, and therefore in Inner London boroughs. This area is a relevant comparator to show data in the KQ and British Library LSOA as compared to Inner London.
London Region	The region is the broad functional area and the political and planning authority. This is used as a comparator.
England / England and Wales / Great Britain	National data is used as a comparator. What constitutes the national comparator depends on data availability. For example, in some cases data is compared to England and Wales versus some data being compared to Great Britain. In each case, the section will specify the source of the data and clearly explain the comparison geographies.

In a few instances – health and wellbeing, environmental quality and culture and heritage sections – the data presented does not align with these geographic areas due to the nature of the data available. In each case, the section will specify the source of the data and clearly explain the comparison geographies.

¹ Inner London boroughs are: Camden, Greenwich, Hackney, Hammersmith and Fulham, Islington, Kensington and Chelsea, Lambeth, Lewisham, Southwark, Tower Hamlets, Wandsworth and Westminster

2.3 Demographics

2.3.1 Population

The population of Camden, Inner London, and London are all set to significantly rise above the England and Wales average rate of 8% between 2019 and 2040, as seen in Table 12. Camden's population will grow by 17%, which is 4% more than Inner London averages (13%)².

Table 12 Population changes from 2019 to 2040

	2019	2040	% Change
British Library LSOA	2,032	Data not available ³	Data not available
Knowledge Quarter	156,726	Data not available	Data not available
Camden	267,424	312,027	+17%
Inner London	3,304,336	3,723,001	+13%
London	9,106,200	10,718,700	+18%
England and Wales	59,439,840	64,279,186	+8%

2.3.2 Age structure

As seen in Figure 13 2019 Population Demographics (Source: ONS 2019) the working age population (age 16 – 64) of the Knowledge Quarter (76%) and the LSOA in which the British Library (74%) is located⁴ is above Camden (71%), Inner London (72%), London (68%) and England and Wales (62%) levels⁵

Both Camden and the Knowledge Quarter have lower than England and Wales average (19%) 0-15 populations, however, the British Library LSOA has a 0-15 year old population proportion of 20%. This is higher than Inner London (17%) but is 1% lower than London averages (21%).

The Knowledge Quarter and particularly the British Library LSOA have a lower over-65 population at 9% and 6% respectively than the Camden (12%), Inner London (11%), London (12%) and England and Wales (19%) averages. Although data at a Knowledge Quarter and below granularity was not available for age structure projections, Figure 12 2040 Population Demographics (Source: GLA 2016; ONS 2018) shows that at a Camden, Inner London, London, and England and Wales level, over 65 populations are due to increase by 2040. In both Camden and Inner London, this population group is due to increase by 6%.

Across Camden, London and England and Wales^{2 6}, this increase in over 65 populations means a decrease in both 0-15 and 16-64 populations in 2040 compared to 2019 figures.

The smaller than average over-65 populations in the British Library LSOA and Knowledge Quarter that, if they follow Camden, London and national projections, are due to grow by 2040 show a local demographic that could benefit from the British Library development.

² GLA (2016) Population Projections - <https://data.london.gov.uk/dataset/gla-population-projections-custom-age-tables>

³ Projection data not available at LSOA or combination of LSOAs (eg. The KQ) level

⁴ ONS (2019) 2019 LSOA Population Estimates -

<https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/datasets/lowersuperoutputareamidyearpopulationestimates>

⁵ ONS (2019) 2019 Population Estimates -

<https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/datasets/populationestimatesforukenglandandwalesscotlandandnorthernireland>

⁶ ONS (2018) National population projections -

<https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationprojections/datasets/2014basednationalpopulationprojectionstableofcontents>

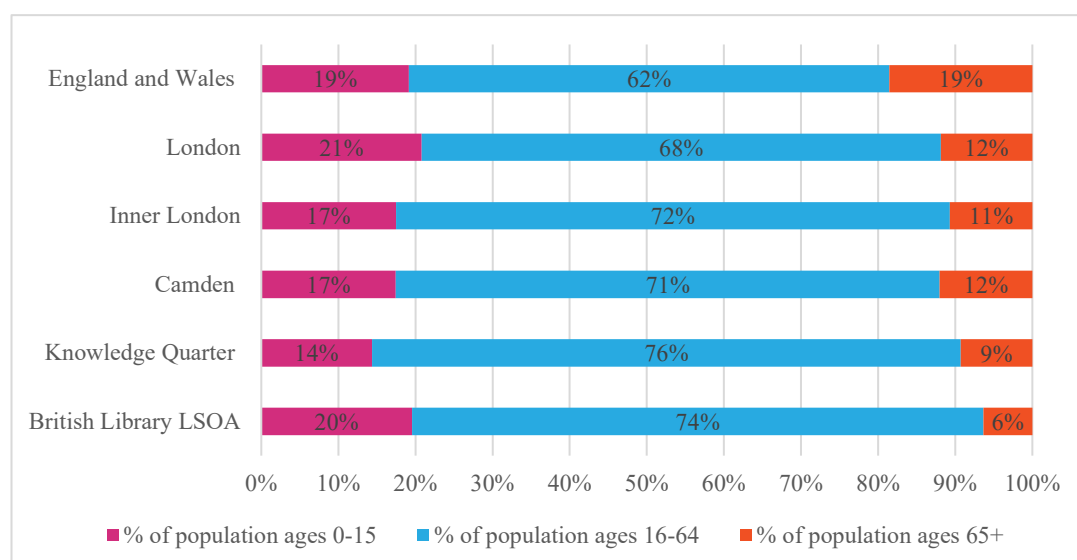


Figure 13 2019 Population Demographics (Source: ONS 2019)

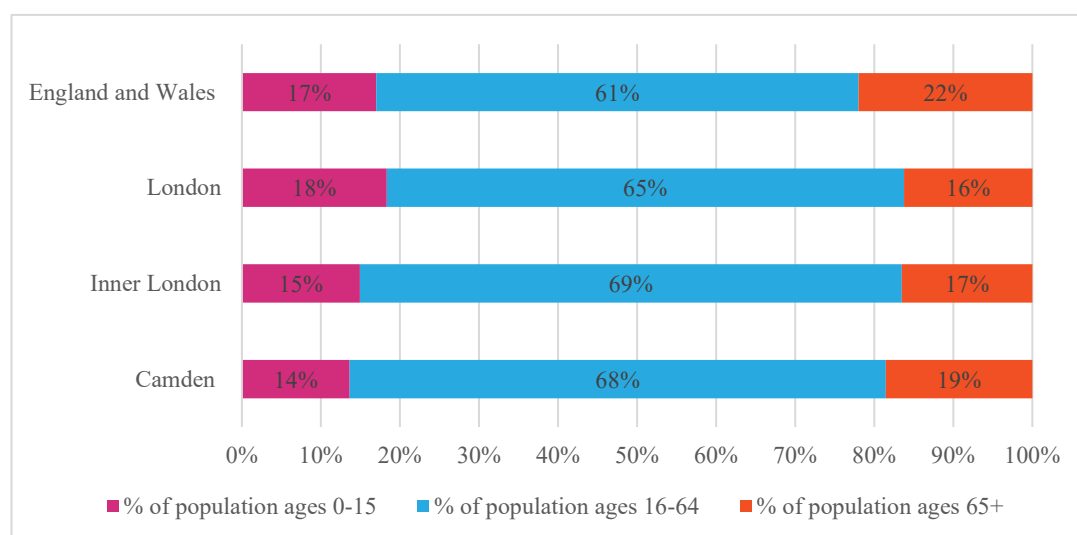


Figure 12 2040 Population Demographics (Source: GLA 2016; ONS 2018)

2.3.3. Deprivation and income inequality

Table 13 shows a summary of the deprivation domain decile analysis for LSOA's in the Knowledge Quarter aggregated up into MSOAs⁷. Domains that are in deciles less than 5 are shaded in red as they are below average levels. Similarly, those with deciles above 5 are shaded green as they are above average.

The average IMD decile for the neighbourhoods within the Knowledge Quarter was 4. This means that on average, the neighbourhoods in this area are in the 40% most deprived neighbourhoods in England.

- The lowest performing deprivation domain is Living Environment. On average, the Knowledge Quarter neighbourhoods are in the 20% most deprived neighbourhoods in England for that domain, 36.5% of which are in the 10% most deprived neighbourhoods in the England.
- In the Income Deprivation Affecting Older People Index (IDAOI), 37.8% of LSOA neighbourhoods in the Knowledge Quarter are in the 10% most deprived neighbourhoods in the England. On average overall, the Knowledge Quarter area is in the 30% most deprived neighbourhoods in the England for that domain. The MSOA containing the British Library is in the top 10% deprived neighbourhoods for the IDAOI domain.
- For both Crime and Income domains, the Knowledge Quarter is on average in the 40% most deprived neighbourhoods in England.

⁷ MHCLG (2019) IMD 2019 -

<https://opendatacommunities.org/resource?uri=http%3A%2F%2Fopendatacommunities.org%2Fdata%2Fsocietal-wellbeing%2Fimd2019%2Findices>

- The best performing domain is Education, Skills and Training domain, which the Knowledge Quarter on average is in the 40% least deprived neighbourhoods in England.

In the domains of Income, Employment, Education, Skills and Training, Health and, Crime, decile ranks for neighbourhoods in the Knowledge Quarter ranged 9 deciles; overall IMD and Income Deprivation Affecting Children Index (IDACI) ranged 8 deciles. This spread indicates vastly varying levels of deprivation in multiple domains.

The particularly deprived Living Environment domain highlights an opportunity for the British Library to contribute to the Outdoor Living indicators that contribute to this score, such as air quality.

Furthermore, the high deprivation in the IDAOI domain, particularly in the British Library MSOA, presents an opportunity for the British Library to contribute to the alleviation of income deprivation affecting older local residents. In light of this deprivation, and with the elderly population in Camden set to rise, the consultation notes from the British Library Soundings Report highlighting stakeholder concerns around isolation, online literacy, and access to transport with older groups are even more poignant.

Table 13 Index of Multiple Deprivation domain decile scores for MSOAs in the Knowledge Quarter

MSOAs in study area	a. Index of Multiple Deprivation (IMD)	b. Income Deprivation Domain	c. Employment Deprivation Domain	d. Education, Skills and Training Domain	e. Health Deprivation and Disability Domain	f. Crime Domain	g. Barriers to Housing and Services Domain	h. Living Environment Deprivation Domain	i. Income Deprivation Affecting Children Index (IDACI)	j. Income Deprivation Affecting Older People Index (IDAOPI)
Camden 015	4	4	5	7	6	4	4	2	4	3
Camden 019	3	2	3	6	4	2	4	3	2	2
Camden 021	4	4	5	7	6	4	4	2	4	2
Camden 022 (containing BL)	2	2	2	3	4	3	5	3	2	1
Camden 023	3	2	3	4	4	6	5	2	2	1
Camden 024	4	3	4	5	6	3	4	2	4	2
Camden 025	4	5	5	7	7	3	4	2	3	3
Camden 026	6	7	9	9	9	5	4	1	5	4
Camden 027	4	3	4	7	7	8	5	2	3	2
Camden 028	6	6	7	8	9	4	4	1	5	4
Islington 015	3	4	5	4	4	3	2	3	2	1
Islington 017	6	6	6	9	7	5	4	2	5	4
Islington 019	2	2	3	4	2	3	3	3	2	1
Islington 020	5	5	6	8	5	2	4	1	4	3
Islington 021	4	4	4	8	4	3	3	2	3	2
Islington 022	5	5	6	7	5	5	2	2	2	3
Islington 023	3	2	4	6	7	4	2	2	1	2
Westminster 013	5	6	7	7	7	5	4	2	4	3
KQ average	4	4	5	6	6	4	4	2	3	2

2.4 Skills and education

There are 29 primary schools, 10 secondary schools, and ten 16-18 educational institutions within a 1-mile radius of the British Library.⁸

In primary schools within the Knowledge Quarter, on average pupils are performing at above average levels in reading and at an average level for writing and mathematics, as seen in Table 14. However, for reading, 78% of pupils are reaching the expected standard, the lowest percentage when compared with writing and mathematics. For writing and mathematics, 83% and 86% of pupils respectively are achieving the expected standard.⁹

Data on three secondary schools out of the ten in the 1-mile radius were openly available. On average, in these three secondary schools, 43% of students are achieving Grade 5 or above in English & Mathematics GCSEs. This attainment level in the Knowledge Quarter is the lowest level in the comparative geographical areas of Camden (46%), Inner London (46%) and London (48%).¹⁰

Available data on secondary schools in the Knowledge Quarter showed that one school (Capital City College) received an Ofsted rating of 3 (Requires Improvement), two schools (Regent High School, Maria Fidelis Catholic School) were rated 2 (Good), and one school (Elizabeth Garrett Anderson School) was rated 1 (Outstanding).

This data demonstrates that the schools both local to the British Library and in London as a whole are underperforming in secondary educational attainment in comparison to England averages. Stakeholders who attended the drop-in exhibition as part of the St Pancras Transformed / Building the Future community consultation expressed that they would like to see the Library “Work with local schools more”, potentially through “school trips”. This presents an opportunity for the British Library to support local schools, particularly secondary, in raising attainment.

Table 14 Educational attainment of students at GCSE level, Department for Education, 2019

Geographic Area	Percentage of pupils achieving grades 5 or above in English and Mathematics GCSEs in 2019
Knowledge Quarter	43%
Camden	46%
Inner London	46%
London	48%
England	63%

In terms of 16 to 17-year-olds not in Education, Employment or Training (NEET), Table 15 shows that whilst Camden had higher rates than both Inner London and London at 2.8%, this was only 0.1% higher than the England average of 2.7%¹¹. However, this does highlight Camden as a poorer performing London borough on average for NEET rates. Multiple stakeholders in the St Pancras Transformed / Building the Future community consultation raised skills training in younger age groups as an issue they would like to see the British Library contribute more to. Given this, raising aspirations and skills in 16 to 17 years in the local area is an important agenda that the British Library could contribute to.

⁸ Gov.uk (2019) <https://www.gov.uk/school-performance-tables>

⁹ Gov.uk (2019) <https://www.gov.uk/school-performance-tables>

¹⁰ Department for Education (2019) <https://www.gov.uk/government/collections/statistics-gcse-key-stage-4>

¹¹ Gov.uk (2019) <https://www.gov.uk/government/collections/statistics-neet>

Table 15 Percentage of 16/17 year olds who are known to be Not in Education, Employment or Training

Geographic Area	Percentage of 16/17 year-olds known to be Not in Education, Employment or Training
England	2.7%
London	1.8%
Inner London	1.9%
Camden	2.8%

2.5 Health and wellbeing

Data from GPs local to the British Library has been analysed to build up a picture of health in the area across the following themes:

- Demography
- Disease
- Lifestyle and Environment
- Mental Health

There is one GP centre within 500m of the British Library, Somers Town Medical Centre (STMC). Analysis has compared the patient data of STMC with:

1. An average of the six other GP surgeries within 1km of the British Library. Two other surgeries within 1km of the library were excluded given their patient typology¹² as seen in Table 16 below;

Table 16 Registered persons at GP practices within 1km of the British Library

GP Name	Registered Persons
Amphill Practice	8,256
Brunswick Medical Centre Uhpc	6,965
Killick Street Health Centre	11,990
Kings Cross Surgery	5,759
Somers Town Medical Centre	3,877
The Bloomsbury Surgery	4,455
The Regents Park Practice	6,249

2. The NHS North Central London Clinical Care Group (CCG); and
3. England

The results show that on average, the health of those patients registered at Somers Town Medical Centre is worse on average than those in the surrounding 1km of the British Library. Full data can be found in Table 18.

- Asthma prevalence is highest, though lower than the England average
- Chronic obstructive pulmonary disease is more prevalent, though lower than the England average¹³
- Estimated smoking prevalence is much higher
- Obesity prevalence is higher than the surrounding area and the CCG, but lower than the England average
- Highest mental health prevalence¹⁴ of all ages
- Highest incidence of new depression diagnoses

Whilst STMC had the highest percentage of patients' mental health issues in the round, it appears they have the fewest patients with Dementia (just 0.3%), and the lowest prevalence of depression in those aged over 18 (7.8%)

¹² One practice, Camden Health Improvement Practice, is a specialist primary health care service for homeless people and those on the verge of becoming homeless and has just 824 patients registered. The other practice that was left out of the area average was the Ridgemount Practice, which is UCL's partner GP surgery and therefore has a very high student population registered at it.

¹³ Chronic obstructive pulmonary disease (COPD) is the name for a group of lung conditions that cause breathing difficulties.

¹⁴ Full definition is the highest percentage of patients with schizophrenia, bipolar affective disorder and other psychoses as recorded on practice disease registers.

compared to the national level of 10.7%). New diagnoses of Depression are the highest however, which suggests that the overall prevalence may rise to national average if measures cannot be taken to prevent it.

To the extent that is feasible, recognising that many of these issues are multi-faceted and complex, it will be important for the British Library Extension to support health and wellbeing interventions, to help tackle these challenges.

2.6 Life Expectancy

As seen in Table 17, within Camden 022 (the MSOA containing the British Library), the life expectancy is 78.5 for males, and 81 for females. This is lower than the Camden life expectancy (80 for males and 86 for females).

However, when looking at healthy life expectancy (HLE), the difference is even starker. The HLE in Camden 022 is just 54.5 for males and 54 for females, suggesting far less disparity between the sexes. For males living in Camden, on average they can expect 11 more years of health than males living in the British Library area, and females can expect almost 9 more years of health.

Table 17 Life Expectancy (LE) and Healthy Life Expectancy (HLE) at birth for males and females, 2009 to 2013

Regions		HLE (years)	HLE (years) - difference between given area and British Library MSOA	LE (Years)	LE (years) - difference between given area and British Library MSOA
Males					
	England	63.5	8.9	79.1	0.6
	London	63.2	8.6	79.6	1.1
	Inner London	62.3	7.7	79.3	0.8
	Camden	63.2	8.6	80.4	1.9
	Knowledge Quarter	56.3	1.7	74.2	-4.3
	Camden 022	54.6		78.5	
Females					
	England	64.8	10.7	83.0	2.1
	London	64.0	9.9	83.8	2.9
	Inner London	63.4	9.3	83.9	3.1
	Camden	64.9	10.8	85.6	4.7
	Knowledge Quarter	57.6	3.6	79.8	-1.0
	Camden 022	54.1		80.9	

Table 18 Patient outcomes at Somers Town Medical Centre compared to national and local area outcomes

Theme	Indicators	Somers Town Medical Centre	1km average	NHS North Central London CCG	England
Demography	% aged 0 to 4 years	4.3	4.6	5.6	5.5
	% aged 5 to 14 years	11.7	9.2	11.2	11.8
	% aged 65+ years	7.0	7.8	11.1	17.4
	% aged 75+ years	2.8	3.3	5.0	8.0
	% aged 85+ years	0.7	1.0	1.5	2.3
	% aged under 18 years	20.3	16.5	19.8	20.4
Disease	Asthma: QOF prevalence (all ages)	5.3	4.5	4.5	6.0
	COPD: QOF prevalence (all ages)	1.5	1.6	1.2	1.9
	CVD-PP: QOF prevalence (30-74)	1.0	1.2	1.0	1.1
	Estimated smoking prevalence (QOF)	39.2	36.4	34.7	33.5
	GP patient survey: ex-smoking prevalence	42.8	36.2	43.7	53.4
	GP patient survey: smoking prevalence	36.5	39.0	32.7	28.7
	Hypertension: QOF prevalence (all ages)	11.2	10.5	10.9	14.0
	Obesity: QOF prevalence (18+)	9.0	6.9	7.9	10.1
	% with a long-standing health condition	36.6	40.8	43.4	51.5
Lifestyle and Environment	% with caring responsibility	13.5	16.9	14.2	16.9
	Deprivation score (IMD 2019)	32.4	28.4		21.7
	Working status - Paid work or full-time education	73.0	71.0	68.9	63.3
	Working status - Unemployed	9.8	6.9	5.3	3.8
Mental Health	% reporting a long-term mental health problem	9.6	14.2	8.7	9.9
	Dementia: QOF prevalence (all ages)	0.3	0.5	0.6	0.8
	Depression: QOF incidence (18+) - new diagnosis	1.9	1.7	1.4	1.7
	Depression: Recorded prevalence (aged 18+)	7.8	9.8	8.3	10.7
	Mental Health: QOF prevalence (all ages)	1.7	1.7	1.3	1.0

2.7 Environmental quality

The earlier section ‘Deprivation and income inequality’ includes a calculation of the Index of Multiple Deprivation. One of the domains used to calculate the index is the Living Environment Deprivation Domain.

Four different indicators comprise the Living Environment Deprivation Domain. The first two relate to the indoor living environment – houses without central heating and housing in poor condition – and the second two relate to the outdoor environment – air quality and road traffic accidents.¹⁵

Of the seven domains used to calculate the Index of Multiple Deprivation, Table 19 shows that the Living Environment Deprivation Domain is the lowest scoring, indicating a need in the area for better quality indoor and outdoor environments. The areas making up the Knowledge Quarter are on average more deprived than 80% of all the MSOAs in the UK. The MSOA with the British Library (Camden 022) is in the lowest 30% of MSOAs in the UK.

Table 19 Environmental-related indices from the IMD

MSOAs in study area	a. Index of Multiple Deprivation (IMD)	h. Living Environment Deprivation Domain
Camden 015	4	2
Camden 019	3	3
Camden 021	4	2
Camden 022 (containing BL)	2	3
Camden 023	3	2
Camden 024	4	2
Camden 025	4	2
Camden 026	6	1
Camden 027	4	2
Camden 028	6	1
Islington 015	3	3
Islington 017	6	2
Islington 019	2	3
Islington 020	5	1
Islington 021	4	2
Islington 022	5	2
Islington 023	3	2
Westminster 013	5	2
KQ average	4	2

The poor results on the Living Environment Deprivation Domain is supported by data from air quality monitoring stations placed throughout London, shown in Figure 14. The data show that Euston Road was in the top five most polluted roadways in the city in 2017 – making it one of the most polluted places in the England. With NO₂ levels at 92.5 µg/m³, it was over double the Government’s and EU’s air quality target of 40 µg/m³.¹⁶

¹⁵ Ministry of Housing, Communities & Local Government (September 2019), *The English indices of deprivation 2019: Technical report*, Accessed 29 September 2020, https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/833951/IdD2019_Technical_Report.pdf.

¹⁶ Friends of the Earth, ‘Nearly two thousand locations across England, Wales, and Northern Ireland breaching air pollution limits’ (February 2019), Accessed 29 September 2020, <https://friendsoftheearth.uk/clean-air/nearly-two-thousand-locations-across-england-wales-and-northern-ireland-breaching-air>

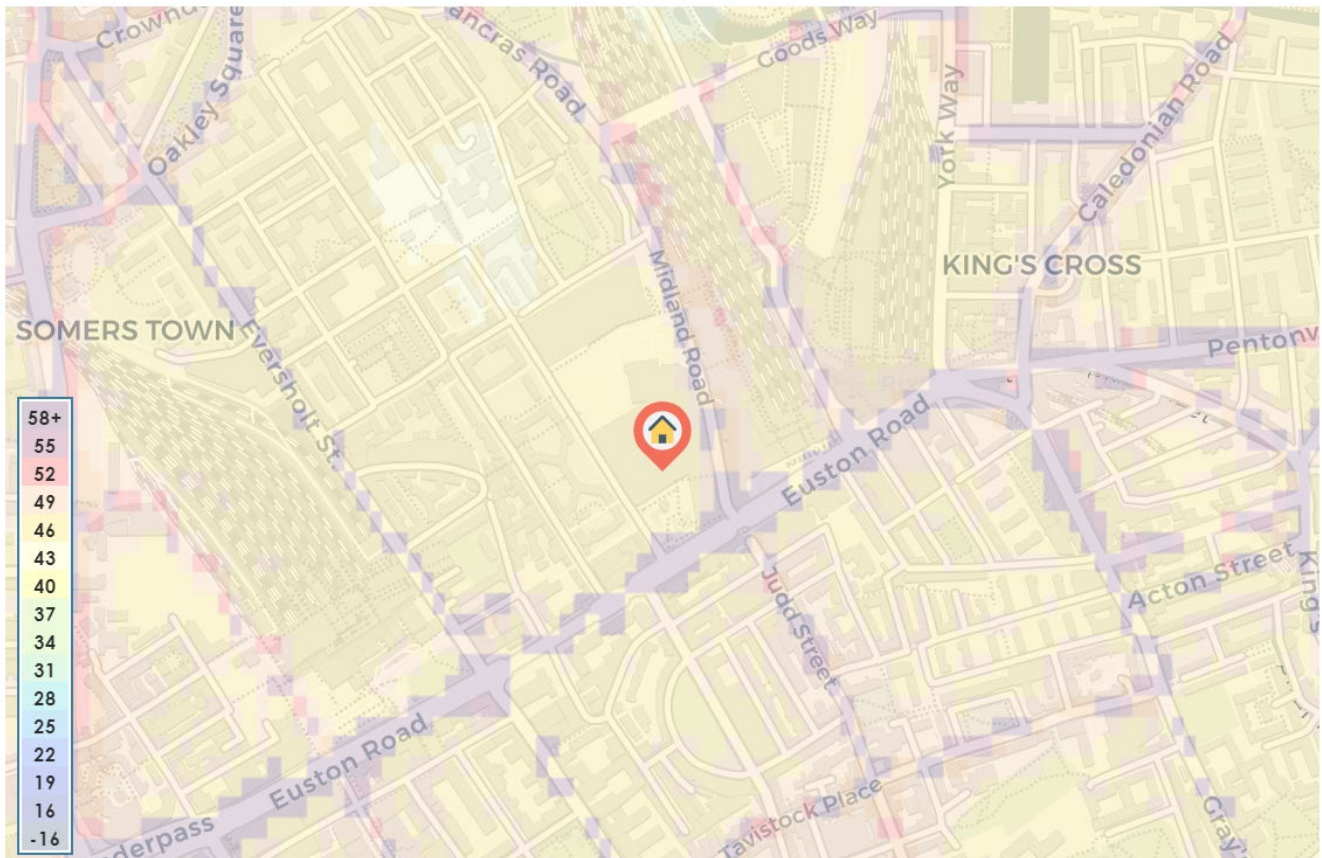


Figure 14 Mean annual value of nitrogen dioxide ($\mu\text{g}/\text{m}^3$) (Source: London Air Quality Network, 2016 data)

While not part of the Living Environment Deprivation Domain, access to open space is another important consideration in the environmental quality for residents. Using 2013 data, in the Camden Ward of St Pancras and Somers Town:

- 84% of households have access to a public open space, defined in the London Plan as being less than 2 hectares in size.
- 61% of households have access to a local park, defined in the London Plan as being about 2 hectares in size.
- 96% of households have access to a metropolitan park, defined in the London Plan as being about 60 hectares in size (e.g. Regent's Park).
- 0% of households have access to a regional park, defined in the London Plan as being at least 400 hectares in size.^{17 18}

In 2013, 14% of the land area in St Pancras and Somers Town Ward was any type of open space. But all of this open space was not publicly accessible. Only 5.6% of the total land area in the ward was accessible to the public (publicly accessible open space is a subset of the 14% of the open space in the Ward).¹⁹ In Camden overall, about 24% of the borough is open space, and of all the land in Greater London, close to 39% of the land is open space²⁰ of which 18% is publicly accessible.²¹ In summary, the ward has less public open space than both Camden and Greater London, and this can contribute negatively to the environmental quality of the area.

¹⁷ Definitions of open spaces can be found in the London Plan 2011 version (this version used to conform with the dataset) https://www.london.gov.uk/sites/default/files/gla_migrate_files_destination/LP2011%20Chapter%207.pdf

¹⁸ Greenspace Information for Greater London CIC (GiGL), London Datastore, Access to Public Open Space and Nature by Ward (2013), Accessed 29 September 2020, <https://data.london.gov.uk/dataset/access-public-open-space-and-nature-ward>.

¹⁹ Greenspace Information for Greater London CIC (GiGL), London Datastore, Access to Public Open Space and Nature by Ward (2013), Accessed 29 September 2020, <https://data.london.gov.uk/dataset/access-public-open-space-and-nature-ward>.

²⁰ Greenspace Information for Greater London CIC, Borough Planning Stats (January 2020), Accessed 29 September 2020, <https://www.gigl.org.uk/planning-for-nature/boroughstats/>.

²¹ Greenspace Information for Greater London, Key London Figures (2019), Accessed 29 September 2020, <https://www.gigl.org.uk/keyfigures/>.

During the Library's community engagement programme in 2015 and 2016, the comments from residents and community groups supported the environmental quality findings in this baseline assessment. They expressed a desire for the Library to contribute to an improved living environment. They are concerned about outcomes like increased roadway traffic that would adversely affect their wellbeing, and they suggested the Library could help to improve the local environment and air quality by providing green open spaces.²²

While environmental conditions are the primary subject of a separate environmental impact assessment, they do have significant implications for the wellbeing of the local community. To the extent possible, the Library should look to improve the living environment for its neighbours.

2.8 Culture and heritage

Somers Town and the British Library are within and adjacent to London's Central Activities Zone, an area replete with rich culture and heritage assets. Residents have ready access to these assets via public transport and other modes of travel; many, such as the British Museum, are within a 20 minute walk of the Library. As the national library of the UK, the British Library is itself a major institution, has a substantial cultural offer and serves as an archive for many cultural artefacts.

In addition to these institutions serving national and international audiences, the St Pancras and Somers Town Ward has many cultural and community assets which cater to a more local audience. There are many community facility buildings which provide a wide range of services to the community. The St Pancras Community Centre has a large, varied programme of social activities and educational and support services.²³ Training Link offers skills training courses free-of-charge, and its office also hosts the Library's community engagement team's weekly visit.²⁴ There are also many halls for hire which offer flexible spaces for community use. In the ward, these include Godwin and Crowndale Community Hall, Coopers Lane Community Hall, Doreen Bazell Hall and Basil Jellicoe Hall. The ward also has many pubs which also serve an important role in a community's culture. For example, the Constitution also hosts a well-regarded schedule of live music performances in addition to other community benefits.

The ward has a number of visual and performing arts facilities. UAL Central Saint Martins art and design school has gallery space and hosts exhibitions and events that are open to the public. The Platform Theatre at Central Saint Martins can host different types of staged performances, exhibitions and events, and many of these are open to the public. In addition to the Platform Theatre, the ward is also home to Theatro Technis and Kings Place. The former stages theatrical productions and cultural events and serves as a community resource on the arts. The latter is a recently opened building and includes a large concert hall, other performance spaces and art galleries.

As part of the Library's community outreach, residents and local community groups expressed their support for the existing programme of cultural events and called for a deepening of this offer. Many contributors provided specific examples of cultural programmes in addition to more general statements of support. These included sponsoring a series of talks by visiting scholars, outdoor events, workshops and community activities. In addition, some participants reported not attending any events in the programme of activities. There were varying explanations, but they included a lack of knowledge of the events, perception that they were not the intended audience, and a prohibitive price of exhibitions.²⁵ To respond to this, the Library must work to ensure that its spaces and programme of events are welcoming and accessible to all.

This picture of local cultural institutions may mask a relative disparity between Somers Town and surrounding parts of central London. Figure 15 below, taken from the Greater London Authority's Cultural Infrastructure Map, suggests that there are a larger number of cultural institutions (represented by coloured bubbles) in the areas surrounding the St Pancras and Somers Town Ward (outlined in red).²⁶

²² British Library, St Pancras Transformed / Building the Future Community Consultation (May 2016).

²³ Saint Pancras Community Association, Accessed 30 September 2020, <http://www.sPCA.org.uk/>.

²⁴ Training Link, Accessed 30 September 2020, <https://traininglink.org.uk/wp/>.

²⁵ British Library, St Pancras Transformed / Building the Future Community Consultation (May 2016).

²⁶ Mayor of London, Cultural Infrastructure Map, Accessed 30 September 2020, <https://maps.london.gov.uk/cim/index.html>.

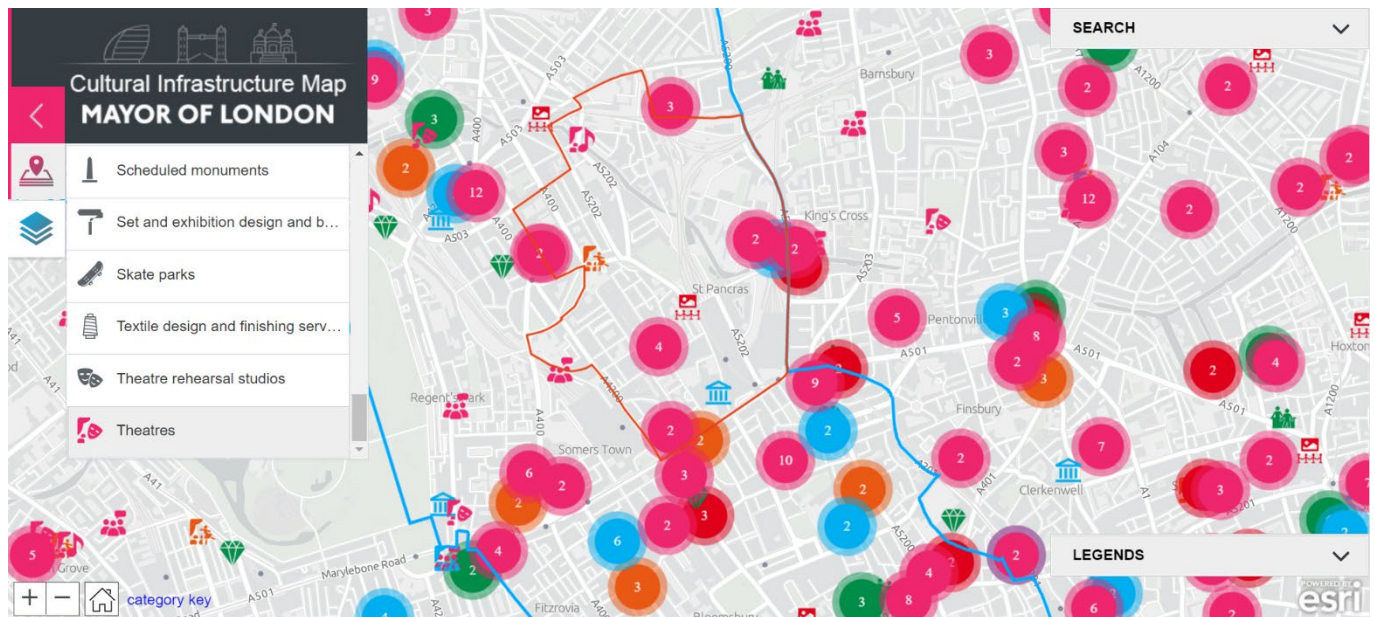


Figure 15 Geographic distribution of cultural infrastructure in and around St Pancras and Somers Town Ward (Source: GLA Cultural Infrastructure Map)

Heritage assets, shown in Figure 16, include conservation areas and buildings listed on the national register of architectural or historic interest or Camden's local list. These conservation areas denote places of particular cultural, historical and/or architectural importance, underscoring the heritage in the area. The richness of heritage assets in the area places an emphasis on the need of the new development to respect and support the built heritage of the area.

As with the cultural facilities, there appears to be a relative disparity between Somers Town and the surrounding areas, which have greater amounts of heritage assets (as illustrated by the presence of conservation areas and locally and nationally listed buildings.)²⁷

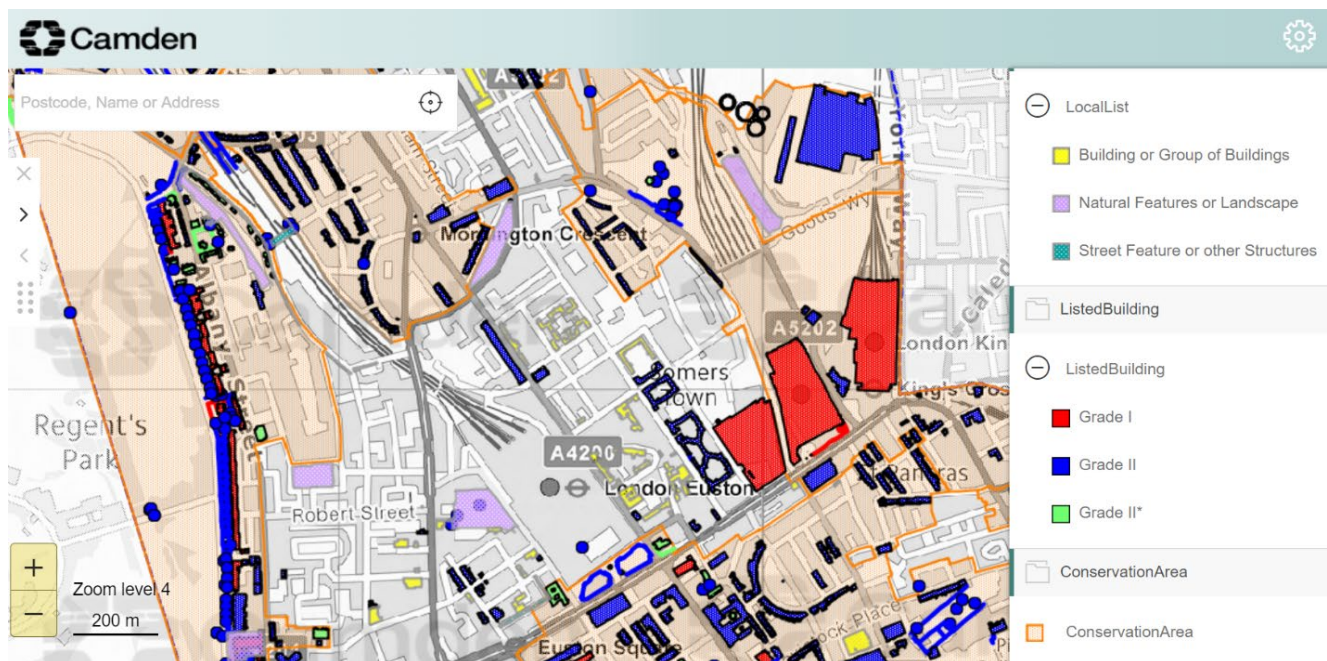


Figure 16 Heritage assets in and around Somers Town (Source: London Borough of Camden)

²⁷ London Borough of Camden, 'Conservation and Listed Buildings', Accessed 30 September 2020, <https://ssa.camden.gov.uk/connect/analyst/mobile/#/main?mapcfg=CamdenConservation&lang=en-gb>.

Priorities for local people: Needs assessment

2.9 Key challenges facing the local community

Given the baseline presented above, the following table outlines the key challenges faced by the local area. It outlines in broad terms how these challenges might be tackled, and *possible* interventions that could be undertaken by the Library, SMBL, and commercial tenants. Through this analysis, the initiatives which are likely to be most effective in creating social value through the BLE have been identified and drawn into the Social Value Framework and Public Benefits Document. Note that the Social Value Framework and Public Benefits Document have been developed since, and represent the latest thinking.

Table 20 Analysis demonstrating challenges facing the community and possible interventions that could be undertaken at the development

Number	Challenge	How to tackle the challenge	Possible interventions
C1	Growing over-65 population and high rates of income deprivation affecting older people	Access to mobility and transport support, support for gaining online literacy and skills, outreach to combat loneliness and isolation, accessible financial support services.	<ul style="list-style-type: none"> • Collaboration with community groups to provide outreach support • Ensure that the library is accessible to those with limited mobility and disabilities • Ensure the library is accessible to and supports vulnerable groups • Design exhibitions which attract multiple generations
C2	Income Deprivation Affecting Younger People	Employment, training, internships, and apprenticeships accessible to local young people, access to local community groups, activities, and support services	<ul style="list-style-type: none"> • Provide safe, inclusive and engaging spaces for children, families and young people • Create accessible employment, training, internship and apprenticeship opportunities for local young people
C3	Inequality in the levels of deprivation across the Knowledge Quarter	Targeted approach in addressing deprivation issues, initiatives based on identified local need rather than blanket initiatives.	<ul style="list-style-type: none"> • Supporting local employment as far as possible, both in construction and operation • Pay fair and decent wages to all staff, and encourage the supply chain and occupiers to do the same • Support skill development and target programmes at local people of all ages

Number	Challenge	How to tackle the challenge	Possible interventions
C4	Lower than average secondary educational attainment	Financial support and funding for schools with lower attainment levels, support via school outreach and volunteering	<ul style="list-style-type: none"> • School engagement that aligns with the curriculum, Camden education strategies and local schools • Support programmes for local schools to support disadvantaged pupils • Educational space for schools to visit
C5	Higher than London average NEET rates	Employment, training, internships, and apprenticeships accessible to local young people, career events and talks to raise aspirations, employability skills sessions	<ul style="list-style-type: none"> • Space to host career talks, job fairs, and other events for local young people seeking work • Create accessible employment, training, internship and apprenticeship opportunities for local young people, and encourage suppliers and occupiers to do the same
C6	High prevalence of asthma and chronic obstructive pulmonary disease	Improve air quality, both internal and external	<ul style="list-style-type: none"> • High quality internal ventilation • Use of natural materials inside the building • Greening of outdoor areas • Barriers or filters between the site and the neighbouring main roads
C7	High prevalence of obesity	Healthy food choices, easier access to active travel, and green space	<ul style="list-style-type: none"> • Ensure that food offers in the development are healthy, and inexpensive • Provision of affordable and safe cycle parking • Well-lit and easy to navigate pedestrian routes around the site
C8	High prevalence of mental health issues	Places to relax and socialise, access to green space, and safety in public spaces	<ul style="list-style-type: none"> • Provide welcoming and safe public realm • Ensure that there are quiet, sheltered places in the library for people to relax in • ‘Safe by design’ public spaces • Places to meet and socialise with friends and strangers
C9C	Deprivation in both outdoor and indoor living environments	<p>Adopt measures to improve air quality and enhance roadway safety.</p> <p>Support local residents in improving their indoor living environment</p>	<ul style="list-style-type: none"> • Ensure construction does not negatively impact air quality • Ensure traffic generated by construction site does not endanger residents • Design of new building should include greenery to improve air quality • Design of new building should consider how a pedestrian will

Number	Challenge	How to tackle the challenge	Possible interventions
			move around, and prioritise their safety
C10	Lower access to public open spaces than is average for Greater London	Provide safe, high quality public spaces	<ul style="list-style-type: none"> • Include high quality, green open spaces in the new development
C11	Presence of many cultural institutions, but a relative scarcity when compared to neighbouring areas in central London.	Develop new cultural institutions and the cultural offer in the community	<ul style="list-style-type: none"> • Expand the depth and breadth of the existing cultural programming • Ensure that the new development's cultural offering is accessible, appealing and open to groups who don't currently engage with this content, including to the local community
C12	Presence of many heritage assets, but a relative scarcity when compared to neighbouring areas in central London.	Celebrate existing heritage assets and ensure that all deserving buildings are listed and protected	<ul style="list-style-type: none"> • Design of the new development should complement the built heritage in the community

2.10 Key strengths to support in the local area

In the same way as the previous section, key strengths in the local area identified in the baseline are presented below, along with how the strength might be built-upon, and possible interventions that could be undertaken on the site, either in design or operation.

Table 21 Analysis demonstrating the strengths of the local community and possible interventions that could be undertaken at the development

Number	Strength	How to support the strength	Possible interventions
S1	Growing population	Increased capacity of facilities	<ul style="list-style-type: none"> • Prepare for a gradual potential increase in users or prospective users of the library. • Monitoring the demographics of this growing population and early identification of any groups that would be useful to support.
S2	Large population proportion of 0-15 year olds	Outreach and support for local schools, youth groups, and young person organisations.	<ul style="list-style-type: none"> • Incorporate a mix of high quality educational, study, and informal spaces for younger populations
S3	Education, Skills, and Training deprivation	Outreach, visits, and support for local schools.	<ul style="list-style-type: none"> • Outreach and support local primary, secondary and further education schools.

Number	Strength	How to support the strength	Possible interventions
	domain score is better than the national average	Support adult skills and training	<ul style="list-style-type: none"> Support adult skills such as English language proficiency through workshops
S4	Strong primary school level attainment	Early intervention and support for KS1 and KS2 children	<ul style="list-style-type: none"> Identify and support primary school students through to GCSEs, especially if these students are going to lower performing secondary schools. Provide resources, learning programmes and workshops to local primary schools and families
S5	49 schools within the Knowledge Quarter area	Outreach, visits, and support for local schools.	<ul style="list-style-type: none"> Target lower attainment or poorer scoring Ofsted schools in the Knowledge Quarter area for support and outreach.
S6	Low prevalence of Dementia	Activities for older adults to exercise both their brain and their body	<ul style="list-style-type: none"> Provide welcoming and safe public realm Regular programming and events targeted towards older local people Pedestrian access is suitable for those with mobility impairments
S7	Low prevalence of Depression	Places to relax and socialise and access to green space	<ul style="list-style-type: none"> Provide welcoming and safe public realm Ensure that there are quiet, sheltered places in the library for people to relax in Places to meet and socialise
S8	Access to quality public open spaces	Protect existing and add new public spaces	<ul style="list-style-type: none"> Incorporate new high-quality open spaces into the St Pancras campus expansion
S9	Active cultural groups and community institutions	Nurture the existing groups and spaces and support new endeavours	<ul style="list-style-type: none"> Provide space and resources for collaborative events and displays with the local community

A catalyst for change: Impact assessment

Over the past five years, the project team have been working hard to engage with the local community and design activities and interventions that help meet their needs. The British Library and SMBL recognise their pivotal role in supporting skills and education, arts and culture, and enterprise in Somers Town, the Knowledge Quarter and beyond. The BLE would be able to provide more space and resources to continue supporting and improving these endeavours.

It should be recognised at this stage however, that the British Library or SMBL are not in a position to tackle these issues alone. Many of the local needs are multi-faceted and complex and cannot be addressed easily or quickly. By developing strong, ongoing partnerships with other organisations with shared goals, SMBL and the British Library will be able to maximise their contribution to the local area. Such partnerships and collaborations might include but are not limited to:

- LB Camden;
- Community and resident groups;
- Business networks and organisations, including the Knowledge Quarter;
- NHS and local Clinical Commissioning Groups; and
- Education and skills providers.

Beyond this, partners of the BLE should use its influence and reputation to set a new standard of best practice for delivering community services.

Initially, this section was developed to consider the impact that the BLE would have on the challenges and opportunities being faced by the local area. The original impact assessment developed in late 2020 can be found in Social Impact Appendix 1. The impact assessment table outlined how current and planned interventions related to the BLE will fulfil the needs of the local community, and the likely impact each will have on the local area objectives.

SMBL are committed to maximising their social benefits in Somers Town, Camden and beyond. Leading directly on from the original impact assessment developed for this report (Social Impact Appendix 1), a Social Value Framework has subsequently been developed, which looks in greater detail at the interventions that the team are planning, across all stages of the development from planning to operation. The Framework aims to quantify the impact of each intervention, and in some case monetise this impact.

Social Impact Appendix 1: Impact assessment

The following table sets out the initiatives and activities planned by the British Library and SMBL. Against these, the related UN SDGs, the location of the works, the description of the initiative, and the social impact has been mapped. The interventions and activities have been sorted by the three objectives in the local area, and within these, are ordered based on the project stage that they will take part in. Existing interventions are listed first, followed by forthcoming initiatives. Note that the Social Value Framework and Public Benefits Document have been developed since, and represent the latest thinking.

The planned initiatives are also categorised into which stage of the project they are likely to take place during, and if they are existing or forthcoming. Project stages include:

- Pre-Planning
- Planning
- Construction
- Operation

Due to the length of the development programme, it will be important for SMBL to keep reviewing this list of initiatives and cross-reference it with ongoing community engagement feedback to ensure they are fulfilling the latest needs of the community as change over the coming years.

Table 22 Social impact assessment

Number	Initiative/ activity	Related UN SDGs	Location	Project Stage	Initiative Description	Social Impact Description
			<i>Where is this initiative or activity taking place</i>	<i>Which project stage will this initiative be active: existing/forthcoming; pre-planning/planning/ construction/ operation/all stages</i>		<i>Description of the impact that this initiative is likely to have and which local priority (as outlined in Section 3) will it help to address</i>
CULTURE: COMMUNITY, CULTURE AND PLACEMAKING						
II	Story Garden	3: Good health and well-being 11: Sustainable cities and communities	BLE	Existing Pre-Planning; Planning	The Story Garden was opened in 2019 in partnership with Global Generation. The story garden – housed as a temporary use on the Library’s proposed development site – provides a place for community building activities centred around food. The site has an orchard, garden allotments and a community kitchen. The goal of the space is to provide a place for people to come together, garden, cook, and share food. It also includes a MAKE space which hosts a partnership with the Somers	The garden responded to a community desire for additional open, green spaces expressed during the Library’s community engagement programme. The Story Garden has improved access to public green spaces and help support relations between SMBL and Somers Town. Access to greenspace can support improved wellbeing and developing cooking skills can also lead to healthier eating habits and reduced obesity.

Number	Initiative/ activity	Related UN SDGs	Location	Project Stage	Initiative Description	Social Impact Description
					Town Community Association and UAL Central Saint Martins.	The MAKE space has also provided opportunities for local creators of all ages, offering hands-on creative workshops and participatory projects that promote creativity, cooperation and knowledge-sharing.
12	Community Gardener	11: Sustainable cities and communities 15: Life on land	Somers Town	Existing Construction; Operation	Commencement of Community Gardener in Sept 2020 coordinated by Global Generation. DSDHA will work with Global Generation to map existing greening projects and identify further greening projects in Somers Town, with consensus of residents. These projects would be facilitated by Global Generation, working with the community and with the support of SMBL team (DSDHA) to roll out projects during the construction period. This would ensure that Global Generation maintain a presence in Somers Town when the Story Garden is closed as a result of construction commencing.	<p>This position will provide a job for someone in the local area who may not have had one previously.</p> <p>The Community Gardener will help provide greater access to high quality green spaces in the local area.</p> <p>Greening of the local area will support health and wellbeing, through increased quality of open space, and improved air quality.</p> <p>In turn, and alongside other measures, this could help reduce mental health incidence and prevalence of asthma and COPD.</p> <p>The role also helps foster a closer relationship between Somers Town and the Library.</p>
13	Community Advisory Groups	11: Sustainable cities and communities	British Library; BLE	Existing All stages	Establishment of Community Advisory Groups (run by the British Library) whereby the community can be involved in the creation of collaborative projects and the long-term delivery of community-based services.	<p>Linked closely to the Community Engagement team, this initiative will ensure that local people and groups have a say in the programming of the BLE and the British Library.</p> <p>This will make sure that local priorities are heard first-hand, and programmes to address these can be designed in collaboration with residents to be meet their needs.</p>
14	Community Engagement team	11: Sustainable cities and communities	British Library; Somers Town	Existing All stages	As a result of the Library's plans for expansion, it created a Community Engagement team with full-time staff which is dedicated to deepening the connections between Somers Town, Camden and the Library. The group is already actively partnering with the community to deliver new programmes. The team has also rented an office at the office of Somers Town-based organisation Training Link to further improve the Library's visibility and provide engagement opportunities to people who might not visit the main building.	<p>The community engagement team forms an important link between the British Library and the local community and help improve connections between the Library and Somers Town.</p> <p>They are able to ensure that the voices and ideas of local residents are reflected in the design and programming of the BLE, improving access to a wider and more diverse audience.</p>

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15	Flexible spaces available to the community, within the BLE	4: Quality education 11: Sustainable cities and communities	BLE	Existing and Forthcoming All stages	<p>Provision of approx. 10,000sq.m of new British Library Space to increase the Library's learning, exhibition, events and business facilities and deliver a range of spaces for community use which are flexible, versatile and able to host: exhibitions, art shows and events (not exhaustive).</p> <p>The BLE will have flexible spaces that the community can use for a variety of purposes. The ground floor will perform like an extension of the public realm and be a welcoming and democratic space where people feel free to enter via generous entrances.</p> <p>Increased permeability and accessibility of the British Library and associated facilities, including a new entrance from Ossulton Street and a publicly accessible ground floor to reinforce the knowledge ecosystem and create a democratic space accessible to all.</p>	<p>This landmark space within the BLE will be a substantial contributor to social value at the site.</p> <p>The ground floor public foyer will provide space for visitors to sit, relax, study and meet others.</p> <p>It will be designed to be as safe, inclusive, accessible and welcoming as possible; this will help increase a diverse visitor-ship and increase access to the services at the British Library as a whole.</p> <p>The design and ongoing use of the foyer will be managed by the BL with a focus on community engagement</p> <p>The architecture of the space, the new entrance, and the programmes hosted within it, could help instill pride in the new BLE amongst local residents.</p> <p>The space will allow many new programmes and events to take place, increasing access to skills, culture, leisure and learning for those in Somers Town and the Knowledge Quarter.</p>
16	Design features to promote good air quality	3: Good health and well-being 11: Sustainable cities and communities 13: Climate action	BLE	Forthcoming Planning; Construction; Operation	<p>Climate change mitigation is a priority for the project, and the building will be designed to minimise carbon emissions – both in construction and in operation. The building will be designed to reduce operational carbon emissions and will be all-electric in normal operation, with no fossil fuel combustion on site for space heating or hot water.</p> <p>Other strategies to improve the sustainability of the building include the selection of structural and façade materials, and the durability and longevity of elements including public realm, and interior finishes.</p>	<p>These design interventions will improve the outdoor living environment and also ensure that the BLE does not make any additional negative contributions to an area that is already deprived.</p> <p>If greenery such as a green wall is used in the sustainability approach, it will provide another quality open space for residents.</p>
17	Neighbours Advisory Panel	11: Sustainable cities and communities	Somers Town; BLE	Forthcoming Construction	Starting a Neighbours Advisory Panel which will represent community interests during construction, led by SMBL.	<p>This presents an avenue for community engagement, ensuring the residents' desires are reflected in the final project</p> <p>The panel will help to ensure any nuisances created by construction are swiftly managed, including those such as air pollution which might lower the quality of the outdoor living environment.</p>

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						An advisory panel will serve to increase community members' sense of ownership and belonging with the Library.
I18	Greening the BLE	3: Good health and well-being 11: Sustainable cities and communities 13: Climate action 15: Life on land	BLE	Forthcoming Construction; Operation	Implementing a programme of greening and planting, especially around the Story Garden. The site is surrounded by a patchwork of green spaces, from pocket parks and gardens to larger areas such as the Camley Street Nature Park and, further afield, Regent's Park. Biodiverse roofs, and planting at ground level, will incorporate habitat and species that can thrive in the local environment, and can use this site as a steppingstone to larger sites. The public realm at ground level will incorporate permeable landscaping, contributing to the site-wide surface water drainage strategy, in line with the SUDS hierarchy.	Greening will help reduce air pollutants and support a relaxing environment. By making the green spaces outside the BLE as attractive and vibrant as possible, this is likely to attract more people from the local area, thereby supporting their mental and physical wellbeing. Jobs relating to the maintenance and caretaking of these green assets and landscaping could be positions which are targeted at local people, building on the success of the Community Gardener position.
I19	Creation of new outdoor public spaces	3: Good health and well-being 11: Sustainable cities and communities	BLE	Forthcoming Operation	Creation of three distinct external zones – a square off Midland Road, an enhanced Dangoor Walk and a square off Ossulston Street.	Providing safe, relaxing and inclusive spaces at these locations could help to attract new visitors to the Library. Ensuring that seating is provided will enable those with mobility issues to stop and sit, which might encourage walking, particularly in the local elderly population.
I10	Improved permeability for pedestrians	11: Sustainable cities and communities	BLE; British Library	Forthcoming Operation	Targeting improved permeability across the British Library site and new connections to the neighbourhoods and communities in the Library's immediately surrounding area. Create greater permeability and safe pedestrian routes through the development, that will increase walkability in the area, including creation of new east-west and north-south routes across the site.	By making the site as pedestrian-friendly and safe as possible, the BLE will support active travel. Increased active travel can help support an active lifestyle within Somers Town and with visitors, and in turn reduce obesity. Active travel can also help reduce stress, which in turn could support improved mental health outcomes for local residents and visitors.
I11	Active travel facilities for commuters	3: Good health and well-being 11: Sustainable cities and communities 13: Climate action	BLE; British Library	Forthcoming Operation	Provision of cycle and runner-commuter facilities to encourage sustainable transport options such as cycling and walking to reduce pollution from transport.	By providing cycling and running facilities, the BLE will support active travel. Increased active travel can help support an active lifestyle within Somers Town and with visitors, and in turn reduce obesity. Active travel can also help reduce stress, which in turn could support improved mental health outcomes for local residents and visitors.

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						Air quality around the site could be improved marginally through increased take-up of active travel.
I12	Future occupiers community compact	4: Quality education 11: Sustainable cities and communities	BLE	Forthcoming Operation	Potential for the occupiers of the building to enter into a compact for a community outreach programme to provide education, services and support to the community and local schools. SMBL will support a programme of events to bring the local community, businesses, and KQ occupiers together to explore opportunities and local projects, and aligning to outreach undertaken by the British Library	If taken up, this compact would ensure a lasting legacy of social value creation around the BLE. Creating a sustainable programme of job creation, and support for local schools
LEARNING: EDUCATION AND SKILLS						
I13	New space for learning	4: Quality education 11: Sustainable cities and communities	BLE	Forthcoming Operation	Physically expand the Library's learning facilities through the new development, allowing for a larger schedule of programmes.	New learning facilities will enable a wider range of programmes which are specifically tailored to the challenges in the Somers Town community, for example: <ul style="list-style-type: none"> • An expanded subsidised Adult Learning programme, including new Digital Literacy courses; • A new Youth Learning Programme aimed at 16-25 year olds; • Increasing BL's reach to 100% of Camden schools; and • Learning Open Reading Room to provide informal space for community and family activities such as story-telling, display and events space for community projects.
I14	Somers Town Legacy	4: Quality education 11: Sustainable cities and communities	British Library; BLE; Somers Town	Forthcoming Operation	Work with local individuals, schools and community groups to co-curate events and displays celebrating their local history, heritage and culture, including the use of items from the Library's collections and local history archives.	Space and staff time provided for co-curated projects, events and displays within the new development and have a mechanism to include local voices in decisions around commissioning for exhibitions.
I15	Free site wide WiFi and study space	4: Quality education 10: Reduced inequalities 11: Sustainable cities and communities	British Library; BLE	Forthcoming Operation	The British Library (and BLE) will provide free site-wide WiFi for the public's use. In addition, study desks will be provided within the building.	Providing new facilities for learners of all ages will help to encourage more people to come and be involved with the Library. Free connectivity to the internet can help reduce disparities in digital access, especially when paired with workshops or classes.

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I16	Local Community Ambassadors	11: Sustainable cities and communities	British Library; Somers Town	Forthcoming All stages	Support a network of ambassadors from the Knowledge Quarter and British Library who will collaborate with the local community.	Network of local Community Ambassadors embedded in the BL community engagement team to inform community programme and support communication
BUSINESS: BUSINESS AND INNOVATION						
I18	Enhancing the BIPC	4: Quality education 8: Decent work and economic growth 11: Sustainable cities and communities	British Library; BLE	Forthcoming Operation	Enhancing the services offered by the Library's Business and IP Centre to further support Camden entrepreneurs looking to start businesses through workshops and other educational events.	By enhancing the offering for business users, the Library can help to strengthen the Knowledge Quarter and create new employment opportunities for locals BIPC to be involved in a Young Entrepreneurship Scheme with Learning Centre as part of the Youth Programme for 16-25 year olds.
I19	Incubator and maker space	8: Decent work and economic growth 9: Industry, innovation and infrastructure 11: Sustainable cities and communities	BLE	Forthcoming Operation	Including affordable incubator and maker spaces in the development and providing related services to help tenant start-ups and small businesses scale up their operations.	Provides space for local people, who may be wanting to start or grow their business New businesses will bring jobs and employment opportunities for local people Incubator and maker spaces can provide extensive and flexible commercial accommodations for organisations seeking to locate and work in the Knowledge Quarter
I20	London Living Wage	1: No Poverty 8: Decent work and economic growth 10: Reduced inequalities 11: Sustainable cities and communities	British Library; BLE	Forthcoming All stages	Require London living wage as a minimum salary for all employees	Paying a living wage to all employees can help to reduce income inequality, deprivation and other disparities in the area. In particular, it could help to mitigate the income deprivation affecting older and younger people. A more stable financial position can also have ripple effects across other aspects of a person's wellbeing including their mental health.

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121	Alignment with Crossrail 2	9: Industry, innovation and infrastructure 11: Sustainable cities and communities	Somers Town; Knowledge Quarter	Forthcoming Independent of project stage	Delivery of CR2 infrastructure to deliver significant improvements to Camden and London's public transport network Coordination with the construction of CR2 would prevent the need for a second major construction project as the works could be carried out during construction of the BLE.	<p>Improved accessibility to the area could increase the attractiveness of the area, thereby drawing new businesses which could provide new employment opportunities for locals</p> <p>Better accessibility to the Library will increased access to skill and training</p> <p>Access to Crossrail 2 could also help locals more easily travel outside of Somers Town, improving the number of jobs which they can access in a short journey.</p> <p>By coordinating the construction of CR2 and the BLE, it will prevent a second large construction project and the related air pollution, road noise, and general effects to wellbeing brought about by the disruption.</p>

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Artist's impression of the British Library Extension
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