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Digital Age Women  
Entrepreneurship

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# Exploring Digital Age Women Entrepreneurship in Bangladesh: Constraints and Prospects

*Dr. Anuradha Bardhan & Mst. Jannati Khatun*

*University of Dhaka*

## ABSTRACT

Which one should be your priority? This is a question that the majority of women still face whenever they decide to do something beyond their homes. Even after 54 years of Bangladesh's independence, a large portion of the population still firmly holds onto socio-cultural norms and beliefs. This male-dominated society still believes that women's first and only responsibility should be to take care of their families. However, people are now slowly realizing that women's entrepreneurship can not only improve the family's financial stability but also strengthen the country's overall economy. Modern technologies are creating new opportunities for women to become successful entrepreneurs. However, they are still fighting for access to capital, overcoming social and religious norms, dealing with the pressure of family responsibilities, and lacking training and education, among other challenges, on their way to their dreams. This study analyzes the constraints and future prospects of women's entrepreneurship in the digital age using the case study method.

*Keywords:* women empowerment, digital platforms, SDGs, societal barriers, women from home to online.

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Dr. Anuradha Bardhan<sup>α</sup> & Mst. Jannati Khatun<sup>σ</sup>

## ABSTRACT

*Which one should be your priority? This is a question that the majority of women still face whenever they decide to do something beyond their homes. Even after 54 years of Bangladesh's independence, a large portion of the population still firmly holds onto socio-cultural norms and beliefs. This male-dominant society still believes that women's first and only responsibility should be to take care of their families. However, people are now slowly realizing that women's entrepreneurship can not only improve the family's financial stability but also strengthen the country's overall economy. Modern technologies are creating new opportunities for women to become successful entrepreneurs. However, they are still fighting for access to capital, overcoming social and religious norms, dealing with the pressure of family responsibilities, and lacking training and education, among other challenges, on their way to their dreams. This study analyzes the constraints and future prospects of women's entrepreneurship in the digital age using the case study method. Developing policies that consider the proper use of modern technologies, the proper implementation of existing policies, easing capital management, eliminating socio-cultural hindrances, and ensuring stable political conditions are some of the significant ways to take women entrepreneurship to the next level, thereby increasing its contribution to national GDP.*

**Keywords:** women empowerment, digital platforms, SDGs, societal barriers, women from home to online.

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## I. INTRODUCTION

In Asia and the Pacific, women's economic empowerment and equality could be achieved through entrepreneurship, which is one of the main pathways and thus becomes a multiplier effect on family welfare, poverty reduction, and sustainable economic growth. Creating innovative connections between technology and ensuring easy financing are considered for catalyzing women's entrepreneurship. Catalyzing women's entrepreneurship, which is directly relevant to economic empowerment and would help achieve the Sustainable Development Goals, especially SDG 5 on gender equality and the empowerment of all women and girls.

Entrepreneurship could be an effective way to empower women and create employment. Promoting women's entrepreneurship can empower women within the family and the wider community (ILO, 2008).

According to the Global Entrepreneurship Monitor Report (2023-2024), entrepreneurship is referred to as any initiative at a new venture or new business innovation, such as a new business, self-employment, or the expansion of an existing business, by an individual, a group of members, or an established company (GEM, 2024).

According to the Global Gender Gap Report 2024, Southern Asia has achieved 63.7 percent gender parity, ranking second-lowest among the eight regions. In the last five years, Economic gender parity has been weakened vigorously over the previous five years, leaving Bangladesh with a wider gender gap to close. In 2024, Bangladesh's economic parity score of 31.1% was the lowest since 2014 and the lowest ranking globally in the 2024 index (Pal et al., 2024).

Bangladesh has made significant progress in improving women's status and empowerment over the years. Women have made substantial progress across various fields globally, including education, healthcare, and political and economic representation. Bangladesh has made incredible strides in recent years in terms of economic development, women's empowerment and societal integration as contributing citizens. The percentage of women who are in the labor force has risen steadily; from 2021 to 2022, it climbed by 32.4% to 42.7% (BBS, 2024). Recognizing the crucial role that women play in advancing sustainable development, the nation has put forward groundbreaking programs to empower women, advance gender equality, and tap into their economic-growth potential. The work in Bangladesh provides evidence that supporting women can yield major socioeconomic gains (USAID, 2023). Women's empowerment through entrepreneurship can significantly advance gender equality by enabling women to participate in economic activities, gain financial independence and reduce gender disparities in income and decision-making. Women-owned businesses can stimulate economic growth by creating jobs, increasing productivity, and fostering innovation. Understanding their role in Bangladesh's economy is crucial for sustainable development.

For attaining different United Nations Sustainable Development Goals (SDGs), such as SDG 1: "End poverty in all its forms everywhere"; • SDG 8: "Promote inclusive and sustainable economic growth, employment and decent work for all"; • SDG 10: "Reduce inequality within and among countries", the challenges must be highlighted related to women entrepreneurship. Traditionally, it has been found that men are more involved in entrepreneurial activities than women. So, increasing female participation in entrepreneurship is a very important agenda for different countries while establishing policy objectives (UN, 2024).

A study by (Rahman & Raihan, 2016) explored that whenever women become financially empowered, they become a genuine human resource for the country, which ultimately lowers

household poverty. Again, it indicated that all formal credit and financial institutions require tangible collateral when giving loans to men, but it is very unfortunate that the same institutions show ignorance toward women borrowers, even if they have tangible collateral.

A study by (Shoma, 2019) found that in Bangladesh, women are primarily involved in the apparel and leather sectors. They are contributing both as workers in production and also as women entrepreneurs. This study also revealed three types of women entrepreneurs in Bangladesh. Firstly, those born with economic privileges are given the opportunity to become highly educated with family support. Secondly, women who face society's negative mindset but still choose entrepreneurship as their dream. Thirdly, the women who are being forced to start entrepreneurship activities due to a family financial crisis. A study conducted by (Ahmed, 2014) shows that there is a positive relationship between women's entrepreneurship and Bangladesh's economic development. The study also indicates socio-cultural hindrances, educational and legal barriers, the exclusion of women from access to markets, technology, and finance as problems hindering the development of women entrepreneurship. (Shoma, 2019) mentioned that many women entrepreneurs in Bangladesh, face various problems in businesses that include unavailability of raw materials, lack of marketing opportunities, lack of capital, delay in loan processing, insufficient experience, difficulties in attainment of skilled workers and challenges of account keeping, harassment of law enforcing agents, problems involved in production, freedom of movement, male dominated social structure, non-cooperation of the wholesalers and irregular cash payments hampering the smooth running of their business. A joint report on women's entrepreneurship in Bangladesh by the Asian Development Bank (ADB) and the Australian Government found that women's entrepreneurship can increase family income and thus contribute to poverty reduction (ADB, 2012).

In a study (Sultana et al., 2022), it was found that women entrepreneurs start businesses with

insufficient capital, limited market knowledge, managerial skills, and confidence. Besides these, they also face various challenges, such as a lack of confidence, a lack of capital, a limited understanding of the market, limited managerial skills, an unavailability of skilled workforce, time management between family and business, and difficulties in obtaining raw materials. The social norms and customs are not suitable for women entrepreneurs in Bangladesh because they have to spend more time at home to fulfill family responsibilities, family members do not like or accept entrepreneurship, and there is a lack of sufficient funding support for business, which was found as a barrier in the study. Besides family barriers, women face community disapproval, negative impressions towards women entrepreneurship, irregular payment of products, additional charges, gender discrimination and religious superstition as social barriers.

According to the 2022 Labor Force Survey, the total employed population in Bangladesh was 70.47 million, of which 45.61 million were male, and 24.86 million were female. The male labor force participation rate declined slightly in 2022 (80 per cent) from 2010 (82.5 per cent). But the labor force participation rate for women has risen from 36 per cent in 2010 to 42.77 per cent in 2022, and the gap between men and women is wider in Bangladesh (ILO, 2023).

Globally, women's entrepreneurship is considered a crucial initiative for economic growth through job creation, and according to the International Finance Corporation, in East Asia and the Pacific, women own 50 percent of microenterprises and 59 percent of small and medium-sized enterprises. In South Asia, women own 10 percent of microenterprises and 8 percent of small and medium-sized enterprises. In a hostile business environment, which is a key limitation on women's empowerment, the key approach is to promote dialogue between the Government and women's organizations. To promote women's entrepreneurship, ADB's strategy is to provide grant funding to chambers of commerce to address the lack of networking (ADB, 2012).

Day by day, our world, including Bangladesh, has been introduced to new technologies. Not only our lives, but also our jobs and businesses are adapting to these new technologies very rapidly. In this digital age, women's entrepreneurship can take a new shape by adapting to these new technologies. Women in Bangladesh have also begun to realize the importance of adapting to these new technologies. In this study, we have tried to understand how the digital age is helping women make a footprint in entrepreneurship, the challenges they face, and the opportunities in women's entrepreneurship in this digital era.

## II. METHODOLOGY

This study is qualitative in nature and is based on information regarding the challenges and opportunities women entrepreneurs face in the digital space. The case study method was followed, as it is widely used to collect in-depth information about the study problems. The purposive sampling technique was applied in this study, which is a form of non-probability sampling. By using the purposive sampling technique, 20 cases were taken from the Dhaka and Sirajganj districts of Bangladesh. Interviews, observations, and document analysis were used as data collection techniques. Data were analyzed using thematic analysis techniques, which included identifying codes and searching for themes from respondents' verbatim responses, and reviewing and establishing specific names for themes. Then, the identified themes were reviewed and linked to the research objectives to explore the study problems in depth. Along with these primary data, secondary data was collected from journals, books, published research reports, census records, periodicals, research monographs, dissertations, & international reports.

## III. CONSTRAINTS OF WOMEN ENTREPRENEURSHIP IN BANGLADESH

### 3.1 Getting Family Support

The first challenge that the majority of potential women entrepreneurs face is obtaining family support for starting their entrepreneurial activities. Although families are becoming more

liberal in encouraging women in business, many families still hold the belief that women should not be engaged in outside activities. They still prefer the traditional beliefs, social norms, & religious aspects over the financial freedom of the women. They still believe that women's responsibility is only to take care of the family (Agrawal et al., 2023). As this is a male-dominated society, women face an extra layer of difficulty in getting support from male members.

Many men still believe that if women contribute to the family, people will laugh at them. People will mock them, saying they are not capable enough, so they drive their women into business. However, over time, people are realizing that to cope with the rising cost of living, it is ideal to support women in entrepreneurship. Especially in urban areas, it is challenging to run a family on the income of male members only. Therefore, gradually, people are understanding that the involvement of women not only helps women financially, but both the family and society can benefit from this (ADB, 2018). Again, family members are concerned about the woman's security and safety. As women might need to travel to different places and meet different people for business purposes, they become worried about their safety, especially in the volatile political conditions of Bangladesh. Many of the respondents in this study reported that they had difficulty convincing their families to support them before starting their businesses, but ultimately, family members provided support. Opportunities of Entrepreneurship in digital platforms play a vital role here. As digital platforms allow women to conduct various activities from home, family members feel more comfortable with this. One of our respondents, who graduated from Dhaka University and started her online-based clothing business, mentioned the same experience,

*"Initially, my father was not happy with my business decision...In our family, no woman had ever run any business...So he was concerned about what my relatives would say and also my safety...But when I assured him that I would run my business through a social media page, he was*

*convinced... Later, he also supported me in finding different clothing vendors for me."*

Another respondent who started her online-based Henna and Makeup item business got the support from her husband after convincing him,

*"When I shared my business idea with my husband, he was in a dilemma....he was worried that I would have to face different people ...but as my business would be social media-based, so he was convinced...He also realized that my income can help the family too...later, he supported me in many ways, and now I can earn 40,000 to 50,000 BDT monthly on average."*

### 3.2 Balancing between Work Life & Family Life

For decades, it has been believed that the primary responsibility of women is to take care of family members, especially husbands, parents, children & elderly people (Agrawal et al., 2023). Although families nowadays support women in starting their entrepreneurial businesses, that doesn't mean women are free from their family duties. Male members can go outside to do their job and return home; they are not bound to household duties, but women are bound to household activities along with their business or job activities. In our study, most respondents reported receiving family support for their businesses, but with one condition: continuing their family duties. Sometimes it becomes tough for women to manage both work and family life. If they focus more on their work, then family members become upset with them. Again, if they focus more on the family, they cannot grow their business despite having opportunities. Again, due to a lack of formal care settings in Bangladesh, women are bound to provide care, especially to their children and elderly members of their families. A practical and sufficient formal care system might help the women grow their businesses. One of our married respondents started her online-based leather item shop 10 years ago. Now she has a physical retail store in Dhaka. She expressed that,

*"I have been doing business for the last 10 years... both my online and offline stores have got the reputation...but despite having the*

*opportunity, I could not open more outlets in Dhaka, because I need to spend a minimum of 4 to 5 hours for my home duties....If I could get more support from my husband and in-laws in doing household duties, I might have opened at least 2 more outlets."*

Another unmarried graduate who started an online-based electronic gadget store a few years ago is facing difficulties in managing both work and family life. While studying at Dhaka University, Sajida's father passed away, leaving her in charge of her family. Her mother is seriously ill with different diseases. She uttered that,

*"I am doing well with my business...my customers are happy, but along with managing all my business activities, I need to do maximum household duties too...I have a helping hand at home, but my mother needs my support for her day-to-day activities...I feel that if I had given more time to my business, I could have achieved higher growth...I become exhausted by managing both...but it's ok...taking care of my family is also my duty."*

### 3.3 Managing Capital

Usually, a large proportion of women from lower socioeconomic classes engage in entrepreneurial activities to provide financial support for both their families and themselves but, one of the significant challenges that women face is managing initial capital to start their businesses (Rahman et al., 2024), (Agrawal et al., 2023), (Dana et al., 2023), (DC, 2019).

Most respondents in this study reported the same problem. It becomes very easy for women if they get a business loan from financial institutions at lower interest rates. But in the context of Bangladesh, women face different difficulties in obtaining bank loans. Although the Government and Bangladesh Bank have issued different policies and guidelines for financial institutions so that women entrepreneurs can get loans more easily, women still face a variety of hardships in obtaining business loans. In our study, we found different issues related to different financial institutions for women entrepreneurs, such as,

seeking for collateral obligations, increased collateral obligations, lack of loan guarantor, bank asking for mortgage documents, high interest rate, demand for transaction in a bank account, women get lack of proper information regarding the rules regulations of loans, lack of adequate knowledge regarding the banking system, many women entrepreneurs do not have any business plan, difficulties for getting loan for widows or divorced women, facing non-cooperation and harassment in the banks, lack of information of denying a loan, asking for guarantors' documents, respective officers in the bank showing lower interest deal with prospective women borrowers, higher service charges, and lacks in proper knowledge regarding the banking system (Raman et al., 2022). Because of all these issues, women try to manage their capital by taking loans from relatives, friends, & personal savings, which may not always be enough. Sometimes, potential women entrepreneurs cannot even manage loans from family and friends, which leads them to drop their dreams. One of the respondents, who is currently an undergraduate student and started his online-based gift items selling store, shared her experience in such a way,

*"My father died while I was in 1<sup>st</sup> year in University...I felt that my family needs financial support from me...But I had no savings, not even any fixed assets against which I could take business loans from banks...Even I didn't find any suitable NGO from where I could take a loan.... Banks were not interested in giving even a small amount of loan without any collateral or guarantor...Later, I took small loans from my different friends and started my page."*

### 3.4 Facing Socio-Cultural Issues

Different socio-cultural factors, such as traditional practices, religious misinterpretation, cultural deprivation, social taboos, gender discrimination, male domination in society, etc., are creating obstacles in the road of women's entrepreneurship. Although with the passing of time, men are becoming less rigid about the financial activity of women, a good portion of society still believes that women should not be involved in business or jobs. A few

misinterpretations of religious values and practices also create obstacles for women. Again, in this male-dominated society, women face different gender discrimination or harassment while doing their business activities (Rahman et al., 2024), (Dana et al., 2023), (Sarkar, 2024), (ADB, 2012), (Raman et al., 2022), (ADB, 2018)

Different respondents shared their experiences in this regard. One of our respondents started her online-based clothing store after her marriage. She both imported and bought clothes from local suppliers. She shared her experience in this way,

*"Initially my in-laws were not agree with my business initiative...they seriously opposed with it...they believed that daughter-in-law should not do any business activities with association of different male people...but my husband supported me and convinced his parents...even while bargaining with the suppliers, sometimes they tried to deceive me, I feel because I am a women... that's why"*

### 3.5 Having Lack of Training & Proper Education

Due to the easy availability of social media platforms, many women nowadays start an online business page without proper knowledge or education about their business. Also, there is a lack of training programs in entrepreneurship, digital marketing, skill development, etc. In this study, we found different challenges like lack of formal education, lack of entrepreneur education, low education and work experiences, less training and development facilities, lack of entrepreneurial skill, lack of management skill, lack of knowledge regarding product marketing, lack of knowledge about e- marketing and digital platforms, lack of proper understanding of handling man management, which are creating obstacles in successful entrepreneurship activities for women. To become successful in entrepreneurship, having an entrepreneurship management degree, a digital marketing degree, and an e-commerce degree helps women a lot (Sarkar, 2024), (Agrawal et al., 2023), (Cardella et al., 2020).

However, opportunities to avail of this type of degree are low in Bangladesh. A very few private universities offer this type of degree or course, but

it requires a good amount of money. So, not all women can afford these expensive degrees. Alternatively, skill development training or courses can help the women, too. Although different NGOs, government agencies, and a few private institutions are providing various training programs to develop skills, these are not sufficient. Our respondents reported that, without or with little knowledge of digital marketing, they have started their businesses on digital platforms. One of our respondents, who runs an online page-based business selling birthday cakes and gift items, started her business by making her first posts on a Facebook page managed by Dhaka University students, such as "DU Business Community". She expresses that,

*"Initially, I felt that I didn't need any training....but after a few days, I realized there are a lot of competitions in my business...I don't have any idea how to attract customers... or even how to boost my page...I took help from my friends who know about page boosting....Later, I realized it would have been better if I had taken an entrepreneurship course, especially for digital marketing."*

A few respondents expressed the need to attend different training programs to become experts in their fields at local training centers. One of our respondents took training on parlor services, she uttered that,

*"The knowledge and skills I acquired from this course significantly refined my abilities in the beauty and makeup sector... This led to an increase in orders and positive reviews from my customers, contributing to the enhanced credibility and success of my business."*

### 3.5 Managing Digital Platforms, Networking, and Marketing

Although digital platforms offer great opportunities for women to start and grow their businesses, women face various obstacles in managing them. Many of our respondents express that they face cyberbullying or harassment in social media, deliberate bad reviews on online platforms from competitors or some potential customers without any genuine reason, negative

responses from customers for a situation which is beyond control, aggressive online behavior of business competitors such as spreading misleading and false information; writing bad things in the review panel; spying on the prices and models of the products; counterfeiting the new ideas; spreading rumors about personal lives of business owners, women entrepreneurs sometimes face hacking of their social media pages, imposed social media page restrictions because of false reporting, etc. (Rahman et al., 2024), (Agrawal et al., 2023), (DC, 2019)

Because of these hurdles, women face difficulties in growing their businesses smoothly. Sometimes, they need to hire specialized personnel who can handle these negative issues on digital platforms, which increases their costs. One of our respondents operates a clothing business that primarily sources 85% of its products from local suppliers in Bangladesh and 15% from vendors in India. Her product range includes sarees, panjabis, three-piece suits, and various other clothing items. She expressed that,

*"I genuinely import different clothing items from India and sell on my online page...but a few of my competitors constantly spread the rumors that my imported clothes are duplicates...my customers got misled by these...Once, I also got a restriction on my social media page because of false reporting."*

One of the crucial factors for success in an online business is the proper delivery of goods to customers. However, many women respondents pointed out that they face various problems regarding delivery, such as an inexperienced delivery person hired by the delivery company, rude behavior by delivery personnel toward customers, delays in payment settlement, mishandling or damage to products due to a lack of sincerity, etc. Again, a few suppliers don't trust women or cannot rely on the sincerity and intelligence of women entrepreneurs. Sometimes, just because of gender, suppliers charge higher prices and require full advance payment from women, which is not usually applicable to male business owners. One of our respondents, who

makes and sells pastry cakes and bakery items, shared one bad experience related to delivery,

*"Despite taking extra charge for cake delivery, sometimes, because of negligence of delivery persons, my cakes are being damaged... Customers get damaged cake, so they return it, which is obvious...delivery companies also don't want to take the responsibility...so I need to bear the loss".*

Again, women entrepreneurs face hurdles due to difficulties staffing good employees with a strong command of digital platforms, limited access to information, a lack of skilled, trained manpower to promote the business, and bureaucratic rules and regulations. One of our respondents expressed that,

*"When I started my shop, it was a highly competitive market environment...lack of consistent and reliable product supply and effective management was another challenge for me...I faced another problem of adjusting to rapidly changing consumer demand and market trend...during conducting business page management, page promotion, advertisement strategies, I had to face difficulties."*

### 3.6 Embracing Volatile Political Situations

The volatile, unrestful political situation in Bangladesh seriously affects the growth of women entrepreneurs in their businesses. Usually, women entrepreneurs face extortion by local leaders, goons, and a few corrupt law enforcement officials. Many of our respondents, especially those with physical stores, face this type of extortion on a regular basis. One of the respondents, who runs a small restaurant, selling rice, curry, and snacks for the last four years, expressed her experience in this way,

*"The traffic police sometimes engage in extortion, even two to three times a day. These issues are prevalent in this area, and local political leaders and goons occasionally disrupt my business by claiming territory. This situation keeps me in constant fear."*

Again, different political unrest situations, people's movements or strikes over various issues,

and road blockages create serious problems for women entrepreneurs. These situations hamper their delivery system and supply chain management badly, which causes the cancellation of orders, customer dissatisfaction, product damage, etc. (Rahman et al., 2024)

#### IV. FUTURE PROSPECTS OF WOMEN ENTREPRENEURSHIP IN BANGLADESH

In a country like Bangladesh, where women were deprived of engaging in entrepreneurial activities due to social taboos, religious restrictions & social norms for decades, technological innovation has created a strong pathway for women to take strong steps into entrepreneurship. Whenever women have started entrepreneurial activities, people in Bangladesh, especially men, have recognized the significance of their contributions not only in their families but also in the overall economy. As a least developed country, Bangladesh gets the chance to have new technologies a few years later compared to developed countries. After 2020, a boom in women's entrepreneurship has been observed in Bangladesh as new technologies such as digital social media platforms, artificial intelligence, and digital banking have emerged. These technologies have not only created opportunities for educated urban women but also for rural and uneducated women. They don't want to confine themselves to the walls of their home; they want to explore their hidden talents and contribute financially to their family, which ultimately helps the economy as well.

Women's entrepreneurship in Bangladesh primarily involves small and Medium Enterprises (SMEs). There are approximately 7.8 million SMEs in Bangladesh, of which women entrepreneurs account for 7.8%. The total SME sector contributes around 20-25 per cent of Bangladesh's GDP (Chowdhury, 2025). It clearly indicates that greater involvement of women in entrepreneurship activities can increase the country's GDP.

With the help of digital platforms, women have an excellent opportunity to expand their market not only within the country but also beyond borders.

If they get the right platform and other facilities, they can start exporting their products globally. Even women entrepreneurs from rural areas can expand their markets in city areas if they are properly trained. One of our respondents mentioned that, when she started her homemade food delivery business, her helping hand helped her a lot. Gradually, the helping hand showed interest, invested her savings, and became her partner. Seeing her, other women from her village have started selling their dairy products on social media. This one example strongly suggests to us that these illiterate rural women have a dream too; they just need proper training and support from society.

These digital platforms not only give women the opportunity to start a business from home, but also don't require any physical infrastructure, and the startup cost is minimal. Rural women need basic knowledge of how to operate these digital platforms, access to a smartphone, and an internet connection to start their business. Even mobile banking is giving women the chance to conduct financial transactions with their customers and suppliers without a bank account. They can get mobile banking support from their home. Financial institutions just need to develop their systems more diversely so that these women can be better served.

Nowadays, various AI-generated software and applications are helping women develop their marketing strategies. They can easily create compelling images, videos, reels, posters, and designs to promote their products. They can even analyze the market data by using these AI tools. But very few women know how to properly leverage these AI tools. So, women need proper training on AI programs.

These digital media are also enabling women to teach other entrepreneur aspirants how to start their businesses online. One of our respondents, who runs her cake and pastry business, also takes online classes on how to prepare cakes. Although she takes charge, these online classes can still help other women learn more easily. They don't need to be engaged in any formal training institutions.

It can be mentioned that access to finance, development of skills, and networking can provide expanded opportunities for enhancing entrepreneurship. Along with access to global markets and a proper supply chain can strengthen the connections to domestic and global markets (WB, 2024).

Now, the world knows that women's empowerment and gender equality, which are the core of sustainable development, can create an inclusive work environment by fostering women's entrepreneurship. Economic participation and involvement of women in paid and unpaid work through entrepreneurship could make significant contributions to the global economy. It is a great opportunity to realize the 2030 agenda for sustainable development through women entrepreneurship, including goal 5- achieve gender equality and empower all women and girls, and goal 8- promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all, and goal 10- reduce inequalities within and among countries (WB, 2024).

## V. ACTIONABLE INSIGHTS

Bangladeshi women are no longer confined to the home; instead, they have begun to explore the digital world. In this online world, they have found an excellent opportunity to become financially independent and understand their true value, without giving up their responsibilities to their family and society as women. They now just want to fly as high as possible. Thus, they just need guidance and a proper platform to fulfill their dreams. Based on the findings of this study, we have identified potential actions that our policymakers and various financial and non-financial organizations can take to develop women entrepreneurship and improve the overall economy.

The central bank of Bangladesh has initiated a refinance scheme under which all commercial banks are encouraged to provide loans to female entrepreneurs at lower interest rates and easier terms for their SME businesses. But women are still having difficulty taking loans from these

commercial banks. Also, the Bangladesh government established the Women Entrepreneur Development Unit (WEDU) at all branches of the Bangladesh Bank. This unit operates the Small Enterprises Refinance Scheme to provide low-cost funds. This unit is also responsible for promoting women's entrepreneurship and supporting women entrepreneurs. But these are not as effective as they should be. The Government, commercial banks, and other financial institutions have to understand that investing in women's SMEs is now highly worthwhile, because with the help of digital platforms, women are changing the definition of business success. Developing mobile banking outlets in every village, providing financial literacy training, especially to the rural illiterate women, by which they will get confidence to access and use the financial services efficiently, creating women-focused investment funds, reforming the policy which will eliminate discriminatory lending practices, and supporting equal property rights can help the women entrepreneurs to expand their dream. Again, WEDU can create a financing platform where interested individual lenders are available, and women entrepreneurs can borrow funds from them. This will bypass the hassle of taking loans from institutions and also save time. WEDU will work as a middleman and evaluate both lenders and borrowers before allowing them to join this financing platform (Noman, 2025), (BB, 2024), (BB, 2025).

Under the Bangladesh Technical Education Board (BTEB), there are almost 206 public technical and vocational education and training (TVET) institutions, including 49 polytechnics and 64 Technical Schools and Colleges (TSC). But the irony is that, except for basic computer training, there are no such training programs associated with learning digital media, artificial intelligence, the use of financial services in business, or entrepreneurship. It is high time these institutions should start free training programs, considering the requirement of women entrepreneurship in this digital age. These free trainings will help the women, especially the rural illiterate women, and they will get confidence and ideas to start their businesses (BTEB, 2025). In

the upcoming budget, the Bangladesh govt. must ensure funding for developing these free training programs.

Eastern Bank Limited recently explored opportunities for women entrepreneurs through the introduction of an online training program. It introduced a financial literacy and entrepreneurial development training program for the empowerment of women entrepreneurs, providing practical knowledge, assessments, and certification to enhance their business success. Entrepreneurship development certification presents various videos on business management, entrepreneurship know-how, and digital marketing to enhance women's understanding (EBL, 2025). Like them, other commercial banks and NGOs can start similar training programs, which will ultimately help the women to increase their knowledge in diversified fields like risk management, cost management, revenue models, procurement, offline-online marketing, business documentation, and bank loans, etc. (EBL, 2025).

According to the National Industrial Policy 2022, the Government has decided to give priority to women in the service industry. Different training arrangements, special loan arrangements, banker motivation programs for financing women entrepreneurs, and product fairs would be organized to enhance the capacity of women entrepreneurs. Other programs include incentives by Bangladesh Bank to establish women in cottage, micro, small, and medium enterprises; short-and long-term training programs by the SME Foundation; expanding the scope of collateral-free loans; and the formation of the National Women Development Forum, etc. But, apart from a few isolated programs, this policy is still not vigorously implemented. It is high time the Government should take strict action so that concerned authorities must implement the policies. On the other hand, there is also a requirement for the amendment of this policy by including the focus on women's development on the utilization of social platforms, AI platforms, digital banking on entrepreneurship (GOB, 2022), (WWB, 2024).

Apart from those, policy measures should be taken to address supply-side challenges, thereby motivating more women to take on business leadership positions within the financial ecosystem, promoting alternative sources of collateral, and providing technical assistance and capacity-building for financial institutions. All of these initiatives would reduce the challenges relevant to the supply side, including misalignment of financial products with the needs of women entrepreneurs, prejudicial discrimination, statistical discrimination, and higher unit costs of administering smaller loans (OECD, 2025).

Policy measures could also be taken on the demand side, including lower levels of entrepreneurial skills among women, limited business networks, lower levels of available collateral, lack of financial history, and a tendency toward smaller projects and lower productivity. Demand-side initiatives include developing entrepreneurial skills by identifying adequate funding opportunities, increasing eligibility for financial services, raising knowledge and awareness of financial instruments, and connecting with sources of finance for businesses. As entrepreneurship occurs within a socioeconomic context, religion, culture, and social norms impact the attitudes and behavior of women entrepreneurs. To foster favorable cultural attitudes, policy should address broader structural inequalities, increase public awareness of the positive social and economic impact of women's participation in the labor market, establish platforms for building networks, and create a supportive business environment that enhances the social and financial inclusion of women entrepreneurs. Policy initiatives should take into consideration the following issues: arranging workshops and training, improving digital financial awareness and skills, incorporating financial literacy education, and increasing collaboration and partnerships with financial and educational institutions to enhance women's financial literacy, especially in rural areas. Microfinance could be an essential tool for facilitating access to startup financing, which may

reduce difficulties in accessing traditional banking and lending markets for women entrepreneurs. Last but not least, women also cannot overlook their responsibilities towards their elderly and their children. Bangladesh lacks a formal care system, which is actually creating obstacles for women entrepreneurs. Policymakers must take the initiative to build a strong formal care system where both the elderly and children can receive care, ensuring more free time for women for their entrepreneurship activities. Again, in this study, many respondents stated that volatile political conditions and extortion by political figures are among the significant challenges they face. For the growth of women entrepreneurship, the Government must ensure stable political conditions, and law enforcement agencies must take strong steps, with a zero-tolerance policy, against all illegal activities that affect women entrepreneurs.

## VI. CONCLUSIONS

Women entrepreneurship can not only enhance the financial independence of women, alleviate poverty and social improvement, but also can be a significant contributing sector to the national GDP of Bangladesh. Modern technologies are opening new & facile paths for women's entrepreneurship, which needs to be backed by strong policies and social support on a large scale. Only then, women can overcome the major challenges like financial barriers, the burden of work-family responsibilities, lack of knowledge and education, and religious and cultural hindrances on the way to success in entrepreneurship. This study has revealed some opportunities, such as expanding entrepreneurship in the global market and major contributions by rural illiterate women with the help of modern technologies. If all the stakeholders of the country can think in a broader sense and provide an obstacle-free pathway for women, then these visionary women entrepreneurs can change the face of the country's overall economy.

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# Research on the Visual Image Design of Wuhan Urban Subway from the Perspective of Semiotics

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## ABSTRACT

As an important part of urban infrastructure, the subway not only meets the needs of transportation, but also undertakes the function of urban cultural communication. Based on the theory of semiotics as the research framework, combined with the space environment of Wuhan subway, from the perspective of visual symbol system, this paper analyzes the role of subway visual image design in shaping urban cultural symbols, enhancing public communication and enriching emotional experience. Through field research and case analysis, this paper combs the visual strategies of Wuhan Metro in the creation of three kinds of spatial atmosphere of art, humanities and science and technology, and summarizes the specific paths of visual language system construction, thematic space shaping and future narrative guidance. The research results show that the symbolic visual design improves the cultural recognition and citizen's sense of belonging of Wuhan Metro, and expands the cultural expression of public space. This paper hopes to provide theoretical support and practical reference for the construction of visual image of urban rail transit from the perspective of semiotics, and help to enhance the soft power of Wuhan city culture.

*Keywords:* semiotics, wuhan, urban subway, visual image.

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**Keywords:** semiotics, wuhan, urban subway, visual image.

## I. INTRODUCTION

As an important infrastructure of modern cities, urban subway has become a key carrier of urban

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cultural communication. It not only bears the function of meeting the daily traffic needs of urban residents, but also shoulders the important mission of spreading the cultural image of the city. In the era of intelligent communication, the sensory experience of the visual image of urban subway is deeply integrated with the process of cultural communication. The interaction between subway passengers and the spread of urban subway culture is no longer a simple one-way process, but a dynamic interaction process shaped by multiculturalism. In the field of urban subway cultural image building, with the help of the theory and method of artistic semiotics, it can interact with the dynamic subway visual image carrier and blend with each other, so as to improve the travel experience of subway passengers in an all-round way. In view of this, it is of great significance to study how to use semiotic theory to deeply explore the unique regional cultural elements of Wuhan city and construct a subway visual image system with distinct regional characteristics for shaping the unique urban subway space atmosphere, improving the cultural recognition of Wuhan urban subway and enhancing the sense of belonging and identity of citizens.

## II. SEMIOTICS THEORY AND WUHAN CITY SUBWAY SPACE OVERVIEW

### 2.1 Semiotics Theory

Semiotics is a discipline that studies the law of symbol and its meaning generation. It focuses on the relationship between 'signifier' and 'signified'. Swiss linguist Saussure put forward the theory of binary structure of signs, emphasizing that the combination of signifier and signified in linguistic signs is arbitrary. On this basis, the American philosopher Peirce further proposed the ternary structure theory, that is, 'object-symbol-

explanation'. He believed that the meaning of symbols came from the process of interpretation. French scholar Roland Barthes put forward the theory of mythological symbol system, which regards symbols as an important tool for cultural communication. In the field of design, these theories are widely used in the construction of visual systems such as brand, packaging, and space, helping designers create more connotation and depth of visual language.

## 2.2 The Relationship between Semiotic Theory and Visual Image of Wuhan Subway

As an important carrier of the city image, the composition of the Wuhan Metro is rich and diverse, covering a series of visual elements such as the guide system, space decoration, advertising media and cultural installations. These elements not only bear the basic practical functions, but also shoulder the important mission of conveying urban cultural information imperceptibly. From the perspective of semiotics, elements such as "Yangtze River," "Yellow Crane Tower" and "Jingchu Culture" in Wuhan's regional culture can

be transformed into identifiable visual symbols to enhance the cultural recognition of subway space and strengthen urban memory. As a 'signifier', visual symbols convey the historical context and humanistic spirit of Wuhan through form and material. Wuhan subway system refines regional cultural symbols and strengthens urban cultural expression through visual elements such as color, graphics, text and installation art. As a 'city card', the public transport subway space refines and solidifies the cultural image of the city into a visual symbol that is easy for the public to understand, so as to facilitate the window publicity function of urban culture<sup>[1]</sup>. Wuhan's Hankou North Station takes commercial culture as the theme, Chuhe Hanjie Station takes cultural and creative industries as the basis, forming distinctive subway space signs. Wuhan Hongshan Square Station (shown in Figure 1) uses red and black tones with relief murals to interpret Jingchu cultural heritage, and uses symbolic language to reproduce urban memory, so that passengers can subtly feel the weight and charm of urban culture during their commute.



Fig. 1: Murals of Wuhan Hongshan Square Subway Station

### III. THE VALUE ANALYSIS OF SEMIOTICS THEORY IN THE VISUAL IMAGE DESIGN OF WUHAN URBAN SUBWAY

#### 3.1 The Construction Value of 'City Symbol' in the Visual Image of Subway

As the core city of central China, Wuhan not only has a long history and profound cultural accumulation, the unique charm of Jingchu culture, the magnificent geographical

characteristics of the confluence of the two rivers, and the far-reaching influence of major historical events such as the Wuchang Uprising; it has jointly built a unique Wuhan city symbol system. The visual image of Wuhan urban subway can skillfully use visual elements such as colour, graphics, text and installation art to refine and display regional cultural symbols and effectively strengthen the spread of urban culture. For example, the subway station of Hubei Academy of

Agricultural Sciences (shown in Figure 2) is located on the waterfront of the scenic South Lake. The theme of the station is 'tree shade into a kind', which extracts two design elements of plants and science and technology to highlight the cultural connotation. The Gedian South Station of Wuhan Metro, fully considering the regional culture, has six themes: Gehong 's search for medicine, Wudu Echeng, Zhu ink painting,

ecological livability, airport new port and industrial city. Under the trend of art entering the station space in an all-round way, more and more art station spaces in China have appeared. In the stage of station construction and decoration planning, it is bold to integrate the overall planning of art into the space design, which can create a complete and systematic station visual effect<sup>[2]</sup>.

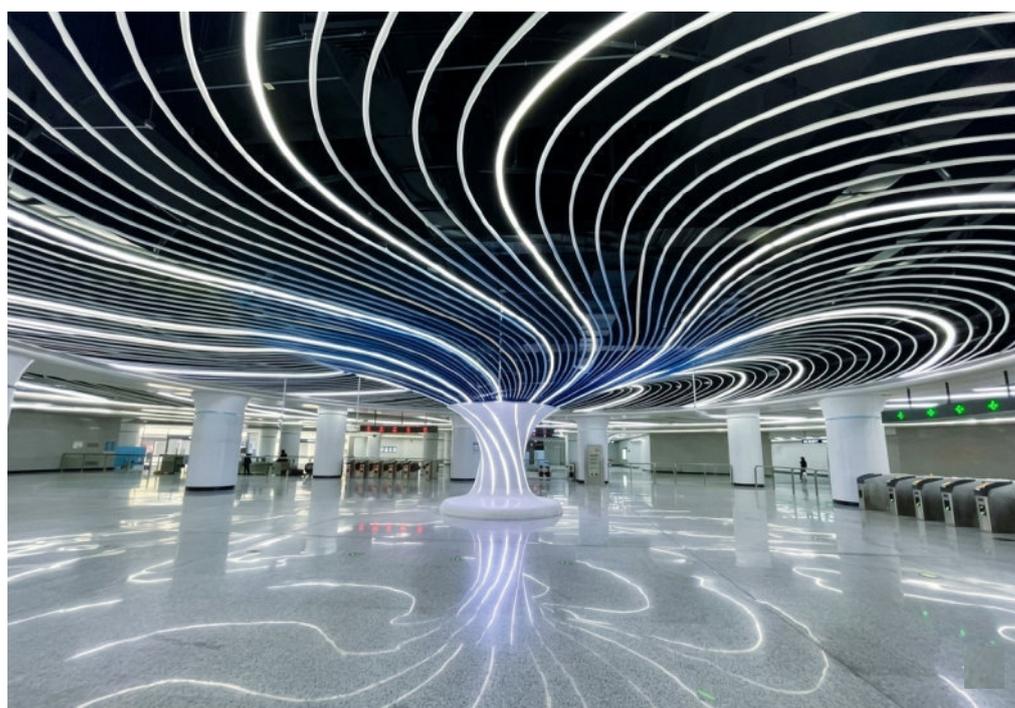


Fig. 2: Hubei Academy of Agricultural Sciences subway station 'urban forest'

### 3.2 The Value of Public Media Communication in the Subway Visual Image System

As a public medium used frequently by people, subway space has strong communication efficiency. With the clever visual narrative strategy, the subway space can efficiently convey the spirit of the city, and then shape the passengers' emotional identity to the city. Wuhan Metro is unique in space design and attaches great importance to the ingenious implementation of cultural narrative. For example, Jiangnan Road Station is like a three-dimensional historical picture scroll. Through exquisite reliefs and lifelike murals, it vividly reproduces the historical scene of Wuhan's port opening period, so that passengers feel the magnificent historical years as if they crossed time and space; with the theme of science and technology, the Optics Valley Plaza

Station fully demonstrates the unique image of Wuhan as an innovative city through modern design elements and creative display methods, highlighting the vigorous scientific and technological vitality of the city. This symbolic design method can not only effectively enhance the subway passengers' perception of urban culture, make urban culture appear in an intuitive and vivid way in front of people, but also further promote the wide spread of urban spirit and cultivate passengers' sense of identity and belonging to the city.

Through the perfect combination of visual symbols and spatial narrative, Wuhan Metro has successfully constructed a cultural symbol system with distinct local characteristics, realized the visualization and wide-area dissemination of urban culture in public space and made every

passenger a disseminator and witness of urban culture. For example, as the first subway line in Wuhan, there are a total of 21 stations on Metro Line 2, which are decorated with simple modern style and personalised style respectively. Among them, there are 13 stations with modern standard style, and there are 6 stations that can show the characteristics of personalised Jiangcheng culture. The Hankou Railway Station, with the theme of 'Yellow Crane Return', uses the 'River City Impression' glass mosaic to splice out the art sculptures and regional grounds such as 'Crane shape, lotus leaf and lotus canopy, highlighting the hospitality culture of Wuhan city. In order to show the image of the city's green lung, Zhongshan Park Metro Station uses murals with the theme of 'Happy Wuhan' for cultural contrast [3].

### *3.3 The Emotional Design Value in the Visual System of Subway Space*

Emotional design is an important embodiment of semiotics applied to urban subway space design. Compared with function-oriented infrastructure construction, emotional design pays more attention to the emotional link between symbols and people. Through the delicate processing of colour, material and shape, it gives space, temperature and memory. The emotional design of Wuhan Metro has also been explored. The warm-tone lighting system, combined with poetry elements and local cultural symbols, has created a cordial and warm ride experience. For example, the use of warm colours such as orange and yellow lights in the winter station space reduces the sense of coldness; local poems are introduced into the wall decoration of some stations, such as the poem "Yellow Crane Tower" in Zhongjiacun Station of Wuhan Metro Line 6, which triggers the cultural and emotional memory of passengers with text symbols. Through the embedding of emotional symbols, Wuhan Metro has transformed the urban traffic space from a cold channel to a warm, emotional and memorable urban life scene, which further strengthens the humanistic care and cultural temperature of urban public space. The use of modern science and technology, especially the use of lighting control technology, has greatly enriched the

cultural connotation and visual effects of public art in subway space, and created a unique artistic atmosphere for passengers<sup>[4]</sup>.

## **IV. THE APPLICATION STRATEGY OF SEMIOTICS IN THE VISUAL IMAGE DESIGN OF WUHAN URBAN SUBWAY**

### *4.1 Constructing the Symbol Visual Language System of Regional Characteristics*

Wuhan Metro can build a visual symbol system from two aspects: 'cultural excavation' and 'visual transformation'. First of all, the core images are extracted from the regional culture, such as the Yellow Crane Tower, the Yangtze River Bridge, the cherry blossoms of Wuhan University, etc., so as to build a concrete symbol library; then, using abstract graphics, style colours and decorative patterns to recreate these images, and then unify the style of the visual system. For example, the business district station of Wuhan Metro Line 7 (shown in Figure 3), above the station hall, is a dome device with a blue main tone, which is spliced by geometric glass. The color gradually changes from the center of the dome to the outside, from shallow to deep, like a flowing digital ocean, and like an information network that continues to spread outward in the era of science and technology. The dome structure is rigorous and rhythmic. The grid composed of triangular steel frames not only enhances the overall structural stability, but also creates a beauty of order full of a sense of future. The sculpture device under the station hall is unique, showing a delicate shape similar to water droplets or crystals. The surface of its material has a very high reflectiveness. When the light falls on it, it mirrors and echoes each other with the dome color above, creating an intoxicating immersive visual experience. Whether it is the careful selection of color or the ingenious combination of shape and material, it accurately reflects the profound response to the site positioning of 'Technology City'. Compared with other subway stations that focus on showing regional culture or telling humanistic stories, the business district subway station is more like a fantastic visual imagination of the future urban form. Actively explore diversified forms of expression, widely

introduce the display means of the integration of art and science and technology and give higher artistic texture and scientific and technological charm to the space<sup>[5]</sup>. This expression of the combination of art and structure not only shapes

the city's impression through visual language, but also allows Wuhan passengers to feel the changes brought about by technology and art in their daily travel.



Fig.3: Wuhan business district subway station

#### 4.2 Create A Visual Image of 'One Stop, One Theme'

Wuhan Metro can implement the strategy of 'one station, one theme culture'. For example, Tanhualin Wushengmen Station takes 'Yilin Danqing' as the design theme, breaking the traditional framework. On the top of the station, hand-painted art paintings create a visual feast, combined with indirect lighting, running through the entire station hall space. Refining the typical architectural elements of Tanhualin block, transforming them into visual graphic language, combining them with the scattered composition in traditional Chinese painting, fully demonstrating the historical and cultural essence of Tanhualin and the strong artistic atmosphere of the block. The subway station of Hubei University of Traditional Chinese Medicine takes 'sailing' as the design theme, which means sailing up and standing up bravely, reflecting the spirit of students' eagerness to learn and progress. The mid-span of the station is designed as a circular combination, and the sail tension structure is

designed to increase the space height. The top surface adopts a highly scientific and technological spray-painted aluminium plate pattern, showing the vitality and tension of youth. The implementation of visual culture can create a unique cultural atmosphere for the subway station, enhance the cultural experience and emotional resonance of passengers, and convey the cultural connotation and image of the city through these cultural symbols and symbols<sup>[6]</sup>.

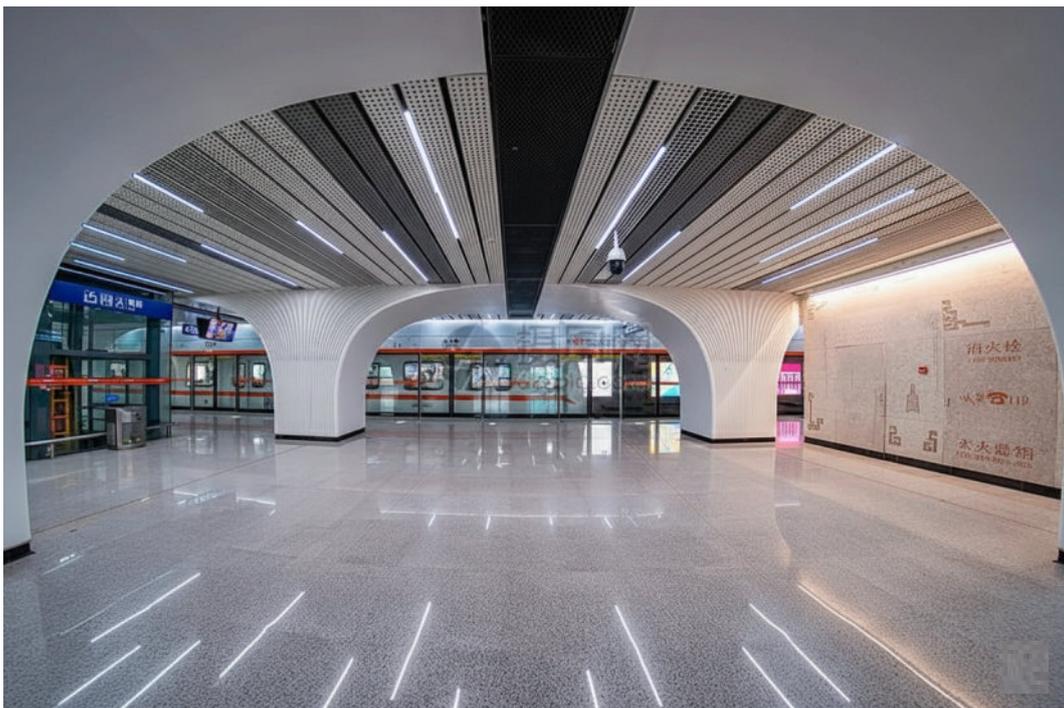
#### 4.3 Create A Digital Immersive Visual Interactive Experience

With the continuous development of artificial intelligence technology, the visual image design of Wuhan urban subway has ushered in a new opportunity. It can fully integrate cutting-edge technologies such as augmented reality (AR), interactive screen, and multimedia projection to enhance the interaction between subway space and passengers, while enhancing its information carrying capacity. For example, the 'AR interactive wall of urban culture' can be set up and

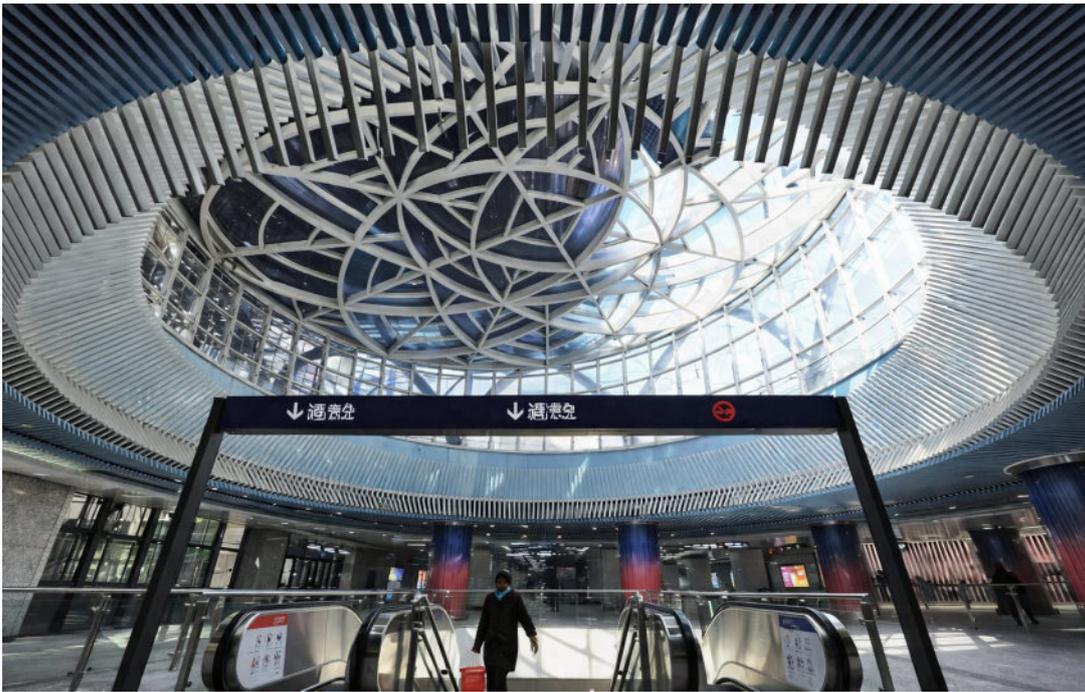
passengers can watch the wonderful animation of Wuhan's historical evolution by scanning the code on their mobile phones. It is as if they have experienced the vicissitudes of the city through time and space; the LED screen is used to create a dynamic poetry display area, so that ancient poetry can be presented in front of passengers in a flexible manner, giving more levels and more charming cultural content to the urban space. By skillfully integrating symbols and media, we can create an immersive Wuhan subway cultural scene, so that Wuhan urban culture can be presented to the public in a more intuitive and vivid way, thus enhancing the visibility and participation of urban culture, so that passengers can deeply experience the unique charm of urban culture.

In the field of site space design, Wuhan urban rail transit is gradually introducing the 'immersive'

oriented visual language. This measure not only accurately responds to the core demands of the city's "innovative" development orientation, but also fully demonstrates the positive and important role played by the subway in the process of Wuhan city image construction. Taking Xujiapeng station (as shown in figure 4), Zhuyeshan station (as shown in figure 5) and other stations as typical representatives, these stations have unique ingenuity in structural layout, material selection keeps up with the trend of the times, and the design of lighting system is unique, which reflects distinct technology and future sense everywhere. They together constitute a representative digital technology aesthetics sample in the Wuhan subway system, bringing unprecedented travel experience to passengers.



*Fig 4:* Wuhan Xujiapeng subway station



*Fig.5:* Wuhan Zhuyeshan subway station

## V. THE APPLICATION STRATEGY OF WUHAN SUBWAY SPACE DESIGN

The subway is not only the basic support system for the normal operation of the urban function, but also a very active medium in the field of cultural communication. With its high-density personnel carrying and high-flow operating characteristics, the subway naturally has the advantage of 'visual symbol cluster'. From the perspective of semiotics, the scope of Wuhan Metro is not only limited to the selection of materials, color matching and graphic structure at the design level, but also related to a 'meaning generation mechanism' - that is, how the visual elements in the subway jump from the neutral function state to the carrier of cultural discourse, act as emotional media and become identity symbols.

### *5.1 Constructing the Visual Impression of Urban Culture*

In the underground public space of Wuhan city, the subway station is the key to break its monotonous shortcomings, and the public art design of the subway station is an important entry point to decorate the subway station. From the psychological point of view, passengers will

naturally become the recipients of public art in subway stations when they are waiting for the train. The systematicness of visual language is the basic guarantee for the continuous cultural tension of urban public space. A mature visual symbol system does not depend on a single graphic or surface decoration, but should realise the transition from physical space to cultural space through the chain logic of 'cultural image-symbol extraction-structural integration'. In this system, the 'cultural sense' station of Wuhan Metro shows a distinct visual hierarchy and profound cultural narrative depth.

Wuhan Hanzheng Street subway station is the first subway station in the country to imitate outdoor scenes indoors. It uses antique wooden structures, overhanging streets, and old-fashioned signs as basic elements to reproduce the commercial vitality and market memory of 'Old Hankou'. Therefore, the abstract regional culture is presented in a metaphorical and concrete way, creating a highly visual tension of the subway space and a strong cultural atmosphere, so that passengers passing through it can deepen their impression of different regional cultures in imagination and understanding<sup>[7]</sup> (as shown in Figures 6 and 7).



Fig. 6 & Fig. 7: Wuhan Hanzhengjie subway station

### 5.2 Shaping the Urban Humanistic Space Scene

In the context of the new era, the construction of urban culture in the subway station space is not a simple continuation of the context, but a subway culture that can reflect the people, space and culture as a whole<sup>[8]</sup>. The cultural subway station

emphasises the 'historical dimension' of the city, while the humanistic subway station is more like the 'social dimension' in space, which resorts to the visual reconstruction of emotional temperature, public life and daily experience. The city subway station realises the perceptual bonding between the city and the people by

clarifying the theme, contextual semantics and friendly visual strategies. For example, the decoration of Wuhan Jiedaokou subway station (as shown in Figs. 8 and 9) draws inspiration from its development history, it abstracts the old name of Jiedaokou's 'key' and the new label 'computer city' into two elements: 'key' and 'computer display'. On the art wall of Jiedaokou station, through the dislocation relationship of computer display screen in different periods, a visual aesthetic effect is formed. Four copper keys are arranged in a line with computer display screens of different ages to create a unique sense of rhythm and rhythm for the picture. Four copper keys, linked to a computer monitor in the street story entrusted with the past, present and future of the street good memory and outlook. The continuous upgrading of computer display screens has not only witnessed the development of street

crossings in time, but also witnessed the process of street crossings towards prosperity. The screens of different computer monitors are equipped with images that record the bustling streets, thus confirming the yesterday and today of the streets, and at the same time reminding of a beautiful tomorrow and future. In the whole design scheme, there are four copper keys: one symbolises the record of a beautiful history yesterday, one represents the opening of the street and the door of modern civilisation today, one means the opening of the street and the world stage tomorrow, and one is the vision of the prosperity of the street. From the perspective of humanities, it avoids the excessive accumulation of redundant information. still, it adopts the method of 'blank-motion-structure segmentation', giving the rhythm of the picture and the flexibility of scene switching, which is closer to the source of life.



Fig. 8 & Fig. 9: Wuhan Jiedaokou subway station

### 5.3 Manufacturing Urban Subway Visual Technology Experience

Urban subway visual technology is the most symbolic discourse of "future tendency" in urban space semantics. In the Wuhan subway system, if the cultural shaping is to build the 'past of the city' and the humanistic construction is to respond to the 'current needs of the citizens', then the scientific and technological presentation shoulders the visual construction task of 'depicting the future picture'. Its core point is to create a truly perceptible future experience for people through non-figurative visual forms. For example, Wuhan Optics Valley Square subway station (as shown in Figures 10, 11, 12, 13), the station uses a 360-degree circular station hall

design. In the positioning method, the degree positioning method is innovatively used, and the color and five elements are combined to help passengers locate, which not only enhances the convenience of direction recognition, but also improves the aesthetics of the subway station hall. Its five main entrances and exits (G, H, J, Q, R) take the five elements of gold, wood, water, fire and earth as the core design concept, skillfully integrate Chinese traditional philosophy and modern aesthetics and create a subway space with both practical functions and artistic atmosphere. Specifically, the G mouth corresponds to 'gold' and is decorated in yellow, symbolizing wealth and cohesion; h mouth corresponds to 'wood', with green as the main color, symbolizing vitality and education; j port corresponds to 'water', and

blue is used to symbolize mobility and commercial vitality. Q port corresponds to 'fire', using red, symbolizing hope and technological innovation;

the R port corresponds to the 'soil' and is brown, which symbolizes the foundation and regional development.

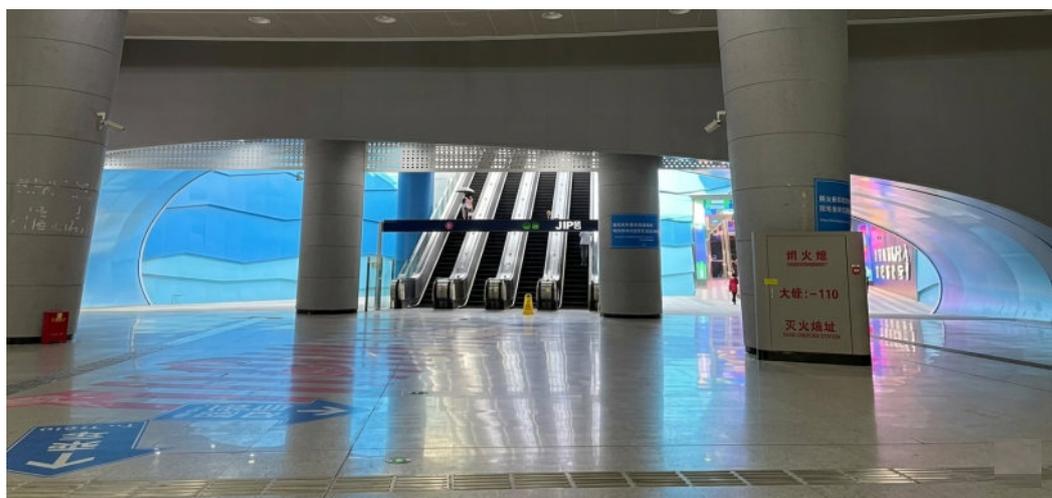
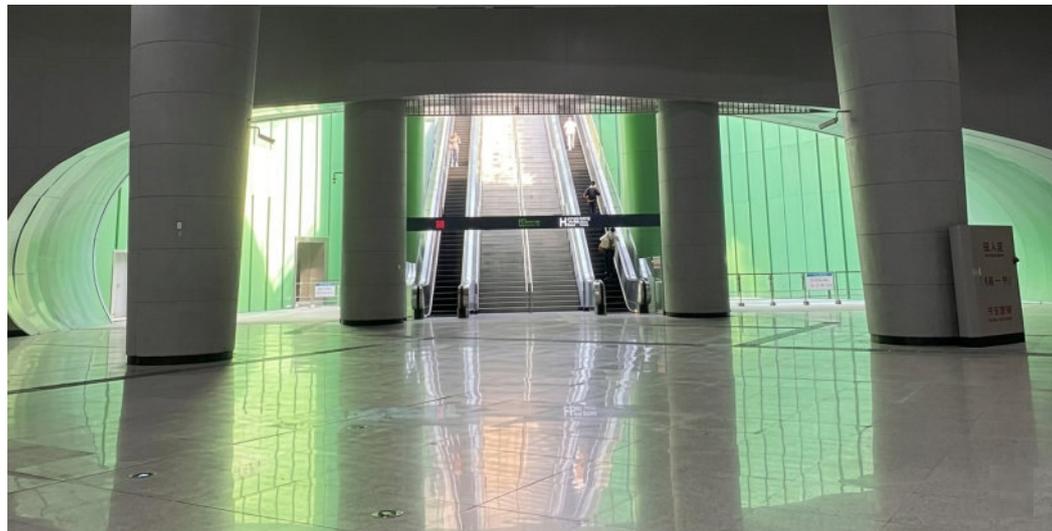




Fig. 10, Fig. 11, Fig. 12 & Fig. 13: Wuhan Optics Valley Square Subway Station

## VI. CONCLUSION

Wuhan Metro is like a cultural carrier that surges at high speed in the urban context. It takes the semiotic theory as the framework. It constructs the internal logic of the visual image of Wuhan Metro from the three dimensions of art, humanities and science and technology. In the process of building the visual system of the subway, Wuhan subway skillfully uses symbol extraction, image translation and cultural narrative to successfully establish a deep urban identity mechanism. In terms of space scene construction, it makes the original cold subway space overflow with warmth and temperature by virtue of delicate emotional rendering and accurate semantic embedding. It can be seen that the visual image of Wuhan subway is fully integrated into the local regional cultural symbols, creating a unique urban subway space, which not only satisfies people's yearning for a better life in the city, but also enhances people's sense of identity and belonging to Wuhan.

*Fund Project:* key project of philosophy and social science research of Hubei Provincial Department of Education in 2024, 'Research on innovative communication of visual image of urban subway culture in Hubei Province in the era of digital intelligence' (project number: 24D030).

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# An Analytical Study: The Great Umayyad Mosque in Damascus: Through the Journeys of Ibn Jubayr and Ibn Battuta: As a Model

*Gamal Adawi*

## ABSTRACT

This article examines the Great Umayyad Mosque in Damascus through the journeys of the Andalusian traveler Ibn Jubayr (d. 1217 CE), author of *Rihlat Ibn Jubayr* (also known as *Tadhkirah bi-Akhbar min Ittifaqat al-Asfar* – “A Reminder of Reports Concerning the Incidents of Travel”), and the Moroccan traveler Ibn Battuta (d. 1377 CE), author of *Tuhfat al-Nuzzar fi Ghara'ib al-Amsar wa 'Aja'ib al-Asfar* (“A Gift to the Observer Concerning the Wonders of Cities and the Marvels of Travel”). Despite the chronological distance between the two journeys, both works serve as a true mirror of their respective eras. Their literary narratives, accounts, and reports constitute an important historical source on the city of Damascus in the Middle Ages, particularly regarding its monuments and religious architecture, foremost among them the Great Umayyad Mosque.

*Keywords:* ibn jubayr; ibn battuta; travel literature; umayyad mosque; damascus; islamic architecture; artistic decoration.

*Classification:* LCC: NA380.D3, DS99.D3, BP187.3

*Language:* English



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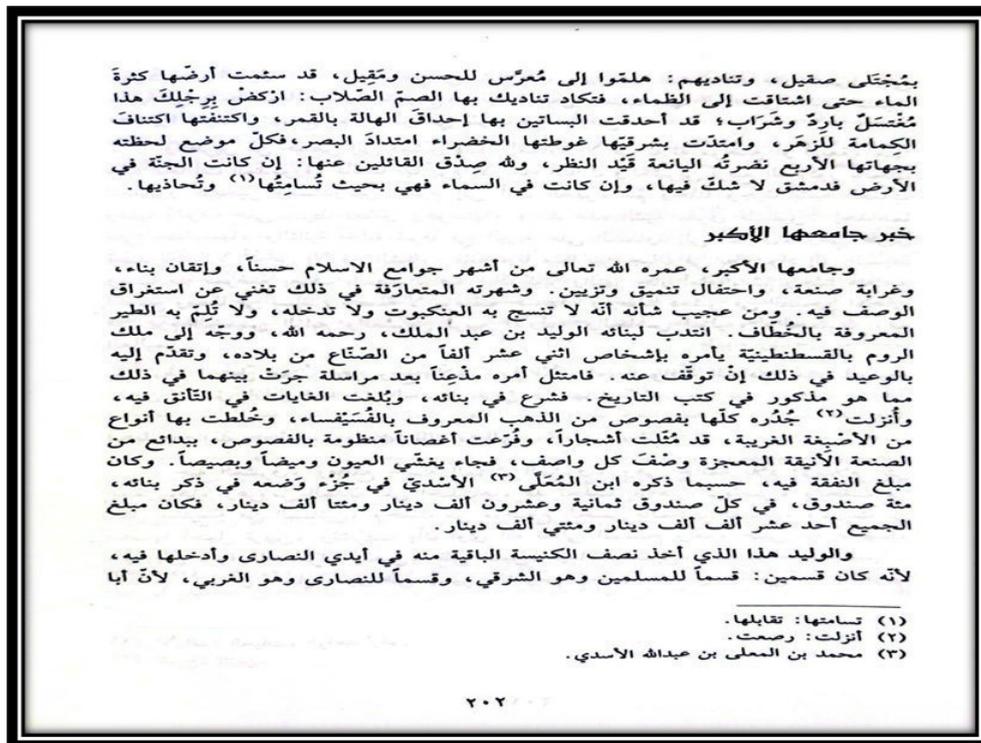
This article examines the Great Umayyad Mosque in Damascus through the journeys of the Andalusian traveler Ibn Jubayr (d. 1217 CE), author of *Rihlat Ibn Jubayr* (also known as *Tadhkirah bi-Akhbar min Ittifaqat al-Asfar – “A Reminder of Reports Concerning the Incidents of Travel”*), and the Moroccan traveler Ibn Battuta (d. 1377 CE), author of *Tuhfat al-Nuzzar fi Ghara'ib al-Amsar wa 'Aja'ib al-Asfar* (“A Gift to the Observer Concerning the Wonders of Cities and the Marvels of Travel”). Despite the chronological distance between the two journeys, both works serve as a true mirror of their respective eras. Their literary narratives, accounts, and reports constitute an important historical source on the city of Damascus in the

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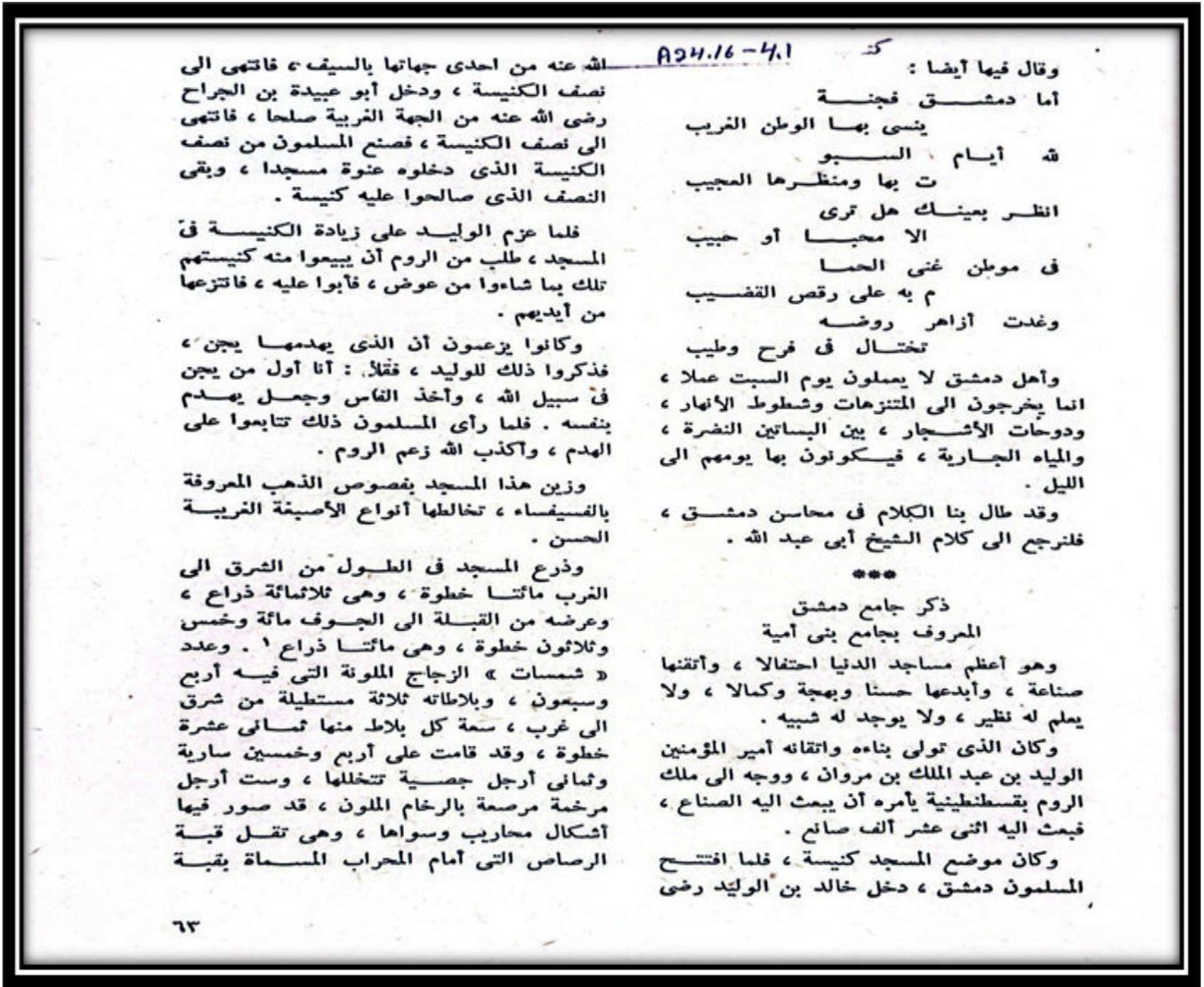
This study is based on a descriptive-analytical methodology that incorporates the historical approach, in accordance with the nature of the subject. In addition, it applies a comparative framework to examine the two travel accounts.

The first passage is drawn from Ibn Jubayr’s travel account, under the title “News of Its Great Mosque” (pp. 202–212).



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The second passage is drawn from Ibn Battuta's travel account, under the title "Mention of the Damascus Mosque, known as the Umayyad Mosque" (pp. 63-67).



My choice of these two journeys in particular was for the following reasons:

1. "The striking similarity between the accounts of Ibn Jubayr and Ibn Battuta in their descriptions of the Umayyad Mosque lies in their detailed, vivid, and comprehensive portrayals. Their narratives reflect an objective and reportorial mode of description."
2. "The high literary and historical value of travel writing, which represents one of the most effective means of recording travelers' observations of Islamic cities and their architectural heritage. The works of Ibn Jubayr and Ibn Battuta demonstrate

remarkable precision of observation and expressive clarity, characterized by vivid imagery and fluid language. Moreover, travel literature constitutes a vital historical and archaeological source, providing essential geographical and cultural information about the Levant and the broader Eastern regions. In this respect, it is comparable in importance to material sources such as inscriptions, tablets, scrolls, and manuscripts."3.

The grandeur of the Umayyad Mosque inspired numerous narrators and travelers who visited it, including the Andalusian traveler Ibn Jubayr and the Moroccan traveler Ibn Battuta. Both portrayed

it as the “pearl” of Damascus, the “paradise of the East,” and a rare architectural masterpiece—one of the most famous, grandest, and most beautifully constructed mosques of the Umayyad era. The renowned geographer Yaqut al-Hamawi (1995) wrote in *Mu'jam al-Buldan* (“Dictionary of Countries”): “If a person lived for a thousand years and visited the Umayyad Mosque every day, he would see today what he did not see yesterday.”

Among the most important findings of this study is the strong convergence between the accounts of Ibn Jubayr and Ibn Battuta in their descriptions of the Great Umayyad Mosque in Damascus. Both texts employ rich aesthetic language and detailed references to artistic decoration, highlighting the magnificence, grandeur, and originality of medieval Islamic architecture as embodied in the mosque. The structure emerges not only as a masterpiece of Umayyad civilization but also as a central religious landmark within the Arab-Islamic world.

Historical reports further emphasize this significance. It is said that the Umayyad Caliph Al-Walid I declared in 705 CE: “I wish to build a mosque the like of which has never been built before me, nor will anyone after me build its equal.” Likewise, the Abbasid Caliph Al-Ma'mun is reported to have acknowledged its uniqueness, stating: “It was built unlike any mosque before it” (al-Bahnasi, 1988, p. 25).

## I. INTRODUCTION

The Great Umayyad Mosque in Damascus occupies a prominent place in the travel accounts of Ibn Jubayr and Ibn Battuta, both of whom described Damascus as the “paradise of the East.” Historians and writers have frequently cited their descriptions, portraying the mosque as a masterpiece of Islamic architecture and a defining monument of Islamic civilization.

A review of comparative studies on the two travelogues indicates that, despite the importance of the mosque in their narratives, it has not received sufficient focused analysis. This study therefore examines the Great Umayyad Mosque through the accounts of Ibn Jubayr and Ibn

Battuta in order to identify similarities and differences in their descriptions of its aesthetic and artistic features. It seeks to answer the central question:

Why is the Umayyad Mosque considered one of the masterpieces of Islamic architecture in Arab-Islamic civilization?

Travel literature represents one of the most important intellectual products of the medieval Islamic West. Scholars have highlighted its value due to the reliability of its observations, stylistic richness, and narrative depth. The travelogues of Ibn Jubayr and Ibn Battuta in particular constitute foundational works in this tradition.

This study begins with brief biographical introductions to both travelers and their journeys, followed by a comparative analysis of their descriptions of the mosque.

## II. IBN JUBAYR

Abu al-Husayn Muhammad ibn Jubayr al-Kinani (539 AH/1144 CE–614 AH/1217 CE) was an Andalusian traveler and writer born in Valencia. He undertook several journeys to the East and authored a celebrated travelogue commonly known as *Rihlat Ibn Jubayr*. He died in Alexandria at the age of approximately seventy-five.

Ibn Jubayr arrived in Damascus during one of his eastern journeys and recorded an extensive and stylistically elaborate description of the city and its Great Mosque. His prose is characterized by ornate language and rhetorical devices typical of medieval Arabic literary style, including rhymed prose. While critics have sometimes noted the artificiality of such stylistic features, the work remains an invaluable historical and literary source.

In his description of Damascus, Ibn Jubayr presents the city as a place of exceptional natural and spiritual beauty, emphasizing its gardens, flowing water, and religious significance. He famously describes it as the “paradise of the East,” reflecting both aesthetic admiration and spiritual symbolism.

### III. IBN BATTUTA

Like Ibn Jubayr, Ibn Battuta provides a detailed account of Damascus in his travelogue *Tuhfat al-Nuzzar fi Ghara'ib al-Amsar wa-'Aja'ib al-Asfar*. He arrived in the city in 726 AH/1326 CE and resided there for a period at the Maliki madrasa known as al-Sharabshiyya.

Ibn Battuta's description is more concise but equally emphatic in its praise. He describes Damascus as unparalleled in beauty and explicitly acknowledges Ibn Jubayr's earlier account. His narrative blends observation with literary embellishment, including poetic references that reinforce the city's reputation as a terrestrial paradise.

Both travelers record traditions concerning the construction of the mosque, including accounts of its immense cost and the ambitious building program attributed to the Umayyad Caliph al-Walid I. These narratives highlight the mosque's monumental scale and the resources invested in its construction.

### IV. PREVIOUS STUDIES

Several comparative studies have examined the journeys of Ibn Jubayr and Ibn Battuta; however, most focus on urban descriptions across different regions rather than a dedicated analysis of the Great Umayyad Mosque. Existing scholarship tends to address broader themes such as religious sentiment, urban development, or regional geography.

Although a number of works analyze aspects of their travel literature, few provide a systematic comparative study centered specifically on the mosque's architectural and artistic features. This gap underscores the need for a focused analytical approach examining the mosque through both narratives.

### V. RESEARCH PROBLEM AND QUESTIONS

The research problem stems from the limited scholarly attention devoted to the Umayyad Mosque within comparative travel literature

studies, despite its architectural and civilizational importance.

*This study addresses the following questions:*

1. How did Ibn Jubayr and Ibn Battuta describe Damascus and the Great Umayyad Mosque?
2. What similarities and differences appear in their accounts regarding architectural features and artistic decoration?
3. How do their stylistic approaches shape the reader's perception of the mosque?

### VI. RESEARCH OBJECTIVES

*This study aims to:*

- Analyze the descriptive focus of both travelers on the Umayyad Mosque.
- Compare historical and aesthetic elements in their narratives.
- Examine the architectural and artistic features emphasized in each account.
- Evaluate the broader cultural significance of the mosque within medieval Islamic travel literature.

### VII. IMPORTANCE OF THE STUDY

The importance of this study lies in its focus on a monument that has received limited dedicated comparative analysis in travel literature scholarship. By examining the mosque through the perspectives of two major travelers, the study highlights its role as a central symbol of Umayyad architectural achievement and Islamic cultural identity.

### VIII. METHODOLOGY

The study adopts an analytical and comparative methodology. It combines descriptive textual analysis with inductive and critical approaches in order to identify patterns, similarities, and differences in the two narratives. Comparative textual analysis enables a more nuanced understanding of how each traveler constructed the image of the mosque (Maxwell 2013; Creswell 2013; Creswell and Clark 2017).

## IX. RESULTS AND DISCUSSION

A close reading of both texts reveals strong overlap in the narrative traditions surrounding the construction of the mosque. Both accounts present similar stories regarding the transformation of a former church into a mosque and emphasize the determination of the Umayyad leadership in completing the project.

However, differences emerge in descriptive emphasis. Ibn Jubayr offers a more elaborate and rhetorically rich narrative, characterized by extended aesthetic descriptions and religious symbolism. In contrast, Ibn Battuta provides a more concise but structured account, focusing on key architectural features and social functions.

Both travelers demonstrate a notable concern with numerical and spatial details, including measurements, structural components, and institutional roles. This quantitative tendency reflects broader intellectual traditions in medieval Islamic scholarship and suggests that travel literature may serve as a valuable historical source for architectural and urban studies.

### *Artistic and Architectural Features*

Both narratives highlight the richness of the mosque's artistic decoration. The descriptions emphasize:

Vegetal motifs and mosaics, associated with Umayyad artistic identity. Geometric ornamentation, including octagonal forms and patterned marble.

- Calligraphic elements, especially inscriptions linked to sacred figures.
- Domes and minarets, which symbolize architectural innovation and religious significance.

These features collectively reinforce the mosque's status as a landmark of Islamic architectural development.

### *Shared Religious Framework*

Both travelers wrote from similar religious and intellectual backgrounds, which shaped their narrative tone. Their writings frequently incorporate Qur'anic references, devotional

language, and expressions of admiration. This shared framework contributes to the idealized portrayal of Damascus and its mosque as a space of spiritual and aesthetic excellence.

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# The Formation of the Brazilian Export-Oriented Pastoral Agro-Industry: State, Agrarian Employers' Associations and World Market in the First Republic

*Dr. Paulo Villaca*

## ABSTRACT

Our doctoral dissertation demonstrates that the export-oriented pastoral agro-industry in Brazil began growing in the 1920s, shaped by two continuous and interconnected trends. Exogenously, it stemmed from transformations in the global economy following the late nineteenth century, particularly the expansion of capital exports and consolidation of monopolies in core countries, particularly British and US capital and, on the other hand, endogenously, the process of investment diversification by large coffee capital. As shown in the dissertation, the Brazilian agro-export model produced an economy marked by dependence, association, and subordination. Our research presents the political mediations of the Rural Society in the drafting and construction of the national project, in conjunction with the constrained State (the distinct executive branches, parliaments, and state agencies). This project was materialized through the association of major domestic capital with major international capital, specifically from the meat-processing industry.

*Keywords:* brazil, first republic, agro-industry, pastoral economy, export model, agrarian elites, rural society, political economy, capital dependence, meat industry, world market, southern cone, economic history.

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# The Formation of the Brazilian Export-Oriented Pastoral Agro-Industry: State, Agrarian Employers' Associations and World Market in the First Republic

Dr. Paulo Villaca

## Abstract

*Our doctoral dissertation demonstrates that the export-oriented pastoral agro-industry in Brazil began growing in the 1920s, shaped by two continuous and interconnected trends. Exogenously, it stemmed from transformations in the global economy following the late nineteenth century, particularly the expansion of capital exports and consolidation of monopolies in core countries, particularly British and US capital and, on the other hand, endogenously, the process of investment diversification by large coffee capital. As shown in the dissertation, the Brazilian agro-export model produced an economy marked by dependence, association, and subordination. Our research presents the political mediations of the Rural Society in the drafting and construction of the national project, in conjunction with the constrained State (the distinct executive branches, parliaments, and state agencies). This project was materialized through the association of major domestic capital with major international capital, specifically from the meat-processing industry.*

*In this vein, our research covers the period of the First Republic, based on the investigation and interpretation of the political mediations of the Rural Society in the development of the export-oriented pastoral complex. For the development of the research, it was fundamental to expand investigations beyond Brazilian territory and incorporate distinct international relations, particularly those established by the Rural Society in the Southern Cone with its counterparts: the Argentine Rural Society (SRA) and the Rural Association of Uruguay (ARU). This includes the interpretation of the Rural Society as a political actor, a claimant agrarian employers' association, a space for power*

*and consensus-building, articulated across economy, politics, and ideology.*

*Our article aims to contribute to the development of research on agrarian employers' associations and the agro-export model, both in Brazil and Latin America. This historical period (1920-1930) is of maximum relevance for interpreting the foundations of contemporary Brazilian political economy and the development of the agro-export model. Therefore, we present a new interpretation of the political economy of the First Republic.*

**Keywords:** brazil, first republic, agro-industry, pastoral economy, export model, agrarian elites, rural society, political economy, capital dependence, meat industry, world market, southern cone, economic history.

## I. INTRODUCTION

In the contemporary scenario of the global economy, Brazil has become the world's largest exporter of processed beef, surpassing Australia, the United States, India, and Argentina, among others. However, the hegemonic power of the Brazilian export-oriented pastoral agro-industry was developed starting in the early 20th century. In this article, we present a brief description of the historical context of the formation of this agro-export complex, and thus, the political economy of the period, featuring the leading role of the Brazilian Rural Society (*Sociedade Rural Brasileira* - SRB). In this sense, we present a small fragment of our doctoral research, pointing toward new investigations. This historical research focuses on the political mediations of the Rural Society in the formation of the national project for the export-oriented pastoral complex

during the First Republic (1920–1930). This project was linked to an agro-export economic model of a dependent, associated, and subordinated nature, within the framework of the international division of labor (Marini, 2005). According to our research, the Rural Society developed both the coffee export complex and the incipient export-oriented pastoral complex in parallel. The Rural Society exercised strong hegemony in the field of different agrarian employers' associations during this historical period, to the point of incorporating two influential associations with the restricted State of São Paulo: the *Sociedade Paulista da Agricultura* (SPA) and the *Liga Agrícola Brasileira* (LAB).

Therefore, we wish to affirm the importance of historical investigations into the associations of dominant fractions, particularly those linked to the rural universe, due to their prominence throughout the country's republican history in interfering with various public policies. Our questions concern the political power of agrarian employers' associations, their different constitutions, programs, institutional profiles, and political mediation, among others. For this undertaking, it is necessary to develop historical research on the hegemonic power of these employers' associations. The relevance of such investigations is in line with the capacity to intervene historically in the destinies of Brazilian politics and economy, exercising political mediations within/with the restricted State (executives and parliaments), within civil society (with other agrarian employers' associations) and in the world market (particularly in the Southern Cone).

Our investigation aims to contribute to the development of research on agrarian employers' associations, representatives of the different dominant agrarian fractions, both in Brazil and in Latin America. We focus on a historical period (1920-1930) of extreme relevance for the interpretation of the foundations of Brazilian political economy and the development of the agro-export model. We offer a historical interpretation of the most influential agrarian employers' association of the First Republic, founded in the city of São Paulo in 1919, but

which, throughout its trajectory, acquired a national and international character in the process of developing the agro-export economy and constructing a specific national project in Brazil: the export-oriented pastoral agro-industry. We consider this project to have been instigated by major international capital via the Southern Cone.<sup>1</sup>

Therefore, our research is situated in the field of Agrarian History, especially the Brazilian political economy of the 1920s. To allow the reader to identify the dimension of the process and its impacts on the Brazilian economy, we present the distinct segments of the export complex under development in the 1920s, based on different segments of large capital, both national and international. We consider the most significant to be: 1) large properties for breeding and fattening (national/ international capital); 2) industrialization, with large international meatpacking plants (which we consider the generating nucleus); 3) transport, such as railways, ports, roads, communication routes, among others (private/state capital); 4) livestock credit, through private and state banks (national/ international); 5) production of inputs and fertilizers, such as large alfalfa-producing properties; 6) export trade (international meatpackers) and import trade (international companies importing fine livestock); 7) scientific development, vaccines, and medicines. This entire productive, commercial and financial chain under development had, as owners and directors, distinct leaders and members of the Rural Society during the investigated period.

Specialized literature frequently identifies the Rural Society as an agrarian employers' association that represented the interests of coffee capital, farmers of São Paulo, and coffee producers, as a response to the strengthening of the São Paulo state apparatus, thus acting as pressure on the São Paulo executive, primarily of a regional nature and opposed to

<sup>1</sup> In this vein, we have developed new research: Villaça, P. I. C. (coordinator). *The Formation of the Brazilian Export-Oriented Pastoral Agro-Industry: State, Entrepreneurs, Agrarian Employers' Associations, and International Relations during the First Republic*. Funding: CNPq/Brazil

industrialization.<sup>2</sup> However, the sources researched indicate that its socioeconomic constitution did not consist solely of farmers or coffee producers from São Paulo or the coffee elite. Large international capital was present, especially from the export-oriented pastoral industry, with directors from the large international meatpackers Anglo, Swift, Continental Products, Wilson, and Armour. Its leaders and members were not only from São Paulo; since its foundation and throughout the first decade, its socioeconomic constitution was formed by members from different localities and regions. In addition to those from São Paulo (*paulistas*), there were members from the United States, Mato Grosso, Rio Grande do Sul (*gaúchos*), Argentina, Uruguay, England, and Minas Gerais, among others (RSRB, 12/1929). This reality conferred upon the association a regional, national, and international character in the development of agro-export complexes.

In this vein, our research presents the different political mediations of the Rural Society with the Brazilian restricted State and the world market, mainly with the international processed meat market. Our research seeks to contribute to the development of studies on agrarian employers' associations of the First Republic.<sup>3</sup> Particularly regarding the Rural Society as a political actor and organizer of the national project for the export-oriented pastoral complex within the process of internationalization of the Brazilian economy. This project materialized through the association of large national capital (primarily coffee) with large international capital (specifically the meat processing industry).

## II. CONCEPTUAL FRAMEWORK AND WORKING HYPOTHESES

Our research encompasses the period of the First Republic, especially from 1920 to 1930, based on historical research and interpretation of the most

<sup>2</sup> "Among the authors who produced these different interpretations of the Rural Society, see: (Font & Barzelatto, 1988), (Love, 1982), (Perissinotto, 1997), (Mendonça, 1997), among others.

<sup>3</sup> Among the relevant published studies, we highlight: (Mendonça, 1997); (Perissinotto, 1997), among others.

influential agrarian employers' association of the period, the Rural Society. Therefore, we propose a new interpretation of the Rural Society, its foundation, institutional profiles, organizational model, programs, projects, and political mediations, among others, in the process of developing the agro-export economy and constructing a specific national project in Brazil.

For our interpretation of Latin America's relations with central countries during this period, Marini (2005) describes:

"It is from this moment that Latin America's relations with European capitalist centers become part of a defined structure: the international division of labor, which will determine the meaning of the region's future development. In other words, it is from this point that dependency is configured, understood as a relationship of subordination between formally independent nations, within which the production relations of subordinate nations are modified or recreated to guarantee the expanded reproduction of dependency. The consequence of dependency cannot, therefore, be anything other than greater dependency, and its overcoming necessarily presupposes the suppression of the production relations involved in it (p.05)."

According to the author, this conjuncture of the international economy, specifically the export of capital from central powers, subordinated the development process of large national capital and its integration into the world market. In this sense, we consider that this process was reinforced by the arrival of the international processing industry in the country, in particular the export-oriented pastoral industry.<sup>4</sup> The dependency theory developed by Marini (2005) presents the assumptions of center-periphery relations, subordination, and association. Thus, it helps us reflect on the character of the Brazilian economy's integration within the framework of the world market, allowing for a historical interpretation of the entry of the international

<sup>4</sup> Regarding foreign capital investments in the Brazilian economy during the First Republic, see: (Castro, 1979), (Saes & Szmrecsányi, 1985), among others.

processing industry into Brazil. The foundation of the Rural Society was a result of this context of international relations and the expansion of the dominance of large international capital presented by Marini (2005). Its program and socioeconomic composition demonstrated the ongoing process of association between large national capital and large international capital.

To interpret the impacts of this new international conjuncture on the Brazilian economy, we use the concept of the Extended State (*Estado Ampliado*), substantiated by Gramsci (1991). As Mendonça (1998) states:

"As a Social Relation, that is, the condensation of social relations present in a given society. In this new perspective, the State is traversed by all existing social relations in a given social formation, incorporating, within itself, the conflicts that prevail in the social formation (p. 20)."

Therefore, we consider that in the capitalist State, the political mediation of different fractions of the dominant class, organized in representative class associations, constitutes an element of the development of capital itself. According to Mendonça (2014):

"The concept of the extended State makes it possible to verify the close correlation between forms of organization of wills (singular and, above all, collective), action, and consciousness in itself (civil society)-always rooted in socioeconomic life-and the specific institutions of the State in its restricted sense (political society). Gramsci overcomes the dualism of analyses that differentiated and contrasted the base from the superstructures, integrating political society and civil society into a single totality, in constant interaction, within what he considered superstructures (p. 34)."

The distinct dominant fractions would seek, through their private associations, to inscribe their demands and projects into the restricted State with the aim of building hegemony, through which these same specific interests are incorporated by other class fractions, as they are

enunciated as universal. As Gramsci (1991) points out:

"The State is conceived as the organ of a fundamental social group destined to create favorable conditions for the maximum expansion of that group. But this development and expansion are conceived and presented as the driving force of a universal expansion, of a development of all 'national' energies. The dominant group coordinates specifically with the general interests of subordinate groups, and state life is conceived as a continuous formation and overcoming of unstable equilibria (within the scope of the law) between the interests of the fundamental group and the interests of the subordinate groups; equilibria in which the interests of the dominant group prevail to a certain extent, excluding the economic corporate interests (p. 50)."

The Gramscian concept of the extended State is extremely relevant for analyzing this conjuncture of the participation of agrarian employers' associations in the construction of a specific national project. This is because it goes far beyond interpretations that attribute to the State the role of a subject, autonomous, hovering above classes, or an object, such as a committee or instrument of bourgeois domination in capitalist societies. Gramsci advances by presenting that in the capitalist State, the function of social domination is exercised not only through repressive apparatuses but also by the articulation between these apparatuses and the

private apparatuses of hegemony.<sup>5</sup> For our research, the concept of the Extended State presents itself as a fundamental methodological instrument for identifying the relations between the Rural Society (its leaders and members) and the Brazilian restricted State (state agencies, executives, and parliaments). It allows for the interpretation of the development of Brazilian political economy in the First Republic, situating the distinct connections between political society and civil society in the process of inscribing the demands and projects of dominant fractions within the State.

Therefore, we must emphasize that this relationship of unity and distinction between the restricted State (political society) and civil society is always organic, as the distinction is merely methodical and didactic. In historical-social reality, they form part of the same process in the interpretation of the State as a totality. In research on the Rural Society, especially in the 1920s, we can identify this close correlation and integration, in the sense that its board of directors and members acted both in civil society, together with other agrarian employers' associations, and in the world of production-especially in agro-export complexes-as well as in different executive branches and parliaments.

Our periodization focuses on the 1920s, at the moment of the expansion of the Brazilian capitalist State, which resulted in a significant increase in agrarian employers' associations. It is

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<sup>5</sup> According to Mendonça (2014, p.35), "(...) The notion of civil society implies the set of so-called 'private' organisms or 'private apparatuses of hegemony,' in the sense of the voluntary membership of their members. Among these apparatuses, Gramsci highlights churches, private associations, trade unions, schools, parties and the press. It is around them that collective wills are organized, whether of dominant or dominated groups. (...) Therefore, the full development of a class-or fraction-depends on its capacity to generate its own personnel of intellectuals, capable of conferring upon it homogeneity and even an awareness of its function, whether in the economic, political, or ideological sphere. Based on this organizational capacity *par excellence*, intellectuals are responsible not only for the organicity of a given apparatus of hegemony but also for the task of achieving the very organization of society in general, which would effectively configure the full hegemony of the specific class fraction represented by them."

a historical interpretation of the Rural Society, from its foundation to the development of the export-oriented pastoral complex, directed by its political mediations with the restricted State at municipal, regional, and national levels (Vilaça, 2024). Therefore, we interpret the Rural Society as a claimant (*reivindicativa*) agrarian employers' association, as a space of power and consensus-building, consulting, formulation, and execution of public policies. It acted as a supra-association articulated between economy, politics, and ideology in the process of expansion of the Brazilian capitalist State.<sup>6</sup> In this sense, we interpret the political economy of the period, especially the 1920s. According to Carini (2016), citing Acuña:

"(...) when studying the bourgeoisie as a political actor, he defended the need to articulate at least three dimensions. The author's gaze lingers on processes that operate from below and correspond to a structural-economic dimension; while actions developed from above correspond to a political-institutional and ideological sphere; and finally, that which observes phenomena from within constitutes the organizational-institutional dimension (p. 09)."

In this sense, we conducted a systematic investigation of its role in the planning and implementation of different economic policies of interest to the agro-export economy. Therefore, we interpret that the Rural Society was a claimant employers' association which, in addition to

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<sup>6</sup> We consider that the Rural Society was a new type of agrarian employers' association-a supra-association-due to its socioeconomic composition, institutional profiles, programs and political mediations. It acted as a representative of the association between large national capital and large international pastoral capital, with a strong presence of finance capital, something very peculiar for an employers' association of that time. For example, its members included companies such as Cia. Armour do Brasil (international), Cia. Indústrias Têxteis (national), Theodor Wille & Co. (international), Cia. Paulista de E. de Ferro (national), and Leon Israel & Cia. (international), among others. The presence of banking/finance capital was represented by the National City Bank (international), Banco do Estado de São Paulo (national), London and River Plate Bank Ltd. (international) and Banco Francês e Italiano (international), among others (RSRB, 01/1927).

representing and disseminating collective wills before civil society and political society, often assumed a role commonly attributed to the State. Regarding the concept of claimant associations, Carini (2016) describes:

"(...) it is characterized by having as a fundamental objective the integral defense of (all) the interests of a collective, being universalist in the nature of the ends they pursue and the activities they develop, and having a discourse with a strong ideological component, constructed based on the values assumed by their leaders and the ways in which they interpret the problems of their social base (p. 10)."

For a better interpretation of its political mediation as a claimant association, it is necessary to use the concept of institutional profiles. According to Carini (2016):

"We start by considering those aspects that refer to both the internal structure of the entity and the external one. The former are constituted, for example, by its organizational model, its roles and functions, its degree of formality and the discourses implemented within the entity; while the latter are those manifested in the entity's practices, discourses and strategies transferred to the outside, especially manifested in the relational dynamics between different state and agrarian actors. Both dimensions of analysis become visible if the historical trajectory of the entity is studied" (p. 10/11).

Therefore, both concepts assist in the interpretation of the trajectory of the Rural Society and its nature as a political actor, always seeking to inscribe the interests of large coffee capital and large pastoral capital in the state agencies of the Brazilian State within the conflictive arena-of precarious equilibrium-of relations between State and Society. The objective was to enhance capital accumulation and the development of a national project strictly linked to the agro-export economy. Due to the magnitude of the coffee and pastoral economy, we consider historical research on the relations

between State and Society to be significant. There are several questions we can address for the interpretation of the political mediations of this agrarian employers' association in the construction and development of export complexes: its different projects, its role in the formulation of public policies, the registration of its claims before executives (municipal, state, and national), representations before civil society, with other employers' associations (including international ones) and relations with its counterparts in the Southern Cone, such as the Argentine Rural Society (SRA) and the Rural Association of Uruguay (ARU), among others.<sup>7</sup>

The research intends to contribute to the development of Latin American Agrarian History insofar as it proposes a new interpretation of the Rural Society, representative of the association of large coffee capital with large international pastoral capital in the process of capital export from central powers. In this sense, our research developed a survey of the objective material bases of its leaders and members to identify the different interests at stake in the process of socioeconomic domination by large coffee capital and large pastoral capital. Therefore, we mapped the participation of its leaders and members in various state institutions, such as ministries, secretariats, and agencies, as well as in Parliament, mainly through performance in the Republican Party of São Paulo (PRP).

The research is inserted in the field of Economic-Social History, under the perspective of interpreting the different sociocultural and political dimensions with new questions, regarding the historical interpretation of the projects, demands, and interventions of the Rural

<sup>7</sup> The partnership with counterparts in the Southern Cone was established in 1920, during the visit of delegations from Argentina and Uruguay to the association's headquarters. The former was led by the jurist Dr. Jose Leon Suarez, representing the Argentine government. Accompanying Dr. Leon Suarez were Mr. Carlos Guerrero, representative of the Agrarian League of Buenos Aires and the largest breeder of Aberdeen Angus in the Argentine Republic, and the journalist Dr. Ricardo Berenguer, an editor at the newspaper *La Nación* in Buenos Aires. The delegation from the Oriental Republic of Uruguay was represented by Mr. Julio Muró, vice-president of the Rural Association of Uruguay (ARU). ASRB, (09/1920:257).

Society inscribed in the restricted State (political society) and the world market. Based on the investigation of the historical trajectory of the Rural Society and its political mediations in leading the development of the agro-export model, we present the interests and projects of the world of the economy, particularly of the agro-export complexes, in the institutional political arena.

According to the investigated sources, the national project of the export-oriented pastoral complex was developed through the joint action of the Rural Society with different executives and parliaments. For example, with the federal executive in the person of General Rondon, a member of the association<sup>8</sup>, as well as by the Minister of Agriculture. With the federal, provincial and municipal parliaments, through the performance of its leaders and members as parliamentarians. With the executive of Mato Grosso, in the person of the State President, Dom Aquino Corrêa, a member of the association, and with the State of São Paulo, in the joint action of planning and executing public policies. In this process, the Rural Society also developed relations with international capital based in Mato Grosso, specifically in the person of Mr. H. Walter Ford, director of The Miranda Estancia Company Limited (British capital), with large holdings of quality cattle for export and a founding member of the Rural Society; as well as Mr. Burr, director of The Brasil Land and Cattle Co. (US capital), with an extensive property of quality cattle for export, who was very close to the Rural Society.

In this sense, the executive of the State of Mato Grosso allocated several concessions of large portions of vacant lands (*terras devolutas*) for the

incorporation of the State into the national economic circuit, for connection with the large international meatpacking plants based in São Paulo<sup>9</sup>. For this enterprise, roads, highways, railways, ports and other infrastructure were built. This involved political mediations with the executive and parliament of São Paulo for the occupation and colonization of the Pontal do Paranapanema region, in the extreme west of the State, with the appropriation of extensive vacant lands for the transit and fattening of animals coming from Mato Grosso, as well as in the formulation of economic policies by the executive and parliament of São Paulo for the development of the project.

This conjuncture allowed us to identify that the Rural Society was not a regional character association as affirmed by the literature, but rather a regional, national, and international association. For the reader's knowledge, the content of the published editions of the association's official magazine presents a new type of agrarian employers' association—a supra-association—at the moment of the complete insertion of the Brazilian economy into the framework of the international division of labor, particularly in the association of large national capital (especially coffee) with large international capital (pastoral). In the different editions from 1920 to 1930, we can identify its claimant profile and its institutional profiles as a formulator and executor of public policies at municipal, regional, and federal levels, as well as a spokesperson for different executives in the publication of various official data (municipal, state and federal).

<sup>8</sup> General Rondón presented the extensive territory of Mato Grosso, which was practically unknown to official authorities and the leaders of the Rural Society, with the aim of incorporating this State into the economic circuits of the export-oriented pastoral industry as a major producer of quality cattle for the world market. General Rondón integrated the Rural Society's project into the national integration and security project developed by the Brazilian Army, carrying out four expeditions throughout the territory of Mato Grosso. The entourages included the Minister of War, General Rondón, and the President of the Rural Society. ASRB, (11/1921), (04/02/05/1922).

<sup>9</sup> Land Law No. 601 of September 18, 1850. "Art. 3. Vacant lands (*terras devolutas*) are:

§ 1. Those not applied to any national, provincial, or municipal public use.

§ 2. Those not found in the private domain by any legitimate title, nor held through *sesmarias* and other concessions from the General or Provincial Government, not subject to forfeiture due to failure to fulfill conditions of measurement, confirmation, and cultivation.

§ 3. Those not granted by *sesmarias* or other Government concessions that, despite being subject to forfeiture, are revalidated by this Law.

§ 4. Those not occupied by possessions [*posses*] which, despite not being founded on a legal title, are legitimized by this Law. Source: <https://www.planalto.gov.br>

In the distinct editions, we can identify the trajectories of its leaders and members, from members of economic segments (mainly coffee and livestock export complexes) to their interventions with the restricted State as mayors, ministers, secretaries, deputies, and senators at municipal, regional, and national levels. The performance of leaders and members in the process of occupation and colonization of the Pontal do Paranapanema region, SP—mostly vacant lands essential for the development of the export-oriented pastoral complex as a region for animal transit and fattening—is evident. In this sense, we consider that this region was a true laboratory for the execution of the national project, represented and led by the Rural Society<sup>10</sup>, for the incorporation of the territory of Mato Grosso into economic circuits and for the diversification of investments by large coffee capital.

Based on the investigation of the historical trajectory of the Rural Society and its political mediations to enable the development of the agro-export model, we interpret the interests and projects of the world of the economy, particularly the agro-export complexes, in the institutional political field represented by the association. Our research uses different primary sources, both of a private nature, such as those generated by the Rural Society and those produced by different state agencies, alongside complementary literature, particularly on the political economy of the predominant agro-export model of the coffee complex, the occupation and colonization of the Pontal do Paranapanema region, among others. The fundamental primary sources are the institutional publications produced by the Rural Society itself, in particular the official magazine, from 1920 to 1930. Initially called *Annaes da Sociedade Rural Brasileira* (ASRB) and, from 1922, *Revista da Sociedade Rural Brasileira* (RSRB). This collection, unfortunately little explored by academia, is found in the Library of the Rural Society headquarters in the capital, São Paulo.

<sup>10</sup> "For this topic, see: Cardoso, F. H. *Social Conditions of Industrialization: The Case of São Paulo*. Revista Brasiliense, São Paulo, 1960.

Regarding academic research with institutional press and periodicals, Carini (2016) describes:

"The analysis of this type of source is relevant, as it is a habitual means of mediatization of rurality while presenting itself as a symbolic space that supposes the reproduction of representations of agrarian sectors. These supports constitute selections of data from reality, which are organized in a particular way to say, make understood, and make known, and consequently, are a privileged element both for the study of the discourses and representations of entities and for knowing their institutional practices." (p. 19)

This consultation allowed us to identify a national project in gestation for the export-oriented pastoral complex. The magazine is replete with information on this process, with sections on the Pastoral Industry, market quotations, government actions, cattle improvement, large international capital meatpackers, as well as reports, articles, and information on this industry developing in different states of the federation (such as Mato Grosso, Rio Grande do Sul, Minas Gerais, among others) and in other countries (such as Argentina, Uruguay, the United States, England, among others).

The researched editions, plus complementary literature, allowed us to identify the socioeconomic characteristics of the social bases and their leaders. In particular, the performance of leaders and members as organic intellectuals acting from within the restricted State as representatives of agro-export complexes, both national and international. The different trajectories of these leaders and members range from members of distinct economic segments, mainly the coffee and pastoral agro-export complexes, to their interventions in the restricted State as mayors, ministers, secretaries, directors, deputies, and senators at municipal, regional, and national levels.

The intervention of the Rural Society as a political mediator of the represented interests, together with different businessmen and politicians, allowed for the development of the export-oriented pastoral complex in the country and, at

the same time, organized the diversification of investments by large coffee capital. This role materialized through actions of different magnitudes by the entity's leaders and members. In this way, the Rural Society sponsored different events, from conferences and journalistic reports to meetings with other associations and representatives of large pastoral capital. A fundamental role was played by Dr. Paulo de Moraes Barros, president of the association (1920–1923), who organized the interests of the incipient export-oriented pastoral industry together with the federal government and the states of Mato Grosso and São Paulo. Therefore, the president of the association was a central actor in reinforcing the need to incorporate the extensive territory of the State of Mato Grosso (at the time practically unknown to Brazilian authorities) through the organization and realization of different expeditions sponsored by the Rural Society and the federal government. The committees of these expeditions, dating back to the early 1920s, were in the charge of the Minister of War, General Calógeras; the president of the Rural Society, Dr. Paulo de Moraes Barros; and the entity member, General Rondon. In this process, articulations were made with the government of Mato Grosso, in the person of the State President, Reverend Dom Aquino Corrêa, and with representatives of international capital based in this territory. It is worth citing the relevant role of director Colonel Arthur Diederichsen<sup>11</sup> and the association member,

<sup>11</sup> This director of German origin was a fundamental actor in the execution of the project. He moved between agro-export complexes, employers' associations, and the Brazilian restricted State. He was a representative of German capital, serving as director of the company Theodor Wille & Cia., one of the largest companies operating in coffee exports through the port of Santos and one of the main beneficiaries of the first coffee defense (*valorization*) in 1906. He was a deputy and political leader for the Paulista Republican Party (PRP), both in Ribeirão Preto/SP and in the state Parliament. He built a railway along the banks of the Paraná River, connecting São Paulo to Mato Grosso, and developed the fundamental steam navigation service on the Paraná River in the Pontal do Paranapanema/SP region for the transport of animals to the large meatpacking plants in São Paulo. He was a leader of the Paulista Society of Agriculture (SPA) and the Commercial Association of São Paulo (ACSP). He was the director of the Livestock Bank (*Banco Pecuário*), fundamental to the incipient export-oriented pastoral agro-

Colonel José Soares Marcondes, a politician and businessman, who tried to accelerate as quickly as possible the occupation and colonization of the entire Pontal do Paranapanema region, starting with the arrival of the railway to the city of Presidente Prudente (on the border with Mato Grosso) in 1921, as well as the promulgation of Land Law No. 1844 of 1921 of the State of São Paulo.<sup>12</sup>

As mentioned earlier, the socioeconomic composition of the founding members of the Rural Society reveals the presence of interests and demands that exceeded those of the coffee complex. Some of these leaders and members were representatives of the main global meat processing companies, both chilled and frozen, from central countries. Among them were the meatpacking companies Armour, Swift, Wilson, and Anglo. The presence of these large meatpackers was not a novelty in Latin America, given that their operations had been recorded since the 1880s, mainly in the chilled and frozen meat export market in the Argentine Republic.<sup>13</sup> In Brazil, investments began at the end of World War I, in 1917, when the Anglo meatpacker (British and US capital) was installed in Rio de Janeiro. In the same year, the Armour meatpacker settled in Rio Grande do Sul and later in São Paulo in 1920, when it inaugurated the largest meatpacking plant in South America.

Suzigan and Szmrecsányi (1996) draw attention to the process of concentration of the meat processing industry in the country during the First Republic. This reveals the massive entry of international capital into the manufacturing industry for export to the international market,

industry, as well as the owner of extensive properties for breeding fine cattle and cultivating coffee. Source: (Perissinotto, 1997); ([www.arquivopublico.ribeiraopreto.sp.gov.br](http://www.arquivopublico.ribeiraopreto.sp.gov.br)).

<sup>12</sup> This law established the legal foundations for access to vacant lands in the State. This law became known as the 'Land Grabber's Jubilee Law' (*Lei do Jubileu do Grileiro*) because it facilitated the indiscriminate appropriation of vacant lands through the falsification of property titles, especially in the Pontal do Paranapanema/SP region.

<sup>13</sup> On this topic, see: (Manzano, 2012), (Smith, 1986), (Míguez, 2016), (Almengor, 1995), among others.

especially to the US and European markets. The authors (1996) describe:

"To the point that, in the mid-1930s, they possessed 95% of the national cattle slaughter and processing capacity and 87% of pigs and sheep. (p. 269)" In this process, according to the authors (1996): "Thus, the large leading companies of the processing industry of central capitalist countries, which had been internationalizing since the last decades of the 19th century, began to include new areas, such as Brazil, in their geographic expansion strategies, whether with a view to occupying internal markets or for the exploitation of local sources of raw materials. (p. 266/267)."

In this context, according to specialized literature, the nascent export-oriented pastoral industry in the country was developed by the diversification of investments by large coffee capital, which seems coherent.<sup>14</sup> However, it does not explain the entire process, nor the presence of representatives of international companies as directors of the Rural Society. As presented in the dissertation, the foundation of the Rural Society was the result of endogenous socioeconomic transformations, but fundamentally, it was a consequence of the export of capital from central powers (Villaça, 2024). However, in addition to representing the diversification of investments by large coffee capital, its foundation and program were linked to the interests of large international pastoral capital. Therefore, the Rural Society was the organizer of the formation and development of the incipient export-oriented pastoral complex.

Finally, we highlight the need for the development of new research on the formation of the export-oriented pastoral agro-industry, especially because the international origin of the project appears to us to be fundamental. This national project, for which we have some evidence, was generated by large international pastoral capital from central powers, especially US and British capital.

<sup>14</sup> Count Prates, the first president of the Rural Society (1919-1920), founded the first meatpacking plant for export in Brazil, together with Councilor Antonio Prado, who was also a leader of the Rural Society. These leaders were linked to the São Paulo coffee complex.

In this sense, we consider it important to highlight the international relations of the Rural Society in the Southern Cone, with its counterparts: the Argentine Rural Society (SRA) and the Rural Association of Uruguay (ARU). The association's relations with its Southern Cone counterparts were fundamental to the success of the national project, insofar as we consider the national project as part of an international project, a direct consequence of capital exports from central powers. Therefore, we consider that large international pastoral capital, associated with large capital from countries in the Southern Cone region, gave rise to the development of the export-oriented pastoral agro-industry-an economic model of an associated, dependent, and subordinated nature, within the framework of the international division of labor. Initially in Argentina and Uruguay and, subsequently, in Brazil.

To illustrate what we are presenting, below is a very striking intervention by the founding director of the Rural Society, Mr. Eduardo F. Cotching:

"In this order of ideas, the Society long ago began its work in the Platine Republics, in agreement with the Argentine Rural Society and the Rural Association of Uruguay. However, to give full value to this work, it was necessary to provide foreign breeders interested in sending their products to Brazil with all information regarding the provisions and regulations governing the importation of breeding stock here, and especially regarding the many valuable favors that the Government grants to these imports. For this reason, I requested the Society to act within the Ministry of Agriculture, requesting the sending of complete information on all measures and aid currently in force regarding the improvement of our Pastoral Industry."<sup>15</sup>

This fragment evidences the international articulations in the Southern Cone, as well as those developed together with the Brazilian restricted State, for the formation of the export-

<sup>15</sup>ASRB, (07/1921: 855).

oriented pastoral agro-industry. It also highlights the historical trajectory of the association, involved in distinct institutional spaces, from the world market to state agencies, executives, and Brazilian parliaments. Therefore, we consider that our current investigation can contribute to the development of research in Agrarian History of Latin America, especially on two themes: the political economy of the First Republic in Brazil and the development of the export-oriented pastoral agro-industry in the Southern Cone, having as the object the agrarian employers' associations as political actors.

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# Towards Exploring New Chinese Migrant Businesses in Auckland, New Zealand: A Multi-Method Research

*Dr. Songming Yang*

## ABSTRACT

With three decades of embracing a neoliberal immigration policy in New Zealand, the number of China-born migrants has grown significantly in the country. Consequently, businesses run by these new Chinese migrants have contributed significantly to the country's economy and are an integral part of the country's urban economic landscape. However, research on their entrepreneurship remains limited. This research aims to use multiple methods to examine the entrepreneurial activities of this group of migrants in Auckland, New Zealand, focusing on business types, industry sectors and factors that drive their business choices from macro, meso, and micro perspectives. Data from Skykiwi Orange Page, Chinese Herald, and interviews with 29 new Chinese migrant business owners reveal concentrations in Retail Trade, Professional Services, and Construction, influenced by personal interests, market demand, and experience.

*Keywords:* transnational migration, transnational migrant entrepreneurship, ethnic entrepreneurship, new chinese migrant businesses, china, new zealand.

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*With three decades of embracing a neoliberal immigration policy in New Zealand, the number of China-born migrants has grown significantly in the country. Consequently, businesses run by these new Chinese migrants have contributed significantly to the country's economy and are an integral part of the country's urban economic landscape. However, research on their entrepreneurship remains limited. This research aims to use multiple methods to examine the entrepreneurial activities of this group of migrants in Auckland, New Zealand, focusing on business types, industry sectors and factors that drive their business choices from macro, meso, and micro perspectives. Data from Skykiwi Orange Page, Chinese Herald, and interviews with 29 new Chinese migrant business owners reveal concentrations in Retail Trade, Professional Services, and Construction, influenced by personal interests, market demand, and experience.*

**Keywords:** transnational migration, transnational migrant entrepreneurship, ethnic entrepreneurship, new Chinese migrant businesses, China, New Zealand.

## I. INTRODUCTION

Within three decades of embracing a neoliberal immigration policy in New Zealand, the number of new Chinese migrants<sup>1</sup> has grown significantly

<sup>1</sup> “New Chinese migrants” in the New Zealand context generally refer to Chinese who migrated after the introduction of the Immigration Act 1987, which abolished the “traditional origin” preference term that favoured British immigrants (Ip, 1995). Three major sources of new Chinese migrants are Hong Kong, Taiwan, and Mainland China. In

in the country. Today, China-born migrants constitute 53.64% of New Zealand's ethnic Chinese population (Statistics New Zealand, 2018), and China has become the second largest migrant source country for New Zealand since 1997, just after Great Britain (Liu, 2018; Liu & Ran, 2022). The increasing presence of China-born new migrants has contributed to the formation of a large Chinese consumer market and the rapid development of new Chinese migrant businesses, particularly in Auckland. As New Zealand's most diverse city, Auckland has witnessed a surge in new Chinese migrant entrepreneurs who have established businesses across various sectors and contributed to the shaping of its economic landscape and cultural landscape. Navigating business establishment in a new country has become a central aspect of their migratory and entrepreneurial journey and presents both challenges and opportunities. This research aims to examine the entrepreneurial activities of the China-born new migrants in Auckland, New Zealand, focusing on identifying their preferred business types, industry sectors, and revealing factors that drive their business choices.

Internationally, diasporic Chinese entrepreneurship is a longstanding subject of scholarly research (Lin & Zhou, 2022). Some existing

addition to these three groups, Chinese from other countries are also categorised as new Chinese migrants in New Zealand (Liu, 2018). New Chinese migrants in New Zealand today are different from those who came earlier. Early Chinese migrants to New Zealand were almost exclusively male, with limited education, originating from rural Southern China, either directly or via other countries (Friesen, 2001). New Chinese migrants in New Zealand tend to be more ethnically diverse, highly educated, and possess specialised skills or financial capital, which allows them to qualify and meet New Zealand's entry criteria (Liu, 2018).

literature focuses on the relations between diasporic Chinese entrepreneurs and their ancestral homeland from historical and cultural perspectives (Chan & Cheung, 1985; Zhang, 2020; Zhou, 2021). There is also literature which takes on the perspectives of migrant-receiving countries and draws on the diverse adaptation or integration experiences of Chinese migrant business owners and their descendants to develop concepts such as ethnic enclaves, social capital, embeddedness, and bounded solidarity (Portes & Zhou, 1992; You & Zhou, 2019). More recently, in reflection on China's rising economy, some scholars have increasingly shifted their focus to consider a rising China as the context from which contemporary Chinese entrepreneurship is developed and globalised. Most of this literature is situated in the social context of the USA, Canada, and Australia (Liu & Louw, 2009; Perry et al., 2020; Wang, 2014; Wang & Warn, 2018; Xu et al., 2019; Zhou, 2021). These studies explore Chinese business networks, ethnic enclaves, and transnational ties, often contextualizing entrepreneurship within China's economic rise.

In New Zealand, while extensive research on new Chinese migration exists, including settlement, language adaptation, and economic contributions (Cain & Spoonley, 2013; Casson, 2004; Chan, 2008; Friesen, 2001; Liu et al., 2022; Meares et al., 2011; Spoonley & Meares, 2011; Xue et al., 2012), there is a lack of systematic research on their entrepreneurial activities. Quite often, new Chinese migrant businesses have been studied under an overarching framework of exploring migrant or Asian migrant businesses (Hamilton-Hart et al., 2017; North & Trlin, 2004; Watts & Trlin, 1999). Some research on employment issues of migrants from non-English-speaking backgrounds gave a passing mention to new Chinese migrant businesses (Watts & Trlin, 2000). There is also some micro-level research on new Chinese migrant businesses, such as research on e-commerce in small Chinese firms in New Zealand (Chen & McQueen, 2008), Chinese ethnic precincts in Auckland (Spoonley & Meares, 2011), Chinese business management practices (Casson, 2004), Chinese business owners' co-ethnic networks in Auckland (Meares et al., 2011) and

the clustering of Chinese businesses in Auckland's ethnoburbs (Liu et al., 2022). While these studies provide important insights on new Chinese migrant entrepreneurship, a more systematic research approach is needed.

To remedy this research gap, the paper delves deep into the intricate intersections of the theories of transnational migration (Glick-Schiller et al., 1995) and ethnic entrepreneurship (Gold & Light, 2000) to form the conceptual framework and adopts the multi-dimensional mixed embeddedness (Yamamura & Lassalle, 2022) as an analytical tool to analyse the macro, meso, and micro-level factors that influence their business choices. The central research questions for this paper are twofold. The first is what the preferred business types and industry sectors chosen by the new Chinese migrant entrepreneurs are, and the second is what factors influence the selection of these business types and industry sectors.

In pursuit of answering the research questions, multiple methods were used to collect empirical data. Firstly, this research analyses the classification of new Chinese migrant businesses<sup>2</sup> on *Skykiwi Orange Page* 天维橙页<sup>3</sup> and the commercial advertisements on the *Chinese Herald* 中文先驱报<sup>4</sup>. Secondly, this study

<sup>2</sup> "New Chinese migrant businesses" in this research are defined as businesses of officially registered in the New Zealand Companies Office (<https://companies-register.companiesoffice.govt.nz/>) and operated by new Chinese migrants who are originally from Mainland China after the introduction of the Immigration Act 1987.

<sup>3</sup> *SkyKiwi Orange Page* 天维橙页 is a comprehensive Chinese-language business directory which was developed by and shown on the *Skykiwi* website and mobile app. *SkyKiwi* is the most influential and the most visited online Chinese-language media based in New Zealand. The content of its website includes news, current affairs, education, immigration, real estate, shopping guides, investment, finance, entertainment, and other information. It has two access modes: PC web version and mobile app version. Its network provides extensive services throughout its 14 web channels, 40 sub-forums, and 20 social media accounts. It has over 408,000 daily page views and 81,000 daily visits. Its influence in the commercial sector is also significant. It has an extensive relationship and abundant resources from both New Zealand and China to hold brand and product launches and brand title sponsorship.

<sup>4</sup> *Chinese Herald* 中文先驱报 is one of the best well-known Chinese language newspapers, it also has electronic version.

conducted in-depth interviews with 29 selected new Chinese migrant business owners<sup>5</sup>. This integrated approach, which combines quantitative and qualitative methods, ensures a comprehensive understanding of the preferred types of businesses and industrial sectors of the new Chinese migrant entrepreneurs and the underlying reasons for their preferences. Understanding these dynamics offers insights into migrant entrepreneurship's role in New Zealand's economy, contributing to broader discussions on migration, economic integration and transnational business networks. The research also provides policy recommendations to support the entrepreneurial diversification of Chinese migrants, emphasizing their growing role in shaping New Zealand's urban and economic landscape.

This paper commences with introducing the theoretical underpinning of the research. It then discusses the research methods used to collect and analyse data followed by the empirical findings. The paper concludes with a discussion of the research implications and theoretical scholarly significance.

## II. THEORETICAL FRAMEWORK: TRANSNATIONAL MIGRATION, TRANSNATIONAL MIGRANT ENTREPRENEURSHIP AND ETHNIC ENTREPRENEURSHIP

The theoretical framework of this research integrates three key areas: transnational migration, transnational migrant entrepreneurship and ethnic entrepreneurship. These theories collectively provide a robust foundation for the research. Transnational migration theory (Glick-Schiller et al., 1995) provides insight into the ongoing cross-border connections and activities of

Chinese migrants. Ethnic entrepreneurship emphasises the role of ethnic resources and networks in business creation and sustainability (Gold & Light, 2000). Transnational migrant entrepreneurship highlights the entrepreneurial activities that maintain ties across borders (Portes et al., 2002).

The theory of transnational migration serves as the overarching theoretical framework for this research. Transnational migration encompasses the movement of people across national borders while simultaneously engaging in activities and relationships that span multiple countries (Landolt, 2001; Portes et al., 1999; Sassen, 2001). It underscores the interconnectedness between home and host countries and emphasizes migrants' ongoing ties and activities in across different national contexts (Landolt, 2005; Portes et al., 2002; Zhou & Liu, 2017).

Under the overall framework of transnational migration, Yamamura and Lassalle (2022) defined transnational entrepreneurship as the activities of transnational migrants who actively engage in cross-border trade, seek customers, suppliers and investors, and access resources in a transnational context. Situated at the cross-border intersection of different social, economic, and political contexts, transnational entrepreneurs are those migrants who draw on transnational migration experiences and social networks to operate businesses that operate across more than one country and are embedded in the transnational environment as a result of their migration and entrepreneurial experiences (Nawojczyk & Nowicka, 2018; Nowicka, 2013; Portes et al., 2002; Sandoz et al., 2022; Sinkovics & Reuber, 2021). Transnational migrant entrepreneurship therefore is characterised by the ability of migrants to leverage resources, knowledge and connections from both their home and host countries (Landolt, 2001; Portes et al., 2002; Waldinger, 1995; Zhou & Liu, 2017).

Closely connected with the theory of transnational migrant entrepreneurship is the concept of ethnic entrepreneurship. The theory of ethnic entrepreneurship examines the role of ethnicity in the entrepreneurial process, including business

<sup>5</sup> "New Chinese migrant business owners" in this research are defined as business owners who are adults (over 18 years old) and immigrated to New Zealand from Mainland China after the introduction of the Immigration Act 1987 and whose businesses are officially registered in the New Zealand Companies Office (<https://companies-register.companiesoffice.govt.nz/>). In this study, "New Chinese migrant business owners" and "New Chinese migrant business entrepreneurs" are interchangeable.

creation, management, and growth (Rahman et al., 2021). It is defined as business activities in a certain area driven or undertaken by people of a different ethnic or cultural origin than the indigenous population (Masurel et al., 2004). In other words, ethnic entrepreneurship refers to the process through which members of ethnic minority groups create and operate businesses that are strongly connected to their ethnic identity and culture and use their cultural and social capital to establish and run businesses (Waldinger et al. 1990; Zhou 2004). These businesses often serve the needs of the ethnic community and are connected to the social and economic networks of the ethnic group. Ethnic entrepreneurship is characterised by a strong sense of identity and belonging to the ethnic group, and a desire to preserve and promote the cultural traditions of the group through business activities (Rahman et al., 2021). On the positive side, ethnic entrepreneurship can benefit business owners by giving them access to networks, markets, and knowledge that are unique to their ethnic group (Zhou, 2004). On the negative side, ethnic entrepreneurship can be subject to discrimination and exclusion, which come from the economic and political structures of the host country and from the dominant ethnic groups in society (Light & Bonacich 1988; Min 1990; Waldinger et al. 1990). Furthermore, ethnic entrepreneurship can be constrained by cultural norms and customs that may not be supportive of innovation and venture taking (Chan, 2008).

While transnational migrant entrepreneurship and ethnic entrepreneurship share some similarities, they differ in terms of their research focus and orientation. Transnational migrant entrepreneurship is focused on creating businesses that operate across national borders, while ethnic entrepreneurship is focused on creating businesses that are strongly connected to the ethnic identity and culture of the entrepreneur (Henn, 2012; Honig, 2021). This concept refers to a theoretical approach that captures how migrant entrepreneurs are embedded simultaneously in multiple contexts including structural, market and individual environments. It recognises that entrepreneurial behaviour is shaped not only by

individual capabilities but also by broader institutional and market environments. For this research, these two theories are not mutually exclusive; rather, the two together indicate a new direction to the research, requiring the new Chinese migrant businesses to be examined from both ethnic as well as transnational perspectives.

### III. METHODOLOGICAL NOTES

#### *3.1 Research Approach and Design*

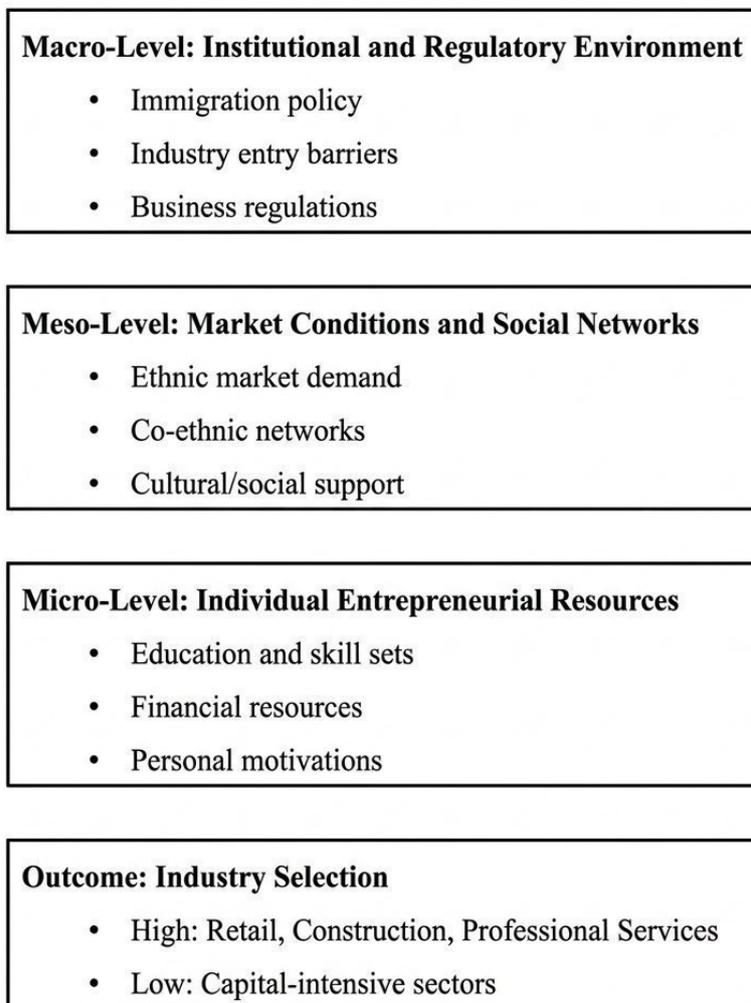
Multi-dimensional mixed embeddedness was used as a guiding principle to design the fieldwork research and develop the analytical framework. This concept refers to a theoretical approach that captures how migrant entrepreneurs are embedded simultaneously in multiple contexts including structural, market, and individual environments (Yamamura & Lassalle, 2022). It recognises that entrepreneurial behaviour is shaped not only by individual capabilities but also by broader institutional and market environments. This approach not only identifies the interaction and interplay of wider institutional regulatory constraint (i.e. macro factor), market factors (i.e. meso factor), and individual resources (such as human capital resources, financial resources and socio-cultural resources) of entrepreneur (i.e. micro factor) as crucial factors in influencing entrepreneurial behaviour (Kloosterman & Rath, 2010), but also provides a framework to investigate different contextual dimensions of the influential factors; for example, the social, political and economic contexts. This approach can clarify the activities and actions of transnational migrant entrepreneurs, while also explain what factors in their surrounding entrepreneurial environment might play a crucial role in the initiation and development of transnational migrant entrepreneurship (Solano, 2019; Yamamura & Lassalle, 2022).

To further elucidate the underlying dynamics influencing Chinese migrant entrepreneurs' industry selection, this study proposes a conceptual model based on the framework of multi-dimensional mixed embeddedness. As illustrated in Figure 1, the model comprises three interacting levels: Macro-level factors refer to the

institutional and regulatory environment, such as immigration policy, industry-specific entry barriers and broader business regulations. These set the structural context for entrepreneurial opportunities. Meso-level dynamics focus on market conditions and social networks, including demand from the ethnic market, support from co-ethnic business networks, and culturally rooted social capital. These factors shape access to information, customers, and trust networks. Micro-level resources highlight the personal capacities of the entrepreneurs, including their

educational background, financial capital, and socio-cultural adaptability, which directly influence their ability to navigate the entrepreneurial landscape. These three levels collectively inform the industry selection. This layered framework visually connects the empirical results of this study with the broader theoretical insights from transnational migration and ethnic entrepreneurship literature, offering a comprehensive understanding of Chinese migrant entrepreneurial patterns in Auckland.

**A Multi-Level Embeddedness Model of Industry Selection Among New Chinese Migrant Entrepreneurs in Auckland**



*Figure 1:* A Multi-Level Embeddedness Model of Industry Selection Among New Chinese Migrant Entrepreneurs in Auckland

Guided by the multi-dimensional mixed multiple methods to collect empirical data, embeddedness, the research was designed to use including a quantitative analysis of the

classification of new Chinese migrant businesses on *Skykiwi Orange Page* and Chinese migrant business advertisements on the *Chinese Herald*, and in-depth interviews with selected new Chinese migrant business owners from different industries. The quantitative component aims to identify the business types preferred by new Chinese migrants and the distribution of these Chinese businesses in different industry sectors. The qualitative component mainly aims to understand how and why the new Chinese migrant business owners established their businesses with certain types and in the chosen industries.

### 3.2 The Quantitative Analysis

As for the analysis of the classification of new Chinese migrant businesses on the *SkyKiwi Orange Page*, firstly, the numbers of Chinese businesses that are classified by the *SkyKiwi Orange Page* under each business category were counted. Non-Chinese businesses were ruled out. Secondly, the proportions of different business types was calculated against 1) the total classified Chinese businesses on the *SkyKiwi Orange Page*, and 2) the New Zealand business industry distribution from New Zealand business demography statistics of 2022 (<https://www.stats.govt.nz/information-releases/new-zealand-and-business-demography-statistics-at-february-2022/>). In this way, new Chinese migrant businesses can be aligned with the coding of the New Zealand business industry classification.

As for the analysis of the new Chinese migrant business advertisements on the *Chinese Herald*, firstly, all Chinese business advertisements in a defined period of time (from 1 November 2022 to 30 April 2023) in the newspaper were collected. Six months of data can ensure the sample pool is big enough to provide indicative data for the research. Secondly, the total number of those collected business advertisements were calculated. Thirdly, all collected business advertisements were categorised into different business and industry types according to the established Business Industry Classification Code of New Zealand (<https://www.businessdescription.co.nz>). Lastly, the number of business

advertisements in each category and their proportions to the total number of the collected advertisements was calculated. In this way, the preferred business types and industry sectors of new Chinese migrants can be identified. Results from these two research components can allow an assessment of internal validity.

In order to identify the preferred industries of the new Chinese migrant businesses, the last step of the quantitative analysis is to compare the business industry distribution shown on the two Chinese platforms with the business industry distribution of New Zealand nationwide. *Chi-square* tests were performed to assess whether the differences are statistically meaningful.

### 3.3 The In-Depth Interviews

The in-depth interviews conducted with selected new Chinese migrant business owners included a series of open-ended questions about their migration experience, business start-up motivation and process, company information, challenges in creating and running businesses, and business development strategies.

The recruitment of interview participants was firstly based on the researchers' personal network, then snowballing techniques were used to recruit more interview participants. Purposive Sampling method were used to determine qualified interviewees for the research. They had to be new Chinese migrant business owners who were adults (over 18 years old) and had immigrated to New Zealand from China after the introduction of the Immigration Act 1987, and whose businesses were officially registered with the New Zealand Companies Office ([www.companiesoffice.govt.nz](http://www.companiesoffice.govt.nz)).

In total, 29 in-depth interviews were conducted, with interviewees coming from different industry categories. All their businesses are all set up in Auckland. To ensure confidentiality, all interviewees were assigned pseudonyms during the process of data analysis. With the consent of the interviewees, all interviews were digitally recorded and researcher also take notes during the interview. All interviewees preferred to conduct their interviews in Mandarin.

The interviews were transcribed to Chinese then translated to English for data analysis. Thematic analysis was performed in which the interview transcripts were coded then themes emerged. Once the themes were firmly established, relevant interview quotations were categorised into each theme and used to validate the data interpretation.

## IV. RESEARCH RESULTS

### *4.1 A Linear Analysis of Chinese Businesses Listed on Skykiwi Orange Page and Chinese Commercial Advertisements in the Chinese Herald*

Chinese businesses listed on *Skykiwi Orange Page* were re-classified according to the New Zealand Business Industry Classification Code. During the data collection period, there were 4,745 Chinese businesses in the Auckland region listed on the *Skykiwi Orange Page*, accounting for 66.62% of the total 7,122 Chinese businesses registered on the *Skykiwi Orange Page*. Figure 2 shows that these Chinese migrant businesses in Auckland as shown on *Skykiwi Orange Page* span across 14 diverse industries. Four prominent industries stand out: Retail Trade (G), Professional, Scientific and Technical Services (M), Administrative and Support Services (N), and Construction (E). The industry of Retail Trade (G) emerges as the leading industry of Chinese businesses in Auckland with 774 businesses, comprising 16.3% of the total Chinese businesses in Auckland shown on the *Skykiwi Orange Page*. The industry of Professional, Scientific, and Technical Services (M) includes 483 businesses, making up 10.2% of the total Chinese businesses in Auckland. The industry of Administrative and Support Services (N) are also notable, with 459 businesses, accounting for 9.7% of the total Chinese businesses in Auckland. This industry encompasses a range of businesses sectors, providing essential support to other industries, such as employment services, travel agency and tour arrangement services, building cleaning, pest control and gardening services, packaging Services and other administrative services. The industry of Construction (E) is also

significant, comprising 433 businesses, accounting for 9.1% of the total Chinese businesses in Auckland. The top four industries are followed by Other Services (S) (8.4%), Finance and Insurance Services (K) and Education and Training (P), accounting for 8.4%, 8.3% and 8.2% of the total Chinese businesses in Auckland respectively. Intriguingly, there is an absence of Chinese businesses in five business industries as shown on *Skykiwi Orange Page*, including Agriculture, Forestry, and Fishing (A), Mining (B), Manufacturing (C), Wholesale Trade (F), and Public Administration and Safety (O).

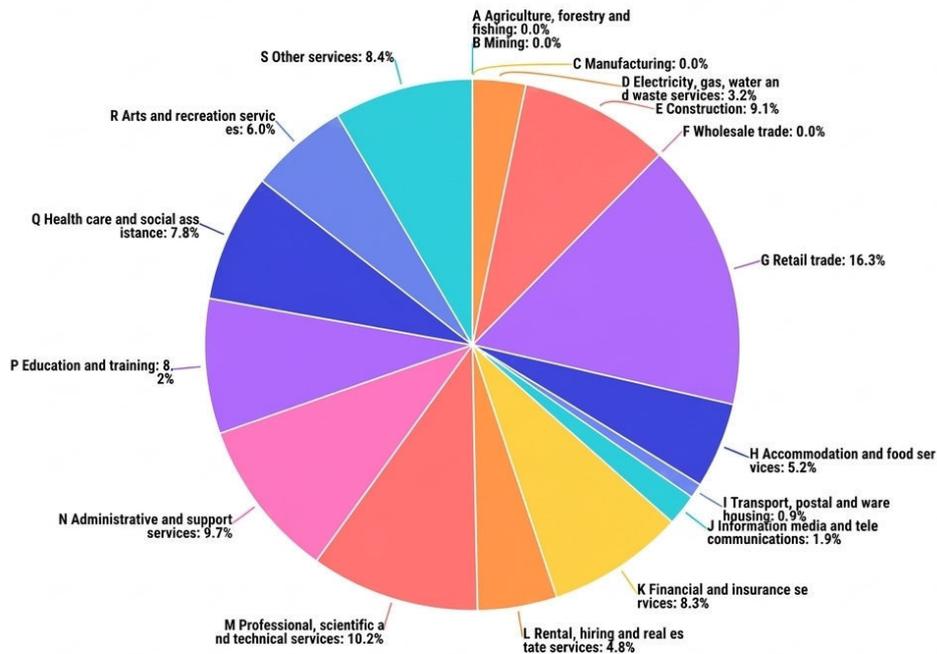
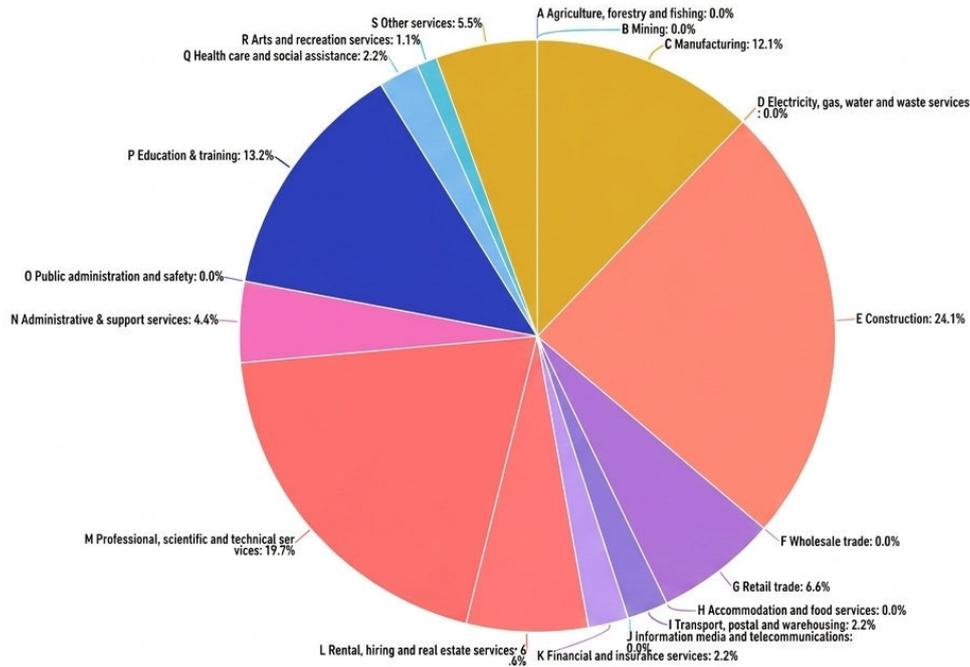


Figure 2: Industry distribution of Chinese business classification in Auckland on *Skykiwi Orange Page*

The analysis of the data collection from the *Chinese Herald* shows that there are 546 commercial advertisements in total during the defined period of time (see Figure 3). These advertisements were distributed across 11 industries. Chinese businesses in the industry of Construction (E) have the highest representation with 132 advertisements, comprising 24.1% of the total advertisements collected. This is followed closely by the industry of Professional, Scientific, and Technical Services (M) with 108 Chinese business advertisements, constituting 19.7% of the total Chinese business advertisements. The industry of Education and Training (P) and Manufacturing (C) are equally ranked in the third position, which have 72 advertisements, accounting 13.2% of the total Chinese business advertisements respectively. The fourth biggest industry shown on *Chinese Herald* are Rental, Hiring and Real Estate Services (L) and Retail Trade (L), both accounting for 36 advertisements; namely, 6.6% of the total advertisements collected. These four top industries are followed by Other Services (S) (30 advertisements, 5.5%), Administrative and Support Services (N) (24 advertisements; namely, 4.4%), Financial and

Insurance Services (K) (12 advertisement; namely, 2.2%), Transport, Postal, and Warehousing (I) (12 advertisements; namely, 2.2%), Health Care and Social Assistance (Q) (12 advertisements; namely, 2.2%), and Arts and Recreation Services (R) (6 advertisements; namely, 1.1%). The analysis reveals that there are no Chinese commercial advertisements in seven industries in the *Chinese Herald*, including Agriculture, Forestry, and Fishing (A), Mining (B), Electricity, Gas, Water, and Waste Services (D), Wholesale Trade (F), Accommodation and Food Services (H), Information Media and Telecommunications (J) and Public Administration and Safety (O).



*Figure 3: Industry distribution of Chinese migrant business advertisements indicated by the Chinese Herald (From 1 November 2022 to 30 April 2023)*

Comparison of the Chinese business distribution between *Skykiwi Orange Page* and the *Chinese Herald* reflects some convergences as well as some divergences. Firstly, both platforms show consistently that the dominance of the Chinese businesses are in four industry sectors. They are Retail Trade (G), Professional, Scientific, and Technical Services (M), Construction (E) and Education and Training (P). While the data from *Skykiwi Orange Page* revealed that Retail Trade (G) is the top one industry, it is ranked as the fourth largest industry in *Chinese Herald*. This suggests that Retail Trade (G) is a thriving industry within the Chinese migrant businesses. It is worth noting that retail is also a main industry sector for New Zealand, with a total of 29,436 companies in the country are in Retail industry, comprising 5.0% of the total businesses nationwide (Statistics New Zealand, 2022). Secondly, both *Chinese Herald* and *Skykiwi Orange Page* show that Chinese businesses in the Professional, Scientific and Technical Services (M)<sup>6</sup> is ranked as the second largest industry.

<sup>6</sup> Professional, Scientific, & Technical Services include architecture, engineering, technical services, legal, accounting, advertising, and computers.

Thirdly, while Construction (E) stands as the first largest industry sector in *Chinese Herald*, it is ranked in the fourth largest industry in *Skykiwi Orange Page*. Fourthly, while Education and Training (P) stands as the third largest industry in *Chinese Herald*, it falls out from the top four industries in *Skykiwi Orange Page*. In addition, Manufacturing (C) and Rental, hiring, and Real Estate (L) stand in the top four industries in *Chinese Herald*, but it is absent in *Skykiwi Orange Page*. Lastly, both *Chinese Herald* and *Skykiwi Orange Page* have an absence of Chinese businesses in Agriculture, Forestry, and Fishing (A), Mining (B), Wholesale Trade (F), and Public Administration and Safety (O).

#### *4.2 Comparison between the Business Industry Distribution of Chinese Businesses in Both Two Chinese Platforms and the Business Industry Distribution of New Zealand Nationwide*

The research also conducted comparison between the business industry distribution of Chinese businesses in both two Chinese platforms and the business industry distribution of New Zealand nationwide. A *chi-square* test was performed to

determine the results from the comparison are less than 0.05 was considered statistically significant. A *p*-value of

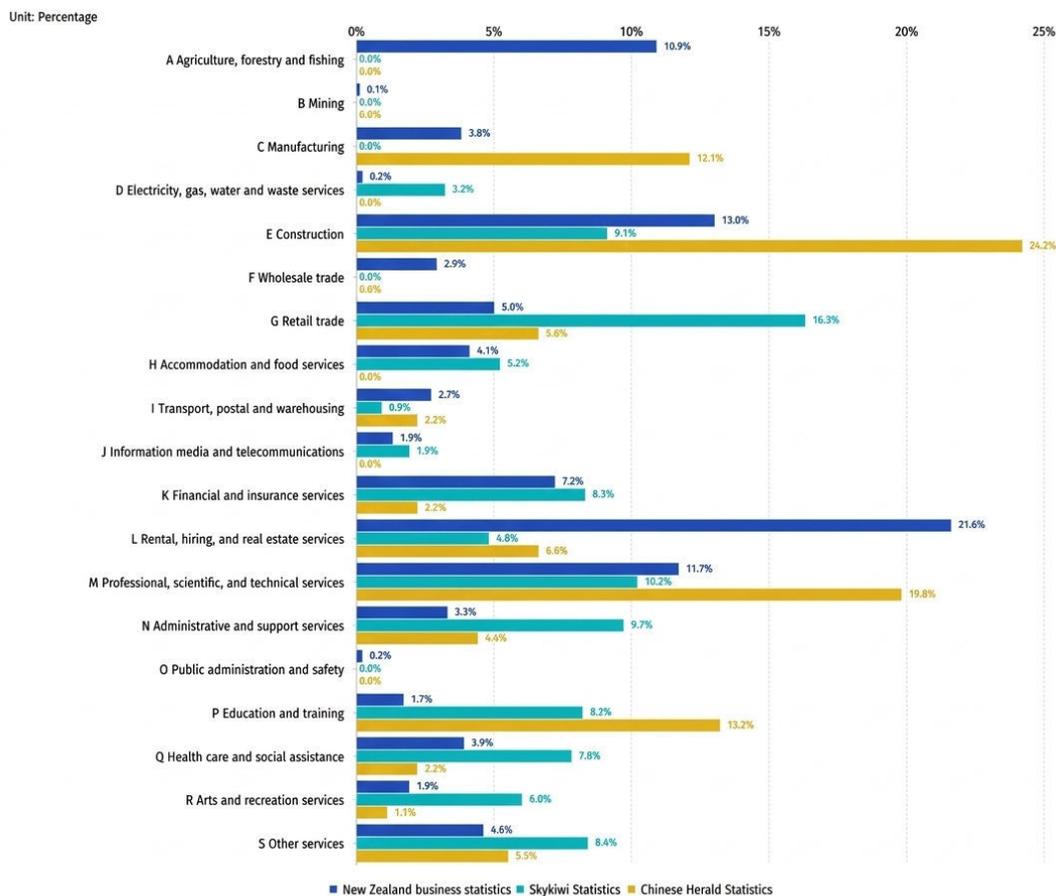


Figure 4: Comparison between the business industry distribution in two Chinese platforms and business industry distribution of New Zealand nationwide

Figure 4 shows that there is something remarkably different between the Chinese business industry distribution shown on the two Chinese platforms and business industry distribution of New Zealand nationwide. To validate that what can be seen from the figure is statistically significant, a *chi*-square test between the Chinese business industry distribution in *Skykiwi Orange Page*, the *Chinese Herald* and of NZ nationwide was conducted. The *chi*-square test result ( $\chi^2 = 7847.87$ ,  $df = 36$ ,  $p < 0.001$ ) indicates that there are some significant differences between the Chinese business industry distribution shown on the two Chinese platforms and the business industry distribution of New Zealand nationwide. In detail, firstly, as for the Professional, Scientific and Technical Services (M), the *chi*-square test showed a significant

difference ( $p < 0.05$ ) between New Zealand Business Statistics (11.7%) and *Chinese Herald* (19.8%) and *Skykiwi Orange Page* (10.2%). The significantly higher proportion reported in the *Chinese Herald* suggests an overrepresentation of Chinese migrant businesses in this high-skilled sector, while in contrast, the proportion on the *Skykiwi Orange Page* remains relatively close to the national average. The high concentration of the Chinese migrant businesses in Professional, Scientific and Technical Services (M) may indicate a substantial demand for professional, technical and high skills-related services in both the mainstream market and local Chinese community. This situation is consistent with the mixed embeddedness theory proposed by Kloosterman and Rath (2010), which emphasises that migrant entrepreneurship is influenced not

only by macro-economic conditions but also meso-level factors such as market demand and micro-level factors such as individual skills of migrants. While the high concentration in the Professional, Scientific and Technical Service (M) arguably reflects the neoliberal immigration regime of New Zealand which prefers highly skilled and business migrants who can make substantial economic contributions to the country (Liu & Ran, 2022), it also reveals the fact that the economic and social advancement in contemporary China enables the provision of qualified skilled and business migrants who can meet the high skill demand of New Zealand's labour market and high financial threshold of the country's immigration system.

Secondly, the Construction (E) industry also has a significantly higher concentration of new Chinese migrant businesses as shown on both *Chinese Herald* (24.1%) and *Skykiwi Orange Page* (9.1%) compared with the industry distribution of New Zealand nationwide (13.0%). The *chi*-square test shows the *p*-value is less than 0.05, which means that the result is statistically meaningful. It is well known that the Construction (E) accounts for a significant share of business in New Zealand nationwide, with 77,157 (13.0%) construction companies in total. The data of the research shows that Chinese businesses in construction contribute a good share in this industry. This on one hand indicates that there is a huge demand for housing and infrastructure in the New Zealand local market. On the other hand, it reveals that new Chinese migrant entrepreneurs are highly sensitive to market demand and thereby able to catch up and ride on the wave of the ample opportunities occurred in the local market. This situation is well aligned with what Meares et al. (2011) suggested that migrants often take their technical skills to meet the demands of the local market and contribute to the local economy.

Thirdly, the Retail Trade (G) accounts for the largest proportion of Chinese migrant businesses on the *Skykiwi Orange Page* (16.3%) which is much higher than its overall New Zealand business industry distributions (5%). The *chi*-square test result of  $p < 0.05$  indicates the result is statistically significant. As Wang and

Warn suggested (2018), the high concentration of migrant retail businesses is largely due to the relatively lower cost to enter into this market. The high concentration of the Chinese retail businesses in Auckland bears out this assumption. The theory of ethnic entrepreneurship can be also used to explain why there are so many Chinese businesses concentrating in the Retail and Trade (G) industry. The theory suggests that migrants often utilise their social networks and cultural knowledge to enter industries which are easy to enter into and/or are familiar by their co-ethnic peers (Jones et al., 2014). This is perhaps another reason that why so many new Chinese migrants engage into businesses in Retail Trade (G) industry.

In contrast, in those capital-intensive industries such as Agriculture, forestry, and fishing (A), Mining (B), Wholesale trade (F), Chinese migrant businesses in *Skykiwi Orange Page* and *Chinese Herald* are almost non-existent. This is statistically different from the overall New Zealand business industry distribution which has 10.9%, 0.1%, and 2.9% distribution of the New Zealand overall businesses in these three industries respectively. Light and Bonacich (1988) pointed out that migrants are often reluctant to enter into industries that require significant financial and/or technological investment and industry-specific training. The absence of new Chinese migrant businesses in these capital-intensive industries highlights the resource constraints and lack of professional advice and support the new Chinese business migrants face.

**Table 1:** Chi-square test of the comparison between the Chinese business industry distribution and New Zealand nationwide business industry distribution

New Zealand Business Industry Classification	New Zealand business statistics (N=592707)	Chinese Herald statistics (N=546)	Skykiwi orange page statistics (N=4745)
A Agriculture, forestry & fishing	64353(10.9)b	0(0)a	0(0)a
B Mining	699(0.1)a	0(0)a	0(0)a
C Manufacturing	22614(3.8)b	66(12.1)a	0(0)c
D Electricity, gas, water & waste services	1224(0.2)a	0(0)a	150(3.2)b
E Construction	77157(13)b	132(24.2)a	433(9.1)c
F Wholesale trade	17073(2.9)b	0(0)a	0(0)a
G Retail trade	29436(5)a	36(6.6)a	774(16.3)b
H Accommodation & food services	24159(4.1)b	0(0)a	248(5.2)c
I Transport, postal & warehousing	16032(2.7)a	12(2.2)a	44(0.9)b
J Information media & telecommunications	7557(1.3)b	0(0)a	90(1.9)c
K Financial & insurance services	42597(7.2)b	12(2.2)a	393(8.3)c
L Rental, hiring & real estate services	127830(21.6)b	36(6.6)a	230(4.8)a
M Professional, scientific & technical services	69639(11.7)b	108(19.8)a	483(10.2)c
N Administrative & support services	19545(3.3)a	24(4.4)a	459(9.7)b
O Public administration & safety	1326(0.2)b	0(0)b	0(0)a
P Education & training	9981(1.7)b	72(13.2)a	388(8.2)c
Q Health care & social assistance	23205(3.9)a	12(2.2)a	369(7.8)b
R Arts & recreation services	11244(1.9)a	6(1.1)a	287(6)b
S Other services	27036(4.6)b	30(5.5)b	397(8.4)a

*Note:* The same letter in the same row indicates no significant difference ( $P > 0.05$ ), while different letters indicate a significant difference ( $P < 0.05$ ). The Chi-square test results show that  $\chi^2 = 7847.874$ ,  $P < 0.001$ , indicating that the number of Chinese migrant businesses is not randomly distributed, but significantly associated with specific business industries.

In summary, the statistics above not only underscore the diverse presence of Chinese businesses in Auckland across various industries, highlighting their significant contributions to the local business landscape, but also indicate the preferred industries that new Chinese migrants engage in. Their preferred business industries intend to be those which are popular among their ethnic communities, easy to enter into and require

less investment funding and specific technological skills and training. The preference reveals certain strength or limits those new Chinese migrant businesses face. The qualitative data presented below provides in-depth and further evidence to validate this point.

*4.3 Reasons of Industry Selection Among New Chinese Migrant Businesses in Auckland, New Zealand*

Based on in-depth interviews with selected 29 new Chinese migrant business owners, the researchers gained insights into their reasons for starting their business, basic information on the companies and the factors influencing their choices of business industries, types and scales. The 29 respondents were from 12 different industries, including 19 male and 10 female entrepreneurs (see Table 2). The participants ranged in age from 26 to 55, with three aged 26–30, six aged 31–35, eight aged 36–40, another eight aged 41–45, three aged 46–50, and one aged 51–55. In terms of education, they are well-educated generally. Most of them have tertiary education, including 15 respondents with a bachelor’s degree and 9 respondents with a Master’s degree. The rest 5 respondents include 3 diploma and 2 high school education. Regarding immigration pathways, 26 respondents migrated to New Zealand through the skilled migration category and 3 through the business category. Their length of residence in New Zealand varied, ranging from 5 to 27 years, with most having lived in New Zealand for over a decade. To improve the analytical clarity and reflect the different stages of migration adaptation, participants were grouped

into 9 recently arrived migrant entrepreneurs (0-10 years), 9 mid-term migrant entrepreneurs (11-20 years) and 11 long-term migrant entrepreneurs (21+years). This sample reflects a diverse and highly educated group of Chinese migrant entrepreneurs, shaped predominantly by New Zealand’s skills-based immigration policy. The diversity in gender, industry, educational background, immigration category, and years of residency ensures a balanced perspective on their entrepreneurial activities across a range of industries in the Auckland.

Three characteristics of their businesses can be drawn. Firstly, there are more sole proprietorship companies than joint-stock companies. Secondly, those businesses are predominantly small businesses with less than 19 employees. This is in line with the trend that most businesses in New Zealand are small businesses. Small Business Council officially defines businesses with less than 20 employees as small businesses. Official statistics shows that there are approximately 546,000 small businesses in New Zealand, accounting for 97% of all businesses nationwide (New Zealand Small Business Council, 2019). Thirdly, the employees of the interviewed business owners are mainly Chinese.

*Table 2: Sociodemographic Characteristics of the Respondents*

Category	Values	Frequency	Percentage
Age	26-30	3	10.3%
	31-35	6	20.7%
	36-40	8	27.6%
	41-45	8	27.6%
	46-50	3	10.3%
	51-55	1	3.4%
	Totals	29	100.0%
Years in New Zealand	Recently arrived migrants (0-10 years)	9	31.0%
	Mid-term migrants (11-20 years)	9	31.0%
	Long-term migrants (21+ years)	11	37.9%
	Totals	29	100.0%

Gender	Male	19	65.5%
	Female	10	34.5%
	Totals	29	100.0%
Immigration Pathway	Skilled	26	89.7%
	Business	3	10.3%
	Totals	29	100.0%
Academic Qualification	Master' degree	9	31.0%
	Bachelor's degree	15	51.7%
	Diploma	3	10.3%
	High school	2	6.9%
	Totals	29	100.0%
Nature of Company	Sole proprietorship company	19	65.5%
	Joint-stock company	10	34.5%
	Totals	29	100.0%
Industry Sector	E. Construction	3	10.3%
	F. Wholesale trade	1	3.4%
	G. Retail trade	4	13.8%
	H. Accommodation & food services	5	17.2%
	I. Transport, postal, & warehousing	2	6.9%
	L. Rental, hiring, & real estate services	1	3.4%
	M. Professional, scientific, & technical services	3	10.3%
	N. Administrative & support services	2	6.9%
	P. Education & training	3	10.3%
	Q. Health care & social assistance	1	3.4%
	R. Arts & recreation services	1	3.4%
	S. Other services	3	10.3%
	Totals	29	100.0%

The thematic analysis of the interview data reveals that the industry selection of new Chinese migrant entrepreneurs in Auckland is driven by a combination of personal, social and economic factors. Four primary factors emerged as influential in determining the industry choices of new Chinese migrant entrepreneurs in New

Zealand. These factors include personal interest, market demand, work experience and academic background. These factors provide a comprehensive understanding of the motivations and strategies behind the business choices of new Chinese migrants entrepreneurs in a new cultural and economic context.

### *Personal Interest*

Personal interests have become an important factor in the industry selection process for new Chinese migrant entrepreneurs. Many respondents stated that their passion for specific industries drives them to pursue entrepreneurship. Entrepreneurs who pursue industries they have passion with often exhibit higher levels of satisfaction and long-term commitment to their businesses. This personal interest-driven motivation provides them determination needed to cope with the complexity of starting their businesses in a new environment; namely, New Zealand, the immigrant-receiving country they chose. For example, Kent, who chose to enter the tourism industry, explained, “I chose tourism because I love it. I’ve always been passionate about traveling and helping others discover new places”. His enthusiasm for the industry not only drove his business choice but also sustained his motivation and resilience to keep up the business during challenging times, such as the COVID-19 pandemic.

Ben shared a similar sentiment about the eatery industry he is in: “I’ve always loved food, which is why I studied Western cuisine and eventually entered the restaurant business”. His passion for cooking and culinary arts was the key driver behind his decision to learn gastronomy as well as to open his own restaurant. These examples align with the theories proposed by Light and Gold (2000) who argued that migrant entrepreneurs often choose industries they are familiar with and passionate about to maximize their personal advantages and achieve success. Additionally, Duan et al. (2023) also emphasise that personal interest and passion are crucial internal drivers of immigrant entrepreneurship, enabling entrepreneurs to remain committed and innovative in their chosen fields.

### *Market Demand*

Market demand was another critical factor influencing the industry choices of new Chinese migrant entrepreneurs in Auckland. The decision to enter specific sectors was often driven by a careful assessment of local market needs and opportunities, particularly the needs and

opportunities among the Chinese ethnic community. Many entrepreneurs conducted informal market research or relied on insights from their community to identify gaps in the market. By aligning their business ventures with high-demand sectors, they were able to ensure profitability and sustainability. For illustration, Yong decided to open a Lanzhou beef noodle restaurant after observing a lack of such restaurants in Auckland. He shared: “At that time, there were not many noodle restaurants in Auckland, and Lanzhou beef noodles are very famous in China. I realised this could be a niche market, so I decided to fill that gap”. Similarly, Miao, who initially started an e-commerce business of selling photography equipment, recognised a market demand for more efficient logistics services. She explained: “I started helping friends consolidate shipments because it was faster and cheaper. Over time, I noticed a growing demand for this service, so I moved into the logistics industry.”

These findings are consistent with the work of Portes and Zhou (1996), who argued that migrant entrepreneurs often succeed by identifying and capitalising on market niches that are underserved by mainstream businesses. The ability to recognise and respond to these opportunities is crucial for ensuring the profitability and long-term operation of businesses.

It should also be noted that the growing Chinese population in Auckland has created specific market demands for culturally relevant goods and services. Entrepreneurs who recognised and responded to these needs were able to establish businesses that served directly to their own ethnic community, ensuring a steady customer base. Yong, who operates a Chinese restaurant, observed: “The demand for authentic Chinese food here is huge, especially among the local Chinese community. We have many repeat customers who come back for the taste of home”. Jason, the owner of the Lanzhou beef noodle shop, emphasised the similar idea: “There are many Chinese people here, and they miss the taste of home. That is why I decided to open a noodle shop that offers the flavours they grew up with”.

The focus on community-driven demand underscores the role of ethnic networks in sustaining migrant businesses, as Bedford et al. (2001) noted that market demand, especially within ethnic communities, directly influences the industry distribution and growth of migrant enterprises.

#### *Work Experience*

The work experience of new Chinese migrants prior to moving to New Zealand also significantly influenced the industry choice of new Chinese migrant businesses. Entrepreneurs with industry-specific experience were more likely to establish businesses in their related fields. This allowed them to draw on their existing knowledge and skills, providing a competitive advantage in the marketplace. For instance, Kun shared that prior to establishing his own tourism company, he had worked for a tourism company for a year in Auckland. Leveraging the existing customer base of his former workplace, he seamlessly transitioned into running his own business in the same industry. This strategic move allowed his company to quickly establish itself and spared him the challenges of building a customer base during the initial stages of entrepreneurship. He reflected:

At first, I worked for a tourism company, but after a period of time the owner quit, and I bought the company. Because this company already had some stable customers, I took over and then expanded the business through my own network.

Similarly, Mark, who has a background in software development, stated: “Software development is my profession. Before moving here, my company in China specialised in software development. It made sense for me to continue in the same field because I already had the expertise”. Wang, an engineer, also explained how his previous experience shaped his business choice: “I have been an engineer for ten years, so I am confident in starting a business in this industry. I had a clear plan for the company's positioning and future development before starting my own business”.

These discussion supports the conclusions of Bedford et al. (2001) and Zhou (2004), who suggested that migrants' prior work experiences play a critical role in determining their entrepreneurial paths, often leading to the replication of familiar business models in new settings.

In some cases, new Chinese migrant entrepreneurs learnt new skills and identified new business opportunities when running their previous businesses and then they establish new business ventures in different industries. For example, before running a logistics company, Miao had a digital camera store. With years of experience in arranging cargo for her camera store, marine logistics, she eventually opened a logistics company:

I had already known the logistics industry very well before I started my business and I did not need to do any more market research because I had been familiar with cargo due to the camera store. And there were very few competitors, just a few peers on the market when I started my own logistic business.

These examples illustrate how work experience provides a foundation for migrant entrepreneurs, allowing them to leverage existing skills, knowledge and business network in new and sometimes unfamiliar environments. This aligns with Zhou's argument (2004) that the professional skills and work experience of migrants are important factors affecting their entrepreneurial success. This strategic use of prior experience often reduces the risks associated with starting a business in a foreign country.

#### *Academic Background*

The academic background of new Chinese migrant entrepreneurs was another significant factor influencing their industry choices, particularly for those who entered knowledge-intensive sectors. Higher education and specialised qualifications provided these entrepreneurs with the skills and knowledge necessary to succeed in competitive and technically demanding industries. Entrepreneurs with higher education degrees were more likely to

engage in industries requiring advanced technical skills or professional expertise, such as technology, engineering and specialised consulting services. Among the 29 respondents, 24 have a bachelor's degree or above, with 9 holding a master's degree. The interviews showed that their academic qualifications not only facilitated their entry into these sectors but also enhanced their ability to compete effectively. For example, Ting's decision to operate a liquor store was influenced by her academic background in winemaking and viticulture during her university studies. She explained:

My major in university is winemaking and viticulture. And I have worked in both wineries and vineyards. I think I chose this industry probably because it is related to my major and I also like wine tasting. My academic knowledge is quite helpful when running a wine shop. For example, when recommending wines to customers, I can provide them with more professional knowledge.

As can be seen, her specialised knowledge provided the essential skills and support required for her entrepreneurial venture. The research shows that it is often that new Chinese migrant entrepreneurs intended to integrate their theoretical knowledge into their business practices, leading to a well-planned venture. This approach contributed to the long-term success and sustainability of their businesses. Wang, an engineer by training, used his academic knowledge to establish a business in the engineering services sector. He emphasised that his education provided him with the tools to strategically plan his company's growth and navigate through technical challenges. These findings align with the research of Zhou (2004), and Wang and Warn (2018), which highlight the critical role of academic qualifications in shaping the entrepreneurial outcomes of migrants, particularly in sectors that require specialized expertise.

In summary, the qualitative findings from this study reveal that the industry selection among new Chinese migrant entrepreneurs in Auckland

is influenced by a combination of personal interest, market demand, work experience, and academic background. These factors not only guide the initial choice of industry but also might impact on the long-term viability and success of the businesses. In addition, the findings suggest that industry preferences are also influenced by their ethnic identity and also the specific demands of the local Chinese community. This situation is in line with ethnic entrepreneurship theory which suggests that migrant entrepreneurs tend to rely on their cultural capital and ethnic networks to develop their businesses (Waldinger, 1986; Rahman et al., 2021). One overarching finding of the qualitative interviews was that new Chinese migrant businesses can easily draw customer resources from their ethnic Chinese community by providing culturally relevant products and services.

## V. CONCLUSION

This research adopted multiple methods to highlight how industry distribution of new Chinese migrant business in Auckland differs from mainstream New Zealand enterprises and explored the underpinning reasons of the concentration of new Chinese migrant businesses in certain industries. The quantitative analysis shows that Retail Trade, Professional, Scientific and Technical Services, and Construction are the most popular industries chosen by new Chinese migrant entrepreneurs. Whereas earlier migrants predominantly focused on small niche and labour-intensive businesses, new Chinese migrants generally have higher educational profiles and rich financial resources, which has enabled many of them to engage with businesses which require more investment funding and specific knowledge of modern technologies and professional services. However, the quantitative analysis also shows that new Chinese migrant businesses are underrepresented in industries such as Agriculture, Forestry and Fishing, Mining, Wholesale trade and Public Administration and Safety. These industries often have higher barriers for entry, including strict national regulatory requirements and also require a large amount of upfront capital investment. These conditions may prevent new Chinese migrants from entering

them; instead, the new Chinese migrant entrepreneurs intended to enter industries with lower costs, less specific training requirements, and fewer regulatory barriers. It is important to realise that their absence from these industries indicates certain structural factors that constrain these migrant entrepreneurs to adventure into those sectors.

By using a multi-dimensional mixed embeddedness framework, the research illustrated how macro-, meso-and micro-level factors interact with each other to influence the business industry preferences of new Chinese migrant businesses. The macro- level institutional and regulatory environment in New Zealand plays an important role in constraining new Chinese migrant entrepreneurs to enter certain industries.

At the meso level, market conditions and ethnic social networks are key determinants of the industry choices of new Chinese migrant entrepreneurs. The high concentration of Chinese migrant businesses in sectors such as professional services reflect both the needs of the Chinese community and the accessibility of ethnic social networks to facilitate business operations. The qualitative data highlights how these Chinese ethnic and social networks provide access to key resources such as information about market opportunities and connections to suppliers and customers.

At the micro level, personal resources such as skill, education, prior work experience and personal networks are also crucial determinants of the industry preferences of new Chinese migrant entrepreneurs. These personal resources not only enabled them to successfully establish and effectively manage their businesses but also enabled them to respond to market demands accordingly.

To conclude, the research provides empirical support to consolidate the existing transnational and ethnic entrepreneurship theories and enrich the literature in this area of research. The adoption of the multi-dimensional mixed-embeddedness framework as an analytical tool verifies how market demand, ethnic networks,

personal resources, and macro-level regulatory environments interact with each other in influencing migrant business choice and preference. Future research can consider longitudinal studies to track migrant business growth, compare different migrant groups, explore regional differences, and examine how new technology and innovation, such as the application of AI shape migrant entrepreneurship.

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# Future Force: The Development of Professional Military Educations for Malaysian Armed Forces

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## ABSTRACT

In an era marked by hybrid threats, rapid technological advancement and increasingly complex battlefields, the effectiveness of the Malaysian Armed Forces (MAF) hinges on the preparedness of its military personnel to evolve into Smart Soldiers. This article highlights the pivotal role of Professional Military Education (PME) in developing military personnel who are capable of operating across diverse operational domains. By focusing on the individual development of military personnel, the article identifies key areas of study that examine how PME enhances critical competencies such as decision-making, leadership, adaptability and strategic thinking, ultimately equipping them to meet both contemporary and future operational challenges.

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*In an era marked by hybrid threats, rapid technological advancement and increasingly complex battlefields, the effectiveness of the Malaysian Armed Forces (MAF) hinges on the preparedness of its military personnel to evolve into Smart Soldiers. This article highlights the pivotal role of Professional Military Education (PME) in developing military personnel who are capable of operating across diverse operational domains. By focusing on the individual development of military personnel, the article identifies key areas of study that examine how PME enhances critical competencies such as decision-making, leadership, adaptability and strategic thinking, ultimately equipping them to meet both contemporary and future operational challenges.*

**Keywords:** future force, malaysian armed forces, professional military education, smart soldier.

## I. INTRODUCTION

The evolving nature of modern warfare, characterized by hybrid threats, multi-domain operations and technological convergence demand a new breed of military personnel who are not only tactically proficient but also cognitively agile, strategically minded, and technologically literate. As nations prepare for increasingly complex security environments, the concept of a Future Force has emerged to represent armed forces that are flexible, adaptive, and future-ready. Within this context, the Malaysian Armed Forces (MAF) must prioritize the structured development of its personnel to

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meet both current operational demands and future strategic challenges.

A central pillar in shaping this transformation is Professional Military Education (PME). PME refers to the deliberate, structured, and progressive educational pathways designed to cultivate the intellectual and leadership capacities of military personnel across all levels of command (Letovaltseva et al., 2026, Enstad & Hagen, 2025; Kucera, 2025; Serrano et al., 2025, Hampson & Taber, 2023; Kelley & Johnson-Freese, 2014). It is not limited to classroom instruction but extends to scenario-based training, joint operations education, strategic analysis, and the continuous development of mission-critical skills. For the MAF, a robust PME system is essential in cultivating the *Smart Soldier*, one who combines traditional military effectiveness with enhanced decision-making, adaptability, and the ability to operate effectively in dynamic and unpredictable environments (Ministry of Defence, 2020).

This article explores the development of PME within the MAF, with particular emphasis on its role in enhancing the competencies of military personnel, who serve as the backbone of tactical, operational and strategic levels of military organization. It critically explores how core areas of study in PME can be aligned with the demands of modern warfare and transformed to meet future expectations. PME is vital to preparing Malaysia's military personnel for the *Future Force*.

Future Force development demands a PME system that cultivates intellectual agility, operational adaptability, and strategic foresight. Designed around future-focused, multi-domain scenarios, PME must integrate joint operations, emerging threats, and technology-enabled learning (Zhang et al., 2026). Recognizing the

varied psychophysiological demands across service branches, PME should be modular, progressive and tailored-ensuring personnel are cognitively, emotionally and physically prepared for high-stress, complex environments. Ultimately, PME is the foundation for a smart,

resilient and future-ready force. Tornero- Aguilera et al. (2024) emphasized the importance of bridging the gap between theoretical knowledge and practical implementation in military training programs to effectively develop military personnel, as illustrated in Figure 1.0.

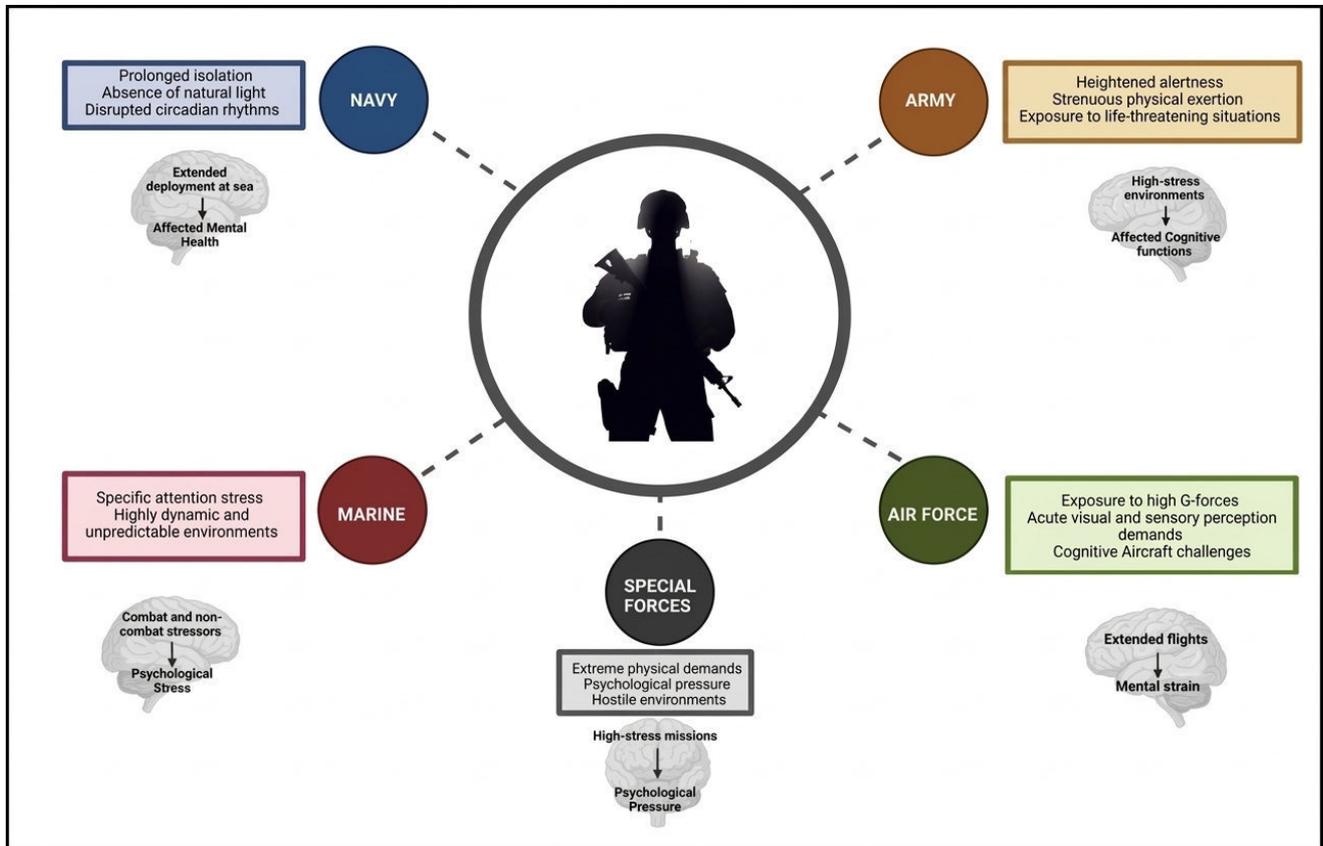


Figure 1: Challenges Faced By Different Soldiers Based on their Armed Forces Roles (Tornero-Aguilera et al., 2024).

## II. FUTURE FORCES

Developing the Future Force is essential to implementing *Concentric Deterrence*, the first pillar of Malaysia’s Defence White Paper (DWP). As the “Nation’s Shield,” the Malaysian Armed Forces (MAF) are entrusted by the Government to uphold the National Defence Objectives at all times. In fulfilling this mandate, the MAF performs both primary and secondary roles. The primary role is to protect national interests by defending Malaysia’s sovereignty and territorial integrity from both traditional and non-traditional threats through joint operations across the maritime, air, land, and cyber-electromagnetic domains. The secondary role involves conducting Military Operations Other Than War (MOOTW),

such as Humanitarian Assistance and Disaster Relief (HADR), Search and Rescue (SAR), and Non-Combatant Evacuation Operations (NEO). The MAF also supports civil authorities in enforcement and nation-building tasks, while contributing to global peace and security through United Nations (UN) Peacekeeping Operations (PKOs). The uniform outlook will help the reader to follow the article easily. This can be obtained effectively if author uses this template file to construct his or her paper.

The force structure and posture of the Malaysian Armed Forces (MAF) must be reshaped to effectively address the evolving and uncertain security environment. Although the overall force size will be maintained at its current level

throughout the Defence White Paper (DWP) period, efforts will focus on repurposing and reprioritising existing capabilities to meet future operational demands. Greater emphasis will be placed on enhancing joint capabilities to ensure readiness for a broad spectrum of contingencies, ranging from armed interventions to natural disaster responses. Additionally, the MAF will

strengthen its capacity to conduct simultaneous two-theatre operations across Peninsular Malaysia, Sabah, and Sarawak. This strategic capability is supported by the integration of the Threat Response Model, as illustrated in Figure 2.0, which enables coordinated, multi-domain readiness and rapid response across diverse geographic theatres.

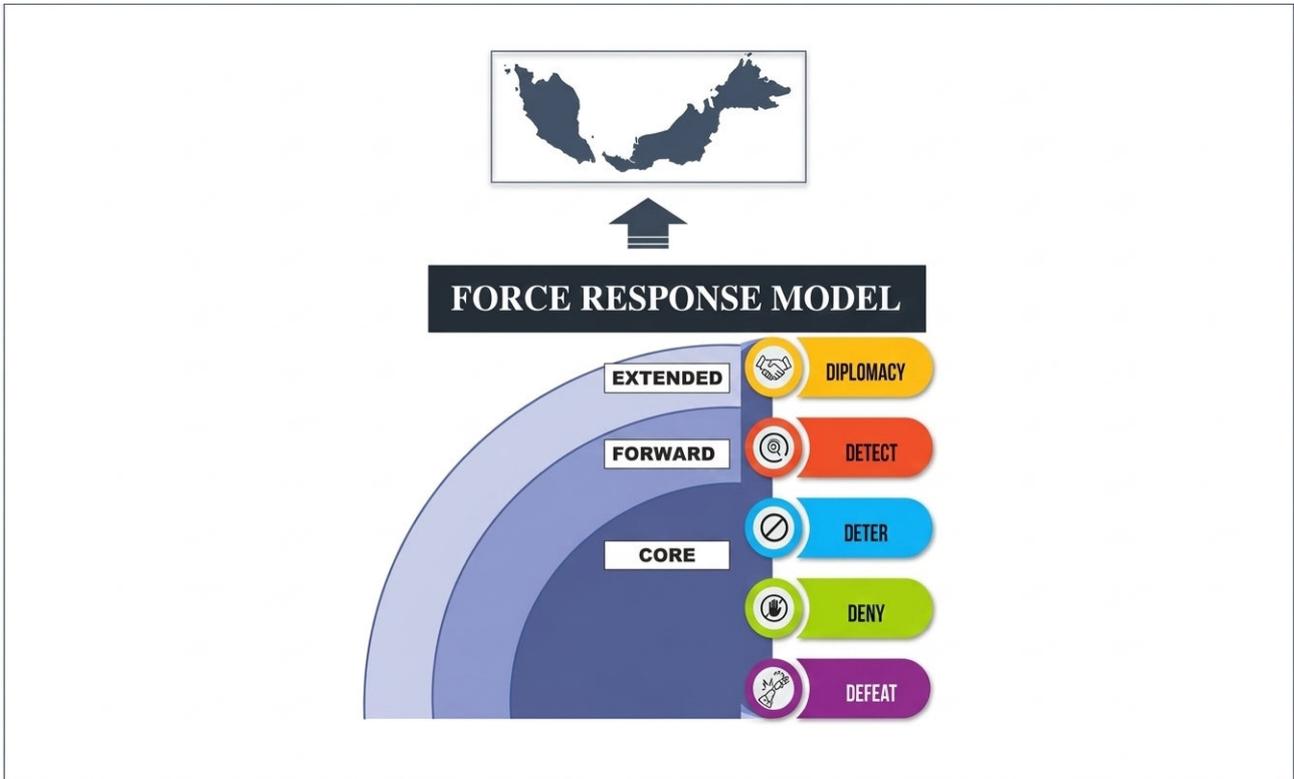


Figure 2: Force Response Model

The Government aims to shape the Malaysian Armed Forces (MAF) into an integrated, agile, and focused force, capable of responding to traditional and non-traditional threats in both peace and conflict. This transformation focuses on enhancing readiness through long-term investment in modern assets, equipment, and a skilled, knowledge-based workforce aligned with the *Smart Soldier* concept. The force will be integrated through joint cooperation across all Services, agile in adapting to diverse threats, and focused on priority-based capability development. The Future Force will be characterised by jointness, interoperability, technological readiness, two-theatre operational capability, and mission orientation—ensuring it is rapid, deployable, and effective across land, maritime,

air, and cyber-electromagnetic domains within the concentric defence areas.

### III. SMART SOLDIER

The *Smart Soldier* concept represents the evolution of the Malaysian Armed Forces (MAF) towards a technologically adept, cognitively prepared and highly adaptable military workforce. This initiative focuses on equipping personnel with advanced technical skills, critical thinking abilities, and leadership qualities required to operate in complex, multi-domain environments. Embracing digital technologies, data-driven decision-making, and integrated warfare systems, Smart Soldiers are trained to respond swiftly to emerging threats, both kinetic and non-kinetic. This transformation aligns with the national

agenda of developing a knowledge-based defence force, ensuring that MAF personnel are not only physically capable but also intellectually agile to meet future operational demands.

To develop new capabilities for future operations, the Malaysian Armed Forces (MAF) will realign its existing structure and review personnel deployment over the next decade. Strengthening human resource management is essential to enhance preparedness and ensure operational effectiveness. Mission success hinges on the ability to recruit, develop, and retain skilled personnel capable of addressing evolving security challenges. This requires a renewed focus on the principles of raising, training, and maintaining the force, aligned with the concept of *Comprehensive Defence*.

In response to the shifting security landscape, the Government will continue to modernise the MAF by reinforcing recruitment, career development, and retention strategies in accordance with the Future Force requirements. A key element of this transformation is the Government's recognition of education as a cornerstone of career development and professional growth. By integrating training, education, and self-development programmes, the MAF aims to cultivate a highly professional military workforce. Emphasis will be placed on enhancing technical and managerial expertise to meet the demands of increasingly complex operational scenarios and technological advancements. This shift supports the development of *Smart Soldiers* and aligns with the national agenda of building a knowledge-based society.

The evolving operational environment demands new levels of knowledge and skills beyond those previously required (Bareebe, 2026; Sellberg & Lindwall, 2026, Barry et al., 2025; Melby, 2025; Martinez Machain, 2021). In response, the Malaysian Armed Forces (MAF) will continue to adopt the *Knowledge Force (K-Force)* concept, which emphasises the acquisition of high-quality knowledge and the cultivation of a continuous learning culture within the force. To support this initiative, the Government will establish a specialised expert pool particularly in critical

areas such as cybersecurity comprising academics and industry professionals to strengthen national defence capabilities.

Professional Military Education (PME) plays a pivotal role in developing the *Smart Soldier* by equipping military personnel with the intellectual, technical, and leadership competencies necessary for modern operations. The *Smart Soldier* is not only physically prepared but also cognitively ready to operate in dynamic, joint, and multi-domain environments. PME achieves this by focusing on key Core Areas of Study (CAOS) that align with strategic, operational, and tactical requirements of the MAF.

#### IV. PROFESSIONAL MILITARY EDUCATION

Professional Military Education (PME) is a structured and progressive learning system designed to enhance the intellectual, ethical, and leadership competencies of military personnel across all ranks and services. Unlike technical or physical training, PME focuses on developing cognitive readiness, critical thinking, and decision-making skills essential for operating in complex, multi-domain environments. It forms a core component of military career development and supports the strategic vision of building a future-ready, professional force.

PME spans the full spectrum of a military career, from junior-level foundational education to advanced courses for senior leadership (Powell & Townley, 2025; Smith et al. 2025). It is delivered through dedicated institutions such as military academies, staff colleges, and war colleges, offering education tailored to strategic, operational, and tactical roles. Key areas of study typically include leadership and ethics, joint operations, military strategy, logistics, technology and cyber defence, and communication. This holistic approach ensures that personnel are equipped to lead in joint and interagency environments and to respond effectively to evolving security challenges.

Within the Malaysian Armed Forces (MAF), PME plays a critical role in developing the *Smart*

*Soldier* a knowledge-based, technologically proficient, and adaptable military professional. By prioritising lifelong learning and cultivating a culture of continuous professional development, PME supports the MAF's transformation into an integrated, agile, and mission-oriented force capable of upholding national defence objectives. Central to this effort are the Core Areas of Study (COAS), which form the foundation of PME curricula. These COAS are designed to address current and future operational demands. By aligning education with these strategic domains, PME ensures that MAF personnel are not only prepared for multi-domain operations but also capable of leading, innovating, and making sound decisions in high-tempo and complex environments. This approach directly supports the transformation of the MAF into an integrated, agile, and mission-focused force, in line with the national agenda of building a knowledge-based and future-ready defence ecosystem.

## V. CORE AREAS OF STUDY

The Core Areas of Study (COAS) are the foundational academic and professional disciplines within the PME system, designed to systematically prepare MAF personnel for the demands of modern military service. These areas include leadership and ethics, military strategy and security studies, joint and combined operations, logistics and sustainment, technology and cyber defence, military history and doctrine, and strategic communication. Each area is carefully selected to ensure comprehensive knowledge development that spans strategic, operational, and tactical levels of warfare. COAS provides the intellectual backbone for training adaptive, mission-oriented personnel capable of operating in complex, multi-domain environments.

The purpose of COAS is to transform new recruits often civilians with minimal military background into *Smart Soldiers* who possess not only physical endurance and combat skills but also high levels of cognitive readiness, analytical thinking, and decision-making ability. This transformation begins at the initial entry phase, where foundational military values and discipline are

instilled. As personnel progress through their careers, they undergo PME phases tailored to their rank and responsibilities. Through structured education pathways, each COAS develops key competencies: leadership training fosters command readiness; military strategy enhances strategic foresight; cyber defence builds digital resilience; and logistics improves operational sustainability. This staged, layered approach ensures that military professionals are intellectually agile and ready to meet future challenges across the concentric layers of national defence.

The Core Areas of Study for the Malaysian Armed Forces (MAF) reflect a comprehensive approach to preparing military personnel for contemporary and future challenges. These areas include: Policy, Strategic and Security Studies, which focus on national defense strategies, geopolitics, hybrid warfare, and counterterrorism; Military and Defence Management, emphasizing leadership, logistics, procurement, and self-reliance; Operational Art and Joint Warfare, covering multi-domain operations (MDO), force modernization, special operations, and peacekeeping; Cyber, Space and Emerging Technologies, which advance capabilities in cyber warfare, AI systems, satellite security, and disruptive defense innovations; and Non-Traditional Security and Disaster Management, which prepares the military for roles in climate response, pandemic preparedness, and resource security. Together, these domains ensure the MAF remains strategically aligned, operationally agile, and technologically advanced. Figure 3.0 illustrated core areas of study for the MAF.

Core Areas of Study		
<p><b>1. POLICY, STRATEGIC AND SECURITY</b></p> <ul style="list-style-type: none"> <li>• National Defence Policy &amp; Strategy – Understanding Malaysia's defence policies, doctrines, and military strategies.</li> <li>• Geopolitics &amp; International Relations – Studying regional and global power dynamics, ASEAN security, and Malaysia's strategic positioning.</li> <li>• Hybrid &amp; Grey Zone Warfare – Examining non-traditional conflict methods, including cyber, information, and proxy warfare.</li> <li>• Counterterrorism &amp; Counterinsurgency – Addressing threats from extremist groups, maritime terrorism, and radicalization.</li> </ul>	<p><b>2. MILITARY AND DEFENCE MANAGEMENT</b></p> <ul style="list-style-type: none"> <li>• Military Leadership &amp; Command Philosophy – Developing leadership at tactical, operational, and strategic levels.</li> <li>• Defence Procurement &amp; Acquisition – Studying military procurement strategies, budgeting, and technology acquisition.</li> <li>• Military Logistics &amp; Sustainment – Ensuring force readiness, supply chain resilience, and strategic mobility.</li> <li>• Civil-Military Relations &amp; Defence Diplomacy – Enhancing cooperation between the military, government, and international partners.</li> <li>• Defence Industry &amp; Self-Reliance – Strengthening Malaysia's local defence industry and reducing reliance on foreign arms.</li> </ul>	<p><b>3. OPERATIONAL ART &amp; JOINT WARFARE</b></p> <ul style="list-style-type: none"> <li>• Multi-Domain Operations (MDO) – Integrating land, air, sea, cyber, and space operations for joint effectiveness.</li> <li>• Force Modernization &amp; Capability Development – Examining how to upgrade MAF capabilities in response to emerging threats.</li> <li>• Special Operations &amp; Asymmetrical Warfare – Understanding unconventional warfare and rapid response strategies.</li> <li>• Peacekeeping &amp; Humanitarian Assistance – Training for UN peacekeeping operations and disaster relief missions.</li> </ul>
<p><b>4. CYBER, SPACE, AND EMERGING TECHNOLOGIES</b></p> <ul style="list-style-type: none"> <li>• Cyber Warfare &amp; Information Operations – Developing capabilities for cyber defence, electronic warfare, and misinformation/disinformation countermeasures.</li> <li>• Artificial Intelligence &amp; Autonomous Systems – Studying AI applications in defence, including drones, robotics, and decision-support systems.</li> <li>• Space Security &amp; Satellite Communications – Enhancing MAF's space domain awareness and strategic satellite infrastructure.</li> <li>• Defence Innovation &amp; Technology Development – Researching disruptive military technologies like hypersonics, quantum computing, and bioengineering.</li> </ul>	<p><b>5. NON-TRADITIONAL SECURITY &amp; DISASTER MANAGEMENT</b></p> <ul style="list-style-type: none"> <li>• Climate Security &amp; Environmental Change – Assessing the military's role in climate-induced crises and disaster response.</li> <li>• Biosecurity &amp; Pandemic Preparedness – Preparing for biological threats, health security, and medical readiness.</li> <li>• Energy &amp; Resource Security – Understanding the military's role in securing critical resources like rare earth elements and energy supply chains.</li> </ul>	

Figure 3: Core Areas of Study for MAF

The COAS framework is applied progressively throughout a military career, beginning from basic military training and junior leadership courses, continuing through intermediate staff education and culminating in advanced strategic-level education for senior commanders. Civilian recruits start with core military values, general service knowledge, and basic tactics. As they advance, education shifts towards specialized roles, joint operations understanding, and strategic thinking. PME institutions, particularly military training establishments, serve as critical platforms where the COAS are delivered and seamlessly integrated into career progression.

This continuum of learning ensures that, by the time a service member advances to higher leadership roles, they are fully developed as *Smart Soldiers* knowledge-driven, adaptable, and equipped to lead in joint, multi-domain, and technologically advanced operational environments.

## VI. CONCLUSION

In an era defined by hybrid threats, technological convergence, and the growing complexity of multi-domain operations, the transformation of the Malaysian Armed Forces (MAF) into a Future Force is not merely a strategic ambition but a national necessity. Central to this transformation is the development of *Smart Soldiers* military professionals who are not only physically resilient but also intellectually agile, technologically competent, and capable of executing joint operations in high-tempo and uncertain environments. The Smart Soldier concept, supported by the Government's commitment to modernisation, human capital development, and the Knowledge Force (K-Force) agenda, represents the future of Malaysia's defence capability.

Professional Military Education (PME), anchored by the Core Areas of Study (COAS), serves as the

cornerstone in realising this vision. By embedding leadership, strategy, technology, and operational excellence into every stage of a military career from civilian entry to senior command. PME ensures a structured, continuous, and mission-oriented learning pathway. Through this framework, the MAF cultivates a professional force that is integrated, agile, and future-ready. Ultimately, PME does not merely prepare individuals for military service it shapes the intellectual foundation of Malaysia's national defence and secures the nation's strategic posture for the challenges of tomorrow.

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