

Economic Transnationalism and Migration: Portuguese-American Entrepreneurship and Portugal

Carolina Marçalo and João Peixoto
SOCIUS – ISEG/Technical University of Lisbon

Abstract. The main objective of this paper is to analyze economic aspects of transnationalism, particularly transnational entrepreneurship, in Portuguese-American communities—located in Massachusetts, Rhode Island, and New Jersey. Questions addressed in this study include the types of trade and investment that have developed under the frame of transnational ethnic businesses; the ties of Portuguese-American business owners to the ethnic market; and, alternatively, the expansion of businesses beyond the ethnic group. In addition, we also examine changes in business orientation from first to second and subsequent generations. We employ a predominantly qualitative methodology, including interviews and case studies. The main conclusions are that a) the ethnic characteristics of Portuguese-Americans are related to business development in the community and, particularly, to the creation of transnational ethnic businesses; b) the transition from the ethnic market to the mainstream American market and those of other ethnic groups is a condition for business growth; c) second and subsequent generations are associated with business modernization; and d) businesses can be oriented to both the mainstream and ethnic markets simultaneously.

Keywords. Economic transnationalism; international migration; ethnic entrepreneurship; Portuguese-American entrepreneurship; Portugal

The study of economic transnationalism involving migrants has been gaining attention in the last few decades among researchers and policy

makers, in both host and sending societies.¹ Economic transnational relations promoted by migrants are numerous and have become an important aspect of international economies. Although monetary remittances are still the most visible facet of this form of transnationalism, international migrants have become increasingly involved in other types of economic transactions. In addition to remittances, economic transnationalism includes transnational ethnic entrepreneurship, international trade, business investments (related or not to migration), and support for local community development projects (Portes, Guarnizo, & Haller, 2002; Guarnizo, 2003; Vertovec, 2003, 2004). Viewed in more detail, transactions may encompass remittances; the activity of money transfer agencies; government schemes to attract savings and investments from migrants in the sending country; ethnic trade in the host country; the activity of the cultural industry; telecommunications; and air travel, among others.²

Taken as a whole, the volume of economic activities generated by international migrants is now of significant dimension. In the context of globalization, migrants and diasporas are often valued by national governments for the valuable role they play in promoting economic linkages among countries. However, unrestricted optimism about migrant economic transnationalism has been eased, given that migrants' transactions still reflect unequal global relationships, and positive outcomes may only occur when the right institutional framework is in place (Skeldon, 2008).

The main objective of this paper is to research economic aspects of transnationalism in the Portuguese communities of Massachusetts, Rhode Island, and New Jersey. The focal subject matter under analysis pertains to transnational ethnic entrepreneurship involving the United States and Portugal. The economic dimension of migration in this context has seldom been addressed in the literature by either American or Portuguese scholars. Although many studies have been devoted to the Portuguese-American community, little is known about remittances to Portugal and about transnational ethnic trade and investments. For a country like Portugal, privileged economic ties with the United States, supported by the diaspora communities, could lead to significant economic gains. Hence, we attempt to make an initial, exploratory contribution to this area of study.

The research questions to be addressed in this paper are several: (a) are the economic transactions between Portuguese-American communities and their former homeland restricted to remittances or do they involve complex forms of trade and investment, particularly through transnational ethnic entrepreneurship? (b) is the transnational entrepreneurial activity of Portuguese-Americans mostly connected to the ethnic

market or is it expanding to the mainstream market, and, in the latter case, what are the reasons for change? (c) is the economic behavior of the first generation being passed on to the second and subsequent generations, or is it changing—given the higher level of education achieved by the latter?

The paper is organized as follows: In the first section, we review the main theoretical aspects of migrants' economic transnationalism, ethnic entrepreneurship, and transnational ethnic entrepreneurship. In the second section, we describe the research methodology employed in this study, and in the third section, we examine the main patterns of Portuguese immigration to the United States, as well as, the principal demographic and socioeconomic characteristics of the Portuguese-Americans, based on U.S. Census and American Community Survey data. The fourth section centers on case studies of six transnational ethnic enterprises. We analyze, in particular, how the characteristics and strategies of these businesses have been shaped by their linkages to social relationships and networks—as well as evolving market conditions—in the Portuguese-American communities and Portugal. Concluding remarks complete this study.

Theoretical Overview

Embeddedness in Social Networks

In recent decades, a burgeoning literature on migrants' economic transnationalism and diasporas has established that, in many cases, the economic success of migrants is related to their embeddedness in social relationships and networks within diaspora communities and the country of origin. As Portes suggests, social networks are “one of the most important types of structures in which economic transactions are embedded, because they are sources for the acquisition of scarce means, such as capital and information” (1995, p. 8). Through their social relationships and networks, migrants are better able to pool resources, transfer credit, and create investment (Cohen, 1997; Vertovec, 2004). Ethnic business owners may feel more comfortable with co-ethnics, thus giving them better access to business and employment opportunities, as well as sharing information and different types of resources.

The concept of embeddedness comes from the idea that economic actions and transactions are social in nature, and that social networks enrich the economic activity of their members. This concept was originally introduced by Mark Granovetter (1985), who proposed that—just like all other social actions—economic actions and outcomes are affected by the actors' social relations and by the structure of their overall network of relationships. More recently, Portes (1995) enriched

the concept of embeddedness by dividing it into two parts: “relational” embeddedness, representing personal relationships and “structural” embeddedness, signifying, the actors’ social interactions network.

The outcomes of embeddedness are complex and contradictory. On the one hand, social networks can provide easier access to resources, thus enhancing the possibility of economic success of their members; on the other hand, social networks can restrict their members from expanding outside the relationships built within the network. For immigrants, social networks are a means of survival in an unfamiliar society, although dependency on the network can also constrain their integration into the host society (Portes & Sensenbrenner, 1993).

The children of migrants, who do not face linguistic barriers, and who have higher levels of education than their parents, enjoy higher levels of access to business opportunities in the mainstream economy. However, economic opportunities within ethnic communities, according to Portes (1995), also play an important role for members of the second generations.

Migrants’ Transnational Economic Relations

According to Guarnizo, migrants’ “business investment decisions are embedded in a web of social expectations and obligations tied to their place of origin” (2003, p. 676). One of the most studied economic transnational transactions performed by migrants is monetary remittances. Diaspora residents connect to the home country by sending money to relatives. They perform this economic activity through banks, remittance agencies, and social networks. Remittances are used for consumption and, sometimes, for investments, such as real estate purchases. Migrants’ monetary remittances have become one of the most important private transactions in the global economy, at times surpassing the amount of monetary aid to underdeveloped countries (Guarnizo, 2003; Vertovec, 2004).

In addition to remittances, migrant communities create ethnic markets in the cities where they live. Migrant business owners use commercial trade and other types of business interactions to supply their community with products from the country of origin. In this process, migrants take advantage of their social networks and connections in their home country to achieve economic success in the host society. Consequently, social ties and relationships in the home countries are critical for the creation and survival of some types of immigrant businesses (Vertovec, 2004). Social networks within the migrant community are also important for the success of migrant businesses. Migrants recruit labour and raise capital directly from social networks within the community. Their transnational economic relations also call

upon multinational companies, including transportation and communication enterprises and financial institutions, to provide services needed for the operation of migrant transnational businesses (Guarnizo, 2003).

Ethnic Business and Entrepreneurship

Theories of immigrant and ethnic entrepreneurship are manifold, yet they tend to follow coherent patterns. According to Teixeira and Lo (2012), four main perspectives may be identified: (a) the “cultural thesis” that stresses the characteristics brought by immigrants to host countries, including ethnic and class resources, such as solidarity, social capital, culture, education, and skills (Light, 1972; Bonacich & Modell, 1980); (b) the contextual perspective, pointing out the importance of contextual factors, particularly economic opportunity structures (Waldinger, 1986); (c) the “interactive model” or “social embeddedness model,” stressing the interaction between group characteristics and opportunity structures, thus synthesizing the first and second perspectives (Light, 1972; Aldrich & Waldinger, 1990); (d) the “mixed embeddedness approach,” which enlarges the social embeddedness model to incorporate political and institutional variables (Kloosterman & Rath, 2001; Oliveira, 2007; Kloosterman, 2010).

Aldrich & Waldinger (1990) published one of the first comprehensive reviews of the relevant characteristics of ethnic entrepreneurship. Introducing the interactive or social embeddedness approach, the authors explained the development of ethnic business trends from the perspective of differential access to opportunity structures by specific ethnic groups, the characteristics of the groups, and emergent strategies. According to these scholars, “strategies emerge from the interaction of opportunity structures and group characteristics, as ethnic entrepreneurs adapt to the resources available to them, building on the characteristics of their groups” (Aldrich & Waldinger, 1990, p.130).

The contextual variability of ethnic entrepreneurship is better understood through the mixed embeddedness approach. This theoretical perspective, described by Kloosterman (2010) combines at the micro-level milieu of the individual entrepreneur, the meso-level characteristics of the local opportunity structure, and the macro-level institutional and political framework. Factors such as the importance of intra- and inter-ethnic networks, differential access to resources (such as labour, financing, and social capital), immigrants’ socioeconomic characteristics, the context of social reception, and specific business strategies are among the factors explaining why ethnic businesses emerge in some cases but not in others. The role of local and national institutions and policies must also be stressed. Given that public policy directed at the

operations of ethnic businesses may contribute to their success, local governments should view such policies as critical in the overall process of immigrant integration into the host society (Oliveira & Rath, 2008). Regardless of the theoretical evolution in the field, the embeddedness of ethnic economic actions in networks of social relations has been acknowledged from the beginning within this academic paradigm.

Scholars have not reached consensus on whether the degree of social network embeddedness (e.g., reliance on non-market mechanisms) is higher in ethnic or non-ethnic firms. Some scholars argue that over-reliance of ethnic firms on ethnic social capital results from the obstacles they encounter when entering the mainstream market. The competitive market disadvantages they face explain why owners turn to reciprocal and redistributive relationships (Valdez, 2002; Kloosterman, 2010).

Another topic debated within the literature is whether ethnic firms face different growth obstacles depending on their business orientation. Several scholars have found evidence supporting the idea that a predominant orientation to the ethnic market, as well as a privileged use of non-market resources, may compromise business growth. Evidence collected in different locations suggests that orientation to the mainstream market, as well as reliance on mainstream market resources (such as access to financial capital), is conducive to firm expansion (Valdez, 2002; Barrett, Jones, & McEvoy, 2003; Ley, 2006; Scott, Curci, & Mackoy, 2012).

Transnational Ethnic Entrepreneurship

Transnational ethnic entrepreneurship—or migrants' transnational entrepreneurship—is the combination of the two previous theoretical perspectives: migrants' economic transnationalism and ethnic entrepreneurship. Compared with the latter, the former is a relatively new field of research. Theories of migrant transnationalism have always identified the importance of transnational ethnic entrepreneurship, while theories of ethnic entrepreneurship have only recently discovered its significance (Guarnizo, 2003; Zhou, 2004).³

In a seminal paper, Portes et al. focused on transnational economic enterprises as one of the factors “with the greatest potential to affect the socioeconomic mobility of immigrant groups and their influence on the communities of origin” (2002, p. 279). In this study, the authors point out that sending remittances or visiting the home country are “the least novel manifestation of transnationalism” (Portes et al., 2002, p. 284). These practices “do not represent an alternative mode of economic adaptation, given that most persons engaged in them are still wage workers in the host society” (Portes et al., 2002, p. 284). The authors studied the impact and importance of entrepreneurship among Colombian, El Salvadorian,

and Dominican immigrants in the United States. The different types of transnational enterprises were identified as circuit firms (which transfer goods and remittances), cultural enterprises (involving daily contact with cultural goods such as newspapers, CDs, and videos from the migrants' home countries), ethnic enterprises (foodstuffs and clothing), and return migrants' enterprises. In Portes et al. (2002), transnational entrepreneurs are defined as business owners who travel back and forth at least twice a year for business purposes. They also depend on regular contacts with their home country for the success of their businesses.

The research carried out by Portes et al. (2002) points to a link between successful migrant entrepreneurs and high incomes, the acquisition of U.S. citizenship, and the preservation of a number of ties with the home country. A traditional assimilation approach to immigration would suggest that transnational activities are bound to disappear over time, as immigrants become better integrated into the host society. However, Portes et al. (2002) argued that since immigrant businesses rely on transnational social contacts, the relationship between the home and the host country will not necessarily disappear over time but could become stronger.

Transnational ethnic entrepreneurship provides a perfect illustration of the embeddedness mechanisms mentioned above. Vertovec (2003), for example, emphasized that transnational business networks are "empirically embedded" in the ongoing relationships between actors and businesses within the network. This idea suggests that embeddedness in shared social networks could benefit business owners who perform economic transactions within such networks, such as the trading of information and other valuable resources. Likewise, Yeung (1998) has suggested that transnational business networks are structured by social relations embedded within the network.

Research Methodology

To study the economics of transnationalism in Portuguese communities residing in the United States, we looked into what kind of economic and financial relations Portuguese immigrants maintain with their country of origin, including their commercial activities, investment, and business strategies. We also looked into the business organizations and economic transactions contributing to bridge-building between the United States and Portugal. Our research was limited by the fact that there are no official statistics and research on economic relations between the Portuguese communities in the U.S. and Portugal. Although the Portuguese-American communities have already been the subject of considerable research (see, for example, Baganha, 1991; Almeida, 1998; Ribeiro, 2000; Mulcahy, 2003; Scott, 2009), the economic dimension of

their transnational relations has not yet been subjected to any systematic enquiry.⁴

In addition to consulting bibliographies, official documents, and statistics, such as Bank of Portugal online databases, AICEP (*Agência para o Investimento e Comércio Externo de Portugal* or Business Development Agency), U.S. Department of Commerce, the 2000 U.S. Census, and the American Community Survey 2008–2010 3-Year Estimates, the main methodological tools used in this study were in-depth, semi-structured interviews, and case studies. During the months of May, November, and December in 2007, we conducted a total of 32 interviews with key informants from the Portuguese-American community. Our informants included university professors, community leaders, officials engaged in economic development activities, and representatives of Portuguese associations in the United States. We also interviewed five entrepreneurs from Massachusetts and one from New Jersey. In total, seven firms were studied, but only six were used for the purposes of this paper. Five of the businesses selected for this research are located in the cities of New Bedford, Fall River, and Chelmsford, in the state of Massachusetts, and one business (Seabra Supermarkets) is headquartered in Newark, New Jersey. According to U.S. Census data, a significant segment of the population in these cities is of Portuguese descent. The interviews were recorded, except for the initial exploratory and informal conversations with community informants.

In order to attain preliminary information concerning Portuguese American businesses linking the United States and Portugal in the aforementioned areas, our first targeted contacts were with members of the Portuguese community in the United States in Massachusetts and Rhode Island, two states in New England, that were associated with academic and economic institutions involved in transnational transactions. Some of the primary informants were academics and researchers from UMass Dartmouth and Brown University. In Portugal, there were contacts established with the Luso-American Development Foundation (FLAD) and AICEP for the acquisition of information pertaining to transnational economic, cultural, and political relations between Portugal and the United States.

The second set of contacts included the director of the *Portuguese Times* (a Portuguese-American newspaper in New Bedford); a city councilor from the city of Fall River; representatives of *Banco Espírito Santo*, a commercial Portuguese bank with subsidiaries in the U.S., in East Providence; representatives of a Massachusetts import/export centre (agency); the Presidents of the New Bedford and the Fall River Chambers of Commerce. These informants provided us with important information as well as contacts at local Portuguese-American businesses,

including the names of entrepreneurs conducting transnational economic activities between the United States and Portugal on a daily basis.⁵

These members of the Portuguese community in New England provided the names of what they believed to be the top five Portuguese-American businesses owners trading and investing with Portugal. From their selected list of Portuguese-American entrepreneurs, we chose those who were most commonly identified by the informants for the case studies of our research. For the commercial trade case studies, the following businesses were selected: *Grape Moments* and *Saraiva Imports* (wine industry); *Seabra Supermarkets*, *J. Moniz Company Inc.*, *Portugalia Imports* and *Seamans Imports Inc.* (“ethnic” trade and goods). Entrepreneurs were asked a set of open-ended questions about their businesses and the nature of their activities.⁶

Demographic and Socioeconomic Characteristics of Portuguese Americans

The U.S. American Community Survey estimates that 1,425,115 people of Portuguese ancestry were living in the United States between 2008 and 2010 (3-year estimates).⁷ Portuguese Americans constitute a very small percentage (0.5% of the country’s total population), as estimated for the years 2008 to 2010, and, as such, they are a minor ethnic group in the wider context of this country (Ribeiro, 2000).

Table 1. Luso-Americans in the United States

State	Total Population	Portuguese Population	Percent of Total
California	36,971,641	367,578	1.0%
Connecticut	3,561,486	55,786	1.6%
Florida	18,674,425	71,375	0.4%
Hawaii	1,347,518	57,364	4.3%
Massachusetts	6,514,611	315,492	4.8%
New Jersey	8,756,104	81,125	0.9%
New York	19,303,930	51,379	0.3%
Rhode Island	1,053,846	100,627	9.5%
All other States	210,554,872	324,389	0.2%
Total	306,738,433	1,425,115	0.5%

Source: U.S. Census Bureau. *American Community Survey 2008–2010 3-Year Estimates*

The majority of the people who claimed Portuguese as their primary ancestry mostly reside in eight states, as seen in Table 1. Recent data show that the state of Rhode Island, with 9.5 percent, and Massachusetts, with 4.8 percent, had the highest percentage of Portuguese descendants

in the United States. The state of California, however, had the largest number of Portuguese (367,578), followed by Massachusetts, with 315,492 persons of Portuguese descent. The Portuguese community in the state of New Jersey totals 81,125. Despite being a minor ethnic group in the United States, the Portuguese are highly concentrated geographically. In Massachusetts, for example, most people of Portuguese descent live in the southeastern region of the state. In 2000, according to the U.S. Census, the City of Fall River had a total population of 91,938, of which 43,202 claimed Portuguese as their primary ancestry. Therefore, nearly half of Fall River's population claimed Portuguese ancestry.

Those who claim Portuguese ancestry are not identified as first-, second-, or third- generation immigrants in the U.S. Census. We can, however, single out the first generation by the number of the "foreign born." Given that the foreign born constitute 18 percent of the total Portuguese American population (Table 2), most Portuguese-Americans are second- or subsequent-generation. Since immigration from Portugal has stagnated over the past three decades (Pires et al., 2010), the percentage of foreign born is decreasing.

Table 2. Demographic Characteristics of Luso-Americans

General Characteristics	Portuguese Ancestry Group	Total U.S. Population
Total population	1,425,115	308,745,538
Male	48.9%	49.2%
Female	51.1%	50.8%
Median age (years)	37.2	37.2
Under 5 years	6.2%	6.5%
18 years and over	76.5%	39.1%
65 years and over	11.7%	7.4%
Household population	1,397,055	298,732,731
Average household size	2.64	2.61
Average family size	3.18	3.20
Foreign Born	257,790	39,339,270

Source: U.S. Census Bureau. *American Community Survey 2008–2010 3-Year Estimates*

Up to the year 2000, the Portuguese were to a large extent still working in manual occupations—mainly in agriculture, fishing, construction and textiles—which require low educational skills (Ribeiro, 2000; Barrow et al., 2002). Due to deindustrialization in the United States, starting in the late 1980's, the Portuguese experienced massive job losses in manufacturing, particularly in New England (Scott, 2009).

Additionally, the crisis in the fishing industry, in the 1990’s, affected the community in a negative manner. These economic changes, in addition to “blocked mobility” caused by low educational attainment levels, may have led some Portuguese Americans to seek self-employment avenues.

Table 3 shows that there are 68.9% of Portuguese (16 years and over) in the labour force, compared to 65.1% of the total U.S. population. The average household and family income of the Portuguese population exceeds the average for the total U.S. population. The Portuguese have been making gains in terms of income. According to the 1990 U.S. Census, the average income of Portuguese Americans was higher than that of the total U.S. population, although the per capita income level of the Portuguese was \$4,400 lower than the national level. Mulcahy (2003), for example, notes that in 1990, “the apparent advantage in household and family income relative to the national average seems to be the result of larger household and family size among the Portuguese, as indicated by the lower per capita income figures” (p. 49). However, by 2000, this was no longer the case. The per capita income of the Portuguese exceeded the national level by \$781 in 2000 and according to more recent data—(ACS 2008–2010)—the Portuguese exceeded the national level by \$1,725.

Table 3. General Socioeconomic Characteristics of Luso-Americans

Economic Characteristics	Portuguese	Total U.S.
In labor force (population 16 years and over)	68.9%	65.1%
Median household income in (dollars)	59,295	51,222
Median family income (dollars)	70,814	62,112
Per capita income (dollars)	28,667	26,942
Education Characteristics		
Population 25 years and over	949,681	202,053,193
High School graduate or higher	82.6%	85.3%
Bachelor’s degree or higher	23.0%	28.0%

Source: U.S. Census Bureau. *American Community Survey 2008–2010 3-Year Estimates*

In terms of educational attainment, the Portuguese, although improving, still fared worse than average Americans. Data in Table 3 confirm that only 23% of Portuguese attained a bachelor’s degree or higher, versus an average of 28% among the U.S. population. The proportion of those having a high school diploma or higher was also lower among the Portuguese (83% versus 85%).

As for occupational structure, 33.3% of the Portuguese population was involved in management, professional, and related occupations, while the corresponding percentage for the total employed civilian population in the United States was slightly higher at 35.6% (see Table 4). In 2000, the United States American Community Survey indicated that only 29.9% of the Portuguese population worked in this occupational category. As such, in a period of ten years, the percentage of those working in management, professional, and related occupations increased by about four percentage points. These advances in the level of employment may be explained by progress in educational attainment among Luso-descendents.

Table 4. Occupational Structure of Luso-Americans

Occupational Status	Portuguese	Total U.S.
Employed civilian population 16 years and over	705,452	141,848,097
<i>Occupation</i>		
Management, professional, and related occupations	33.3%	35.6%
Service occupations	18.6%	17.6%
Sales and office occupations	26.2%	25.2%
Natural resources, construction, and maintenance occupations	11.2%	9.5%
Production, transportation, and material moving occupations	10.7%	12.1%
Self-employed workers in own not incorporated business	7.1%	6.4%

Source: U.S. Census Bureau. *American Community Survey 2008–2010 3-Year Estimates*

Table 4 also shows that 26.2% of the Portuguese employed civilian population worked in sales and office occupations, a percentage slightly higher than that of the entire U.S. population (25.2%); Portuguese in service occupations accounted for 18.6%, which is one percent higher than the remaining U.S. civilian population working in the service sector. The Portuguese are also somewhat more likely to work in manual occupations, such as construction, extraction, maintenance, production, transportation, and material moving (11.2%) than the national employed civilian population (9.5%). The percentage of self-employed, which includes the entrepreneurial activities addressed in this study, is also higher among the Portuguese (7.1%) than among the whole population (6.4%).

In sum, the Portuguese ancestry group displays higher median household income, median family income, and per capita income than the averages for the U.S. population. In terms of educational attainment and occupational prestige, however, the Portuguese remain at a

disadvantage. Even so, between 1990 and 2010, there was a significant increase in the number of Portuguese who engaged in management, professional, and related occupations. This growth is in part due to a rise in educational achievement among the second and subsequent generations. In addition, the Portuguese seem relatively more present in self-employed entrepreneurial activities than the national average. However, while the United States Census and the American Community Survey provide us with an overview of the socioeconomic status of all Portuguese Americans, these sources of data do not permit us to determine the specific characteristics of the different types of business owners of this ethnic group. Census data also do not allow us to characterize the Portuguese American population by generation in the United States. Nevertheless, the aggregate data permit us to observe that Portuguese Americans continue to provide a viable market for businesses with an ethnic market orientation.

Commercial Trade and Portuguese Ethnic Enterprises

In this section we examine the extent to which the Portuguese community is involved in commercial flows between Portugal and the United States. In an article published by the American Chamber of Commerce in Portugal, Horta (2007), suggested that the Portuguese communities in the United States could provide not only a market for Portuguese products, but also networks for the promotion of those products in the wider American market.⁸

Products listed with the U.S. Department of Commerce as imports from Portugal are not necessarily being consumed by the Portuguese community. Instead, products ranked first and second on the U.S. import list, such as mineral fuel and machinery items are going directly to the American market. According to AICEP, items such as footwear, molds, and paper are also going directly to the American consuming market. The textiles category, which includes bed linen and table linens, could be destined to both markets (American and Portuguese-American).

A representative from AICEP in New York reported that when products coming from Portugal are distributed to various regions of the United States, there is no way of knowing either their destination or their consumption. AICEP representatives indicated that food items and beverages are the easiest products to track. Because these items are often linked to ethnic entrepreneurs and are consumed mainly by co-ethnics, their final destination is often the Portuguese communities in the United States. Based on the 2006 list of U.S. imports from Portugal, the AICEP representative in New York suggested that beverages (including wine), which represent \$73,838 million of total imports, go directly to the areas with large Portuguese communities. The same AICEP official suggested

that ceramic tableware and kitchenware are other items that can also be linked to the Portuguese-American market. Imports of ceramics from Portugal represent \$40,304 million of the total imports from this country.

In the following sections, we will examine six businesses that were started by first-generation Portuguese immigrants; we will focus on the nature of the businesses, their international activities as well as their strategies for sustainability and growth.

Portuguese-American Ethnic Enterprises

Aldrich and Waldinger (1990) state that “an ethnic enterprise may be no more than a set of connections and regular patterns of interaction among people sharing a common national background or migratory experiences” (p. 112); also, according to research by these scholars, “ethnic residential concentration has provided a strong consumer core for many ethnic entrepreneurs, especially for immigrant groups in the early decades of their settlement in their host country” (p. 114). The geographical concentration of the Portuguese immigrant population in cities such as New Bedford, Fall River, and Newark has provided a comparative advantage to ethnic entrepreneurs who have created businesses linked to the ethnic market. Although, as Butler and Herring (1991) claim, first-generation immigrants have higher rates of entrepreneurship and self-employment than their children, members of the American born generations, who have acquired higher levels of individual capital than their parents, may play a fundamental role in the sustainability and expansion of the family business beyond the ethnic market.⁹ In some of the businesses we analyze below, members of the second generation have assumed positions of leadership in the businesses started by their parents.

Business characteristics. Most of the Portuguese ethnic businesses interviewed for this study were small-scale, family-run enterprises, and most began with a small amount of invested capital. Even though a significant number of Portuguese owned businesses in the United States are small, the interviews illustrate that they play a significant role not only in the local community but also, perhaps, in the home country’s economy. Portes et al. (2002) define transnational entrepreneurs as those whose business activities require frequent travel abroad and who depend on contacts and associates in another country for the success of their businesses, mainly in their country of origin. All entrepreneurs interviewed for this study made regular (roughly four times per year) business-related visits to Portugal. João Moniz, for example, travels to Portugal—primarily the Azores—about 15 times a year, in part because he also owns a business there.

J. Moniz Company Inc. is a Portuguese ethnic food product distributor located in Fall River, Massachusetts. João Moniz, the proprietor/owner, immigrated to the New England area in 1974, during the peak of the third wave of Portuguese immigration to the United States. He started his food distributing business by importing cheese from Portugal in 1978. At that time, and due to the presence of a great number of first and second-generation Portuguese immigrants in New England, the opportunity structures and the possibility of success within the ethnic market were highly favorable for Portuguese owned businesses.

Another Portuguese immigrant who took advantage of the opportunity structures found in the ethnic market was Jorge Silva, the owner of *Seamans Imports Inc.* This Luso-American business located in Chelmsford, Massachusetts, also began its commerce by importing cheese from Portugal and later on expanding by acquiring licenses from the United States Food and Drug Administration to import cheese in larger quantities to be distributed to local stores.

Portugalia Imports—an ethnic food distribution business—is another family-run enterprise in Fall River, Massachusetts. The owner, Fernando Benevedes, started this business by importing espresso coffee and selling it to local Portuguese-run cafés and restaurants. Strong demand for this type of product and the success of the business allowed Fernando Benevedes to begin importing more foods and beverages from Portugal.

Antolín (2008) has suggested that migrants do not turn to self-employment as a response to blocked mobility, that is, as a refuge when they are unable to find employment in the host society's mainstream economy. He argues that, as with other entrepreneurs, it is a business spirit and the capacity to be risk takers that leads migrants to self-employment. João Moniz of *J. Moniz Company Inc.*, Jorge Silva of *Seamans Imports Inc.*, and Fernando Benevedes from *Portugalia Imports* had full-time jobs, mostly in local factories, when they started their import businesses. These entrepreneurs worked full-time to accumulate capital while running their commercial businesses part-time. When they noticed the growing demand with the ethnic market, they began importing additional foods from Portugal, such as fresh and frozen fish, olive oil, cereal, beverages, and so on. As a result of this growth, they then turned their part-time import business into a full-time endeavour.

A Portuguese-American business of large dimension is *Seabra Group*, located on Ferry Street, Newark, NJ, which started about 35 years ago as a grocery store. In the late 1960s and early 1970s, there were many Portuguese families immigrating to Newark, and this growth in the population led to an increase in the demand for Portuguese

products. *Seabra Group* not only started importing food products from Portugal but also distributed them to several local stores. The company created its own supermarket network, as well as other types of stores and restaurants. Today, the *Seabra Group* has become a structured and efficient organization, which is responsible for various strategic business units, including slaughter houses, meat processing and packaging plants, real estate holdings, a broadcasting company (SPT – Television), bakeries, as well as wholesale imports and exports. The *Seabra Group* has supermarkets in the large Portuguese communities of New Jersey, Massachusetts, and Rhode Island and intends to open more stores in other states. This business “empire” generates over \$200 million of business volume each year and has exclusive rights to various Portuguese brand products, including *Sumol*, *Água Castello*, *Água do Luso*, *Castelão Cheese*, and *Sagres* beer. As a result, other distributors who may want to import these products have to acquire them directly through *Triunfo* (*Seabra Group*’s distributing company). It is interesting to note that some Portuguese ethnic entrepreneurs have criticized the strategies used by groups such as the *Seabra Group*. The latter has constructed social capital and networks over the years, establishing in the process a kind of monopoly in the United States. The company thus has comparative advantages over other Portuguese-American distributing companies which have difficulty importing products from Portugal.¹⁰

Other businesses included in this study, although small, are modernizing by adopting new technologies and investing in human resources. For example *Seamans Imports Inc.* has 12 employees who now use the latest technologies to maintain a successful business. Distributing orders, for example, can be placed and put in the order system by telephone. In some of the businesses, the educated children of the owners have become involved in modernizing and upgrading their parents’ businesses by adopting new technologies and new marketing strategies. This new model is the case with *J. Moniz Company Inc.*, which counts among its nine employees the university educated daughter of the company’s president.

Business strategies. According to ethnic entrepreneurship theory, the ethnic entrepreneurs’ business strategies may be constrained by a set of circumstances related to the interaction between opportunity structures and ethnic group characteristics. In order to sustain and grow their business, the Portuguese-American entrepreneurs in this study, have adopted different strategies as they have faced evolving market circumstances. For example, they have made efforts to attract customers among new immigrants with consumer preferences similar to those of the

Portuguese, and they have also expanded the business into the wider American market.

As mentioned above, the dramatic decrease in Portuguese immigration to the United States since the 1980's has affected ethnic businesses. However, recent increases in the level of immigration by other ethnic groups to the United States with similar gastronomic habits, such as Latin Americans and particularly Brazilians, has helped sustain some Portuguese ethnic food businesses in the American northeast. For example, the *Seabra Group* maintains its Portuguese customers by offering Portuguese products at a reasonable price at their stores, but it is also attracting other ethnic clients by importing products from Brazil and other Latin American countries. The majority of *J. Moniz Company Inc.* customers (around 70%) are still of Portuguese descent. Its remaining customers include Cape Verdeans (Cape Verde was once a Portuguese colony in Africa) and Latin Americans. Given that most of its customers are of Portuguese descent, *J. Moniz Company Inc.* invests about \$30,000 each year on advertising in local TV and radio stations and newspapers, making the ads available to other Portuguese-speaking ethnic groups, such as the Cape Verdeans.

Studies have found that when entrepreneurs limit their business activities to the ethnic market, they reduce their capacity to grow (Aldrich & Waldinger, 1990; Valdez, 2002; Scott et al., 2012). The owner of *Seaman's Imports Inc.* is a strong believer in attracting American customers by distributing Portuguese food imports to American chain supermarkets—an important strategy that other ethnic Portuguese businesses should consider. Today, *Seaman's Imports Inc.* is a licensed importer and wholesaler of food products in the state of Massachusetts and sells imported frozen foods and other products to restaurants and supermarkets in New England. *Seaman's* distributes around 30–40 tons of frozen fish every month to supermarkets, ethnic stores, and restaurants from its warehouses in New Bedford, Wareham, and New Jersey. There are two distribution subdivisions within the company. One is *Seaport Fish*, which distributes larger volumes of goods (usually fish imported from Spain as well as several Asian countries). The second is *Seamans*, which is dedicated to imported ethnic products (mainly from Portugal and distributed to the Portuguese community). The main import from Portugal is frozen fish from *Portfish*, a company located in Peniche, Portugal.

Other strategies to maintain a successful business are emerging. *J. Moniz Company Inc.*, for example, is developing its own food product brands. João Moniz believes that his locally produced products sell very well because the public is confident that they are of the highest quality.

The company owns seven different brands representing different products: *Santa Isabel* for flour (factory located in Canada); *Tiago* for olive oil (producer in Portugal, Estremoz); *Sweet Life* for olives, seasonings, olive oils (producers in Spain and the United States); *Moubesa* for canned goods (factory located in Cape Verde); *Mestre Alfredo* for canned goods; *Seamar* for frozen fish and other products (producers located in Sines, Portugal); and *São João* for cheese (producers located in the US). The company's brands show a strategy aimed at attracting not only the Portuguese who still live in the area, but also the new immigrant groups. *J. Moniz Company Inc.* targets ethnic clients who have food traditions similar to those of the Portuguese (Brazilians, Latinos, Cape Verdeans, and Haitians).

The business volume of *J. Moniz Company Inc.* has increased each year; however, as a result of the unfavorable euro/dollar exchange rate, this business has been facing a problem shared by other Portuguese-American entrepreneurs who import goods from Portugal. As a result of the unfavorable exchange rate, the company has been forced to raise prices, especially on goods imported from Portugal. The *Seabra Group* also confirms that it has had to raise product prices so as not to lose money in the trading process. Another outcome of the unfavorable euro/dollar exchange rate is that Portuguese-American businesses are now looking into importing goods from other continents. This has been the case with *Seamans Imports Inc.* The company's business strategies have included, for example, buying food products from global markets, including from China and Vietnam, and selling only Portuguese products that have a high market demand, such as wine. Several Portuguese ethnic entrepreneurs in the United States note that even though some Portuguese food products have markedly higher prices, there is still a demand for them in the United States. Portuguese entrepreneurs could specialize in such products.

Businesses Entering the Non-Ethnic Market

In this section, we examine businesses that import specialized products from Portugal, such as wine.¹¹ While being part of the Portuguese ethnic market, these products have characteristics that allow them to be introduced into the wider American market. Results from the interviews show that Portuguese products of high quality, such as wine and ceramics, have been receiving recognition in the United States. These products provide Portuguese ethnic businesses with a bridge that will permit them to expand into the wider market and particularly into its higher income brackets.

Business characteristics. We carried out interviews with two wine distributors in New Bedford, Massachusetts. *Grape Moments* and

Saraiva Enterprises are two distinct businesses serving the New England area. Using the data that emerged from the interviews, we analyze their business approaches and their position as wine distributors both in the local community and the wider American market. The interviewees agreed that Portuguese wine imports have great potential in the United States due to wide recognition of their quality.

Aldrich and Waldinger note that, “immigrant workers often begin as temporary workers in small businesses, seeking jobs that provide opportunities to work long hours and accumulate savings” (1990, p. 125). Sometimes, however, the capital and business know-how is acquired by working in large mainstream companies. *Grape Moments* was founded in 2003. Twenty years earlier, Jack Couto, the former business President (a Portuguese American with ancestry in Sintra, Portugal) worked for an American wine distributor in Massachusetts, where he created a division to import Portuguese wine. Subsequently, he and his partner, Mark Cruz, created their own import wine distribution business called *Grape Moments*, a division of *Sintra Imports*. In 2007, their business portfolio consisted of wine—80 percent of which was imported from Portugal and 20 percent from Spain, Chile, and Italy. The company’s growing success in the last four years can be attributed to the business social network that Jack created over a 20-year period while working for a mainstream American wine distributor.

Jack Couto’s connections to Portugal are also important to his business. He explains that after Portugal joined the European Union (EU) in 1986, viticulture in Portugal was able to benefit from better access to technology and better information exchanges within the viticulture sector. Joining the EU has helped Portugal in the wine industry by allowing producers to work comparably within a wider market. Jack Couto, though living in the United States, has kept up with the transition experienced within the viticulture sector in Portugal.

Saraiva Enterprises, another Portuguese wine distributor, located in New Bedford, is one of the largest in the area. The company distributes wine in Massachusetts, New Hampshire, Rhode Island, and New York and has other distributors as partners. Joe Saraiva, who immigrated from Celorico da Beira with his parents in the 1970s, is the president. His father founded a cod fish drying factory in the 1980s near the New Bedford port. The company bought fresh cod fish from the fishing vessels, dried it (in a traditional Portuguese fashion) and sold it to the Portuguese community. As Portuguese immigration decreased, *Saraiva Enterprises* realized that the wine business was more profitable than the dry cod business. In 1987 the company started importing and distributing wines from Portugal. The company now distributes wines of all scales and qualities. It is believed that the success of this business depends on

the fact that the owners make regular visits to Portugal (about three to four times a year) and network with Portuguese wine producers to inquire about their interest in exporting wine.

Business strategies. *Grape Moments'* business strategy has always been to target the wider American market without forgetting the ethnic market. In the case of *Grape Moments*, Jack Couto's goal was to keep the network of customers he had created over the years while working at a mainstream wine distributing company. He knew this clientele might be interested in Portuguese wines because of their high quality. He also noted the importance of working with local wine stores and restaurants to demonstrate the quality of the wine. What makes *Grape Moments* different from other wine importers in the area is that it imports gourmet, cava wines (vinhos de quinta) that have achieved 85–95 points in wine industry rankings. At this time, *Grape Moments* (Sintra Imports) distributes wine to of 24 states, and it also works with wine sub-distributors to deliver the product to customers. The wider American market seems to be this company's best target into the foreseeable future. However, it also targets the Luso-descendant generations. Second- and third-generation Luso-Americans, possibly because they are enjoying a higher standard of living than their parents did or perhaps because they are wine connoisseurs, are good targets for the marketing of Portuguese wine.

Grape Moments' sales volume is around one million dollars per year. Seventy-five percent of the company's sales are generated from the mainstream U.S. market. *Grape Moments'* strategy includes engaging in a higher level of advertising of quality Portuguese wines within the wider American market. The company publishes a variety of press releases in American wine magazines. Additionally, as Jack Couto explained, the company's strategy also includes promoting an image of the superior quality of its other Portuguese products, a strategy he hopes will lead to the expansion of imports of other gourmet products from Portugal.

Saraiva Enterprises has had primarily an ethnic market orientation, but it has begun to adopt new strategies to expand beyond this market. The company not only imports wine from Portugal, but it also sells a variety of imported liquors from Latin American countries. The wine is distributed to local Portuguese restaurants and American liquor stores in areas with a large Portuguese community. Joe Saraiva mentioned that it is still difficult for *Saraiva Enterprises* to distribute Portuguese wine in mainstream U.S. restaurants. Consequently, the company is now working on new marketing strategies that will allow it to sell to the wider American market. For example, *Saraiva Enterprises* now promotes its wines at wine seminars and American wine tasting events.

Conclusion

In this paper we researched the economic relations and connections between Portuguese ethnic businesses in the United States, primarily in the New England area (Massachusetts, Rhode Island) and New Jersey, and Portugal, particularly with regard to transnational entrepreneurship. We studied whether complex forms of trade and investment were developing within the context of six transnational ethnic firms and the extent to which these businesses remained tied to the ethnic market or were expanding beyond the target ethnic group. Consequently, and in reference to the expansion beyond the ethnic market, we observed the factors that affected the changes. We were also interested in inquiring as to whether the business orientation of the first generation was being transferred to second and subsequent generations. Taking into account the scant research that exists on these topics and the qualitative methodology used, the results of this study must be viewed as exploratory.

The importance of the ethnic group as a factor in the process of ethnic business formation was widely confirmed by the research. The concentration of Portuguese-Americans in specific regions of the United States and their preference for ethnic products provided Portuguese American entrepreneurs with a comparative advantage in the creation of ethnic market oriented business. Ethnic businesses specializing in food distribution emerged in those regions. An example is *Seabra Group*, which started as a small family-owned enterprise but later matured into a large chain. Since several of Portuguese-American businesses relied on imports from Portugal, they developed as transnational ethnic business strongly attached to both the local American as well as the homeland markets.

The embeddedness of these businesses in local ethnic networks became evident during the research. On the one hand, Portuguese business owners relied on the Portuguese-American community as their main consumer market; on the other hand, the ethnic businesses formed networks with producers in Portugal by taking advantage of their former contacts and easier access to information based on a common cultural heritage. Portuguese producers interested in exporting to the wider American market saw the establishment of connections with Portuguese American entrepreneurs as advantageous to both sides.¹² The social embeddedness and mixed embeddedness approaches of ethnic entrepreneurship (Aldrich & Waldinger, 1990; Kloosterman & Rath, 2001; Kloosterman, 2010), suggest that a complex group of factors, and their interactions, influences the process of ethnic business creation and development. These factors include individual capital, such as the socio-economic level of business owners; group characteristics that provided a comparative advantage to ethnic entrepreneurs; economic opportunity

structures, such as access to the ethnic and country of origin markets; and institutional support, namely the role of local Portuguese associations in the United States and political and business entities in Portugal.

A major topic studied in this research was the business strategies of Portuguese-American transnational entrepreneurs to promote growth and adapt to evolving market changes. While providing an initial market for business creation, the intra-networks formed in the ethnic community as well as low levels of individual capital could be factors that limited and challenged business growth. Nevertheless, Portuguese business owners were faced with evolving conditions that made change inevitable: (1) a rapid decrease in immigration from Portugal in the last two decades, (2) the emergence of unfavorable financial conditions resulting from the euro/dollar exchange rate, and (3) improvements in the socioeconomic status of the ethnic community.

A shrinking ethnic consumer market was the first cause requiring a change in the target market. First, the results from this study show that a number of Portuguese-American entrepreneurs turned their attention to other ethnic markets. In some cases, they focused on related ethnic groups, particularly Cape Verdeans and Latin Americans. These groups' similar gastronomic tastes helped the process, although it also required a diversification of product distribution sources and networks away from Portugal. In other cases, entrepreneurs sought to cater to the mainstream American consumer by adopting new marketing strategies that were no longer based on "traditional" preferences, but rather on quality and uniqueness. Second, the emergence of an unfavorable euro/dollar exchange rate led to a diversification of products and distributors in other world markets, such as Asian markets. Third, improved occupational profiles and education levels within the Portuguese-American community, mainly amongst second and subsequent generations, has led to the modernization of processes and of diversification strategies. As a result, these developments have led to a decrease in the role of economic networks and relations with Portugal, and ethnic businesses are distancing themselves from the home country, a strategy that may be necessary for their survival.

This analysis of business dynamics and strategies used by transnational Luso-American business is consistent with findings presented in some of the recent literature in this field. The findings of this study provide support for the hypothesis that a non-exclusive ethnic orientation, i.e., the broadening of business activities to other ethnic groups and to the mainstream market, is conducive to economic success or, at least, is a precondition for sustainability and growth (Valdez, 2002; Barrett et al., 2003; Ley, 2006; Scott et al., 2012). Nevertheless, widening the target market does not inhibit the continuation of privileged links with the ethnic group and established networks with producers in

the former homeland. In our study, even the Portuguese-American entrepreneurs who sold high-quality, expensive wine to the mainstream American market maintained privileged ties with Portugal, from where they import many of their top brands. In other words, orientation to the mainstream market and to ethnic networks may coexist (Portes et al., 2002). Interviews with Portuguese-American business owners indicate that most had started their business as small ventures dependent on the ethnic market but, gradually, they were able to expand into the American (mainstream) market. The expansion of these businesses' networks, partners, and consumers did not hinder their connections to the home country, since they still depend on transnational economic practices between the United States and Portugal for their success. The economic initiatives of the community studied provide support for the assumption that integration of immigrant entrepreneurs in the host country does not necessarily lead to a decrease in their transnational economic activities.

Given that our results are exploratory, further research on the entrepreneurial activities of Portuguese Americans is needed. In particular, we suggest that attention should be given to the role of second and subsequent generations of Luso-Americans in the development and maintenance of the businesses that were started by their parents. The younger generations born and/or educated in America, who have acquired higher levels of individual capital than their parents, could play more active economic roles in the development and expansion of Luso-American businesses.

Entrepreneurs with an immigrant background—due to their familiarity with market structure, consumer preferences, business ethics, and commercial policies in both the home and host countries—can play an important role in bringing foreign investment to the home country. In addition, the cultural and the linguistic links between Luso-Americans and Portugal may facilitate future economic and business partnerships among entrepreneurs in both countries. Therefore, this study has policy implications. The successful coexistence of mainstream markets and transnational links make it possible for the Portuguese government to gain access to the American market through its diaspora, both by designing policies targeting the middle-to-low socioeconomic strata of the first generation and the better-educated and upwardly mobile second and third generations. These privileged links may also create conditions for attracting investment and even return migrants (or their descendants) to Portugal. It is known that the economic potential of diasporas may be of a crucial advantage in the global economy. Although economic transnationalism does not lead by itself to economic growth and development (Skeldon, 2008), the importance of networks and social capital can never be underestimated.

Notes

¹ This article is based on a master's thesis entitled "Transnationalism in the Luso-American community: Networks and economic connections between Portuguese living in the United States and Portugal" (Marçalo 2008). We would like to express our gratitude to FLAD (Luso-American Development Foundation), Onésimo Almeida, Frank Sousa, institutional representatives, and business entrepreneurs of the Portuguese community in New England for their assistance and participation in this study. We would also like to thank the anonymous reviewers and the editors of this journal for their valuable comments and suggestions for improvements on earlier versions of the article.

² For a typology, see Guarnizo (2003).

³ In the review of ethnic entrepreneurship carried out by Zhou (2004), for example, transnational entrepreneurship is considered as a new theoretical and conceptual advancement in the field.

⁴ For one exception to this, see Marçalo (2008). Although Portuguese ethnic trade has been studied in other national contexts (see, for example, Teixeira, Lo, & Truelove 2007, for Canada), corresponding research, with a particular focus on economic transnational ties, seems to be nonexistent in the United States.

⁵ The main questions asked in the first set of interviews were: (1) Are there transnational economic relations among the Portuguese community in the United States and Portugal? (2) Who is involved in economic relations, such as remittances, commercial activity, and investments between Portugal and the United States? (3) Who are the top businesses and firms importing/exporting goods to and from Portugal?

⁶ The questions posed to the head figures of these businesses were: (1) When was the business established, and how? (2) What commercial activities does the business conduct with Portugal? (3) How many Portuguese businesses are involved in commercial activities of this firm? (4) What is the business turnover of the firm and has it been increasing? (5) Is the business focused only on the Portuguese community, or is it also expanding to the local American market? (6) Does the success of the firm depend on the contacts and intra-networks created in the Portuguese community located in the area and inter-networks established in Portugal? (7) What are the future strategies of the business to maintain success in the Luso-American community? (8) Are there any know-how exchanges between this business and the interacting firms in Portugal?

⁷ According to the U.S. Census Bureau, "ancestry" refers to a person's ethnic origin, heritage, or the place of birth of the person or the person's parents or ancestors before their arrival in the United States.

⁸ Basílio Horta was the (then) President of the Administrative Board and Executive Commission for Portugal's Business Development Agency (AICEP).

⁹ According to socioeconomic characteristics described in recent U.S. Censuses, second-generation immigrants have higher rates of educational attainment and better skills than the first generation. They can therefore play an important role in transnational businesses and be a vital factor in the capacity of the ethnic businesses to break through into the wider American market.

¹⁰ Brand companies in Portugal that want to export their goods choose the *Seabra Group* to distribute their product in the United States because they are the company with the best turnover and are able to increase sales every year. These companies also know that their product will be automatically distributed to supermarkets and restaurants and will be advertised on the SPT-Television—a local TV channel. They thus have an assurance that their product will be sold. Other distributing companies cannot offer this sense of dependability.

¹¹ In the more complete version of this study (Marçalo, 2008), there is also a case study about a Luso-American ceramics enterprise called Eurogranite & Tile, Inc.

¹² No data were collected regarding sources of capital and labour for these ethnic businesses. However, our results support the assertions made in this field of study that culture and social capital embedded in social networks were preconditions for business creation and growth.

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Carolina Marçalo is a business analyst at SIBS SGPS and is also a researcher at SOCIUS (Research Centre in Economic and Organizational Sociology) in Lisbon. Carolina Marçalo has a master's degree in Economics and European Studies from the Institute of Economics and Business Administration, Technical University of Lisbon (ISEG/UTL), Portugal. In 2004 she obtained a BA in Economics, with a Minor in Political Science, from the University of Massachusetts, Dartmouth, USA, where she held the positions of Student Senate President (2003) and Student Trustee (2004). Her main research areas are international migration, economic transnationalism, and the Portuguese diaspora.

João Peixoto is an Associate Professor of the Department of Social Sciences, Institute of Economics and Business Administration, Technical University of Lisbon (ISEG/UTL), Portugal, and a researcher at SOCIUS (Research Centre in Economic and Organizational Sociology, ISEG/UTL). He has a Ph.D. in Economic and Organizational Sociology from ISEG/UTL, Portugal. João Peixoto was also a visiting professor at Brown University, USA. His main scientific research areas are international migration, highly skilled migration, labour markets, migration policy, and demography.