The case for London’s Latin Quarter: retention, growth, sustainability

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LATIN ELEPHANT

THE CASE FOR LONDON’S LATIN QUARTER: RETENTION, GROWTH AND SUSTAINABILITY

Written By: Patria Román-Velázquez & Nicola Hill
Latin Elephant is a charity that promotes alternative and innovative ways of engaging and incorporating migrant and ethnic groups into processes of urban change in London, in particular Latin Americans. Following on from The Latin Quarter Workshop held in November 2014, this study is the second of Latin Elephant’s activities at EC in completion of objectives set under Southwark’s High Street Challenge Grant Funding (Round One).

Latin Elephant is currently working to support retention and growth of existing small migrant and ethnic businesses in Elephant and Castle, taking into account conditions for relocation, affordability and future sustainability.

**Latin Elephant Priority Actions**

**Research and Policy**
To respond to urban policy frameworks in support of migrant and ethnic economies in London.

**Business Readiness**
To ensure the right mechanisms are in place to support existing migrant and ethnic businesses maintain stability and sustained growth throughout processes of urban change.

**Increasing Participation**
To increase participation of retailers and community members in the transformation of Elephant and Castle and of projects relating to the Latin Quarter.
"We are pleased to support Latin Elephant with producing this report into the potential of the ‘Latin Quarter’. Our vision for the Elephant and Castle is to enhance its unique character to create a new town centre with a new park, more shops and jobs for local residents, and a thriving cultural and arts scene, with a mix of independent and large businesses serving all of Southwark’s people. The Latin American businesses at the Elephant are recognised across London as an important part of what makes this area so special and help create a vibrant and truly diverse community at the Elephant and Castle. Developers, businesses, the council and its partners all have a role to play in ensuring we build on what is best about Elephant and Castle and we have consulted with the local community and businesses for over a decade to get the right balance and keep the Elephant’s distinct identity intact.

There are some great ideas in this report about how to help make this happen and we will keep working with everyone who is able to contribute as the regeneration of the Elephant continues”.

Cllr Mark Williams, cabinet member for regeneration and new homes
Latin Quarter Vision

That the current Latin American business cluster at Elephant and Castle is formally recognised as a Latin Quarter, and its contribution to the local economy and community cohesion be acknowledged.

The establishment of a Latin Quarter for London will:

- improve social cohesion by creating an environment which is welcoming and inclusive to all;
- enhance the current retail offering of the borough through the provision and delivery of specialist food, goods and services;
- expand local employment opportunities and improve access to skills and training;
- enable small and micro businesses to establish themselves in the area by acting as a small business incubator;
- cultivate and establish a more vibrant and safer public realm at Elephant and Castle.

Given the current programme of regeneration taking place at Elephant and Castle there are a number of existing development opportunities which could help make this vision a reality. If these practical initiatives were implemented the risk of displacement or further isolation of the existing Latin American business cluster would be greatly reduced. In addition, it would strengthen the position of emerging migrant entrepreneurs in the area and secure their role in the future prosperity of Southwark.
1. INTRODUCTION

PURPOSE

This document sets out a strategic vision for any future development of Southwark’s existing Latin business cluster at Elephant and Castle (EC). It is supported by a series of practical initiatives which together maximise the potential of opportunities arising from the process of urban regeneration in the area. It also identifies existing barriers to growth for the business cluster and provides recommendations so that it may continue to flourish as a centre of entrepreneurial activity and social cohesion.

In light of the current redevelopment of the EC area, we hope that this document will also act as a tangible platform for dialogue between the local authority, private stakeholders and the local community. It is our intention that the output will be used to:

- provide a coherent and consistent vision of the aspirations of the Latin Quarter;
- guide and inform planning policies and investment in the area; and
- facilitate projects that support the existing business community, enable growth and contribute positively to the borough.
This document fulfils the following objectives:

**Context building:** To review the current context and build a profile of the existing Latin American business cluster at EC.

**Prioritisation and Recommendations:** To identify priority areas and recommendations for migrant and ethnic economies, assess development opportunities and identify clear actions for the development of the Latin Quarter.

**Communication:** To inform the direction of future investment by Southwark Council and other key stakeholders with regards to the development of the Latin Quarter, in line with the Council’s economic and planning strategies.

**Validation:** Ensure that the concerns and aspirations of local community groups are acknowledged and incorporated into the future development of the Latin Quarter.

**BACKGROUND**

In 2012 Latin Elephant carried out a business survey to learn about the aspirations of Latin American retailers in EC. This survey revealed the perceptions that whilst the Latin Quarter is strong and vibrant it is in need of investment, promotion and a more strategic approach to reinvigorate the business cluster, establish a more distinctive identity and to draw more people to the area (Diaconescu, Roman and Velasquez, 2012). This study builds upon these findings with additional research to present a genuine community-led vision for London’s first Latin Quarter.

Community consultation has focused upon the themes of enhancing visual identity, the public realm and community provision at EC. Possible project ideas were derived from a workshop, the preliminary findings of which were summarised in the ‘Latin Quarter: Elephant and Castle Community Vision’ report, published by Latin Elephant in February of 2015.

These initial ideas have since been interrogated and are presented in this document as development proposals for incorporation into the regeneration strategy for EC, namely:

- A Latin Boulevard
- Public Realm Improvements
- Latin American Food and Craft Markets
- A Community Hub
- Latin American Art and Events
No specific funding is currently attached for delivery of these proposals. Development and resourcing will need to be progressed by Latin Elephant in consultation with local, regional and national stakeholders.

DEFINITIONS

The definition of Latin American business used in this report refers to businesses whose owners are from a Latin American background and have migrated to or lived in the UK and or are of a second generation Latin American background. This definition derives from current ownership profile of existing businesses and is crucial to protect the distinctiveness of EC’s Latin Quarter.

Although there is no accepted definition of ethnic minority business (EMB), a distinction can be made between EMBs and migrant entrepreneurship (Glick-Schiller and Çalgar, 2013). The term EMB has been used to identify businesses whose owner and staff are of an ethnic background, those that cater to or have an ethnic clientele, or by the ethnic origin of the owner (Ram 2008, 2012), whilst migrant entrepreneurship is mainly used to refer to those who share a common national background often attached to the experience of migration. Latin American businesses in EC are regarded as both migrant and ethnic, so throughout this document we use the term of migrant and ethnic businesses (MEBs).

In this context, migrant and ethnic economies (MEE), would recognise the clustering effect characteristically of MEB communities, interdependencies across sectors, transnational flows of products and monetary transactions, multiple transnational economic activities, their role in improving job prospects, breaking cycles of unemployment and their contribution to community cohesion and sense of belonging.

Throughout the document we use the European Commission’s definition of micro businesses (those which employ fewer than 10 persons) and small businesses (those employing less than 50 employees).

STAKEHOLDER INVOLVEMENT

Project proposals were derived in consultation with local retailers, community groups and organisations, the general public and other relevant stakeholders such as local authority and private sector representatives. Participation was facilitated through a combination of workshop discussions, one-to-one interviews and meetings. Further research was conducted through participation in a short documentary film, “London’s Latin Quarter” by Latin Elephant which formed part of our research and sheds further light on the Latin Quarter as it is today. Additional data was collected using standard surveying methodology to address identified information gaps. (See Appendix 1 for a full list of participants).
2. MIGRANT AND ETHNIC BUSINESSES AND URBAN CHANGE

INTRODUCTION

Businesses are at the heart of inner city regeneration and at the centre of government initiatives for economic development. Empowering local communities in the transformation of places to encourage a greater sense of belonging in local areas and the development of policy frameworks for urban regeneration in London are testament to the centrality of businesses, places and people in visions and aspirations for London as a global city. Yet, there is little understanding of how migrant and ethnic minority businesses participate in processes of urban regeneration and what mechanisms are in place to guarantee their participation and involvement in processes of urban change.

Recent studies on small and medium enterprises (SMEs) have revealed the pressure that the economic downturn of the early 2000s put on the UK’s retail spaces on high streets and in town centres and the subsequent need for government intervention (Portas, 2011; Communities and Local Government, 2013a, 2013b). In the case of London, despite numerous government initiatives (SQW and Middlesex U, 2013), the drive for economic development and competition, increasing property costs and rising business rates is continuing to put SMEs at risk (FSB, 2013).
Until very recently, little attention had been given to the specific role of migrant ethnic businesses (MEBs) and their positive contribution to the UK economy and community cohesion. This is significantly important for London given the current context of urban regeneration in deprived areas, where most migrant and Black, Asian and Minority Ethnic (BAME) businesses are concentrated.

As migratory flows to the UK have grown, so too has the ethnic migrant retail sector. Current estimates of ethnic minority owned SMEs in the UK range from 6.2% (BIS, Survey of Small Business, 2014) to 9.3% (Regeneris, 2010) and this sector now employs approximately 1.16 million people (Centre for Entrepreneurship, 2014) contributing between £25 and £35 billion to the UK economy annually (Regeneris, 2010).

Clustering of businesses is common to many urban centres as it offers economic advantage and networking opportunities, but clustering is particularly important for MEBs as it creates strong networks between co-ethnic owners, employees and the local labour market (Struder, 2003). In turn, the local economy gains from increased participation in the housing market, spending on goods and services in the UK and abroad, contributions to taxation, and the provision of greater employment opportunities for ethnic minorities. MEB clusters also create supply chains and in turn create growth in the fields of employment, productivity and exportation but often remain unsupported by public services in doing so. A study commissioned by the Department for Communities and Local Government (2013b) revealed an underrepresentation of certain ethnic groups and highlighted concern over the continued inequality of access that minority groups experience for government advice and services.

The UK government has since acknowledged that more needs to be done to make sure that people from all backgrounds can be reached and supported to achieve their aspirations of starting up a business. Driving this government agenda is the conviction that failure to encourage business start-ups by ethnic minorities in the UK is costing the UK economy approximately £8 billion annually (Department for Communities and Local Government, 2013b).

Regeneration schemes in London are taking place in deprived boroughs where there is a high proportion of diverse ethnic populations. Thus minority groups and MEBS are disproportionately affected by regeneration schemes in London. MEB clusters often contribute to community cohesion and are underpinning of diverse communities in inner city areas, providing a valuable social as well as economic function. Currently, however, this is not accounted for and the importance of migrant and ethnic economies within urban areas are underestimated, as is the willingness and need for migrant entrepreneurs to remain clustered. Throughout the process of urban change, MEBs instead often operate under conditions of great uncertainty, disengaged from planning processes and under-represented from retail strategies for Opportunity Areas. Although the causal factors behind this are varied, it is clear that strong policy frameworks alongside the provision of tailored business engagement and support service for MEBs together could go some way to help build in resilience of MEBs to withstand some of the risks associated with rapid urban change.
Priority Areas and Recommendations

Latin Elephant has identified 3 priority areas for MEBs in the context of urban change and makes 10 recommendations to overcome the current short falls experienced by London's migrant and ethnic business clusters.

Priority Area 1: Policy Frameworks

Despite the fact that small and micro businesses are proven to be crucial for economic growth, job creation and economic and social cohesion, local authorities are not making full use of planning policies and procedures to protect them throughout regeneration programmes, especially in the case of MEBs. Policy frameworks can act as a guide to: protect character areas; provide guidance and definitions for affordable retail space; secure accountability of allocated spaces; and inform the direction of public funding (such as the Community Infrastructure Levy and Section 106 contributions).

Priority Area 2: Business Development and Skills

Evidence suggests that business support and the transformation of business practices goes hand in hand with economic growth yet despite the range of programmes on offer migrant entrepreneurs are not yet supported and access to finance, appropriate business models, relevant advice and support services remains difficult for MEBs across London. Local businesses have a wealth of potential contractors with specialist expertise in particular, those from migrant and ethnic economies. However, opportunities for local people and specialist local contractors (e.g. architects, planners, constructors, artists and designers) are often not maximised.

Priority Area 3: People and Place

There are many missed opportunities in current regeneration programmes. Existing small and micro businesses have unique characteristics and conditions under which they have evolved and thrived. These can be nurtured and enhanced by regeneration if taken properly into account at the planning stage, allowing areas to retain original character and feel. For example, the clustering of migrant and ethnic businesses in EC has stimulated strong local, regional, national and international networks. When taken properly into account, this can be retained through inclusion, engagement and participation of the existing communities from the earliest opportunities in the development process.
RECOMMENDATIONS

The following recommendations will help to foster an environment within which migrant and ethnic entrepreneurs can better succeed and contribute to London’s local economies and cultures in the context of urban change:

1. Improve channels through which London’s growing migrant and ethnic populations can contribute to the planning process and access applicable funding streams (such as the Community Infrastructure Levy and Section 106 contributions).

2. Identify and acknowledge the specific contribution of MEBs within opportunity areas and for this to be reflected in local planning strategy documents.

3. Develop overarching retail strategies for development areas which draw upon the needs of existing communities and local economies and are inclusive to both small and micro businesses and MEB clusters.

4. Set guidelines to guarantee and monitor the quantity and quality of affordable business commercial units (rent space) for small and micro businesses in new and refurbished developments.

5. Create conditions which will enable existing business clusters to better manage urban change at every stage of the development process. This should include support strategies for transition phases whether this is relocation, compensation or a prioritised return.

6. Support the retention, sustainability and growth of existing businesses through a comprehensive business readiness programme to include: language support, business development, financial planning, employment law advice, other training and access to financing options for MEBs.

7. Support local job and skills creation by sourcing local talent and skills to design and build locally and improve access to training, education and employment, especially for migrant entrepreneurs.

8. Invest in infrastructure that reflects community needs and supports the needs of micro business, for example flexible business units where complimentary activities can take place or public realm improvements to maximise footfall.
9. Involve the local population in a community vision for opportunity areas at the earliest stage in the development process.

10. Implement comprehensive monitoring mechanisms which fully capture the varied contribution of MEBs in London.

CONCLUSION

If local business and economies are to remain at the heart of government initiatives for economic development, the incorporation of migrant and ethnic businesses into plans for inner city regeneration cannot be ignored, especially in London. As the case of London’s Latin Quarter at EC will highlight, a real mandate exists for policy frameworks, local business environments and profiles of people and place to be fully inclusive of MEBs. Only then will regeneration schemes fully utilise the role they can play in the transformation of local places and economies and help London to achieve its aspirations and vision of becoming a leading global city.
3. LONDON’S LATIN QUARTER

INTRODUCTION

From arrival in the UK, immigrants from developing countries face distinct challenges which can obstruct the path towards socio-economic progress. For Latin American migrants this can often restrict them to low-wage and insecure jobs which demand long hours and testing schedules. Studies have revealed that up to 55% of Latin Americans in London are employed in low-skilled, manual labour, in particular within the cleaning sector. One avenue that is available and often taken by a minority of migrants, to ‘shortcut’ up the occupational ladder, is to become an entrepreneur (McIlwaine et al., 2011).

Despite being historically affected by high unemployment, Southwark is characterised by a high concentration of migrant entrepreneurial activity, reflecting the ethnic diversity of the population (circa 300,000), over 60% of which are of minority ethnic background (London Borough Southwark, May 2014). People of Latin American heritage are a significant minority group in the borough, numbering at least 7,398, or 8.9% according to official records (Census Data, 2011). But unofficial estimates from local organisations are much higher, for example the number of Brazilians in London alone is estimated at somewhere between 150,000 - 200,000 (Sheringham, 2013).
High concentrations of migrant economic activity have been identified in EC and a recent study on MEBs (Gu et.al., 2015) revealed migrant and ethnic clustering is prevalent along Old Kent Road, East Street Market, Elephant and Castle; with more diverse migrant and ethnic economic activity along Walworth Road. The presence of migrant entrepreneurs widely benefits the surrounding area by increasing economic and cultural diversity, reducing unemployment and social exclusion, mitigating the problematic employment situation of young people and raising living standards for ethnic groups that can often suffer from greater disadvantage than other segments of society.

Latin Quarter Opportunities

Establishment of a Latin Quarter will increase economic and cultural diversity, reduce unemployment and social exclusion and raise living standards by the following mechanisms:

- A specialist MEB retail and leisure activities to actively draw visitors to the area
- A community hub to facilitate the mixing of existing and new demographics which will mitigate the negative consequences of regeneration such as displacement and segregation.
- A cultural quarter which recognizes the existing character of the area and creates a feature for the local community.

The recommendation to Southwark Council is that it should look for opportunities in which to support and encourage the local ethnic and migrant retail sector at EC as it is a valuable feature of the local economy. It is under this guiding premise, within the context of urban regeneration that the vision for the Latin Quarter has been developed, with a view to become incorporated into the wider retail offer and economic strategy for EC.
London’s Latin Quarter Profile

Latin Americans’ particularly strong presence in the EC area of Southwark dates back to the early 1990s when young migrant entrepreneurs from Latin America started to inhabit and revive what were some of the less desirable retail spaces in the EC Shopping Centre, later extending to the Draper House and railway arches (stretching from Eagle’s Yard to Rockingham Street).

The growth in volume of Latin American businesses at EC has been exponential and this is only expected to continue in line with the trajectory of increasing migratory flows of Latin Americans to the UK which will see demand from new migrants begin to outstrip the supply of specialist goods and services.

The wider local population of EC acknowledge the positive contribution that Latin businesses and residents have made to the transformation of the area, once regarded as a transient space to be, to the now much more vibrant, welcoming and safe place and destination it has become.

This place making is made evident by the presence of a cluster of more than 80 small inter-independent Latin American run businesses (see Fig. 1), comprised across four clearly identifiable zones: the EC shopping centre, the Arches in Elephant Road, the Arches in Eagle Yard and Tiendas del Sur in Newington Butts. Latin Businesses are supported by a strong community that come to socialise, work or live in ‘the Elephant’, an area renowned as the central hub and ‘home away from home’ for Latinos in London. Given this established presence and the current context of urban regeneration, it is now, more than ever, that a clear vision for the future of the Latin Quarter is needed.

“The general atmosphere of the Elephant and Castle has vastly improved since the Latin American community has taken root here. From being a rather desolate place where people just went from A to B, you now get people congregating in the streets and it’s a very positive thing. It makes you feel safer to see people there which are not hostile or, you know… you feel… it’s for everybody.”

Tenant, Draper House

1. All references to Tenant, Draper House: Interview with Patria Roman and Nicola Hill on 2nd March 2015.
Latin American Businesses in Elephant and Castle

Updated February 2016

Research: Patria Roman Velazquez
Map: Ilinca Diaconescu

Key
- Cafe/Restaurant
- Clothes/accessories
- Travel agency
- Food shop
- Games/entertainment
- Dentist
- Film/Music
- Money transfer/Courier
- Hair and beauty
- Auto repairs
- Estate agency
- Computer/Print shop
- Retail
- Translations/Legal

Cluster A - Shopping Centre
1. Irina Money Transfers (Unit 241)
2. Lucy’s Hairdressing Salon (Unit 250)
3. Speedy courses (Unit 219)
4. Modelin y su moda (Unit 254-255)
5. La Bodeguita Cafe (Unit 222-223)
6. La Bodeguita Restaurant (Unit 256-257)
7. La Tienda (Unit 259)
8. Alteraciones Nicole’s (Unit 253)
9. Ana Castro (Unit 250)
10. Llavelait Handwashers (Unit 218)
11. Money Remittances (Unit 219)
12. Castle Brasserie (Unit 250)

Cluster B - Eagle’s Yard
13. Los Arrieros (Arch 141)
14. Punto Latino (Arch 143)
15. La Calenita
16. Salud y Vida
17. Videomania
18. Tienda Lucky Shop
19. Sterling Jewellers
20. Nativo Services
21. Peluqueria
22. Corporacion Ponce (Arch 144)
23. Arko 146 (Arch 146)
24. El Costenito
25. Heladeria Oasis
26. Servisell Travel
27. Peluqueria
28. Amanda’s Hair and Beauty
29. San Andrecito (Arch 147)
30. Geomil Express UK Ltd
31. Antojitos Coffee Shop
32. Lara Express International Services
33. Alteraciones Erika Alexandra
34. Peluqueria
35. Diego CDs
36. Corcorna
37. Delicias Lucy

Cluster C - Draper House
38. Sabor Peruano
39. Colombian Fashions (16A Draper House)
40. Cafe do Babado (16A Draper House)
41. Andre & Adam (16A Draper House)
42. Servisell (16A Draper House)
43. Tiendas del Sur (91-95 Newington Butts)
44. Unit 1, Latin Touch Hairdressers
45. Unit 2, Soliman Travel (since 1979)
46. Unit 3, H&S Legal LLP
47. Unit 4, Casa en Casa
48. Unit 5, LEA
49. Unit 6, A Silva Dental Studio
50. Unit 7, CJ Multicentre Boutique
51. Unit 8, Ku-Yoruba - Santeria
52. Unit 9, Oro Facil Shop
53. Unit 10-11, Aroma de Café
54. Unit 12, Money To
55. Unit 13, La Chatica (Surtihogar)
56. La Vida Loca (Unit 1 Farrell Ct)
57. Costa Dorada Ltd
58. Luz Darly’s Nails
59. Video
60. Money Transfers
61. Hairdressers
62. Beauty
63. La Chatica Cafe (Unit 2 Farrell Ct)
64. Arco del Centro (Unit 3 Farrell Ct)
65. Ashley’s a Creaciones
66. Topless
67. Chiros Gustavo
68. Diego Computers
69. Elephant Flooring
70. New Image
71. Uruca de aromas Aromatherapy
72. Dallesandra (Unit 6 Farrell Ct)
73. Tintes de Dalles
74. Plane Services
75. Elephant Mall (Unit 7 Farrell Ct)
76. Waistrainer UK
77. Medipura
78. 24hr logistics
79. 24hr International Ltd
80. Gino Segers Elephant
81. The Castle Cafe
82. C&R Flavours
83. J Cutz stylist and Herbal life
84. J Cutz stylist and Herbal life
85. J Cutz stylist and Herbal life
86. La Fama (113 Elephant Rd)
87. Elephant Coffee (113 Elephant Rd)
88. Balad (113 Elephant Rd)
89. GE Services (113 Elephant Rd)
90. Alteraciones Patricia (113 Elephant Rd)
91. Estilista (113 Elephant Rd)
92. Informatico (113 Elephant Rd)
93. Christian Barbers (The Artworks)
94. Carnaval del Pueblo (The Artworks)
95. Colraces UK (The Artworks)
96. Marcela Blooms (The Artworks)

Cluster D - Elephant Road
97. Elephant Mall (Unit 7 Farrell Ct)
98. Whitewash UK
99. Medipura
100. 24hr logistics
101. 24hr International Ltd
102. Gino Segers Elephant
103. The Castle Cafe
104. C&R Flavours
105. J Cutz stylist and Herbal life
106. J Cutz stylist and Herbal life
107. J Cutz stylist and Herbal life
108. J Cutz stylist and Herbal life
109. Elephant Coffee (113 Elephant Rd)
110. Balad (113 Elephant Rd)
111. GE Services (113 Elephant Rd)
112. Alteraciones Patricia (113 Elephant Rd)
113. Estilista (113 Elephant Rd)
114. Informatico (113 Elephant Rd)
115. Christian Barbers (The Artworks)
116. Carnaval del Pueblo (The Artworks)
117. Colraces UK (The Artworks)
118. Marcela Blooms (The Artworks)
Research by Latin Elephant (see Fig. 2) has found that the majority of businesses in the Latin Quarter begin as small, start-ups with few overheads, employing between 1-5 people on average. This figure does not account for indirect employment (for example, the delivery of goods, provision of financial and legal services, and production of publicity material). A strong sense of community amongst retailers has fostered diversity in commercial activities which now range from specific ethnic food, retail and fashion to broader legal and financial professional services. The physical nature of the quarter allows businesses to grow at their own pace, taking opportunities to scale up as and when needed.

The majority of owners, 72%, are of Colombian origin and relatively young, with 77% born in the 1960s or thereafter. A significant lag time exists between a migrant’s arrival in the UK and business opening dates within the Latin American community. It seems that for the young migrant entrepreneur, time is needed to not just acquire capital for investment, but to establish the relationships and skills (including language) necessary for successful entrepreneurship in the new host economy. From this pattern we can also predict that the quarter is set to grow and strengthen in the near future in line with migratory flows.

Some businesses have grown to become key employers for the community, such as La Bodeguita, Chatica and Andre & Adam, but most remain small, family enterprises. Many have joint husband and wife ownership and women play a more prominent role in enterprise than average, with 41% of Latin businesses at EC owned by women (see Fig. 2). The majority of businesses, 80%, report their customer base to be mainly Latino, but also aspire to attract new clientele from other backgrounds in order to bolster trade:

“Unfortunately my menu is all in Spanish; but I have been thinking about having it in English so it is more visible for the English (people), so they feel more secure, that they can come here.”

Restaurant Owner

The Latin American Business cluster in EC is currently one that is in transition: from diverse to specialist business models, from informal to formal business practices with all having varying degrees of embeddedness in the local area. There is a clear pride from business owners who have broken cultural barriers to trade and are able to claim a ‘mixed’ client base. This ambition and tenacity in part explains the vibrancy and resilience of the business cluster and the potential role it can play in improving social inclusion and cohesion at EC. It does, however, also expose the vulnerability of small, interdependent migrant businesses that needs to be addressed, overcome or compensated for in light of the forecast changes to the area.

Our research suggests that business support and the transformation of business practices aids economic growth, yet for the migrant ethnic businesses at EC, access to finance and a lack of appropriate business models, advice and support services often falls short. To overcome this, many retailers have engaged in informal transnational business practices at some point of their trading in London to get their business off the ground. To overcome this, targeted business support which is geared towards the specific needs of migrant and ethnic businesses is required in order to unlock the full potential for business growth and business sustainability.

The selected examples below (Case Study 1 & 2) highlight some of the routes into migrant entrepreneurship and show the willingness of the business community to adapt to change.

2. All reference to shop owners from Latin Elephant Survey 2014.
Latin Elephant Survey Key Findings

- 80% of respondents reported customers were mostly or entirely Latino
- Majority of businesses are SMEs employing 1-5 people
- Women play an active role in enterprise within the Latin community
- Some businesses are husband/wife joint ownership
La Bodeguita

La Bodeguita, is a family enterprise run by Diana Sachs and her two brothers Jose Lenin & Jose Eduardo. By 2014 they were running three separate businesses: La Bodeguita Delicatessen, La Bodeguita Restaurant and Start Over Liquor.

The Bodeguita, first opened in 1993 as a retail shop in unit 252 in the first floor of the shopping centre. Diana Sach, together with her two brothers Eduardo and Lenin took over from the original owners after having worked for 12 years in cafes and restaurants across London. When they took over, La Bodeguita was a small retail unit in the shopping centre with no running water. Due to her determination and stride she convinced the then managers of the centre to provide the facilities she needed. Slowly, the business started growing and moved to the current location in units 256-257 in the first level of the shopping centre, now known as ‘Cafe Bar La Bodeguita Delicatessen’. The opportunity to take on larger premises and what she perceived as a low risk investment led her to open in 2001 La Bodeguita Restaurant (units 222-223 in the first level of the shopping centre - visible from Walworth Road). The menu and window advertising are in Spanish and English, catering to their main clientele but also seeking to attract those whose first language is not Spanish.
The Bodeguita is now a fully established family business, currently employing 20 people across the two businesses. As with many other small migrant retailers La Bodeguita is a clear example of how with the right support and mechanisms in place migrant and ethnic business can thrive and become significant employers in the area. La Bodeguita is also an example of how Latin American retail have set root in the area and taken into account the surroundings in which they are located by catering to the wider population. La Bodeguita has now secured two affordable premises for its small café at Dashwood Studios and East Street Market.
Ana Castro Shoes

Ana Castro is a Colombian business owner who arrived in the UK 5 years ago to study English. As a graduate of business studies, Ana spent two years crafting a business plan which would fulfil her ambition to become an entrepreneur. In 2014, Ana was offered the lease on a central unit in the EC shopping centre and where she opened her business, ‘Ana Castro Shoes’, which imports women’s fashion items from Colombia.

Within the first six months, the business has proven successful and she manages to cover her outgoings. Her business model incorporates a social aspect, in that many of the Colombian products are handmade, by women who otherwise find it difficult to gain employment in her home country. She also imports and sells products from France and Italy. In addition, she employs two local shop assistants and contracts to local service providers, such as a Window Cleaner and Electrician, all of whom are Latin American.

Despite her success, Ana is concerned about her future and uncertain about what will happen.
The redevelopment of the area was a positive factor in her business plan which she hoped would help to expand her product line and enable business growth as she foresaw that the regeneration would bring new people to the area, with a greater demand for a greater diversity of products.

However, Ana has no provision for relocation or compensation from the property owners included in the terms of her lease. With the help of a lawyer and the support of Latin Elephant she has been able to renegotiate the terms and considering her options beyond July 2016 when her current lease expires. This may or may not mean staying in the Elephant and Castle area.

Asked how the temporary closure of the shopping centre would affect her Ana replied:

“The business owners want to participate and have the opportunity to express what we feel.”

When it comes to the plans for redevelopment it should ideally ensure that the community is...recognised for what we are: organised, hardworking and eager to make the most of the future and continue to grow our businesses here in Southwark.”
CHALLENGES FOR THE LATIN QUARTER TODAY

EC is the current focus of four major development proposals which are set to significantly alter the physical characteristics and demographics of the area. After many years of negotiation and consultation:

- Transport for London (TfL) have started work redesigning the road layout which involves the peninsuralisation of the northern roundabout allowing for the creation of a new public space, the closure of the subways and creation of new crossing points to improve pedestrian flows.
- Lendlease have acquired planning permission to build 3000 new homes in the area, which will also include new retail (around 50 shops of which 10% should be affordable), leisure and open spaces, such as Elephant Park on the site of the old Heygate Estate.
- Delancey plan to deliver 373 new homes, 237 student rooms in the Elephant Road site and redevelop the existing EC Shopping Centre site, the extent of which is largely unknown until the planning application is submitted and approved. At the time of writing Delancey is consulting on its vision to create a new town centre for Elephant and Castle.
- Network Rail plans to develop premises along the railway arches. It’s envisaged that refurbishment of the arches along Elephant Road will fit with Delancey’s New Town Centre Plans. Phase 1 will see the refurbishment of the five arches nearer to New Kent Road however the extent and timing of the development is still unknown as plans are not yet public.

This sudden influx of economic investment, although welcomed by the Latin American retailers, presents a challenge to the current business and retail model. There is an expressed concern that the existing business cluster is not well equipped to deal with external factors resulting from the development of the area, such as; the threat to or loss of premises, increased rent and business rates and loss of customers due to changing demographics and competition from bigger stores.

Migrant ethnic retailers in particular are traditionally harder to engage in the planning consultation process. Factors such as legal status, language barriers and a lack of awareness of the local policy context all make it harder to interact with the planning consultation process. Consequently many feel that that their voices will not be heard within the regeneration programme.

The most immediate concerns are Delancey’s development plan for the EC Shopping Centre and Network Rail’s plan to redevelop and seek use class changes to the arches along the railway lines, where most of the Latin businesses are located. Particular anxiety surrounds:

- Business continuity and sustainability throughout and after the regeneration scheme
- Disruption, dispersal and possible displacement of existing small businesses
- The content and nature of new leases, particularly so for businesses in the shopping centre
- Limited protection for relocation and or compensation when the need to vacate premises arises
- Ability to return to the premises after the redevelopment if rent levels are too high
- Lack of communication of development plans for both the shopping centre and arches along network rail.
- Lack of transparency over plans for the shopping centre and network rail.
Within this context and as part of our ongoing work with retailers we identified as a matter of urgency the need for further consultation to identify needs and discuss alternatives for temporary relocation strategies (Participatory workshop in the context of the Elephant and Castle Town Centre Regeneration plan).

Both the Latin American community and local population look very favourably upon what they see as long overdue and necessary improvements to the place they now call home. There is simply a great deal of uncertainty about whether their businesses will be sufficiently prepared and capable of remaining in the area for long enough to reap the benefits of regeneration.

The sale of the shopping centre to Delancey and APG at the end of November 2013 heightened the level of uncertainty amongst retailers of the centre. At the time of writing Delancey is engaged in pre-planning consultation, with intention to submit and gain approval of its planning application during 2016, with planned development of the shopping centre commencing in late 2017. These plans are contingent upon the planning process going ahead as scheduled (submission of application, consultation and approval).

The Latin American business cluster supports retention and growth of existing businesses through a strategic approach that takes into account the above concerns such as current conditions for relocation, affordability and sustainability. Latin Elephant’s recommendation in this case is to offer protection and support for existing small and micro independent businesses in the borough through the planning policy process by the guarantee of affordable commercial units in new and refurbished developments. This could again be achieved via a tailored engagement mechanism and bespoke service provision for migrant and ethnic businesses who are directly affected by regeneration programmes in the Borough.

“...I’m a bit concerned what’s gonna happen when they knock down this shopping centre development. It will become so expensive...these cafes might be forced to close and you know instead we’ll get a Starbucks or something like that. There doesn’t seem to be any provision to save the Latin American businesses. If the businesses go, then the people will go as well. One has to think ahead and we’ve got to try and find some kind of compromise where, you know, the council and even the city, you know Boris, have to acknowledge that this is a cultural centre and it is a focal point for a large group of people that risks being displaced”

Tenant, Draper House
THE IMPORTANCE OF BUSINESS CLUSTERING

Ethnic and migrant businesses contribute to local economies by forging local and transnational networks of activity. Migrant demands for goods enables transnational networks and flows of goods and services and the emerging transactions create a demand for communication, transportation and financial services, crucial for the continuation and sustainability of migrant businesses (Guarnizo, 2003). This is especially true for the Latin business cluster as the majority of this community live and work in the borough of Southwark, and in EC this is demonstrated by the widespread appeal of large ethnic food stores.

Transnational migrant practices are evident in the importation, promotion and distribution of goods and services. A survey about transnational practices in London’s Latin Quarter (Orellana-Damacela and Roman-Velazquez, 2012) revealed that most shops obtained their products from local importers like La Chatica Distributor and Mercar which buy directly from Latin American companies (see Fig. 3). The second largest source was from Spanish importers of Latin American products. Spain was the source of most Ecuadorian and Bolivian products; whereas Colombian, Peruvian, Brazilian and Argentine products tend to be sourced from local importers. The route of the Latin American products arriving in England transcends the local market as these also become exporters to other European markets, such as to Belgium, Holland, France, and Germany. The expansion of these British Latin American businesses includes also incursions in Latin America, this is best illustrated with the growth of estate agents. These sources are depicted in the model below:

**Latin American Product Flow - Transnational Practices**

![Latin American Product Flow Diagram](image-url)
The social consequence of clustering at EC is that a strong and self-sufficient community has been established. A recent study on ethnic and migrant enterprises, produced for Elephant and Walworth Neighbourhood Forum (EWNF) in partnership with Latin Elephant and UCL students, and our research with Latin American retailers at EC Latin Quarter, found that the value of socio-cultural benefits which ethnic migrant retail brings to an area is often underestimated. One business owner who, despite working in the area since the late 1990s is still not fluent in English, gave a prime example of this:

“The Latin people will not want to leave the Elephant, we are a strong, supportive community here. I work hard all day, I enjoy what I do and make sure that everything I make gets used, we even give away what we can to the hungry when they ask for it. We help each other to get by.”

Latin American Business Owner, Eagle’s Yard Railway Arches

Surveying of visitors to the shopping centre (See Appendix 3) also confirmed this. The general purpose of visitors to the area is two-fold: to shop and to socialise. When asked what the area needed, many responses welcomed the modernisation of the shopping centre because it is ‘dirty’, ‘dingy’ or ‘run down’ and safety is lacking. However, almost all respondents were united in appreciation of the diversity of the current retail offering. Whilst enthusiastic about the prospect of new stores, many expressed a fear that any business closures could be detrimental to the local community. One respondent stressed that, “this place is really important for our community, we need to maintain and keep this place” whilst another responded with “any closures would be very upsetting, EC would lose its character”. Others simply stated it would be “extremely dangerous for the local community” and “a bad sign for multiculturalism” were existing businesses forced to abandon the area because of external influences outside of their control.

The social value of clustering cannot be underestimated. Interviewees indicate that is the ‘sense of belonging’ what brings them back on a regular basis. A restaurant owner went even further and expressed that their conversation with the clients could even improve the emotional health of those who are feeling isolated, with nobody to talk with:

“If you have just arrived, if I don’t know your name, I ask ‘how are you doing, madam,’ in this way, you make her feel well, because there are people that come here very sad, in very bad shape; then, if you don’t give them attention, people just get worse, more depressed; but if you lift their spirit, the person comes back with a little more confidence.”

Latin American Business Owner, Eagle’s Yard Railway Arches

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3. All references to EC Shopping Centre Visitor Survey, conducted by Latin Elephant on 28 March 2015
POLICY CONSIDERATIONS

There is and has been for a long time a political will to develop the Latin Quarter in EC. After a policy review (see Appendix 2) the vision for the Latin Quarter strongly aligns with policies that plan positively for the location, promotion and expansion of business clusters, those that facilitate flexible working practices and is also compliant with local and regional government policies on economic development, regeneration, community cohesion and equality.

EC is identified as an Opportunity Area and Central Character Area in the London Plan 2015 (LP), Elephant and Castle Supplementary Planning Document 2012 (EC-SPD), Opportunity Area Planning Framework (OAPF) and the New Southwark Plan (NSP). These documents together outline levels of support for EMBs in London in general. Given their guiding premise that ‘Southwark is its people’, most policies already aim to support and foster Southwark’s large creative and vibrant cultural communities, including that of Latin Americans. However, the practicality and importance of the application of these policies in light of the regeneration of the area cannot be underestimated.

For example, the NSP – still under consultation – will set out the regeneration strategy for the borough to 2033. The plan is to be adopted from 2018 and will be used to make decisions on planning applications with assurances to:

- protect, and attract businesses into, the borough to increase job opportunities;
- support high streets and increase the range of shops to increase their vitality; and
- direct growth to certain areas of the borough, predominantly Elephant and Castle.

In response to the NSP (see Appendix 4) Latin Elephant stress the need for a more inclusive understanding of urban policy in London, in particular, the contribution that migrant and ethnic communities make to diversify local economies and cultures. Latin Elephant’s recommendation to the London Plan on the importance of migrant and ethnic economies was acknowledged and adopted in the Further Alterations to the London Plan 2015 (FALP 2014) and it is therefore hoped that the reasoned justifications given for supporting migrant and ethnic retail in Southwark will also be incorporated into the NSP.

LATIN ELEPHANT’S RECOMMENDATION TO NSP 2015

Proposals for redevelopment of commercial buildings and spaces should allow current tenants the first choice to bid or tender for business units in the new and refurbished developments. The bidding process should be open to current tenants and existing local independent businesses for the first 18 months after which period an open call should take place. A statement that sets levels of rent value as affordable and quantity of affordable space in relation to the size of the development site would be welcomed.
CONCLUSION

Unfortunately, EC is regarded by many as little more than transitory space, not a place or destination in itself, with no clear attraction to draw people in from the surrounding areas. Yet, the Latin Quarter has and continues to thrive and attract visitors from across London. Centrally located to the redevelopment zone, the existing migrant ethnic business cluster at EC has the potential to be instrumental in the plans for regeneration, and continue to be a part of the wider retail offer at Elephant and Castle.

Southwark Council and private stakeholders in the area are in agreement that any loss of diversity to the current retail offer would be an undesirable outcome of the regeneration process. It is with this in mind that the vision of a Latin Quarter has been developed to be one of great benefit to the vibrancy of the area, providing a viable step towards mitigating risks that the local community face now and into the future.

“The Latin American Quarter is something we can make more of in the Elephant and Castle and promote more widely. We have Chinatown in London, here we have the Latin American Quarter, let’s make the most of it.”

Clr Fiona Colley, ex cabinet minister for regeneration and corporate strategy
THE CASE FOR LONDON’S LATIN QUARTER:
RETENTION, GROWTH AND SUSTAINABILITY
MARCH 2016
Herman, Tiendas del Sur, Newington Butts

Andrea, A Silva Dental Studio, Tiendas del Sur

Oscar, La Calenita, Arkos 143, Eagle’s Yard
4. CURRENT SITE AND VISUAL ANALYSIS

The current site of the Latin Quarter is split into four clearly identifiable zones (see Fig. 4). The largest grouping of businesses can be found in the railway arches (stretching from Eagle’s Yard to Rockingham Street). Out of the 19 arches that are in commercial use, 13 are occupied by tenants of Latin American background and or country of birth, equivalent to an occupancy rate of 60% Latin American tenants. A further 12 units can be found in the EC Shopping Centre, and other core areas are the Draper House and Sherston Court.
A NATURAL BUSINESS INCUBATOR

The business cluster operates as a natural business incubator, attracting start-up enterprises and fostering growth with minimal risk to the migrant entrepreneur. Units are occupied by multiple retailers who share the space and fixed business costs. For example, units under the railway bridge have been converted into restaurants and small commercial centres whereby one unit (arch) is divided up and let under licence agreement to other small retailers (see Fig. 5). This business model allows for flexible short term contracts and cheap rent (including utility services). This model works well, allowing for small business to operate at much lower cost. Furthermore, community ties can be strengthened and local supply chains be developed without the associated risks or management responsibilities for the site which the leaseholder is accountable for. In addition, as businesses experience growth, they are easily able to upscale by transferring into a bigger sub-unit. This however, presents problems for property owners (Network Rail), because of possible breach to uses and property management issues.

Accessibility to these units is not just a road safety concern, but their positioning results in low footfall for the retailers. Their location and external appearance acts as both a physical and psychological barrier to entry, especially for non-Latino visitors, despite the knowledge of many locals that the exterior is not reflective of the welcoming community found within. Consequently, an unintentional, yet significant social disconnect exists between the Latin American and non-Latino communities at EC. The situation is frustrating for the Latin retailers who wish to expand their business, the wider Latin community who visit the area and wish to share and celebrate their culture and locals who experience feelings of exclusion from their immediate environment.
This same problem has been experienced with the temporary containers and creative hub, Artworks Elephant, who have also expressed difficulty portraying externally the breadth of the retail offering inside. As a consequence, footfall is not maximised. One potential solution is the better communication of the business cluster model as something characteristically ‘Latino’, just as Artworks is known as a ‘creative hub’ so that through careful design, welcoming and standardised signage, the visitor can begin to translate what is to be found inside.

**USERS AND PEOPLE FLOWS**

Notorious as a road traffic hotspot, some people actively avoid the EC area altogether. Analysis shows that many of the accidents involving pedestrians take place away from the existing crossing points at EC and the true pedestrian desire lines of visitors are not being met. Planned changes to the existing transport links and road crossings at EC northern roundabout will hopefully improve movement between the Latin Quarter sites (Shopping Centre, Elephant Road, Draper House, and Sherston Court), however the corridor of railway arches from Eagle’s Yard to Rockingham Street that crosses two major road intersections at both Walworth Road and New Kent Road (at each end of Elephant Road) remains a concern.
Currently the four main commercial zones are accessed and fragmented through what we have identified as the Polygonal Zone. Linking the different parts of the cluster is crucial for critical mass and growth. At the moment crossing from cluster A to C is an issue. Pedestrian improvements and signs of visual identity for the Latin Quarter should concentrate in this area (see Fig. 7).

Fig. 6

Fig. 7
LATIN QUARTER FEATURES

There are as many common drivers to the LQ today as there are distinctive elements, some of which should be built upon to achieve the desired aspirations of economic growth, wider clientele base, improvements to the public realm and better perceptions of safety in and around the Latin Quarter. These shared and distinctive elements across the business quarter are supported by the five development proposals outlined in chapter five

Shared elements

Latin American migrant background
Relatively young entrepreneurs
Draw Latin American clientele and population from across London
Micro and interdependent enterprises
Enterprising outlook
Strong community links and support

Distinctive elements

Diverse nationality of owners
Variety of experiences and routes into entrepreneurship
Commercial Centre business model - multiple commercial activities within one arch
Highly networked cluster
Shared public realm space
Latin Elephant have developed the initial ideas put forward by the local community in the Latin Quarter Workshop to present a series of project proposals to be implemented together, or on a project by project basis, in order to achieve the desired vision of London’s first Latin Quarter. The project proposals have been informed through stakeholder consultation and an analysis of the current site, taking into consideration the guiding principles outlined in the previous chapter.

Underpinning our series of recommended development proposals is an understanding that support for existing Latin American businesses is positive not only for growth of the existing Latin Quarter, but also to promote the area's unique retail offering to the rest of London and its visitors to add to the growth and future sustainability of the borough of Southwark’s local economy. Support for businesses can be provided through a variety of mechanisms.
London has several successful shopping parades, for example Carnaby Street and Seven Dials, which enhance the general retail experience for shoppers, increase the draw to an area for visitors and improve footfall for local businesses, giving a boost to the local economy. Within the redevelopment of EC there is clear scope to follow suit by developing the existing Latin business cluster into a shopping parade, or ‘Latin Boulevard’.

This could be achieved by the better integration of the railway infrastructure and existing urban realm, which is becoming an increasingly popular element of regeneration strategies in London. For example the arches on Maltby Street and in London’s East End have already been revived and there is proposed low line development along the rail arches from Bankside to Walworth Road.

THE OPPORTUNITY

The Latin Boulevard would be best located along the stretch of railway arches, under the Thameslink line, which connects Eagle’s Yard at Hampton Street with the end of Elephant Road, at the intersection with New Kent Road. These units have made the perfect business incubator for
young migrant entrepreneurs and also serve an important social function and meeting place for the Latin American community. By creating a feature out of this natural boulevard, the accessibility and connectivity of businesses will be improved, pedestrian safety enhanced and a more attractive visual identity for the business cluster will be established. Also known as ‘Calle Latina’ it is hoped that the Latin Boulevard will become the central focus and attraction of the Latin Quarter, with a view to encourage new visitors to the area, giving a sense of permanence to the existing community.

The Latin Boulevard could be fully pedestrianised or remain a shared space in order to serve deliveries to businesses in the morning and then become pedestrianised in the afternoon to offer a safe environment within which the visitors and local community can gather, trade, play and host events to the early evening.

An official map and guide to the Latin Boulevard would portray the history and stories of Latin American traders at EC and could also be used to advertise businesses, products and services as well as social events. The Latin Boulevard will require a visual strategy that reflects the history of the Latin American community and ‘the Elephant’ which will include unifying elements of design to be extended to connect it with the rest of the business clusters at EC.

A clear gateway will be needed for the area to act as a strong signifier, both attracting and welcoming visitors to the Latin Boulevard, and physically defining it as the heart of the Latin Quarter. The EC train station will be an important point of access, but other points of entry should also be considered and incorporated into the design to create the impression of the boulevard as a bright, open and inviting space.

**POTENTIAL RISKS**

The Latin American businesses that run along the stretch of railway arches slice through the street network without any safe crossing points or unified visual identity. New and improved pedestrian crossings will be required to ensure safety, accessibility and continuity between the two stretches of the Latin Boulevard and the wider area. Analysis of Department for Transport (DfT) data forecasts a considerable increase in pedestrian traffic at EC resulting from the redevelopment of the area which points to the need for, the very least new crossing points and pedestrianisation of some access roads to meet this future demand. This fits with the proposal to pedestrianise Elephant Road and create a pedestrian crossing on Walworth Road under the bridge, in order to follow pedestrian desire lines for visitors to the Latin Boulevard. There are already traffic light control measures within a few meters of the proposed site and desired crossing line. The proposed crossing points offer better visibility for pedestrians and drivers alike. New crossings would also help control traffic flow along the Walworth Road and potentially reduce traffic accidents at that junction, particularly in light of the relocation of the bus stop at Elephant and Castle Link Road to the corner of Walworth Road ([Proposed New Road Layout for EC](#)).
**ACTIONS**

Further traffic modelling analysis and desire crossing lines will be needed to assess the feasibility of the proposed crossings, but it is assumed that the new bus stop location will make the proposed crossing along the Walworth Road key to the improved movement and flow of people across the two distinct destinations in the area.

The Latin Boulevard will require additional unifying urban design elements such as consistent paving, lighting and street furniture not addressed here, but further explored under a separate project (see Proposal Two in this chapter). Additional opportunities arising from the creation of the Latin Boulevard such as provision for a Latin American street market and community and cultural events are further addressed in Proposals Three and Five of this chapter respectively.

Option One: Raised pedestrian crossings (Fig. 8)
- Provides safer crossing for pedestrian by forcing vehicles to reduce speed as they approach and pass over the crossing.
- Create a clear spatial connection between Elephant Road and Eagle’s Yard.
- Provides a visual transition to pedestrianised area and shared surface space at Elephant Road

Option Two: Island Crossings (Fig. 9)
- Provides the same advantages as option one, but it is less constraining on traffic flows.
PROJECT PROPOSAL TWO: PUBLIC REALM IMPROVEMENTS

PUBLIC REALM IMPROVEMENTS

A public realm improvement strategy would address a range of issues identified in the workshop, such as safety, attractiveness of the area and coherent urban design. The delivery of the required work can be undertaken in partnership with the local business community through setting up a management board, together with the Council, developers and other partners such as Network Rail and voluntary organisations.

The Latin Boulevard is an overarching concept in itself, but it will require significant public realm improvements to fulfil its potential, ideally to be delivered in conjunction with the above but which could also be implemented independently. The following suggestions are deemed crucial to achieve a unique and cohesive feel to the Latin Quarter, consistent with the proposal of the unified Latin Boulevard as outlined in the previous section.

THE OPPORTUNITY

A comprehensive public realm improvement strategy will be developed in order to address the range of issues identified by current retailers and community members such as the need to improve safety, the attractiveness of the area and a coherent urban design that strengthens the identity of London's Latin Quarter. Initiatives could comprise of improvements to street surfacing, lighting, signage, street furniture, murals and new or improved shop frontages.

The public realm proposal for public realm improvements stems from our consultations with the Latin American community and is consistent with local desire for greener and safer links that put pedestrians first. Studio Gil have produced further site research for public realm proposals on the Elephant Rd and Eagle’s Yard (see appendix 5).
Outdoor seating and greening will increase the appeal and functionality of the public realm, creating safe and enjoyable pockets of space to gather, rest and eat. Street furniture can be placed outside the arches especially between Walworth Road and the train station, where there is more room and shelter. Lighting is an essential element for improving safety and appearance, especially along the railway arches and under the bridge.

The use of bilingual street signage, although unusual in London, is used in many cities and would help to reflect the presence of the Latin American community at EC providing more accessible information and a sense of ownership and recognition in the area.

Murals and design elements on the platforms and entrances to the station could be used to reflect the history of Latin American traders. This approach is used in many parts of London, such as the stations on the Overground line. Murals decorating the railway arches and bridge would highlight the colours and vibrancy associated with Latin American identities.

Maps around EC will show the types of businesses on the Latin Boulevard, increasing accessibility to other communities, and indicate the large spread of trades and services available in the Quarter. Finally, improving the appearance of storefronts by incorporating elements of design and art would make the business clusters more visible and attractive.

POTENTIAL RISKS

Improvements to the public realm to assert an identity for the Latin Quarter will mean nothing if the existing Latin American businesses are not supported. The loss of Latin American spaces is the most immediate risk to the Latin Quarter. The proposed public realm initiatives should be complemented by business models that support a variety of units within one railway arch. Refurbishment of the railway arches would meet the needs of growing and emerging businesses, and would support the flexible approach taken by Latin American traders to share the space between diverse complementary commercial activities, though still within the same use class to comply with legal requirements. Potential changes to use classes in railway arches should also support this business model.

ACTIONS

Management - Latin Elephant will continue to promote public realm proposals from interested parties and deliver public realm proposal in conjunction with relevant stakeholders, some of whom have already expressed their intention to support such initiatives for the Latin Quarter. The work can be taken in phases to fit in with local building work and regeneration project timetables. The delivery will be undertaken in partnership with the local business community through the creation of a management board, together with the Council, developers and other partners such as Network Rail and local groups.

Funding - Commitment and investment from relevant stakeholders to take these proposals further is needed. Projects could be delivered in parts using specialist funding from different sources, such as GLA, Lottery Fund, and European Funding for business clusters.
Pop-up temporary markets, such as those at Bishopsgate and King’s Boulevard in London, have proven a very popular way of utilising sites that are being developed, but these types of markets are often pointed to as symptoms of gentrification, ignoring the needs and preferences of existing communities. However, for EC the development of a more permanent Latin American market, devised, managed and supplied by existing retailers in conjunction with the development of the area would complement the regeneration strategy and bring positive benefits to the existing community.

Markets, such as Camden, Brick Lane and Portobello, supply fresh produce at low cost and often cater to the specific needs of the local population. This serves to strengthen the local economy by developing skills, creating job opportunities and enhancing the local retail offerings to increase the pull to an area. Markets also aid community cohesion by providing a context for cultural exchange in a safe and welcoming environment, positively animating the public realm.
**THE OPPORTUNITY**

Food, craft and trade is central to Latin American culture and the act of sharing goods, food, music, art and culture with the wider population in a common and accessible space would serve to integrate the local communities, improving social cohesion and diversifying the shopper profile to strengthen the business cluster and foster growth.

A successful Latin American market would enhance the current retail offering for local residents and attract new visitors to the area by creating the sense that EC is a vibrant and unique shopping destination. In addition it would serve as an acknowledgement, celebration and signifier of one of Southwark’s largest and most vibrant ethnic communities to the wider population of London. A market would provide a platform for the development of entrepreneurial skills and job creation to boost the local economy and for local traders to play a part in it so as to minimise negative impact on existing local businesses.

Recommendations around the future regulation and management of London’s market point to the need for a greater focus on promoting enterprise and entrepreneurialism (URBACT, 2014). The majority operate under the London Local Authorities Act 1990, whilst the remainder are privately managed under agreements with local authorities. Over a third of markets operate under both the London Local Authorities Act 1990 and the Food Act 1984 because of the commercial and managerial limitations in the former.

The Cross River Partnership recommend the development of a trust market management which links a new or existing street with shop units, providing a location for training, test-trading and trader movement into shop space. This would be the ideal model for the Latin Quarter Food and Craft Market to adopt so as to bridge the divide between Latin businesses and non-Latin communities.

Southwark Council acknowledge that markets are a valuable social space and in recent years, has sought to ensure that street markets become an integrated part of its regeneration schemes. Latin Elephant welcomes this strategy, which includes reinvigorating existing markets and recommend that the council support the opportunity for Latin American Food and Craft Market and EC as new mixed market in a location with good transport links, in line with its overarching strategy.

The council has been working with the EC regeneration team to establish what opportunities exist for the provision of a new market. In the EC-SPD a new market square has been identified to the east of the railway viaduct on Elephant Road which leads out to the new Elephant Park – currently Delancey’s Phase 1 development on the corner of Elephant Road and New Kent road. New, modern market space provides the perfect setting for a Latin American Food and Craft market, especially given its proximity to the proposed Latin Boulevard development. Alternative locations can also be identified at the plaza in front of the Draper House and newly conceived Plaza Latina in East Street Market.
POTENTIAL RISKS

Underinvestment in public markets has led to a steadily declining trend in street retail, but this is not a reflection of dwindling consumer demand, rather it is indicative of limited council resources for capital investment and alternative funding streams becoming harder to secure. With adequate planning, consultation and the right stakeholders, the proposition of a Latin American Food and Craft Market would not fail to secure appropriate investment but public ownership is preferable to safeguard access, affordability and wider social benefits that a market can offer.

ACTIONS

Management - To ensure that the market is central to and for the benefit of the existing community, a management body to be formed by a group of traders and volunteers as either a Community Interest Company (CIC) or as part of a Business Improvement District (BID).

Location - Potential locations must be identified and agreement made by the appropriate stakeholders (council, private sector, BID and/or business support organisations).

Funding - Contributions from Section 106 planning obligations or the Community Infrastructure Levy (CIL) to finance improvements to the local retail environment which could include a market. This would help compensate for loss or damage created by the shopping centre redevelopment and mitigate its potential impact on the local community.

Infrastructure - It takes more than high quality crafts and food for a market to fulfil its potential. As such, the market management board should seek to ensure that the market design addresses factors which inhibit growth and entrepreneurship. This means ensuring the provision of adequate storage, access to water, cleaning facilities, lighting and power and wifi which enables the retailers to accept electronic payments.

Support - Development of a business support package, in conjunction with Southwark council, which offers training and financial incentives (such as reduced rates and insurance costs) tailored towards the specific needs of new local entrepreneurs and would help to foster local entrepreneurial talent.
PROJECT PROPOSAL FOUR: COMMUNITY PROVISION

Community Provision

Providing social infrastructure tailored specifically for the Latin American community is an essential step in recognising their needs, culture and long-standing presence at the Elephant and Castle. A range of facilities and services should become a community centre, affordable premises for community and voluntary organisations, open and play space, as well as training, education and language support programmes.

There is a clear consensus amongst the local population that community provision is severely lacking at EC, especially since the closing off and demolition of public space and facilities linked to the redevelopment of some of the major sites. For Latin Americans in particular, the cafes, restaurants and shops fulfil an important community role some even doubling as service advice centres. They become spaces of family reunion either to celebrate or mourn significant family occasions. These businesses are addressing a shortfall in spaces to gather, for children to play, to access services or any suitable premises for community events and activities.

Providing essential infrastructure which is tailored specifically towards the needs of the local community is an essential part of recognising the culture and long standing presence of any ethnic group. Factoring a community facility into the regeneration plans, would therefore help to offset some of the negative impacts that the redevelopment is having on the local population.

The Opportunity

The Latin Quarter workshop revealed the need for a distinct community space from which to host a wide programme of tailored activities which cater to the multifunctional needs of the local community including; daytime childcare facilities, youth programmes, language and skills training, access to IT equipment and a space to gather and hold meetings and cultural events.
Any multifunctional community space such as the one proposed must be well planned to ensure it meets the varied demands of its users and caters to the genuine needs of the community. Consequently, an elected management committee would be required to conduct a needs assessment and agree upon what facilities are needed by the community. Latin Elephant recommends that a cooperative or mutual society be formed as a partnership between the local authority, private developers and community groups to carry out this function.

Ideally, any facility would be purpose built and located as close to the existing business cluster and community as possible, to ensure that it is perceived to be a true community hub. However, without funding secured, Latin Elephant have also investigated other possibilities such as the use or adaptation of existing premises, disused units at the shopping centre, and shared space such as the Crossway Church, which is being redeveloped next to Eagle’s Yard. Finally, a container-like solution similar to the style of Artworks Elephant could also work to satisfy the needs of the community on a more immediate basis.

POTENTIAL RISKS

Lack of community spaces in the area and lack of involvement of EC’s migrant and ethnic population will contribute to a sense of community isolation, and be detrimental to community cohesion and community ownership. The preference is therefore to have a purpose built facility incorporated into the existing development plans that could cater to multiple groups active in the area.

ACTIONS

**Funding:** In lieu of applying for funding or crowd-sourcing funds for this community project, Latin Elephant would like to see enhanced community provision and that this becomes a primary obligation of private developers in the EC area.

Infrastructure: A purpose built facility would be the best solution to meet the varied needs of the community, but depending on the size and reliability of funding secured, a temporary measure could be the occupation of disused business space in the shopping centre or partnership with another local organisation.

**Management:** A management committee must be elected early on in the project, elected by the Latin American community itself to identify genuine needs. In addition, an agreed vision or aim as well as formal management structure and procedures must be agreed by the elected committee.

**Support:** Partnership should be sought from private developers as well as local authority departments. In addition, local service providers who will be delivering activities should also be approached early on to ascertain what additional support they could offer to the running of the centre.
This page photos: ©Jenifer Lodono, Santiago Peluffo & Latin Elephant / part of My Latin Elephant: Workshops in Participatory Video and Photography with InsightShare & Fotosynthesis / 2015
Southwark is home to some of the nation’s most significant museums and its local museums are testament of its large multicultural history. There has been a surge in public art, murals, street festivals and celebrations of different cultures in Southwark, some of which are attached to these cultural institutions, but more and more we are seeing an increment in community led and community organised events. Some of which are supported by the council, developers and other charitable trusts. These are integral to local community life, shared history and sense of belonging. The economic benefits of community events for local economies is often understated.

THE OPPORTUNITY

Latin American public art, murals and cultural events would raise the profile of the Latin American community in Elephant and Castle by showcasing high quality contemporary Latin American cultural programme of events. These could enhance and improve the immediate environment and potentially attract more visitors to the area. There are ample opportunities for community involvement by developing a parallel education and community programme.

Latin American cultural events, festivals and art projects are primarily run by non-profit organisations that rely heavily on volunteers, a great part of whom are professionals in their home countries. Inclusive and community art projects and events provide opportunities to fulfil the ambition and career progression of Latin American migrants who find it difficult to transfer professional skills
to the local London job market (Villazana, 2013). They act as catalyst for local economic growth and provide individual opportunities for professional growth and creating another route into employment.

An example of such initiatives is the current strategy to further develop Carnaval del Pueblo who are also GLA and Southwark High Street Challenge winners. In its development, the organisation now has a new Board of management, advisors and dedicated stakeholders. The Carnaval is now involved with various community projects e.g. Plaza Latina - pre-sequel and sister event - taking place in Nursery Row Park off East Street Market, the first of which took place in December 2014.

**POTENTIAL RISKS**

Open air festivals and events should remain free to the public and failure to secure funding sources or being financially secured through sponsorship deals (in the case of festivals) could mean higher rental price for stalls at some of these events and could reduce participation of local food and craft market traders.

**ACTIONS FOR LATIN ELEPHANT**

**Art projects** - Our consultation with Latin American retailers and organisations has exposed the desire for a major piece of work or sculpture to identify and provide character to the Latin Quarter. This will act as a signifier and marker of identity for the Latin Quarter. This can take the form of a permanent bespoke commissioned piece (sculpture and or mural) or as a programme of short temporary installations. Community involvement, engagement and sense of ownership could be guaranteed through an education and community programme associated with the public art work. There was also a desire for more cultural events in EC as these will have the potential to increase footfall and draw more visitors to the area. Community involvement, sponsorship deals and financial support from different stakeholders are needed for these events to take place.

**Infrastructure and location** - Through its consultation with retailers Latin Elephant has identified possible spaces for public art and or murals along the arches in Elephant Road and Eagle’s Yard. Permission from land and or property owners is needed and compliance with planning regulations. Latin Elephant is looking for partnerships to develop this initiative and has informally presented these ideas to different stakeholders, many of whom are in principle in agreement with the concept.

**Management** - Latin Elephant will lead on this initiative and draw a board of experts to provide advice and guidance on contemporary artists and galleries, commissioning process, community engagement and support with fundraising from art specific organisations.

**Funding** - Funding come in the form of grants from GLA and Southwark’s High Street Challenge, Arts Council, Southwark’s Cleaner, Greener, Safer and Neighbourhood Fund, EC community fund, other art specific organisations.
## Assumption of stakeholder buy in and feasibility

<table>
<thead>
<tr>
<th>Development Opportunity</th>
<th>Goal</th>
<th>Predicted Benefits</th>
<th>Risks</th>
<th>Funding sources</th>
<th>Timescale</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Latin Boulevard</strong></td>
<td>The creation of a Latin American shopping parade at the heart of the existing Latin Quarter which will celebrate, promote and help develop the existing business cluster.</td>
<td>A feature to draw people into the area Boost the local economy Diversify shopper profile Improve community cohesion and safety Improve public realm Better use of urban space</td>
<td>That the existing businesses will not fulfil their potential, unsupported by the current policy framework and lack of investment and will be forced to disperse.</td>
<td>CIL, Community funds, Trusts and City Funds</td>
<td>Phased implementation to take into consideration other planned works.</td>
</tr>
<tr>
<td><strong>Public Realm Improvement</strong></td>
<td>Enhance the local environment to improve the attractiveness and visitor experience in the local area.</td>
<td>More use of public spaces Better perception of the local environment Improved desirability of the area as a place and destination</td>
<td>Low desirability to visit the area Poor social cohesion and perceptions of safety for locals because the public realm does not reflect the true nature of the business cluster and community that exist in the area.</td>
<td>Council community fund and heritage funds, locality lottery funding, health?</td>
<td>With immediate effect and / or in line with phased implementation of Latin Boulevard.</td>
</tr>
<tr>
<td><strong>Food &amp; Craft Markets</strong></td>
<td>Development of street market trading of Latin products (food and art) in the Latin Quarter, managed and supplied by a local community of traders.</td>
<td>Latin community can share goods and culture in a street setting to animate the public realm Uniqueness of market will pull for tourists and visitors from outside of the local catchment A platform for existing businesses to diversify their customer base Improves and builds entrepreneurial skills and creates jobs for the borough</td>
<td>Would be migrant entrepreneurs remain unsupported in business start-up Diversity of retail sector is lost Opportunities to improve social cohesion through cultural exchange is not taken.</td>
<td>Joint public/private funding (public, private market management companies, mutual society)</td>
<td>In line with other developments and phased with implementation of Latin Boulevard / Pedestrian road</td>
</tr>
<tr>
<td>Development Opportunity</td>
<td>Goal</td>
<td>Predicted Benefits</td>
<td>Risks</td>
<td>Funding sources</td>
<td>Timescale</td>
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<td>---------------------------------------------------------------------------</td>
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<tr>
<td><strong>Community Hub</strong></td>
<td>Establishment of a multi-purpose centre, in existing or new premises, that facilitates the provision of services, events and activities which are responsive to the specific needs of the Latin American and wider community of EC.</td>
<td>A heightened sense of belongingness and permanency in the place where the Latin American community has settled. Provision of facilities to carry out a tailored and regular programme of activities for and by the community. A space to build skills and capacity of the community from within and a point of access for external service providers.</td>
<td>Social isolation and displacement of community members. No sense of rightful belonging for the community. Inequality of access to opportunities, support and services.</td>
<td>Planning policy requirement of housing developers to provide for existing community need.</td>
<td>Built in to development delivery timescales. In the interim temporary space could be sought through disused retail units or temporary containers e.g. Library.</td>
</tr>
<tr>
<td><strong>Arts, Cultural Events</strong></td>
<td>Provision for regular programme of art and cultural events which will promote and improve knowledge of Latin American culture within the wider community.</td>
<td>A heightened sense of belongingness Improved visibility for the LQ Increase in offers and footfall to the LQ Positive perceptions of safety</td>
<td>Decreased cultural offers Decreased opportunities for community cohesion Weak sense of social belonging</td>
<td>Various art foundations, Art Council, GLA, Southwark Council</td>
<td>With immediate effect</td>
</tr>
</tbody>
</table>
6. CONCLUSIONS

This study has drawn on the current case of London’s Latin Quarter in EC to identify and propose a series recommendations and guidelines for best practice approach to improve the situation of MEBs in the context of urban change. The 10 recommendations serve to maximise possibilities for retention and growth and generally improve conditions for migrant and ethnic entrepreneurs in London across three priority areas: Policy Frameworks, Business Development and Skills, and People and Places. This is particularly prescient given that regeneration schemes across London are taking place in the most deprived and ethnically diverse boroughs in the capital.

There are significant lessons to be learned from the experiences of the Latin American business cluster at EC and many opportunities exist to incorporate the existing businesses into the future retail strategy of the area. For the Latin American business cluster, the formal recognition of the area as ‘London’s Latin Quarter’ would give a significant boost to footfall, promoting it’s specialist retail status.

The five development opportunities, identified through the consultation process with existing retailers and community groups: the Latin Boulevard, Public Realm Improvements, Food and Craft Markets, Community Hub, and Art and Cultural events along with the spatial vision have been designed to be easily adopted into the regeneration strategy at EC. These proposals are particularly viable now, given the rapid process of urban change underway at EC.

Investment and a compromise by different stakeholders will be necessary to achieve the mutual benefit from the attraction that a Latin Quarter will bring to EC and this document opens the channels for discussion. The study concludes that to realise the full potential of the business cluster, investment in the area needs to be accompanied by active involvement of the existing group of retailers at all stages of the decision making process. Only this will ensure that the vision remains community driven and that the Latin Quarter will continue to cultivate small independent migrant entrepreneurship for Latin Americans in London.

The adoption of the 10 proposed recommendations and 5 project proposals provided in the document will provide London with an example best practice and minimises the risks posed by urban change to micro and small businesses, with special regard to MEBs. The end result will mean better mechanisms and processes in place to ensure that we maximise the potential that migrant entrepreneurship has and will continue to offer London for many years to come.
REFERENCES


ROI Team (2014). Understanding Perceptions of Southwark Town Centres.


The Bartlett Development Planning Unit & Latin Elephant (April 2016). *Participatory workshop in the context of the Elephant and Castle Town Centre Regeneration plan*.


APPENDIX 1

LIST OF PARTICIPANTS

Latin Elephant would like to thank the following organisations for their contribution to the Latin Quarter Vision:

Artworks Elephant
Bankside Open Spaces Trust
Blue Bermondsey
Brixton Green
Carnaval del Pueblo
Casa Teatro Festival
Coronet
Delancey
Draper House Residents Association
Elephant & Walworth Neighbourhood Forum (EWNF)
Fotosynthesis
InsightShare
Latin American Disabled People’s Project (LADPP)
Latin American Retailers of Elephant and Castle
Latin American Women’s Rights Service (LAWRS)
Lendlease
Local Councillors
Network Rail
Peabody
SPIRE, Prevista Ltd
Southwark Arts Forum
Southwark Council
Sustrans
Studio Gil Architects
Tate Modern
The Cross River Partnership
APPENDIX 2
PLANNING POLICY MATRIX
<table>
<thead>
<tr>
<th>Plan</th>
<th>Commentary</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>4.1 Town centre: Shopping, business and hotels</strong></td>
<td></td>
</tr>
</tbody>
</table>
| **SPD 1: Shopping** - We will support new retail development in the town centre to help consolidate Elephant and Castle and Walworth Road as a major town centre in the borough's retail hierarchy.  
'Ve will use planning conditions or section 106 planning obligations to ensure that at least 10% of new floorspace (GIA) is made available as affordable space to provide suitable premises for small and medium sized enterprises in the opportunity area who have been displaced as a result of development, new business start-ups or independent retailers'.  
'The main strength of the centre is the particular concentration of Latin-American businesses which reflects the growth of the Latin American community in Southwark'. | - Supports mix of retail uses in large retail developments, including diversity of offer, size, and affordable units for SMEs that have been displaced as a result of development, for new business start-ups and independent retailers (in that order of preference).  
- Supports on site affordable units, relocation to off-site affordable units or financial contribution through planning obligations.  
- Supports links into town centre to provide active use of roads into the town centre.  
- Supports and acknowledges Latin American business cluster at EC and need for such retail spaces. Recognises services provided to the communities it serves.  
- Supports local shop frontages and shopping parades and recognise services provided by such retail to the communities it serves.  
- Consistent with London Plan policy 4.9 / 4.8 & EC Traders Charter. |
| **SPD 2: Markets** - A new market square will be provided to the east of the railway viaduct. Improvements to East Street Market will be supported. | - This supports the creation of new market presented in this study to enhance economy of the area by reinforcing identity of the area, shopping experience and offer.  
- Supports local producers and as incubator for new route to setting up business. |
| **SPD 4: Jobs and Business** - Provision of new business space, including incubator space, will be supported and must be designed flexibly to accommodate a range of unit sizes to help meet the needs of the local office market and SME businesses and to enable businesses to remain in the area as they grow. Existing business floorspace should be retained, unless replaced by an alternative town centre use. The railway arches should continue in active use for a range of B uses including small business space, creative and cultural industries, light industrial uses and appropriate A or D class uses. | - Supports provision of business spaces as incubators with a mix of size and uses to enable sustainability and continuity of businesses. Essential for existing businesses to remain in the area.  
- Support mix uses for railway arches, including shops, cafes, restaurants, business units and community uses.  
- Supports improvement to public realm around railway arches proposed in Latin Quarter feasibility study.  
- Supports supply chain and local networks – economy stays local.  
- Protects loss of business space. |
### 4.3 Wellbeing: Social and community infrastructure

<table>
<thead>
<tr>
<th>SPD 6: Arts, culture, leisure and entertainment</th>
<th>Commentary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proposals involving arts, cultural, leisure and entertainment uses which contribute towards consolidating Elephant and Castle and Walworth Road as a major town centre will be supported. Proposals on the Heygate development site, 50 New Kent Road and the shopping centre site should include appropriate arts, cultural, leisure or entertainment space which contributes to supporting a lively and vibrant town centre, increasing its attraction to a wider catchment and making a positive contribution to the evening economy.</td>
<td>- Supports arts, cultural and leisure entertainment uses and spaces in new developments that contribute to a lively, vibrant town centre, day and night. - Supports connectivity and partnerships between educational institutions, art organisations and community groups. - Supports evening economy.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SPD 7: Sports Facilities and SPD 9: Community Facilities</th>
<th>Commentary</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Supports sport activities, events presented in this study.</td>
<td>- Supports Community Hub space for local organisations and charities proposed in this study. - Supports review of new community facilities</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>4.4. Transport and movement: Better connections and an integrated public transport hub</th>
<th>Commentary</th>
</tr>
</thead>
<tbody>
<tr>
<td>SPD 11: Walking and Cycling - We will work with TfL, developers and other stakeholders to provide a high quality network of pedestrian and cycle routes in the opportunity area.</td>
<td>Supports proposal to pedestrianize Elephant Road and new crossings at junctions with Walworth Road and New Kent Road. This will minimise impact of new developments on road and public transport network.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SPD 13: Servicing and deliveries</th>
<th></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>4.5 Built environment: Attractive neighbourhoods with their own character</th>
<th>Commentary</th>
</tr>
</thead>
<tbody>
<tr>
<td>SPD 15: Public Realm - We will work with TfL, developers and the community to transform the quality of the public realm in the opportunity area.</td>
<td>- Supports overall improvements proposed to the Latin Quarter by creating a sense of place and reinforcing and encouraging positive development of the area’s existing character. - Supports projects around public realm to enhance the area’s identity and its sense of place as Latin Quarter. - Supports the following projects included in this study: · Public art opportunities · Way finding elements · Street Furniture · Lighting · Hard and soft landscaping · Street tree planting · Living walls</td>
</tr>
</tbody>
</table>
Visitor Questionnaire: Results
Elephant and Castle Shopping Centre
28 March 2015 (N=45)

1. Where did you travel from today?
Mapped at: https://batchgeo.com/map/1230a89cff9f702292711a502440b3eb

2. What is your nationality?

3. How often do you come here?
4. Why do you come here?

- To shop: 48.6%
- To socialise: 28.6%
- To work: 10%
- To study: 9.1%
- Just to walk around: 12.5%
- Travel through: 18.2%
- Eating: 5%
- Volunteer for the church: 5%

5. What items do you typically purchase?

- Food & Drink: 42%
- Beauty: 12.5%
- Household Items: 9.1%
- Finance: 18.2%
- Clothing: 5%
- Books/ Newspapers: 20%
- Travel/ Entertainment: 5%

6. How much money on average do you spend each trip?

- £10-20: 45%
- £20-50: 30%
- £1-10: 20%
- £50-75: 5%
7. What do you think about the closure of the shopping centre?

<table>
<thead>
<tr>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>A total disaster.</td>
</tr>
<tr>
<td>Dialogue is necessary between the Latin American business owners so they have a voice and say in the regeneration project.</td>
</tr>
<tr>
<td>Bad news really!</td>
</tr>
<tr>
<td>Don’t tell me they’re closing it! It’s really bad, I like this place not much here but it is where we meet friends and do our shopping.</td>
</tr>
<tr>
<td>Shocked! That's a nuisance, where will we shop then? This is OUR shopping centre, I don’t know what I will do then! So where will I go then?</td>
</tr>
<tr>
<td>I think it’s nice, don’t think it should be shut down it is a nice place to walk around, it's alright!</td>
</tr>
<tr>
<td>It'll be just bars and restaurants, that people won’t be able to afford! I don’t think it should be knocked down, people will lose their business, and it'll be for rich people. I won't be able to afford it. It's going to be fancy restaurants for city people.</td>
</tr>
<tr>
<td>I have my own business so not good for me,</td>
</tr>
<tr>
<td>It's going to be different. I don’t know what I will to 3-4- years is too long. I didn't know about the closure, this is bad.</td>
</tr>
<tr>
<td>I didn't know it was going to close.</td>
</tr>
<tr>
<td>I think it’s disgusting.</td>
</tr>
<tr>
<td>No opinion</td>
</tr>
<tr>
<td>Would affect me because not much shops where I live. I used to travel further.</td>
</tr>
<tr>
<td>No idea</td>
</tr>
<tr>
<td>Lots of people like it. I don't know where people would go otherwise! No idea!</td>
</tr>
<tr>
<td>I don't think it is right. Keep it like it is until it gets really old.</td>
</tr>
<tr>
<td>Bad as it has much potential that has never fully been realised.</td>
</tr>
<tr>
<td>Sad. Grew up in this area so have got used to seeing it.</td>
</tr>
<tr>
<td>It's a shame. It could be refurbished and encourage more local businesses in.</td>
</tr>
<tr>
<td>Awful news. The centre is the defining place of E+C.</td>
</tr>
<tr>
<td>Very upsetting, E+C is going to lose its character and not only that but a lot of people's future is uncertain now.</td>
</tr>
<tr>
<td>Terrible. The replacement options are retrograde. This is an incredible example of the dynamic nature of independent businesses when the right conditions exist to nurture these opportunities, opportunities that cease to exist when large landlords (PLC) control property, terms and conditions.</td>
</tr>
<tr>
<td>It would effect a lot of people but if the new one would be modern it is worth it.</td>
</tr>
<tr>
<td>Will be good. Students hence Iceland etc., but less dingy. Shops would stay the same, maybe more students and shops (e.g. Topshop and off license)</td>
</tr>
<tr>
<td>Coming here only for Tesco. Boots, not even going upstairs. Shopping centre is essential but the shops can change. A cinema would be good.</td>
</tr>
<tr>
<td>It is better if another one would be built.</td>
</tr>
<tr>
<td>I'm not really bothered, I just want to get out!</td>
</tr>
<tr>
<td>It is perfectly fine!</td>
</tr>
<tr>
<td>Bad for people who come to the shopping centre and it might take long time (longer than few years) where will people go? Pound shops, groceries, they are essential,</td>
</tr>
<tr>
<td>It's a huge shame! You know you meet your friends, it is near for pensioners, shame really! I really like it!</td>
</tr>
<tr>
<td>It is a sad thing, it is a disposable to the culture.</td>
</tr>
<tr>
<td>It is something really bad.</td>
</tr>
<tr>
<td>Catastrophic!</td>
</tr>
<tr>
<td>It is not good for the multiculturalism.</td>
</tr>
<tr>
<td>Extremely dangerous for the local community.</td>
</tr>
<tr>
<td>Bad sign for the community.</td>
</tr>
<tr>
<td>Is something really bad, we are less of London people travelling here every day.</td>
</tr>
<tr>
<td>It is very important for our community, this one is very important we need to maintain and keep this.</td>
</tr>
<tr>
<td>Very bad. Where are we going to meet?</td>
</tr>
</tbody>
</table>
Very bad, it is the only shopping centre in the area. I find everything here.
It is a shame, we love this shopping centre.
Would be a big mistake.
A terrible thing.

8. What do you think would improve the local area?

More security.
The local area would be hugely improved by more visibility of the Latin American community in various areas surrounding the E+C area.

Some gardens and parks.
We got everything, I think it’s more about sport facilities, maybe like in Camberwell (hopefully a swimming pool).

It's alright, no problems.
More security, I lost my ID here and it couldn't be found.
More entertainment, more activities, I really like this place.
Business is quite good, maybe a Primark is needed to entice people.
A sports centre and a library.
Make social events and better shops.
New investment, less council houses, less poor people. I hate here.
More clothing shops.

Needs cleaning up.
Less security men! Too much security guards, otherwise it is fine.
Improved housing for local people to maintain character and community.
Affordable housing but 'affordable' as we understand it and not Southwark Council!
More international representation, continuation of Latin stores restaurants and facilities.

I think more shops and security.
Community engagement/steering. One of the best things about the centre is the way in which migrant communities have taken ownership and organically developed their businesses and created growth/jobs and opportunities for the Borough

No clear directions, hard to find where to go.
Needs a lot of work outside. Shops are fine but the building is dingy. Security is a big issue (stabblings).
The market outside is dodgy, afraid to go there in the evening. Safety for bicycles.
It looks dirty, needs more cleaning, more colour.
When the regeneration is done the centre would be more modern but the outskirts will be the same I don’t think you can improve here. I hate it here, I have to come. The people fight too much, arguing.
To demolish the shopping centre and build a new one. It looks terrible, the façade is terrible, out, outdated and dirty.

Nothing special but nice.
They are taking down all the houses, throwing away people, it was better. People I knew had to move out, my friends and family.
I think its nice like this, you got the pound shop, you get restaurants that are really nice. They should leave it as it is.

It is very important to socialise.
More investment.
More union.
More polish shops
The government has to improve the conditions for business
The council has to improve road safety, especially for cyclists.
Anything, more Ecuadorian local shops
Less noise, more tranquillity
More local Dominican shops
More Dominican shops
To keep and maintain the Latin culture.
More investment in the local community.
More security.

### Other comments

This is one of my favourite parts of London and the locals deserve to benefit from the changes and plans for regeneration.
We need an outside public space in the outdoor air, in a park where we can have more cultural and artistic activities.
I love how diverse Elephant and Castle is. I believe we should have more festivals to celebrate cultures!
The development of Elephant and Castle for the Latin American community that are here for more than 30 years already for the just reason that we are taken into account and we are given local space to develop and hold events and that way the development of Southwark will be much bigger, better and strengthen the community.
Immigration is the way of the modern world and Latin Americans are a big part of it here. Let’s all get used to it and move on to make it a success.
I'm all for it, it's a great idea!
We are missing banks and an information kiosk.
That the Latin community becomes more united.
I love Carnaval del Pueblo, it is the best of the Latin American community.
I love Carnaval del Pueblo and it would be great to see new ways to celebrate Latin American cultures in the UK. Latin Elephant sounds like a great idea!
More security is needed on this site.
APPENDIX 4

LATIN ELEPHANT’S FEEDBACK TO NEW SOUTHWARK PLAN
Latin Elephant welcomes the opportunity to provide feedback on the New Southwark Plan.

Latin Elephant is a Charity working with the community of Latin American retailers in Elephant and Castle. As a charity we aim to promote the inclusion of Latin Americans in regeneration initiatives across London. We do this by influencing infrastructure, increasing awareness and use of public spaces where Latin Americans are often underrepresented, and encouraging inter and intra-community integration.

Latin Elephant advocates for a more inclusive understanding of urban policy in London and as such we promote the contribution that migrant and ethnic communities make to London’s diverse economies and cultures. Latin Elephant’s policy recommendation to the London Plan on the importance of migrant and ethnic economies was acknowledged and adopted in the Further Alterations to the London Plan (FALP2014 - details below).

The feedback to NSP includes reasoned justifications for supporting migrant and ethnic retail in Southwark and why we deemed this to be an important component for inclusion in the New Southwark Plan. We also offer recommendations and feedback to specific policies on ‘business, employment and enterprise’ and ‘Town Centres’ by drawing on our recent consultation and work with retailers and community groups in the area. We hope to see these points addressed and taken into consideration when reviewing the proposed Plan for Southwark.

GENERAL INCLUSION ON SUPPORT OF MIGRANT AND ETHNIC ECONOMIES IN NSP

Latin Elephant would welcome a section in the NSP that acknowledges and expresses its support and intention to protect Southwark’s existing migrant and ethnic economies. This is particularly relevant if considering that Southwark’s migrant and ethnic population accounts for up to 60%. Latin Americans account for approximately 10% of Southwark’s population according to the 2011 Census. Also, a high proportion of the shops at Elephant and Castle, Walworth Road, Old Kent Road are or cater to Southwark’s migrant and ethnic population.

Supporting specialist ethnic and migrant retail is relevant for regeneration schemes across London and a pertinent policy aspect which we outlined in our response to FALP2014 (see references below). To sum up:

- Ethnic minority businesses contributed to an estimated £25 - £32 billion to the UK economy annually (Regeneris 2010).
- Service provision and access to government advice for EMBs is not reaching all (Department for Communities and Local Government, 2013)
• More needs to be done to make sure people from all backgrounds can achieve their aspirations of starting up a business (Department for Communities and Local Government, 2013).

• Failure to encourage business start-ups by ethnic minorities in the UK is costing the UK economy approximately £8 billion annually.

COMMENTS AND RECOMMENDATION ON NSP (Recommendations are highlighted in green)

Chapter 3: Revitalised Neighbourhoods – Elephant and Castle section

The description of Elephant and Castle’s ‘positive and distinctive character’ should include a point that stresses the importance of existing business clusters, such as the Latin Quarter. For example, our research found out that there are 80 Latin American businesses in the EC area, each employing on average between 1-5 people, and attracting large number of visitors and customers to the area.

We recommend adding the following points (to be in line with the description for Walworth Road):

We will continue to support the local economy and protect and promote the local migrant and ethnic economies of Elephant and Castle during and after the regeneration programme.

We will continue to support the ethnic and cultural diversity of Elephant & Castle during and after the regeneration programme.

Strategic Policy 5: Maintaining and enhancing the local economy

We welcome this policy, however we feel that the policy does not mention how existing businesses contribute to a strong local economy and to future development. To address this point we suggest the following changes:

‘The local economy will be strengthened by protecting existing businesses and providing them opportunities to grow, and through development that provides new jobs and which creates an environment where businesses, including small and medium sized enterprises (SMEs), can thrive. Southwark will be a place where local people and businesses benefit from opportunities generated by development, through active engagement in new proposed schemes and opportunities to contribute to their delivery through local supply chains.’

DM22: Railway arches (outside the Preferred Industrial Locations)

We feel that this policy should recognize the importance of existing business clusters in railway arches such as Latin Quarter. We recommend the addition of a new paragraph to address this point:
DM 22.4 Well established business clusters in railway arches will be protected and enhanced where necessary through walking and cycling routes, shop front and public space improvements.

DM23: Small business units

We feel that this policy does not protect existing small businesses affected by regeneration programmes at Elephant and Castle, particularly those which are threatened by regeneration as a direct result of being in a designated Opportunity Area (and thus needing to relocate due to re-development of existing sites and buildings). It is not clear that small businesses in Central Activity Zones, Opportunity Areas, Core Action Areas, Town and Local Centres, Strategic Cultural Areas, Camberwell Action Area will be protected. To that effect we would suggest adding the following text to DM23 policy text:

‘Southwark will protect and encourage business and commercial floor space to meet the needs of small and medium sized enterprises in Central Activity Zones, Opportunity Areas, Core Action Areas, Town and Local Centres, Strategic Cultural Areas, Camberwell Action Area.’

We would also like to recommend adding the following point or one with similar wording:

DM23.3 Proposals for redevelopment of commercial buildings and spaces should allow current tenants the first choice to bid or tender for business units in the new developments. The bidding process should be open to current tenants and existing local independent businesses for the first 18 months after which period an open call could take place.

To protect small business units and in response to Key Question 13 in the NSP Options version regarding affordable business space we would welcome a statement that sets levels of rent value as affordable and quantity of affordable space in relation to the size development site. The wording for rent value could be similar to what is currently approved in Southwark’s Supplementary Planning Document: ‘40% below market rate averaged over a 5 year period’. The wording for quantity of affordable space could follow similar wording to that in policy DM24.1 – 24.3

DM24: Access to employment and training

Latin Elephant welcomes this policy, and we would like to highlight other areas of employment and training outside of the construction sector. Our experience with Latin American retailers at Elephant and Castle highlights the needs and aspirations of existing business to be sustainable and capable of growing alongside the regeneration projects scheduled in Elephant and Castle. Regeneration offers opportunity for growth and with the right mechanisms in place existing migrant and ethnic economies and small and micro
enterprises in the area can continue to thrive and contribute to the area’s economic growth, vibrancy and cultural diversity.

Drawing on our experience with Latin American retailers at Elephant and Castle we would like to highlight areas of need for existing small businesses which we would like to see address in this policy:

**Business support and access to finance for migrant and ethnic businesses** - In London most business start-ups are from ethnic minorities, yet it is this group the one that is missing out on opportunities for growth and access to finance.

**Services to business could be part of a holistic training package or programme for existing businesses wishing to grow and expand and for start-ups.** This should include language support, capacity building, one to one business development sessions, employment law, training and access to finance.

**DM25: Town centres and important shopping parades | DM26: Local shopping parades and small shops**

In response to key question 16 - Latin Elephant would like to see further development, improvement and investment in the Latin Quarter at Elephant and Castle. Investment in enhancing the identity, character and public realm around the quarter is welcomed and needed to attract more visitors to the Elephant and realise the economic potential of the Latin Quarter.

In response to key question 17 – **Elephant and Castle’s Latin Quarter should be included in the list of protected shopping parades** as it fits the definition of shopping parades. In particular along the railway arches in Elephant Road and Eagles Yard. Our research has proven that the Latin Quarter is an important economic business cluster in the area that is highly valued by local residents and visitors alike. These businesses make the area feel safer, vibrant and has made of the Elephant a better place to live, work and visit.

Multi-shopping centres, small units within larger premises is a popular business model developed by many small local businesses in the borough. This can be seen along the Arches in Elephant Road and Eagles Yard, and in New Kent Road and Old Kent Road. This model developed as a strategy to deal with rising rent and business rates cost and has the potential to act as a start-up incubator for EMBs and generally an attractive model to small business. These units can often accommodate a variety of uses which is very valuable to customers and aspiring entrepreneurs. We feel that this **modular business model (usually within larger premises) should be encouraged and supported through planning processes.**

**Strategic Policy 8: Encouraging flexible community uses**

Latin Elephant welcomes this policy and recommends adding to better describe the diversity of sectors that could benefit from such developments:
‘Opportunities for community activities will be increased by encouraging accessible development that is capable of being used by community groups, charities and other support organisations. Facilities will be located and designed in such a way as to complement and support different groups.’

Latin Elephant welcomes this policy and would like to see a stronger commitment by including a clause about the affordability of such spaces.

**DM42: Local character**

We feel that this policy should make a direct reference to the ethnic and cultural character of areas. Places are more than just buildings, architecture and materials. Local character should be wider than physical characteristics to include ethnic and cultural character.

‘Southwark’s places will continue to have unique local, ethnic and cultural characters. This will ensure that the neighbourhoods and areas that benefit from a positive local character and have a distinct sense of place are well managed, and places with poor or mixed character are improved.’

**DM43: Public realm | DM44: Public art | DM47: Shop fronts**

Latin Elephant welcomes these policies as many of these features were identified in our recent consultation with Latin American retailers. The results of this consultation has been published as a report: *Latin Quarter: Elephant & Castle Community Vision* - http://latinelephant.org/wp-content/uploads/2015/02/Draft-report-Jan-2015.pdf

**MIGRANT AND ETHNIC ECONOMIES IN FALP2014**

Latin Elephant made an important intervention and policy recommendation about the disconnect between urban policy and migrant and ethnic economies in the London Plan in the recent FALP2014. One of our policy recommendation (adding point vii to policy 4.8.g) was adopted as a result of the evidence we presented: https://latinelephant.files.wordpress.com/2014/09/eip_presentation_le_2014_09_11_final1.pdf

Change in London Plan (page 147 policy 4.8.g.vii): https://www.london.gov.uk/sites/default/files/FALP%20ITP%20changes%2015%20December%202014.pdf
APPENDIX 5

STUDIO GIL

PUBLIC REALM PROPOSAL
Public Realm
Elephant Road and Eagle’s Yard
London Borough of Southwark

Client: Latin Elephant
May 2015

DESIGN PROPOSAL

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ELEPHANT & CASTLE SHOPPING CENTRE

REDEVELOPMENT OF HEYGATE ESTATE

ELEPHANT ROAD

TEMPORARY PARK & TEMPORARY BUILDING

REDEVELOPMENT OF HEYGATE ESTATE

EAGLE’S YARD

SITE LOCATION OF ELEPHANT RD AND EAGLE’S YARD
KEY

01 Marker: Elephant Rd + Walworth Rd
02 Link: Railway Station + Temp. Park
03 Marker: Elephant Rd + New Kent Rd
KEY

01 Limit vehicle access
02 High density pedestrian traffic
03 Limit vehicle access
01 Connection: Arches + Sidewalk
02 Activate linkages via Elephant Rd
KEY

01 Opportunity to upgrade arch shopfront
02 Break-out space in front of arch
03 Identity through designed signage
04 Floor surface to delineate entrance
05 Raise street level to pavement level
06 Street furniture to replace bollards
KEY

01 Datum 1: Floor surface
02 Datum 2: Seating height
03 Datum 3: Door height
04 Improved shopfront
05 Visible vibrant signage (identity)
06 Lighting integrated into shopfront
07 Floor surface to delineate entrance and draw pedestrians into arch
DESIGN PROPOSAL FOR STREET FURNITURE

Bench + Street Light + Bin + Signage = New Furniture Cluster to replace existing Bollards

KEY
01 Street lighting
02 Signage
03 Timber bench [Winter]
04 Concrete bench [Summer]
05 Bin
06 Soft landscaping
**KEY**

- 01 Art project as marker (local artist)
- 02 New signage / lighting (identity)
- 03 New welcoming shopfront
- 04 Street furniture to replace bollards
- 05 Pattern of floor surfaces (level access)
ELEPHANT ROAD: EXISTING PART PLAN

KEY
01 Obtrusive street lighting
02 Unwelcoming shopfronts
03 Cluttered waste bins
04 Bollards forming barrier
05 Loading bays for cars / vans
06 Kerb prohibits level access
KEY

01 Art project as marker (local artist)
02 Street furniture to replace bollards
03 New welcoming shopfronts
04 New Concrete Paving
05 New Resin Bound Gravel
06 New External Grade Timber Decking
07 New Soft Landscaping
KEY

01 Obtrusive street lighting
02 Irrelevant advertising
03 Cluttered motorbike parking
04 Bollards forming barrier
05 Loading bays for cars / vans
06 Kerb prohibits level access
KEY

01 Art project as marker (local artist)
02 Street furniture to replace bollards
03 Pattern of floor surfaces (level access)
04 New welcoming shopfronts

*Yellow denotes positive changes
KEY

01 Obtrusive street lighting
02 Irrelevant advertising
03 Waste bins clutter sidewalk
04 Bollards forming barrier
05 Kerb prohibits level access
06 Loading bays for vans / trucks
**KEY**

01 Art project as marker (local artist)
02 New Signage / Identity
03 Pattern of floor surfaces (level access)
04 Floor surfaces delineate entrances
05 Street furniture to replace bollards
06 New welcoming shopfronts
07 Art project as marker (local artist)

*Yellow denotes positive changes*
KEY

01 Signage with no impact
02 Unwelcoming shopfronts
03 Bollards forming barrier
04 Kerb prohibits level access
05 Loading bays for vans / trucks
06 Opportunity for art project
**KEY**

01 New welcoming shopfronts  
02 Floor surfaces delineate entrances  
03 Art project as marker (local artist)  
04 Pattern of floor surfaces (level access)  
05 Street furniture to replace bollards

*Yellow denotes positive changes*
KEY

01 Unused street furniture
02 Opportunity for new paving
03 Vehicle barrier
04 Bollards forming barrier
05 Kerb prohibits level access

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KEY

01 Street furniture to replace bollards
02 Connection to temporary park
03 Pattern of floor surfaces (level access)

*Yellow denotes positive changes
**KEY**

01 New welcoming shopfronts
02 Street furniture to replace bollards
03 Improved lighting design
04 Art project as marker (local artist)
05 Pattern of floor surfaces (level access)

*Yellow denotes positive changes*
KEY

01 Opportunity for art project
02 Obtrusive street lighting
03 Kerb prohibits level access
04 Opportunity for new paving
05 Opportunity for art project
06 Obtrusive street lighting
07 Irrelevant advertising
KEY

01 Art project as marker (local artist)
02 New Signage / Identity
03 Pattern of floor surfaces (level access)
04 Floor surface delineates entrance

*Yellow denotes positive changes
KEY

01 Graffiti
02 Opportunity for art project
03 Advertising opportunity
04 Badly designed signage
05 Badly designed service ducts
06 Unwelcoming shopfronts
07 Opportunity for new paving
KEY

01 New Signage / Identity
02 Art project as marker (local artist)
03 Floor surface delineates entrance
04 New Signage / Identity
05 New welcoming shopfronts
06 Pattern of floor surfaces (level access)
01 Obtrusive street lighting
02 Badly designed service ducts
03 Irrelevant signage/advertising
04 Unwelcoming shopfronts
05 Bollards form barrier
06 Kerb prohibits level access
07 Waste bins clutter sidewalk
KEY

01 Street furniture to replace bollards
02 Art project as marker (local artist)
03 New welcoming shopfronts
04 Floor surface delineates entrance
05 Pattern of floor surfaces (level access)

*Yellow denotes positive changes*
KEY

01 Badly designed lighting
02 Unwelcoming shopfronts
03 Irrelevant signage/advertising
04 Waste bins clutter sidewalk
05 Parking for motorcycles
06 Bollards form barrier
**KEY**

01 New pattern design (identity)
02 Seating integrated into shopfront
03 New welcoming shopfronts
04 Floor surface delineates entrance
05 Pattern of floor surfaces (level access)

*Yellow denotes positive changes*
Acknowledgements

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