

Asian Entrepreneurs in Australia

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A Report to the Office of Multicultural Affairs

Executive Summary

Chapter 1 It has been demonstrated that small businesses established by those born overseas have lower rates of failure and more sustained growth than the norm. Yet until the last couple of years almost no research had been done, in this country, on the motivation of these independents, on what strengths and resources are leading to the apparent success of their businesses, on the contributions they are making to the economy and on the problems they face and how these might be tackled by enlightened policies.

In Europe, Britain and America there has been substantial research in the last decade, seeking to explain why some immigrant or minority groups, such as Indians and Pakistanis in some parts of Britain, or Chinese, Koreans, Jews, or Cubans in the United States, have had high rates of business involvement and success while others, such as West Indians in Britain, or native Blacks or Irish in America have had much lower rates. A considerable debate has raged, with one view stressing that the main focus should be on the opportunity structure of the economy, and also on the blocked access to desirable alternatives, resulting from discrimination. An alternative view has emphasised the culture and motivation of the entrepreneurs themselves.

The most fruitful theoretical model seeks to

analyse the interaction of structured opportunities with the particular personal and communal resources of the ethnic group, including both those resources rooted in its culture and history and those which are developed within the new country, in response to the circumstances it has to face.

A third factor, which emerges as of significance in the current study, but which features in only a few overseas writings, is the contribution to business success made by continuing links with the countries of origin of migrants, in terms of privileged access to new skills being developed there and to knowledge and contacts useful for trade.

The present study has chosen to focus primarily on the Chinese in Brisbane, mostly quite recent arrivals, with a very high level of business involvement. The Chinese come from a wide diaspora of countries, throughout a region which is crucial for Australia's future. The third factor mentioned above, that of ongoing useful contacts with the countries of origin, should be relevant in their case if in any. Indians were chosen for comparative purposes because, despite similarities in the timing of their arrival and their regional diaspora origins, census data shows them to have below average proportions of independents in the labour force. A smaller number of interviews were also carried out with members of both groups in Sydney.

The origins of both Indian and Chinese business in Australia can be traced to the gold rushes and the indentured labour schemes of the 19th century. A shrinking but determined residue survived through the White Australia period in narrowly specified niches, for which immigration exemptions were granted, most often, for the Chinese, in restaurants, cafes and take-aways.

The 'permanent commuters' who owned and worked in these were obliged to keep their families overseas, from generation to generation. Only since 1956 have they been able to bring out their immediate families, providing at last the resources for business development and growth. Only in the last two decades has there been new immigration of these groups, seeing now a rapid growth and diversification of these business communities, using the existing structurally constrained niches as their initial launching pads.

Chapter 2 For the first and probably the last time the 1986 census included a question on 'ancestry'. This makes possible the construction of a profile of such diaspora groups as Chinese and Indians, who have come to Australia from a wide variety of source countries, and also include native born groups going back several generations. In descending order the main birthplaces of the Chinese in Australia were: Australia, Malaysia, China, Vietnam, Hong Kong, Singapore, Indonesia, Kampuchea and Timor. For Indians the main birthplaces were India, Australia, Fiji, Africa, Malaysia, UK and Ireland and Pakistan.

In both cities the two groups had more in both the upper and lower occupational categories, and fewer in intermediate ones than did the employed population as a whole, but manual workers were a minority in all four cases. There was little residential concentration of either group in either city. A substantial majority of both groups live outside any areas of ethnic concentration, and there are very few parts of either city in which none were to be found.

Both groups in both cities, but particularly the Indians, were more highly qualified than the total population. A comparison of the numbers of qualified people and of the numbers in occupations normally requiring qualifications does not indicate massive or widespread downgrading and non-recognition. The existence of pockets of blockage is however suggested. The data suggests that both groups may be, on average, better qualified for the positions they hold than are mainstream

workers.

While Indians had lower than average proportions of independents (employers and self-employed) and Sydney Chinese resembled the population as a whole, Brisbane Chinese had exceptionally high independence rates. Ward has suggested a regional typology in which a 'middleman minority' area is one where a group has a high proportion of independents, a low proportion of manual employees and businesses oriented mainly to supplying mainstream end users. Chinese business in Brisbane seems to fit this model easily while that in Sydney does so more narrowly.

Length of residence and country of birth are strongly related to independence rates. However standardisation by these factors tends, in fact, to strengthen considerably the contrast between the cities and to reveal that it also exists, to a lesser extent, amongst the Indians too. For example, while 8 per cent of Chinese born in China and Taiwan, and resident under five years, are independent in Sydney, the comparable figure in Brisbane is 37 per cent. While 22 per cent of those born in Hong Kong and Macao and resident over 10 years are independent, the comparable figure for Brisbane is 48 per cent, and while 6 per cent of Chinese in Sydney born in Vietnam and resident between five and 10 years are independent, the Brisbane figure is 17 per cent. For the Indians there are generally smaller differences but in the same direction.

A thumbnail sketch of the four business communities shows the largest Chinese birthplace groups in both cities to be China and Taiwan followed by Hong Kong and Macao, with Malaysia and Singapore forming the third largest group. Amongst the Indians, India itself is the largest birthplace, followed in Sydney by Sri Lanka and in Brisbane by Fiji. Migrants who arrived within the previous five years are noticeably more important for the Brisbane than the Sydney independent Chinese and slightly more for the Indians. All four groups have a substantial component of independents with under 10 years residence, over a third in all

cases and nearly half for the Brisbane Chinese.

While professionals in the four groups have similar tendencies to become independent, the pool of available professionals varies substantially. As a result there were more independent professionals amongst the businesses in Sydney than in Brisbane and amongst the Indians than the Chinese.

Industry figures show the main fields of Chinese business are retail trade (including take-aways), restaurants, wholesale trade and property and business services and health. These industry subdivisions account for 80 per cent of Brisbane independents and 73 per cent of those in Sydney. Amongst Indians health, retail and property and business services head the list.

The 1986 census may provide unrepeatable data, but much of it is already out of date. Since then the massacre in China and the coup in Fiji have provided new incentives for those oriented to business, along with others, to come to Australia, and the business migration scheme has provided the means for a proportion of these. That the relative strength of the Brisbane Chinese business sector seems likely to have been reinforced recently is indicated by Department of Immigration figures for migration between 1986 and 1990. The proportion coming to Queensland, in all but one of the migration categories, is less than its share of the total Australian population would lead one to expect. The exception is business migration in which it is over-represented. While 11 per cent of all migrants to Australia from the four clearly Chinese countries of China, Hong Kong, Singapore and Taiwan, have Queensland as their destination, this is the case for 18 per cent of the business migrants from these countries. While 50 per cent of migrants to Queensland from these countries are in the business category, this is true of only 30 per cent of those coming to Australia as a whole. Taiwanese are a very recent source country, with over 7000 coming to Australia since 1986. Three-quarters of these were business migrants and nearly a third of these were bound for Queensland.

Chapter 3 The survey team included three members with diverse contacts within both communities in Brisbane, and these were used as the starting points for a snowball approach based on personal recommendation from one interviewee to the next. This ensured a low refusal rate and a great deal of co-operation. In all 144 individual independents in 138 businesses were interviewed, including 104 Chinese and 40 Indians, 20 women and 124 men, 100 in Brisbane and 44 in Sydney.

The Brisbane snowball led into a variety of inner and outer suburbs, to people born in most of the major source countries indicated by the census. It included all migration categories and covered a range of business types and ages. We believe most important kinds of business experience in these two groups are represented. Sydney is a much larger and more complex situation but it was only possible to conduct a small number of interviews there and these were obtained from a more limited number of contacts. Most Chinese interviews were restricted to the Chinatown area, no business migrants were included and no Indian professionals. There is therefore no claim that this approximates to a representative picture of the Sydney communities. The major interest of this part of the study lies in the many features which were found to be common in both cities and which can be presumed therefore not to be peculiar to Queensland.

The survey can be compared on a number of dimensions with the Adelaide Italian independents studied by Lampugnani and Holton. It becomes clear that the Asian businesses are in many ways very different from the South European ones. While the Italians had largely been born in Italy or were a second generation born in Australia, the Asians had been born in a wide diaspora of countries, and had often migrated several times during their lives. Internal migration was also surprisingly large. Twenty per cent had moved to Brisbane after first living in other states, mainly because of business opportunities or the weather, while 16 per cent in Sydney had done so.

Education levels of both Asian business groups in both cities were extraordinarily high, with under a fifth of the Chinese and little over a tenth of the Indians having less than a completed secondary school education, and most having done at least some tertiary studies. This was in sharp contrast with the Adelaide Italians, 44 per cent of whom had not completed secondary school and only 15 per cent of whom had a tertiary education. The Asian businesses were somewhat smaller than the Italian, with three-quarters having under five employees (or none) and the largest employing 75 workers. Involvement by nuclear and extended family members in work, management and ownership of the businesses was very high and substantially greater than for the Italians, especially in Brisbane.

The experiences of the Asians and the South Europeans are rooted in quite different historical periods. While two-thirds of the Asians had arrived in Australia since 1975, this was true of only 5 per cent of the Italians. Nearly two-thirds of the Asian businesses had been established less than five years ago and only 4 per cent were over 20 years old. Among the Italians, only one-third had been set up within the previous five years and another third were over 20 years old. Sixty-five per cent of the Brisbane independents and 45 per cent in Sydney had a family background in independent activities, often in quite large businesses and rarely peasant farmers or workers.

South Europeans, often from peasant or working class backgrounds, came to Australia in the period when the factories were hungry for production line workers, in search of higher wages, with the hope of saving for a small business of their own. Non-manual European qualifications were refused recognition, and few who held them came or remained. The Chinese and Indians have come in a period of manufacturing decline. Their motives are not primarily economic, but rather fear of political changes or racial discrimination or a desire to get away from pollution and overcrowding and to find less competitive educational opportunities for their children. They have

substantial class resources, being well educated, often with qualifications from Australian or British affiliated institutions recognised here, and with experience in family business activities. Many bring financial resources with them and nearly half had expected to set up a business when they arrived.

Chapter 4 The past history of Chinese and Indians in Australia had been of narrowly prescribed and circumscribed opportunities. When immigration was recommenced the newcomers found in place a residue of prejudice and discrimination and a battery of obstacles to the recognition of overseas qualifications which had been formalised in the post-war period as part of the channelling of Europeans into factory jobs. Many of them were however well placed to evade these.

Altogether around a quarter of the survey had turned to independent activity because of blockages they faced as employees, unable to find work or work in their field or at a suitable level or else being blocked from further training or promotion. In 13 cases the difficulty arose from non-recognition of qualifications, sometimes causing extreme bitterness and sense of injustice and waste. In 14 cases it was attributed to discrimination on grounds of race or accent or of age or gender. In six cases it was caused by a general lack of work in their field, in a period of closures and redundancies. Only a quarter of those with qualifications from outside Australia or other English speaking countries were making any use of them in the business.

The origins of most respondents, however, in countries that had been part of the British empire, had given them a schooling which provided access to recognised courses and qualifications. A quarter had indeed originally come to Australia as overseas students. Altogether, in both cities, 52 had Australian qualifications or schooling and another 14 had obtained them in other English speaking countries (UK, NZ, USA, South Africa). While some of these had suffered discrimination in employment, there were generally no obstacles to them using their skills in their own practices

and businesses. A large majority of the professionals relied heavily on mainstream patients and clients, but reported nonetheless that they were doing very well, and had few problems.

In Australia they found some ready markets in which they would have an advantage over mainstream providers. Their own ethnic community provided demand for mainstream goods and services translated or modified to their own tastes and needs or for authentic specialities not normally available from mainstream providers. Some of the most prosperous and fastest growing enterprises were targeting co-ethnic businesses as customers. Nonetheless only 16 per cent of the Brisbane independents relied entirely or mainly on co-ethnic custom. In Sydney the proportion was significantly higher.

Another privileged niche lay in the provision of ethnic products to mainstream customers. While this sometimes overlapped with the last category, often these had to be so modified to suit mainstream tastes as to make them largely unacceptable to co-ethnics. About two-fifths of businesses, similar in both cities, were in this group. In Brisbane, two-thirds of these were restaurants and take-aways.

Restaurants were the original permitted niche for the Chinese in White Australia, and most of the current owners had themselves first been employees in other Chinese restaurants, which in turn would often have been able to trace links back to that period. Nearly 30 per cent of the Chinese businesses in Brisbane were restaurants or take-aways, and their significance as an articulated core of the community's economy was unique. They provided employment for students as casual waiters and for new arrivals as kitchen hands. Those who learned on the job could progress to well paid jobs as chefs. They provided relevant experience and sometimes direct assistance to employees who sought to set up independently and then a ladder, from the low capital requirements of a take-away up to a large city restaurant with 40 or 50 employees or a chain of suburban branches.

They provided a market for wholesalers and container manufacturers and vegetable growers, and contributed to the turnover of estate agents and interior designers. Over half of the Chinese respondents had been affected by this sector at some time, through owning a restaurant, working in one or supplying them or through close relatives who had done so.

The original niche developed enormously in numbers and sophistication, with an explosive growth rate in the late 1970s and early 1980s. In the last few years however the demand for Chinese food seems to have reached a plateau. Some had turned to other Asian cuisines such as Malaysian, Thai or Korean. Many however were looking to other fields for their own or their children's future. Under a fifth of the businesses set up since 1986 were restaurants compared with over a third before that date and while a fifth of the restaurants hoped for expansion in coming years, this was true of half of the other Chinese businesses.

Small firms may be squeezed out and excluded, sponsored or assisted by banks, landlords or large firms. Most of the Brisbane survey firms were, however, not significantly affected in either way. Although only a third had obtained start up capital from Australian banks, only 10 per cent said that obtaining finance had been a problem. They had had access to other sources in their own means and in those of relatives and friends. Rents and landlords were nominated as a problem by 9 per cent, although for a few of these, indeed, the insecure tenure, restrictive conditions and high rents or percentages of turnover, imposed by shopping centre owners, were seriously oppressive. Other locations were however available. Exporters complained of the monopolisation of supplies by large companies. There were a few cases of subcontracting and franchise holding, but most were felt to be mutually beneficial arrangements. Where this had not been the case, these independents had shown a clear will and ability to extricate themselves from the relationship. That these 'independents' were not only often successful, but also on the whole genuinely independent, owes as much to the resources they bring to

entrepreneurship as to the structures of the Australian economy and society.

Chapter 5 Obvious class resources of finance and business experience had been brought with them by many, especially of the Brisbane respondents, when they migrated. Thirty-six percent had used start up capital originating overseas. Nearly half had had prior experience as owner operators.

Some were direct branches or offshoots of family businesses in other countries. Altogether three-fifths had used some kind of overseas resource (money, experience, training, contacts) in setting up the business and over a third were continuing to draw afresh on these resources. At least as important as these for business success and expansion were distinctive modes of operating, rooted on the one hand in family co-operation, and on the other in personalised networks based on friendship and trust, which were not restricted to co-ethnics.

Eighty per cent of the Brisbane businesses made use of part or full-time labour by family members, three-fifths that of spouses and children still studying and over a third that of other extended family members (some used both). It is often alleged that the major resource of migrant business consists of such supposedly 'cheap' or 'unpaid' labour. This ignores the opportunity cost of the forfeited wages that the family member could otherwise be earning elsewhere and contributing to the family budget. The hours of work of children were in any case considerably restricted by the higher priority given to their educational success.

Very few respondents cited savings on wages as the advantage of family members as workers. Most emphasised that they were trustworthy and had a long term commitment to the business and were therefore willing to acquire the necessary skills. The difficulty of finding workers with these attributes is a major complaint of all small business owners.

A large majority of family members who worked full-time in the business were also partners,

generally involved in the decision making. They thus provided a managerial layer of greater weight and range of expertise than is available to most other small businesses. It was not unusual to find contributions from family members with professional qualifications. Few mainstream small businesses are able to make the transition to a structure of paid managers and supervisors. These Asian businesses were able to expand and diversify much further before hitting this ceiling. Of the 20 firms employing over 10 workers, only three involved paid managers, but 13 had extended family members as working partners. In fact there was a strong positive correlation between the involvement of extended family members and the number of employees, for both communities in both cities. Far from substituting for wage labour, the presence of wider family members made possible more job creation.

Contrary to stereotypes, Chinese and Indian family businesses provide a major role for women. Daughters and sisters, if they worked full-time, were often partners. Full-time wives usually participated fully in making decisions and often were autonomously responsible for particular branches or functions. Wives in about a third of the couples had a solo, primary or equal role in the business. Eighteen businesses in the survey had been started by a woman. Some interviews revealed very strong and entrepreneurial women, who made use of the relative autonomy provided to partners in a family business, to carve out a considerable degree of independence.

Apart from family ties, another resource for the business came from personalised, trust based networks which extended into the community and beyond, into mainstream society and overseas. Current literature suggest this kind of networking is spreading in a vanguard of innovative and flexible mainstream companies as well, as an alternative to the insecurity and short term perspectives brought on by purely contractual, market relations and to the sclerosis of rule bound, bureaucratic hierarchies.

It is thanks to these resources that the Chinese

and Indian businesses in the study showed an ability to establish successfully multiple, diverse activities and branches in rapid response to opportunities as they became available, and to exhibit a high level of innovativeness. Considerably more described themselves as 'growing and prospering' and expressed hopes for expansion in coming years, than in a 1986 study of all small businesses in Brisbane.

Chapter 6 There are generally believed to be major difficulties in small businesses engaging in exporting. Where, however, the exporters can plug into internationally linked trading networks of small and medium firms, and can leave the overseas side of things in the hands of locally based, trusted friends or relatives, such activities may seem easy and natural.

Over a quarter of Chinese and Indian businesses in both cities had engaged in exporting goods or services or were taking definite steps to do so. If we add those who were selling goods and services within Australia to visitors from overseas (tourists, students, business people on visits) the total rises to a third. Business migrants were prominent, but not exclusively so, in these ranks. In contrast, there was only one exporter among the 98 Italian businesses in Adelaide, studied by Lampugnani and Holton.

The resources described in the previous chapter go a long way to explaining this success. These ethnic groups frequently come from countries where many small and medium family businesses are successful exporters and where their communities, scattered in a diaspora across the region, have long established trading networks. Over a tenth of them had already been engaged in international trade before coming to Australia and some had simply transposed these activities here. Personalised, long term relationships with friends and relatives throughout the region provide continuing local knowledge and local agents.

About two-fifths of these export earners were primarily go-betweens, bringing together Australian sellers and overseas buyers, sometimes

just as agents, trawling the Australian scene for exportable products, sometimes as traders buying and reselling overseas. The remainder were more directly involved in producing the goods and services that were sold. Some had opened up quite new markets, while others were developing new products and innovative means and methods of production.

Although the resources of these groups fitted them better for exporting activities than most other small and medium businesses, they still have an uphill battle against an Australian economic environment which is unsupportive and incredulous of such efforts by anyone other than big business. One major problem was a lack of easy access to information about regulations, documentation and procedures. A multiplicity of different government agencies had to be approached and often lacked even the knowledge of where they should be referred. Another major problem was the seeming lack of interest of many (often monopoly) suppliers in entering new markets or dealing through unaccustomed channels or in relatively small quantities, even though these could grow much larger later. Shipping and handling cost structures were geared to bulk transport and their minimum costs were often prohibitive to those venturing, with small quantities, into new fields. Access to Crown land or water was beset with obstacles for those seeking, for example, to develop aquaculture or tree plantations. Australia was also often uncompetitive in price, even when compared with high wage countries like Italy and the United States, sometimes because relatively small quantities for unfamiliar buyers were not being given the discounts available to large established customers.

Despite an uphill battle, successes were being registered, although slowly and with what they felt were an unnecessarily high proportion of delayed or abandoned transactions. There is a belief current, both in the Chinese and general community, that recent business migrants do not intend to set up productive enterprises but seek to live on the proceeds of investments and property speculation. Several restaurant owners expressed this view, based on their observation

of those who spent hours each day sitting chatting over yum cha. One interviewee, a community leader and himself a business migrant who was living off investments, insisted that this was the norm. Among the 16 business migrants whom we interviewed he was the only one to whom this applied. While we were seeking people who did have businesses, not those who did not, and can make no estimate of their relative numbers, it is clear that those who are engaged in setting them up have little time to sit visibly in restaurants or to hold community leadership positions. While the option of an unproductive, rentier existence was clearly available to some of our respondents, many of these rejected it with surprising passion, as lacking self-respect, a neglect of one's duty to children and the country and as unbecoming and boring for anyone not yet approaching retirement age.

Chapter 7 This chapter focuses upon the determination of terms and conditions of employment. Greatest attention is given to Chinese restaurants, but contrasts are drawn with professional practices and manufacturing, construction and primary industry. The attitude of employers towards trade unionism is also considered.

Terms and conditions of employment are influenced by three factors. First, there are legally binding determinations of industrial tribunals. Second, in cases of high market demand employees can command remuneration above the award levels. The market can also push wages below award levels, a practice which, unlike over-award payments, is illegal. Finally, a 'community standard' operates in Chinese restaurants, based on expectations of fair and reasonable terms and conditions of employment. The norms are known and enforced, both between employers and employees, and among employers themselves.

The award serves as a basic reference point in the restaurant industry, with variations away from the award dictated by the market. Market pressure, for example, pushed chefs' wages well above award minimum rates. Community

norms also provided standards for the wages of chefs, as well as their hours of work. These norms served to prevent exploitation of employees in a weaker bargaining position, such as overseas students. A survey of students employed in Chinese restaurants provided some corroboration for the conclusion that standards acceptable in the wider society were not being frequently or seriously breached.

Some award non-compliance was found in Chinese restaurants. This is not unusual in the hospitality industry in general and the restaurant sector in particular. First, many employers are ignorant of their award obligations. Part of this is the result of the development of awards in a context with which small restaurateurs have little familiarity and usually no institutional relationship. Few restaurant owners belong to an employer association, and there is almost no unionization. Second, beliefs about reciprocity produced such practices as a 'training wage', which involved below award payments while a new employee learns the trade. Community norms appear to prevent these practices from reaching a serious level, and there was evidence that employees were willing to take matters into their own hands, either by finding other work or by notifying the relevant public authorities.

The occupational networks characteristic of Chinese restaurants were absent in other industries. Here the determination of wages and conditions was based upon the award, with over-award payments made where market pressure applied, such as in the Central Business District in Sydney. There was no evidence of a community standard. Employment relations in these other industries appeared to be no different to the situation applying in non-Chinese firms.

Contrary to common perceptions of widespread, strong anti-unionism among small business owners, attitudes towards trade unionism were mixed. Positive and negative orientations were held in roughly equal proportions, while most respondents were ambivalent in their views. Where negative

attitudes were held, most were based on a specific objection to union policy or practice, rather than on fundamental objections to collectivism.

Chapter 8 The overall findings of the study were positive to a degree surprising to the researchers themselves, trained in academic scepticism. A high proportion of the businesses studied were successful, innovative and export oriented, and few were tangled in dependency relations with banks, landlords or large companies. They provided jobs for new arrivals and training and experience which opened up options for self-employment at a later date. Their relations with their employees and their wages and conditions were no worse than in other small businesses and in some respects better. The role of women in these family businesses was substantial and often involved significant levels of responsibility.

Surprisingly, there were more similarities than differences between the Chinese and the Indians in these respects. The Indians, forming a much smaller and more selected section of their own communities, were somewhat more likely to rely on tight knit extended family solidarity than were the Chinese, and less on looser networks of trust and friendship extending widely into the ethnic community and beyond. They employed much co-ethnic labour and had relatively few co-ethnic customers. While the Indians included some of the most successful people interviewed, their success is less likely to transmit itself to business growth within their own communities as a whole.

Many features were common to both Brisbane and Sydney, particularly in tendencies to innovate, expand and export and to evaluate their own operations as successful. Common also was the high level of education and the tendency of professionally educated people to be drawn into a wider range of entrepreneurial activities; an inclination to diversify and to multiply activities and branches; a significant proportion of wives playing a primary or equal role in the business. The Brisbane respondents were more likely to come from an independent

family background and to have migrated with the intention of establishing a business. Their businesses were less likely to be oriented primarily to co-ethnic customers and clients. The Sydney respondents turned more often for partners to university friends and less to extended family members than those in Brisbane.

The relative importance of Australian structures of opportunity and blockage to these outcomes, compared with that of the individual and collective resources of ethnic independents themselves, has varied over time. During the White Australia period, immigration restrictions were overwhelming in preventing access to ethnic resources of family and community and in determining which businesses were allowed to survive. In the 1970s and 1980s, there was mutual reinforcement between the rapidly expanding demand for professional and restaurant services, in the economy as a whole, and the propensities and resources of these ethnic communities. With family reunion and renewed immigration ethnic resources could be brought to bear to maximise the advantage to be obtained from these opportunities.

In the present and future the situation is more ambiguous. The most recent growth area is in those activities oriented to exporting, either as go-betweens or as direct producers of goods and services. The ethnic resources are clearly available here and are producing some notably successful results. The inertia of Australian structures, in a society where there are few precedents or provisions for small exporters, is pulling in the opposite direction. The outcome may in part depend on government initiatives.