

JUNIOR TEAM CANADA

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# MISSION REPORT & SECTOR BRIEFINGS CHINA 2015

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CHONGQING  
CHENGDU  
GUANGZHOU

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JUNIOR TEAM CANADA



July 31st 2015, Chongqing. Photo by Benjamin Palmer. The Junior Team Canada China 2016 Team with Mr. Philippe Rheault, Consul General, Mr. David Perdue, Consul and Senior Trade Commissioner, and Trade Commissioners at the Consulate General of Canada in Chongqing, China.

ABOUT JUNIOR TEAM CANADA

Junior Team Canada is a delegation of youth ambassadors that work with the Trade Commissioners Service to represent Canadian business interests abroad. JTC Ambassadors partner with companies and organizations in their community, who provide funding for the mission in exchange for market research and establishing relationships with contacts on the ground.

Through the support of countless companies and organizations since 1991, Junior Team Canada delegates have: participated in numerous trade missions lead by the Prime Minister; sourced foreign direct investment for Canada at the G8, G20, and APEC summits; and served Canadian communities by helping create new business and community relationships with emerging market economies.

ABOUT GLOBAL VISION

Global Vision is a Canadian non-profit organization founded in 1991 by Terrance Clifford, MP London-Middlesex (1984-1993) and Member of the Order of Canada. To date, Global Vision’s various programs have provided over 30,000 young Canadians with hands-on experiences in international trade and leadership, and has inspired a number of similar initiatives around the world.

Global Vision’s flagship Junior Team Canada program in particular has travelled to more than 30 countries across 6 continents since 1991, and continues to advance Canadian business interests in key global markets.

MISSION ROSTER

AMBASSADORS

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MISSION ROSTER

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REGIONAL BRIEFINGS

CHONGQING

Despite having little recognition globally, Chongqing is of utmost significance within the dynamics of the new Chinese economy. With a population of 33 million people, combined with its strategic location at the top of the Yangtze River in South Western China, make it an ideal industrial, transportation, and logistics hub from which to meet domestic consumption needs in the inland regions. Indeed the strong sustained growth of Chongqing’s large industrial and manufacturing base is fuelled primarily by domestic consumption, in sharp contrast to the country’s historic reliance on exports to support its primary sector.

With cities like Beijing, Guangzhou, and Shanghai now characterised by higher wages and a primarily tertiary sector economy, many of the advantages found in coastal China a decade ago have migrated inland to cities like Chongqing where growth continues at breakneck speeds of 17% a year – nearly double the national rate of growth.

Chongqing’s competitive advantages are threefold. First, as the Chinese population continues its rapid transition from rural to urban living, half a million migrants pour into the city every year. This influx of low-cost labour strengthens the foundation for a thriving manufacturing industry, and drives further economic activity as catalysts for increased construction and infrastructure investment.

Second, Chongqing has benefitted immensely from the central government’s focus on development of inland cities, and transition from an export economy to an economy powered by domestic consumption. The policies that accompany this second wave of development strategy include tax breaks, special economic zones, and investment in infrastructure.

Third, and perhaps most crucial for Chongqing’s

future, is the city’s geographic position within China. Chongqing’s location on the Yangtze River places it at the top of China’s most important internal artery, with direct access for ships up to 10,000-tonnes straight to the Lianglu Cuntan Bonded Port in downtown Chongqing. A designated special economic zone specifically designed for international trade, Lianglu Cuntan is China’s only inland bonded port with a capacity of 2 million TEUs annually. The port actively partners with Chinese e-commerce platforms like T-mall and TaoBao to market high end foreign products to urban consumers, and is a unique window for Canadian companies looking to export consumer goods into interior China.

CHENGDU

Chengdu, the capital city of Sichuan Province, is the economic, cultural, financial and political center of Sichuan Province. The most prosperous and affluent city in Southwest China, it holds many opportunities for Canadian companies particularly in the agricultural products and services sectors.

Lead by China’s broad “Go West!” development plan, the city is undergoing tremendous changes and rapid economic development to establish itself as the logistics and distribution center for the Western regions of China. Highlights in infrastructure include: the Eurasian Continental railway connecting Sichuan Province to European and Central Asian markets; Chengdu Shuangliu International Airport serving nearly 40 million passengers and 50 international destinations; and numerous logistics parks and special economic areas, including a bonded logistics center in a high-technology development zone.

REGIONAL BRIEFINGS

There is also a tremendous supply of high quality of human capital available in Chengdu, with 43 universities, 184 research institutions, and 1.3 million scientists. In combination with the logistics capabilities and the high standard of living, Chendgu has risen to become the number one preferred destination for foreign direct investment. Indeed more than half of the Fortune 500 firms have some form of presence in Chendu, with a particular emphasis on the financial and high-tech industries.

On the consumption side, rising incomes and increasing western presence are creating significant opportunities for Canadian exports. Local residents are keen to try imported products, and are willing to pay a premium for quality, reliability, and food safety. As one of the most well-Chengdu, the capital city of Sichuan Province, is the economic, cultural, financial and political center of Sichuan Province. The most prosperous and affluent city in Southwest China, it holds many opportunities for Canadian companies particularly in the agricultural products and services sectors.

GUANGZHOU

Guangzhou is the capital city of the southern Chinese province of Guangdong. As one of the Five National Cities it holds sub-provincial administrative status, giving the city administrative control independent on the province, with regards to its economy and law.

With a per capita GDP of over \$20,000, Guangzhou is one of the largest and most prosperous cities

in China. Guangzhou’s location in the Pearl River Delta puts it in the heart of an area often called “The Factory of Asia”, home to the world’s largest concentration of manufacturing and industrial activity supported by tightly integrated ports, transportation systems, and supply chains. This region is deeply integrated within in the global economy through the shipping hubs of Hong Kong and Shenzen, and thus owes most of its economic success to foreign trade.

Guangzhou has a long established industrial base, built on the pillar industries of steel works, paper mills and textiles. Today, the automobiles, electronics, and petrochemical industry dominate its primary sectors, while the city transitions to a tertiary sector economy with a larger percent of GDP coming from the service sector (64.6%), than Chengdu, (50%) and Chongqing (46%).

However, the rapid development of the tertiary sector has brought with it a parallel increase in wages and living standards, labour costs seeing an increase of up to 40% over the past two years. While opportunities for cost effective manufacturing still exist, the most lucrative cost reduction opportunities have shifted further inland to cities like Chongqing and Chengdu.

This new paradigm offers new opportunities for Canadian exports, as rising consumer incomes continue to enable preferences for luxury and higher quality food products. With Guangzhou already consuming more than ¼ of all seafood imported to China, Canadian red meat and processed food products could also see success by further building on Canada’s existing brand recognition for quality and food safety.

AGRICULTURE, FOOD & BEVERAGE PRODUCTS

SUMMARY

- Chinese consumers associate the Canadian brand with quality, health, and safety; recent health-related incidents have increased demand for organic production and naturally derived ingredients without artificial additives.
- High demand for: luxury agricultural products such as maple syrup, blueberries, nutraceuticals, wild rice; Canadian seafood such as lobster, snow crab, and shellfish; ingredients for traditional Chinese medicine such as ginger and ginseng;
- Growing sustainable agriculture industry actively seeking technology and expertise
- Noticeable lack of on-the ground presence from Canadian companies that results in insufficient marketing and product adaptation to the local market.
- E-commerce consumers more likely to have interest in health-conscious products and conduct research into product quality & origin; online shopping means lower prices for consumers and larger margin for exporters.
- Exporters can take advantage of various cost & regulatory benefits available in the many special economic zones in the region through partnerships with local importers
- Establishing market presence through e-commerce platforms can reduce market entry costs while opening new sales channels and building reputation

As economic development in the Southwestern China intensifies, the resulting growth in income and standards of living will continue to drive demand for foreign agricultural and food products. While fierce competition from countries like Australia and New Zealand continues to pressure market share, Canada holds its ground as China's 7th largest agricultural import source, with particular success in offerings of high value luxury exports such as ice wine, ginseng, Manuka honey and sea cucumber.

THE CANADIAN BRAND

Chinese consumers associate the Canadian brand with quality, health, and safety; an image based on their pastoral ideals of our landscape, and appreciation for rigid federal food safety regulations. Recent incidents related to food safety and concerns regarding pollution have lead to health-conscious preferences, including increased demand for organic production and naturally derived ingredients without artificial additives.<sup>1</sup>

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AGRICULTURE, FOOD & BEVERAGE PRODUCTS

These concerns have also prompted the Chinese government to introduce new food safety legislations that improve transparency regarding the origin and production process for food products. With Canadian products in particular benefiting from this environmental and health-conscious image, product labelling should be designed with greater focus on a "clean environment" image.

A FOCUS ON HIGH-END PRODUCTS

As the rapid growth so characteristic of Chinese economic development shifts inland, companies targeting focus areas like Chongqing and Chengdu in the inland regions have an opportunity to capitalize on the first mover advantage still remaining in these relatively unsaturated markets.

An increasing number of working households are finding less and less time to spend on cooking and shopping to serve traditional Chinese cuisine at home. As China's growing middle and upper class population live almost exclusively in high-density urban environments, the demand for ready-made products and processed foods in these markets has been rising steadily.<sup>2</sup>

In tapping this growing market Canadian focus should be on high value agricultural products, or niche products sold in high-end supermarkets



August 12th 2015, Guangzhou. Photo by Daichi Ishikawa. Ice wine of Australian origin displayed in a high-end boutique shop, specializing in product from only two brands to avoid confusing customers with choice. While high-end wine is displayed in cases like jewelery or cars, climate control and product handling standards are largely non-existent and store attendants lack appropriate education.

and hotels. Low margin agricultural products like vegetables, common fish, and poultry meat often lack clear labelling and attribution of origin, having little added value to importers and shop owners especially when alternative low cost domestic sources exist.

1. Perdue, David. Southwest China's Opportunities and Challenges. Canadian Consulate to Chongqing. Chongqing, 31 July 2015.  
2. This trend can also be observed in the availability and diversity of ready-made food products in convenience stores such as 7 Eleven, or Family Mart. The selection and quality of these take-home meals is far superior to similar products found in the North American equivalent of these stores. Often an entire week's worth of meals can be satisfied through these convenience stores with adequate nutrition and diversity of meals to keep such a consumer from repeating a meal.  
3. Foods containing health-enhancing additives and having medicinal benefit.



AGRICULTURE, FOOD & BEVERAGE PRODUCTS

In contrast, there is high demand from importers for luxury agricultural products such as maple syrup, blueberries, nutraceuticals<sup>3</sup>, and wild rice. High-end Canadian seafood such as lobster, snow crab, and shellfish feature prominently on supermarket shelves, and there is significant unmet demand for Canadian dairy that eagerly await industry liberalization. Hotels and high-end restaurants are also promising consumers of imported products, primarily due to food safety and quality concerns. These establishments may also seek imported products in an effort to differentiate themselves from the competition with offerings of specialty items for which few local substitutes are available.

Finally, the long history of traditional Chinese medicine, combined with the aforementioned trend in health and sustainability conscious products have generated significant demand for health foods and supplements. Certain agricultural products considered low-value in Canadian or Western markets are happily sought after in Chinese markets, with consumers willing to pay a premium for products marketed for their promising health claims. Ginger and Ginseng are examples of Canadian products that have found tremendous success in China, and merits further investigation into whether additional synergies exist between traditional medicinal practices and Canadian agricultural offerings.

THE WAVE OF E-COMMERCE

The urban centres of China’s interior provinces are undergoing tremendous development, with the cities of Chongqing and Chengdu in particular slated as the shipping and trading hubs of Chinese domestic consumption. This advancement in

logistics and transportation capabilities has catalyzed the swift uptake of e-commerce for both business-to-business and business-to-consumer sectors, with already 35% of sales in the Chinese market being carried out online in stark comparison to the roughly 6% in North America.

In the agricultural sector, e-commerce capabilities have enabled unprecedented product selection and access for consumers, while allowing importers to reach further into the Chinese market using their websites as gateways for inland consumers to purchase their product. Tech-savvy consumers shopping on e-commerce websites are

August 6th 2015, Chengdu. Photo by Alexis Wagner. A box of Ginseng root sold in a traditional Chinese medicine store. North American wild ginseng (panax quinquefolius) is considered far more potent than its cultivated alternative, and can sell between \$300 to \$900 per pound.



AGRICULTURE, FOOD & BEVERAGE PRODUCTS

more likely to have an interest in health-conscious products, and conduct extensive research into the quality and origin of their purchases. E-commerce is also much less expensive for consumers, and leaves a larger profit margin for exporters.

Canadian businesses should actively take advantage of e-commerce platforms, in particular to tap markets for niche products in the luxury and health segments. If shipping product directly from Canada, companies should focus on making their websites accessible to Chinese readers, investing in appropriate translation and cultural screening for their content. As those who purchasing agricultural products online are more often willing to pay a premium for healthy and natural food products, companies should position their products as exclusive and luxury items with the appropriate mark-up in price.

Finally, partnerships with local importers should be considered in order to take advantage of the various cost and regulatory benefits available in the many special economic zones in the region. Logistics and trading centres in China’s interior can offer many new access points for Canadian exporters, including bonded ports with no taxes, transport costs, or delivery fees for purchases below 500 RMB in value. A significant portion of the trade processed through these ports is done online through e-commerce platforms, with the products shipped from bonded warehouses within the ports



August 8th 2015, Chengdu. Photo by Corinna Ha. Rows of celery grown in an hydroponics demonstration centre for the Chengdu Minsen Agricultural Development Limited Company.

directly to the consumer’s point of sale. The clear paper trail and elimination of middlemen can help to ensure product authenticity and differentiate legitimate product from counterfeits offered by local competitors.

EXPORTING CANADIAN EXPERTISE

Owing to Canada’s excellent legacy of agricultural science, over 50% of China’s swine population

4. Perdue, David. Southwest China’s Opportunities and Challenges. Canadian Consulate to Chongqing. Chongqing, 31 July 2015.  
5. An analysis of the legal environment in China, as well as examples of strategies to combat counterfeiting are available. See Professional Services: Law.  
6. Travelling to China is often the most expensive cost item for small businesses looking to establish presence in the Chinese market. However it is also often the most significant in terms of return on investment, and should not be overlooked in favour of lowering operating or market entry costs.

AGRICULTURE, FOOD & BEVERAGE PRODUCTS

comes from genetic material of Canadian pigs.<sup>4</sup> There are similarly many opportunities for Canadian firms engaged in agricultural research, particularly in technology development, increasing crop yields, and production efficiency.

There is also a growing health-conscious and organic agriculture industry actively seeking techniques and expertise related to food production without the use of chemicals and pesticides. With food safety regulation and consumer awareness on the rise, sustainable agriculture is another promising area for Canadian agricultural companies.

CHALLENGES & RISKS

Canadian exporters of raw unprocessed products face stiff competition from countries like Norway, Australia, and New Zealand, advantaged by their geographic proximity and more frequent on-the-ground presence. Government subsidization of domestic products also limits the appeal of unprocessed foreign produce. There is a noticeable lack of on-the ground presence from Canadian companies that results in insufficient marketing and product adaptation to the local market.

As with most consumer products sectors, Canadian exporters operating in China can be exposed to counterfeit and IP risk. The cost associated with legal action can prevent SMEs from pursuing legal actions when their IP is threatened, which is significant in the Canadian context as SMEs make up the majority of Canadian exporters involved in the Chinese market. Working

with industry groups and collective associations to take legal or administrative action is one way SMEs can wield greater influence when IP integrity is threatened.<sup>5</sup>

Finally, economic potential of Canadian products notwithstanding, Chinese imports fell by 6% last year, marking the first decline in import growth in more than a decade. Canadian businesses looking to expand into the Chinese marketplace would be wise to manage expectations accordingly, and consistently seek to offer unique products without domestic substitutes.

While by no means a reason to reduce investment in developing face-to-face relationships with Chinese partners<sup>6</sup>, a more progressive market entry approach with gradual investment may be needed during this period of economic uncertainty in China. Once robust relationships have been established, conducting initial sales through e-commerce platforms can allow businesses to reduce market entry costs while opening new sales channels and effectively building their reputation with Chinese consumers.

EDUCATION

SUMMARY

- Domestic secondary education capacity lags behind demand; strong reliance on rote-learning methods leads to increased emphasis on STEM subjects and reduced emphasis on arts & humanities;
- Parents of Chinese overseas students concerned with their children's loss of Chinese identity; Language & cultural barrier continues to be largest hurdle in both inbound & outbound Canada-China student movement
- Disadvantage for Canadian institutions: US schools first choice for Chinese students due to Ivy League brand prestige; Provincial administration of education policy leads to lack of cohesion in application process & requirements
- Improving Canadian education brand & presence: commitment and investment in long-term, face-to-face relationship development; greater ties with non-traditional institutions like language schools & education consultants; promotion through student representatives & greater use of Chinese social media
- Interest in Chinese education among Canadian students hampered by: lack of awareness; cultural & language barriers; uncertainty of accreditation recognition;
- Opportunity for Canadian institutions: Chinese students seeking programs & summer camps for extra-curricular opportunities like Model-UN, Mock Trials.
- Opportunity for Canadian institutions: develop programs to target 4-week Lunar New Year break in Chinese education, mid-January to mid-February;
- Opportunity for Canadian institutions: intensive programs to meet 10th grade course requirements for Chinese students seeking enrolment in Grade 11/12 secondary education;
- Opportunity for Canadian institutions: Dual-degree undergraduate programs – 4 years, 2 degrees, 2 years at partner institution, 2 years at home

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EDUCATION

SECONDARY EDUCATION

Domestic secondary education capacity in China still lags behind the rapid growth in demand, despite sincere government efforts to close the gap. In Chongqing alone, there are 1.07 million students served by only 258 high schools.<sup>1</sup> To provide context for the magnitude of this issue of undersupply, Toronto accommodates for 250,000 students with 110 schools at the secondary level, with a pupil per school ratio of 1/2272, compared with 1/4148 in Chongqing.

The high student-teacher ratio combined with busy working parents, leads to a lack of personal guidance in the classroom that forces Chinese schools to adopt a rote-style of teaching based heavily on memorization. Strict regulation of all aspects of school life, from schedules to dress and personal hygiene, are intended to aid students in focussing on their studies without the distractions irrelevant to their academic success. Great emphasis is placed on memorizing “correct” answers to score well on tests, which in many cases is the only metric used to evaluate students. Opportunity for process work is rare, limiting the

August 1st 2015, Chongqing. Photo by Benjamin Palmer. The Junior Team Canada China 2016 Team at the Chongqing Municipal Education Commission, with Mr. Bin Li, Deputy Director of the Department of International Cooperation and Exchanges.



1. Li, Bin. Education in Chongqing. Chongqing Municipal Education Commission. Chongqing, 31 July 2015.

EDUCATION

development of critical and integrative thinking skills.

Due to the difficulty of administering non-standardized subjects in this environment, there is a lack of institutional interest in offering well-developed secondary-level courses in the arts and humanities. Programs in political science, for example, are difficult to find in both secondary and postsecondary institutions, in part due to low demand for studies deemed to be non-career oriented.<sup>2</sup>

In contrast, there is high demand for studies in the STEM (Science, Technology, Engineering, and Math) fields, and standardized test scores of students in this area often exceed that of their Western counterparts. However as a result of limited time and resources, lab-based work is a rarity at the secondary level and students are often given the results of a lab experiment on paper, expected to commit them to memory. As such, there seems to be room for further improvement in introducing increased opportunities for experiential learning, which parents are increasingly seeking in summer programs and extra-curricular activities such as Model UN.

POSTSECONDARY EDUCATION

Students who choose to stay in China for their post-secondary studies will have undergone three to four years of secondary school, and generally choose to study in the STEM fields. The path of transition to post-secondary education is

determined primarily by performance on the post-secondary entrance exam, the “Gao Kao”.

In contrast students seeking to study abroad, especially in OECD countries, focus their efforts on studying for the SAT, TOEFL, and other standardized admissions exams. Although English education begins in the seventh grade, the language barrier still proves to be a significant hurdle and intensive efforts are made to overcome it through language colleges, private tutoring, and summer programs.

Few students choose to pursue for both domestic and foreign admissions processes, owing to the significant time required for adequate preparation. Parents therefore play an influential role in selecting the path of post-secondary education, by directing their children’s development towards a certain direction at an early age.

In this regard, there are four major factors taken into consideration by parents when selecting the path for post-secondary education:

1. Local v.s. Abroad

Parents are the decision-makers at this stage. Students interested in pursuing studies and/or careers in non-STEM fields, especially business, are particularly drawn to studying in Canada and other OECD countries, and constitute the majority of the Chinese student population in Canada. Parents often believe that this international education will be an enriching experience that will

2. Jiang, Shan and Johnson, Kevin. Personal interview. 2 August 2015.



## EDUCATION

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make their children more competitive in the job market; this is especially prevalent in fields such as business, where Western education is largely considered to be superior.

Other parents, however, are concerned that their children will lose their Chinese heritage by studying abroad. Domestic education is also significantly less expensive, and scholarships are available to the top-scoring Gao Kao students. As such, finances also play a large role in making this decision.

### 2. Country of Study

Chinese students generally consider the United States first when choosing foreign post-secondary institutions. American schools typically have a more widely acknowledged international reputation, and the United States is also home to the Ivy League institutions. Particularly with the high influence of parents who place great importance on brand prestige, choosing schools is very much a ranking process based on reputation and image.

Another major competitor is Australia. The nationally comprehensive system is a major competitive advantage for Australian institutions, as education policy is administered at the federal level, in contrast to the Canadian system where jurisdiction is fragmented and managed at provincial/territorial level. Applying to different Australian institutions proves to be a simpler process for foreign students, than applying to inter-provincial/territorial institutions in Canada that have differing individual requirements.

Standards of living and environment, however, is also an influential factor in selecting the country of study. Canada leads in this area as a result of its environmental superiority, in addition to its multicultural population, which act as strong selling points for many prospective Chinese students.

### 3. Destination

The location of the school plays a secondary, though nonetheless significant, role in the decision-making process. The universities situated in Canada's most internationally recognized cities, such as the University of Toronto and University of British Columbia, tend to be more popular. This trend is also apparent in China; the more popular universities happen to be the large state universities located in recognizable urban centres, such as Beijing University and Chongqing University.

### 4. Ease of Transition

As the language barrier continues to be a significant hurdle to overcome, many Canadian universities require Chinese students to complete a semester or year of intensive language study. While perhaps ultimately beneficial for the student, such requirements often act as deterrents in selecting a particular institution. Chinese students often see these requirements as an unnecessarily investment of time, and will choose institutions that require the least amount of non-field-related study.

## EDUCATION

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### EXCHANGE PROGRAMS

Exchange programs at both the secondary and post-secondary levels are becoming increasingly popular in China, as Chinese students understand the importance of a globalized education. Exchange programs at the secondary level act as opportunities to both improve students' academic English and experience foreign education, to aid them in selecting post-secondary programs. For those who choose to remain in China at the post-secondary level, many now look to spend a summer abroad to study English or broaden their educational experience by pursuing complementary courses in their respective fields of study.

### OPPORTUNITIES FOR CANADIAN SCHOOLS

The world is more globalized than ever, but many Canadian students lack the Asia competence that is required to succeed in this global market. Furthermore, many Canadians are unaware of the opportunities available in China to further their Asian and international experience; according to Li Bin from the international affairs department of the Chongqing Municipal Education Commission, few marketing efforts are made by Chinese institutions to attract Canadians. As such, it is imperative to encourage both in- and out-bound education relationships with China.

### INBOUND OPPORTUNITIES

The schools most successful at recruiting Chinese students are those who invest in an active on-the-ground presence, developing consistent relationships with students and administrators through dedicated representatives. The University of British Columbia has been exemplary in this regard, conducting annual recruitment drives and partnership development efforts specifically targeting Chinese institutions and authorities in the Southwestern region. As a result of these efforts, local representatives consider UBC to be out performing other top-ranking US and Canadian schools in developing a strong local reputation.

In addition to formal ties to universities and colleges, strengthening relationships with foreign language centers and independent advisor agencies could also introduce a greater number of prospective students to education opportunities in Canada. Finally, sending student representatives to these target institutions can be an especially effective strategy to showcase a diverse student body, and facilitate first-hand promotion of Canadian education.<sup>3</sup>

With regard to initiatives that augment on-the-ground relationship development, social media is a relatively untapped opportunity for Canadian institutions.<sup>4</sup> Chinese social media platforms such as WeChat and Weibo allow for greater specification of target demographics,

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3. According to David Perdue, Canadian Consul General to Chongqing, it is important to emphasize the research-based education and multicultural student population in Canada. While having a large Chinese population at a particular institution may be attractive to some families (especially those who fear that their children will lose their Chinese heritage), multiculturalism and diversity of education both academically and extra-curricularly is highly valued.

4. Jiang, Shan and Johnson, Kevin. Personal interview. 2 August 2015.

EDUCATION

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and encourage the searching and sharing of information with professional and personal circles. While such “informal” media channels may be relatively unfamiliar for higher-education institutions, they are more effective in cost-effectively appealing to the newly affluent demographic interested in pursuing overseas education.

Although the majority of Chinese students keen on studying abroad will not have significant problems in admissions testing, one area in which students do find difficulty is the requirement of extra-curricular involvement. While extra-curricular activities such as Model UN and Mock Trial are becoming more popular in Chinese secondary schools, extra-curricular culture is still lacking relative to Canadian schools. As a result, many students seek to enrol in summer or exchange programs abroad to improve their English, and supplement their application profiles.

A particular opportunity in this regard is the four-week Lunar New Year break in January/February. Because this timing does not conflict with traditional school breaks in the Canadian system, institutions with available capacity could offer additional supplementary programs specifically targeting Chinese overseas applicants during this winter period. Program with an enrichment focus in the fields of business and humanities subjects are especially promising, as substitutes in the Chinese market are few and far in between.

There is also growing interest for enrolling in North American secondary schools at the Grade 11 and 12 levels, to reduce culture shock and overcome the language barrier prior to post-secondary education. Currently the most significant hurdle

for foreign enrolment in Canadian secondary schools is the requirement to retake some courses at the tenth grade level. Independent institutions and agencies may find opportunity in developing intensive programs that could allow students to waive or expedite the fulfillment of these requirements.

Such programs are potentially highly lucrative for Canadian institutions, as Chinese families sending their children to Canada for secondary education are most often highly affluent. Families interested in a two-week summer program of this nature have a budget of approximately 50,000 - 100,000 RMB (CAD\$10,200 - \$20,400), while families seeking full/multi-year programs may not even set a budget.

Finally, the on-boarding process to integrate foreign students into the academic and social lives of Canadian schools is in need of improvement. Additional student services such as guidance-counselling, mentoring programs, and tutoring, whether offered privately or as part of an institution, will find ample opportunity in the Chinese student market. Improvement in on-boarding infrastructure could also encourage greater interest in Canadian graduate programs where there is significant room for growth, especially for MBA degrees.

OUTBOUND OPPORTUNITIES

It could be said that the greatest imbalance in Canada-China trade is in education. Very few Canadians pursue secondary and post-secondary education in China, especially relative to the volume of Chinese students who arrive in Canada annually.

EDUCATION

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There are a number of key drivers of this imbalance. The first is the lack of interest among Canadian students, partly owing to a lack of awareness of the programs available to them in China. Recruitment activities by Chinese institutions are rare in Canada, and most students who do pursue Chinese programs do so out of personal interest established on an individual basis.

The second is the perceived cultural barriers associated with student and academic life in China. Canadian students are apprehensive to enter a completely foreign environment to engage in post-secondary studies, despite the potential career advantages associated with proficiency in the Chinese language and culture. Those who do actively seek opportunities to acclimatize with Asian culture through education will most often choose to do so elsewhere with some cultural and linguistic familiarity such as Hong Kong or Singapore.

Third, and perhaps most influential, is the uncertainty regarding the validity and acceptance of accreditation from a Chinese post-secondary institution. With perhaps the limited exception of a top-tier school with global recognition such as Tsinghua University in Beijing, recognition of Chinese secondary and post-secondary accreditation remains uncertain particularly in recruitment settings. Particularly in more technical fields such as law or engineering, the accreditation obtained may not even be valid in the field of practice in North American jurisdictions. Given the high financial and time investment a student makes in obtaining education abroad, Canadian students tend to choose the tried-and-true institutions elsewhere in the US, Europe, and Australia.

However, demand for culturally and linguistically proficient graduates will continue to increase in parallel with China’s importance to Canada’s economic future. China-bound student mobility programs currently lag behind those in other OECD countries, with demand for “Asia competent” hires quickly outpacing supply. There are many ways in which Canadian institutions can address the aforementioned challenges and take a proactive role in meeting this demand.

One such opportunity is the development of dual-degree programs to reduce uncertainties regarding accreditation and cultural orientation. Sciences Po, a premier liberal arts university in France, have established dual-degree programs with The University of Hong Kong and Columbia University. Students complete a four-year intensive program split evenly between Sciences Po and the partner institution, after which they receive two Bachelor of Arts degrees from both institutions.

If such an arrangement were to exist between Canadian and Chinese institutions, the risk of a student’s Chinese accreditation having less value in the North American marketplace is hedged by the second accreditation from a Canadian institution. Further, the apprehension of completing post-secondary studies in a foreign environment would be partly addressed through the comfort of completing half of the program in a familiar environment in Canada.

PROFESSIONAL SERVICES: LAW

SUMMARY

- Opportunities for Canadian legal services sector is in facilitating Canada-bound Chinese FDI and immigration through referral/ expertise partnerships with Chinese firms;
- Chinese government is making sincere steps to improve IP laws, however significant risks remain for foreign firms with high-value proprietary products;
- Ownership of a filing must be proven to take legal or administrative action against counterfeiters and infringers – instructing an employee or contractor to file does not constitute as ownership as rights are assigned to the registrant;
- Strategies to combat counterfeit products include embedded QR codes unique to each product item, which can be verified through secure online website to identify product lineage and distribution information;
- Increased documentation requirements when operating through bonded ports and special export zones could also offer a measure of protection;

While China’s legal framework is based in civil law, marriage laws, contract laws, and inheritance laws are fragmented into separate legal frameworks. There are indications that efforts are underway to develop an integrated system, though the timeline for implementation is uncertain.

Contrary to the Western standard of billing by the hour, legal services in China are negotiated with fixed prices for various services. For one particular firm with between 150-200 lawyers specializing in corporate law, commercial litigation, and M&A, fixed rates were converted to the following hourly rates for the purposes of comparison:

- Senior Partner: \$CAD 380-450
- Junior Partner: \$CAD 300
- Lawyer: \$CAD 200-300
- Paralegal: \$CAD 150

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In general the perception of cheap Chinese labour does not apply in this context, especially as wages in all sectors continue to rise with increased economic development.

Opportunities for Canadian firms specializing in FDI and immigration issues are in establishing active affiliations and partnership agreements with Chinese law firms. These arrangements can facilitate bilateral client referrals, in addition to expanding the service offerings and expertise of both parties in their respective jurisdictions.<sup>1</sup>

The importance of these arrangements stems from the heavy cultural emphasis on family and community relationships. Language and culture barriers can be a significant deterrent to establishing the close personal relationship

PROFESSIONAL SERVICES: LAW

clients desire from their lawyers before seeking professional services. Therefore referrals are paramount in this development of client trust.

COUNTERFEITING & IP RISK

Brand and trademark squatters are common in China, as the first-to-file system determines ownership priority by filing date. Administrative or legal action against counterfeiters and infringers are not recognized without ownership of a filing in China, and while registration costs are relatively low, disputes can be expensive to settle. The following measures of can be taken to avoid squatters and ensure legal ownership of a trademark in China<sup>2</sup>:

- File both an English and Chinese trademark
- Register as soon as China can be considered a potential market, and do so prior to any discussion with prospective partners
- File broadly in all classes and sub-classes to eliminate the potential for squatters
- Avoid having partners or employees filing trademarks on your behalf, as ownership of the filing is assigned to the registrant rather than the party that initiates the process or owns the trademark in foreign jurisdictions

Despite genuine efforts by the government to tighten IP regulations and introduce new measure to protect foreign companies, issues related to counterfeiting and false representation persist

for Canadian companies operating in China. To minimize infringement and combat counterfeiting, existing operators have employed various strategies.

For consumer products imported into China, a growing trend is to use QR codes or product numbers unique to each item that are verifiable through a web or mobile application. These codes verify authenticity and product lineage (shipping and importing details, for example), while providing an additional point of contact for brands looking to build stronger ties with their customers or promote further purchases.

Companies can also find a measure of protection in e-commerce when operated through bonded ports. These ports have particularly strong government oversight as import/export windows for foreign products entering the Chinese market, and are tightly regulated for traceability and documentation. While no strategy is fool-proof against savvy counterfeiters, efforts to increase documentation, product traceability, and ease of authenticity verification by the consumer can help minimize IP and counterfeit risk.

1. Ling, Xiao. Personal Interview. 3 August 2015. Mr. Ling, is an attorney with Hui Ye Law in Chengdu, is actively seeking to partner with Canadian law firms that specialize in areas pertaining to business law (Corporate, Commercial Litigation, estate etc). See Golden Rolodex.  
2. Perdue, David. Southwest China’s Opportunities and Challenges. Canadian Consulate to Chongqing. Chongqing, 31 July 2015.

PROFESSIONAL SERVICES: FINANCE

SUMMARY

- Heavy state control of economy skews market indicators, reduces effectiveness of quality control checks like audits, inappropriately mutes downside reaction of share prices to adverse financial performance;
- Government restriction of currency withdrawal leads to high savings rates, low cost of capital for domestic firms, an equity market composed primarily of investors, and grey and black markets for investments outside of conventional Chinese economy;
- Canadian institutions can offer advising and consulting services in governance and risk management, capitalizing on reforms underway including elimination of deposit rate ceilings and efforts to curb shadow banking;
- FDI can be sought with assistance from firms such as China Investment Corporation, however a greater effort must be made to establish face-to-face, personal relationships with prospective Chinese investors;
- Primary concern regarding Canadian market for Chinese investors is insufficient information and awareness;
- Investment products tied to mobile banking and payment apps are offering up to 17 times greater returns, and gaining considerable ground against traditional products offered by banks;
- No-fee user to user fund transfers through apps such as WeChat, has the potential to bring digital payments to the cash-only segment of the Chinese economy estimated to be between US\$6 to US\$10 trillion;

ECONOMIC & INDUSTRY ENVIRONMENT

The Chinese financial industry is highly regulated by the state, which remains the majority shareholder in the biggest Chinese banks. This high degree of involvement allows the government to maintain access to the control levers necessary for a command and control economy.

Offering a full portfolio of banking services is

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therefore difficult for most foreign banks. Their local offices are mainly used as a platform to serve foreign clients in the country, while working to gain business with Chinese companies and high net worth individuals with overseas fundraising and wealth management needs.

Further, due to most large enterprises also being state owned, audits of governance practices and corporate finances are seldom taken with the

PROFESSIONAL SERVICES: FINANCE

same seriousness as in western markets. The material risks associated with a company's poor financials or the failure to pass an audit may not be adequately reflected in the company's stock price, as investors often expect government intervention to correct any significant impacts to share value.

Government intervention skews the market elsewhere as well. Chinese citizens are restricted to 50,000 USD of foreign investing and spending per year, which when combined with an undersupply of domestic investment opportunities, leads to a capital surplus in the market. This surplus can be observed in the relatively high savings rate, lower cost of equity capital for domestic firms even for lower grade issues, and an equities market composed primarily of retail investors.

Particularly aggressive investors may also be incentivized to seek underground or grey-market opportunities in search of greater risk-adjusted returns, turning to luxury goods, precious metals, and art markets to isolate their capital from what they view as an unpredictable Chinese economy.

There are however, meaningful economic reforms underway. For example, the introduction of deposit insurance in May 2015 is an important step towards a market-oriented framework for the Chinese financial system. Further, the PBoC is expected to eliminate the ceiling on deposit rates, which will introduce competition in the market and encourage the development of appropriate risk management practices for creditors.

Given uncertainties regarding the asset quality following the rapid rise in credit volume in recent years as well as noticeable efforts by authorities to curb shadow banking, Chinese banks will be looking to improve their risk management and governance practices as the financial sector undergoes further reforms. Widely seen as global leaders in prudent and robust banking, Canadian financial institutions have much to offer in the form of advising and consulting with their Chinese counterparts.

INBOUND INVESTMENT (FDI)<sup>1</sup>

Chinese FDI is largely managed by consulting firms, financial services firms, and institutions, such as the China Investment Corporation (CIC), who introduce Chinese investors to investment opportunities in Canada. The CIC is particularly active in the Toronto region, and partnering with such institutions<sup>2</sup> can assist Canadian firms and individuals by connecting them to prospective investors in China.

However robust our partnerships with these institutions, the importance of face-to-face relationships with potential investors and business partners cannot be overstated. Personal relationships are crucial in attracting Chinese FDI; Chinese investment interest in Canada can only be realized when Canadian representatives actively develop relationships with partners on the ground.

Chinese investors find Canada's robust legal system, abundant natural resources, and skilled

1. Specific analyses for the automotive and ICT/high-tech sectors are available. See Engineering, Manufacturing, IT.

PROFESSIONAL SERVICES: FINANCE

workforce, particularly attractive. This appeal has been further enhanced by the recent strategic agreements Canada and China have signed<sup>3</sup>, with the Chinese government streamlining the approval process for foreign direct investment to Canada. The largest impediment to Chinese FDI growth is a lack of awareness about the Canadian market – fund managers cite a lack of confidence stemming from insufficient information as the primary reason for clients hesitating to invest in Canada.

MOBILE BANKING & PAYMENTS

Social and mobile banking is leading a significant shift in Chinese consumer and investor behaviour. With credit card penetration still lagging behind western standards, mobile transactions completed through apps linked directly to chequing accounts continue to catalyze further growth in both online and physical storefront consumption.

On the merchant-side, online shopping giant Alibaba’s payment platform Alipay, has established a strong presence at point-of-sale terminals by building off of their existing e-commerce client base. The point-of-sale payment systems are paired with a consumer-side mobile wallet in which users can either directly link their bank accounts or deposit money to their Alipay account.

A particularly note-worthy feature however, is Alipay’s offering of financial products. When users deposit funds into their Alipay wallet, they have

the option of investing the money in a privately managed fund called Yu’e Bao, which offers returns as much as 17 times greater than the state sanctioned bank deposit rates. This product has been so successful, that with more than 49 million customers and over US\$40 billion in investment by Jan. 15, Yu’e Bao’s fund manager Tianhong Asset Management Co, rocketed from a relative no name in the industry to the second-largest mutual-fund manager -- threatening the throne held by China Asset Management.

Meanwhile, mobile social media and chat application WeChat has launched their own payments and money transfer service, also offering a similar investment product that allows users to invest the funds deposited in their WeChat account.

While the service is limited to domestic transfers of 20,000 RMB or less per day, there is no fee for users to initiate or receive transfers. This fee structure, or lack thereof, opens up significant new opportunities for introducing digital payments in the sizeable cash economy, which in China is estimated to be somewhere in between US\$6 to US\$10 trillion.

Given the relatively new mobile payments and banking sector in Canada, there exists an opportunity for Canadian firms and entrepreneurs to learn from the Chinese market and implement new products and services that anticipate the further development of our sector at home.

2. See Golden Rolodex.  
3. E.g. Foreign Investment Promotion and Protection Agreement

PROFESSIONAL SERVICES: REAL ESTATE

SUMMARY

- While the housing market correction seems to have stabilized somewhat, excess inventory will continue to exert downward pressure on market in the short to medium term;
- Domestic developers generally optimistic and expect demand growth from government intervention and relaxation of “One Child” policy;
- Observed preferences for mid-to-high level real estate in China reflect the “luxury tastes” of middle class, which is less about quality and more about the image of wealth conveyed;
- Marketing of real estate services to potential Chinese immigrants in Canada should be at the grassroots level through partnerships with immigration centers and language schools (e.g., write and sponsor curriculum with real estate vocabulary to educate and source potential clients)

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MARKET OUTLOOK

While the ongoing housing market correction has shown signs of stabilization, the downward pressure exerted by excess inventory will likely continue over the coming months. However property developers in China maintain a positive outlook for the medium term, in part due to their expectation of government intervention to stimulate growth in the sector. In combination with a recent slump in the domestic equity markets, the government may see a bullish real estate market

as a possible counterbalance for a bearish equities market.

Urban consumers’ incomes and spending continue to increase globally, and half of the 2.2 billion new middle-class consumers created by 2030 will be in China. With developers’ also expecting a gradual easing of the “One Child” population control policy from a one child per family restriction to two children, the future outlook for increased population growth supports the expectation for a recovery in housing demand.

1. Zhu, Jun-Nan. Personal Interview. 8 August 2015. Mr. Zhu is the Founder and President of Green Land Property Development Group in Chengdu.



PROFESSIONAL SERVICES: REAL ESTATE

CHINESE HOME OWNERSHIP IN CANADA

Marketing to Chinese families and investors seeking real estate would be most effective at the grassroots level prior to their arrival in Canada. Partnerships with immigration centres and collateral placement in strategic locations such as language schools, could offer first-mover advantages for Canadian real estate firms through early brand impressions on potential clients.

One potential strategy is for real estate firms in Canada to write and sponsor english language curriculums, focused on real estate vocabulary and know-how for buyers. Not only does such an initiative allow firms to approach the target demographic prior to their arrival in Canada, it can provide value to potential clients above and beyond simply assisting with their real estate needs.

With regards to preferences, the most popular home segment in the second-tier urban centres are high-end condominiums aimed at the new generation of young urban professionals and their families. These projects incorporate as many luxurious amenities as possible while keeping the price affordable for this rising middle class.

For example, the projected rental revenue for a 92 sqm 2 bathrooms, 2 beds apartment in the Arcadia court development by Hong Kong's Kerry Properties is 4,200 RMB/month (\$670USD), plus 322 RMB/month (\$50USD) in management fees. These apartments are equipped with gyms, indoor and outdoor pools, event space, award-winning green space, and boutique coffee shops.

However it is important to note that these types of amenities are important not necessarily for their utility, but rather for the image of wealth and luxury that attracts buyers in the newly wealthy middle-class. Similarly, the popularity of gated communities with both perceived and actual segregation from neighbouring areas is also rooted in the feeling of exclusivity and wealth that it provides to residents. The tastes and preferences of middle-class Chinese consumers are still relatively undeveloped and immature, with many lacking a clear understanding of the inherent qualities of a product and instead focusing on monetary and messaging value.

For this reason the décor and interior design of these new developments tend towards a more flamboyant style, with a preference for bold opulence and noticeable displays of wealth. Chrome, granite, gold, and velvet are used extensively, with abundant displays of seemingly expensive pieces of art and wine on every shelf and countertop.

Another observed preference amongst Chinese home-buyers is an attraction to green space. Stemming from pollution and environmental concerns in the quickly developing urban centres in Chinese cities, any access or proximity to back yards, gardens, parks, and greenspace is considered a luxury for Chinese consumers.

This preference for visible luxury and green space is almost certainly present in the preferences of Chinese home buyers searching for properties in Canada, and is an opportunity to determine which properties may be more attractive to this demographic when designing marketing collateral and selecting properties to refer to clients.

PROFESSIONAL SERVICES: IMMIGRATION & VISA SERVICES

SUMMARY

- While China remains the second largest source of immigrants to Canada, it is outranked by the United States in preference due to the global prevalence of the “American Dream” brand;
- Declining interest in immigration to Canada stems from: increasing complexity and difficulty of fulfilling requirements; high start-up costs and regulatory hurdles relative to alternative destinations such as Australia; an increasingly unaffordable housing market in primary Canadian cities;
- Immigration services should target opportunities in assisting overseas students and their families with visas, family immigration sponsorships, and permanent residency applications.
- Expected changes in immigration laws and regulations are a significant deterrent to prospective Chinese immigrants, and pose a significant political risk for Canadian immigration services firms;

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China is one of the largest sources of immigrants to Canada; in 2011, it was ranked the second largest source of newcomers, with 10.5% of all newcomers to Canada being from the People’s Republic of China. With this high volume of Chinese immigrants to Canada, there is a high and growing demand for immigration services targeted towards this demographic.

OBSERVATIONS

As an increasing number of Western brands enter the Chinese market, Western culture is very much pedestaled in large urban centres. Especially for highly affluent Chinese families, there is growing interest in immigrating to English-speaking countries, despite the fact that the language barrier remains to be a significant hurdle to overcome. Less affluent individuals, on the other hand, are

less inclined to think about immigration, although doing so may bring promise of better opportunities. The high cost and large commitment involved with immigration is often the cause of such disinterest.

When thinking of immigrating to Canada, however, the two most important factors to consider are education opportunities and family lifestyle. Although Western culture is pedestaled in China, most families wish to maintain their Chinese cultural roots; while Western assimilation on the education and professional fronts may be favoured, most families emphasize keeping Chinese culture and language as being important for their children. As such, most prospective immigrants would not consider immigrating to Canada unless they are able to do so with their families on a permanent resident basis. Applicants outside of this demographic are often young professionals or students who choose to temporarily reside in

PROFESSIONAL SERVICES: IMMIGRATION & VISA SERVICES

Canada on a short to medium-term basis in order to jump-start their careers.

TRENDS

Although overseas students and family immigrants from China to English-speaking countries are on the rise, Canada is not particularly favoured. Most Chinese immigrants first think of the United States when thinking of starting a new life, largely owing to the global promotion of the “American Dream”; a brand that promises ample opportunities to obtain monetary wealth and lifestyles. This brand has particular appeal in China, as brand names and monetary wealth are highly valued and sensationalized in China.<sup>1</sup>

Since March 2013, fewer Chinese immigrants, especially investor immigrants, have shown interest in moving to Canada, as opposed to other English-speaking countries. A variety of factors exist as drivers behind this trend.

First, the Canadian points system is a lengthy process. Most Chinese immigrant families will apply for a permanent residency status as opposed to other immigration statuses such as work permits. The Canadian government, however, is accepting progressively fewer applications each year, making the process in applying for an immigration status arduous and not necessarily

worth the time and effort. The province of Quebec in particular attracts the fewest prospective Chinese immigrants, owing to its low acceptance rate at around 20%.

Second, opportunities are more budget-friendly elsewhere. Investor immigrants are more interested in the Australian market and opportunities as opposed to those in Canada, as a result of the high startup costs and regulatory hurdles required to establish investments in Canadian markets.<sup>2</sup>

Third, the Canadian housing market is becoming unaffordable. Vancouver, a Canadian city that has traditionally welcomed the highest volume of Chinese immigrants, is now ranked the second most unaffordable city to live in the world. Similarly, Toronto, another hub for Chinese immigrants, has been seeing relentlessly soaring home prices over the past decade. In comparison, many real estate bubbles in the United States have recently popped, making buying a home in other cities much more affordable.

Despite these deterrents, the most attractive incentive Canada provides to prospective Chinese immigrants is its brand of safety and superior living conditions, even when compared to other mature and industrialized nations. Canada’s brand name, although not as prominent as the “American Dream”, is that of consistent quality and high standards of living. Many Canadian cities are

1. While marketing buzzwords such as “rich” and “wealthy” are not frequently used in North American media, there is a Chinese nuance surrounding such terms. The Chinese character representing wealth is often used in domestic advertising media, and is often directly translated to “rich”. This term, however, does not carry the same pretentious connotation that it does in native-English-speaking countries.

2. Liu, Vivien and Zhang, Sherry. Personal interview. 7 August 2015. Liu and Zhang are representatives from the Department of International Exchange at Huaying Consulting & Service Co., Ltd., a consulting firm that guides Chinese emigrants through immigration application processes to English-speaking countries.

PROFESSIONAL SERVICES: IMMIGRATION & VISA SERVICES

ranked as some of the most liveable cities in the world, and therefore remain attractive for Chinese immigrants.

OPPORTUNITIES

The largest opportunity for Canadian immigration services lies in the education immigration realm. By forming a partnership with international student agencies in China, Canadian immigration service-related firms can market themselves to one of the largest source of Chinese immigrants to Canada: students. Once in Canada, these students require services such as getting a work permit, inviting family, or even permanently staying Canada. As such, servicing students’ immigration needs may lead to more long-term clients and further business down the line.

Another opportunity for firms wishing to attract Chinese immigrants is to work with Chinese startup founders and owners. Canadian venture capitalists and angel investors can invest in Chinese entrepreneurs’ ideas to allow them to immigrate to Canada. The startup immigration option will give Canadians opportunities to both attract Chinese entrepreneurs to Canada, and form strong bonds between early-stage investment capital and foreign startups. In this regard, there is an opportunity for Canada to develop a reputation in China as a foreigner-friendly startup environment, while attracting highly skilled immigrants to our workforce.

Finally, to better promote Canadian immigration services to Chinese new-comers, firms can form a relationship with “immigration consultants” such as Huaying to promote their services even before their arrival. Such consulting firms act as trusted advisors to Chinese families, and can both introduce and bolster the brand name of firms seeking to attract Chinese immigrant clients.

RISKS & CHALLENGES

As Canada nears a federal election, and as a variety of new bills are implemented under the current government, it may become increasingly difficult for prospective immigrants to move to study and live in Canada. New changes to regulations and laws governing immigration could act as a serious deterrent for those considering immigration to Canada.

Further, both business and education opportunities in Canada are becoming more costly. Investment opportunities, relative to those in other maturely industrialized nations, are not as attractive to Chinese investment immigrants. Similarly, as a result of the increasing quality of education institutions both domestically and in other OECD countries, the attractiveness of Canadian institutions to overseas students are also at risk of diminishing in the medium to long term.

3. Ibid.

NATURAL RESOURCES: MINING

SUMMARY

- Commodities demand continues to suffer from downturn in manufacturing & housing sectors;
- China’s foreign & trade policies have shifted to Eurasian & African continent with “One Belt, One Road” development strategy & framework;
- Canada is ill-suited to operate within this framework with a pure commodities export approach, as China is pursuing tighter integration of trade routes and more accessible resource deposits along the historic “Silk Road”;
- Increased development of tertiary sector exports within the Canadian mining sector is needed to augment the commodities exports, given the changing nature of Chinese demand in Canada;
- Skills/knowledge based joint ventures, contracts, consulting services in areas of Canadian expertise like natural gas, can assist with extraction of more complex deposits in central China and along the OBOR trade routes;
- Main challenges for foreign entities operating in Chinese mining sector are: opacity of approval processes; discrepancies between application and interpretation of regulations between state, provincial, and municipal jurisdictions; favouritism of state-owned enterprises;

The Chinese commodities market has been particularly sluggish of late, owing to a pronounced decline in the domestic manufacturing and housing sectors. While the effects of this slowdown has certainly been felt around the world, the Canadian mining industry has been hit particularly hard, as much of the momentum fuelling capital investment in the sector predicated on continued strength in Chinese demand.

While interest for FDI remains at a reasonable level , investment volume has cooled down considerably in the past number of years, due to China’s realignment of its foreign policy and trade focus

towards the Central Asian, South East Asian, and African markets. President Xi Jinping’s “One Belt, One Road” development strategy and framework has had significant impact in this regard. The strategy aims to increase infrastructure connectivity and trade cooperation among countries in Eurasia, supported by multi-billion dollar investments in modernizing the over-land and maritime trade routes of the historic Silk Road.

Building on existing logistics links in the Chinese interior cities of Chongqing and Chengdu, the development approach of One Belt, One Road

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NATURAL RESOURCES: MINING

emphasizes greater integration of the Chinese interior regions to broader global trade markets in Europe, Asia, and Africa. These interior regions of China are rich in both natural resources and agricultural potential, with the opportunity for economic and social development equivalent to those seen in China’s coastal areas in the 1990’s.

Without the advantage of geographical proximity however, Canada is likely ill suited to effectively operate within this trade framework should China pursue tighter integration of more readily accessible sources elsewhere on the Eurasian continent. This risk of “falling off the beaten track” is particularly high if our mining sectors remain heavily reliant on pure commodities exports.

Given this fundamental shift in the nature of Chinese demand on which the Canadian mining sector is heavily dependent, increased development of the tertiary sector component within our mining sector exports is needed to capitalize on decades worth of skills, experience, technology, and know-how. Canadian consulting, advising, and engineering services would be especially lucrative in the Chinese interior, where domestic technology and expertise has yet to develop adequate capabilities to exploit the vast but challenging deposits that exist in the region.

For example, Sichuan province is a region rich in natural gas, shale gas in particular. However, the level of mining technology and expertise in China is insufficient to extract these deposits in a safe and efficient manner. Canadian companies, as the fifth largest natural gas producers in the world, are well

suited for this task.<sup>1</sup>

Joint ventures and other partnerships of this nature will enable Chinese mining companies to advance their extraction capabilities, while their Canadian partners can develop a solid foundation of local relationships and reputational cache from which they can launch into the newly emerging markets of the One Belt, One Road world.

As China continues to evolve into a dominant power within the Eurasian region however, a number of challenges and risks still remain for Canadian companies seeking opportunities in China’s natural resources sector. Chief among them is the persistent uncertainties surrounding industry regulations, including inconsistencies in the application of laws between various state, provincial, and municipal level jurisdictions. The opacity of processes to obtain government approvals such as permits and production licences, are further complicated by clear indications of favouritism for state-owned enterprises and the active discouragement of foreign investment in particular areas of the sector such as the extraction of precious and rare earth metals.

Nevertheless, competition from Northern European, American, and Australian firms remains fierce despite these challenges, as is the presence of local Chinese firms who dominate the market thanks to unique advantages in cost, government relationships, and cultural familiarity.

1. Perdue, David. Southwest China’s Opportunities and Challenges. Canadian Consulate to Chongqing. Chongqing, 31 July 2015.

ENGINEERING, MANUFACTURING & IT

SUMMARY

- Manufacturing sector increasingly transitioning to higher value, downstream, and tertiary functions;
- Housing oversupply & economic slowdown negatively impacting manufacturing demand, while national economy transitions to greater tertiary mix by outsourcing primary/secondary functions elsewhere;
- Wages rising rapidly on the coast, manufacturing activity moving inland to benefit from state-lead development in infrastructure & logistics
- Attracting ICT FDI to Canada, key selling points: proximity to North American markets; educated and highly skilled workforce; high safety and quality standards; global branding & recognition;
- Auto manufacturing FDI in Canada is declining in competition to strong growth in SE Asian, African, and South American markets.
- Expect short to medium-term uncertainties and volatility in Chinese market in this sector;
- Improvements needed for Chinese subsidiary/plant management: shift greater focus on quality in addition to output efficiency; evaluation of performance on incremental improvements rather than production targets;
- Design & development of coordinated technology systems across broad capabilities can be challenge for Canadian companies, as tech sector is fragmented in SME's, while Chinese tend to be conglomerates who can better coordinate development internally.

The “made-in China” mantra is becoming increasingly out-dated, as the know-how and technology transfer accumulated over decades of Western FDI, joint ventures, and partnerships, now fuels a new trend for “designed-in China” manufacturing. Many of the tertiary functions served by foreign firms during the economic reform of the previous two decades are now being met domestically, with primary manufacturing activity having moved elsewhere to new markets the likes of Vietnam and Bangladesh.

The oversupply in China’s housing sector continues to negatively impact demand for resources and heavy manufacturing. As a result, real GDP growth is expected to be slow in the medium term as the country suffers from excess capacity in its heavy industries. Further, the gradual transition from a centrally-planned economic model to a more consumer-based and services-oriented economy will favour faster expansion of the tertiary sector relative to the secondary sector, the former

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ENGINEERING, MANUFACTURING & IT

outpacing the latter with 8.4% y/y growth vs. 6.1% in Q2 of 2015.

The Chinese manufacturing sector is currently in transition towards high-tech, advanced manufacturing, and value-added assembly functions. Combined with a growing pool of highly skilled and educated labour, the sector remains promising for Canadian companies looking to develop Chinese facilities serving manufacturing and production functions higher up the value chain. Priority areas for foreign involvement as indicated by the China Council for the Promotion of International Trade include: computer monitors and screens; robotics; telecommunications; advanced

materials; clean technology; and medical sciences and chemical engineering.

With wages rising as much as 40% in two years in the traditional manufacturing powerhouses on the coast however, factory activity is quickly migrating westward to inland hubs such as Chongqing and Chengdu. The central government is actively promoting this westward economic expansion through its ‘One Belt, One Road’ strategy, making multi-billion dollar investments logistics and transportation infrastructure. This combined foreign policy and trade development initiative aims to link China’s inner industrial hubs to global markets in Europe, Asia, and Africa, through the revival and

August 1st 2015, Chongqing. Photo by Benjamin Palmer. The Junior Team Canada China 2016 Team at the Magna Cosma ChongQing plant, with Mr. David Perdue, Consul and Senior Trade Commissioner at the Consulate General of Canada in Chongqing, China. Magna Cosma is a Canadian global automotive supplier with 319 manufacturing operations, 85 product development, engineering and sales centres, and over 136,000 employees in 29 countries.



ENGINEERING, MANUFACTURING & IT



August 6th 2015, Chengdu. Photo by Daichi Ishikawa. A synthetic fibre weaving machine at a paper manufacturing plant in Chengdu.

modernization of the historic trade routes along the Silk Road.

Concurrently, the investments in inland logistics and transportation have been cornerstones to a parallel initiative aimed at increasing the contribution of domestic consumption to GDP. Therefore in the high-tech, IT, and consumer products sectors in particular, the emerging opportunities are in serving domestic Chinese markets through production facilities located in these developing interior markets, rather than production and re-export for foreign consumption.

ATTRACTING ICT FDI TO CANADA

Fuelled by an increasingly tech-savvy middle class, the information technology (IT) sector in China is a bright light amid an otherwise murky economic landscape. China continues to produce massively successful IT companies the likes of

Huawei, Lenovo, Alibaba, Tencent, and Xiaomi, many of which boast valuations in the hundreds of billions, and are interested in pursuing a global footprint with a particular focus on North America.

In Chongqing, for example, 150 million products in the region's high-tech sector were exported to international markets, the majority of them being laptop computers. The city is a hub for manufacturers of high-tech terminal products, and presents an opportunity for Canada to attract hive-value manufacturing FDI.

Canadian municipalities seeking Chinese FDI in this sector should appeal to prospective investors by emphasizing a number of key points. Of particular interest to Chinese manufacturers:

1. Proximity to key markets

Manufacturing facilities in Canada serve as gateways to market North American with strong demand for high-tech products. The proximity to a large number of major Canadian and American cities is attractive to manufacturers, as eliminating high volumes of trans-oceanic product shipments leads to direct cost savings.

2. Access to an educated workforce

Western talent is highly regarded in China, and mirrors the pedestalling of Western brands and products. Canada has a highly skilled and educated workforce, an especially important consideration for high-tech manufacturers. The appeal of Canada's human capital not only presents opportunities for Chinese firms in the ICT industry, it opens new doors for more sophisticated and cooperative R&D that compliments the rise

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of China's tertiary sectors. Further, there is also an opportunity to provide consulting and advisory services, provided no equivalent resources are available domestically.

3. Quality Assurance

By manufacturing in Canada, Chinese businesses benefit from the Canadian brand of quality and safety. Canada can also offer more stringent protection of intellectual property, which remains a significant issue in China.

4. Global branding

Branching out to the North American market through Canada presents an opportunity for Chinese businesses to gain international recognition in one of the most influential markets in the world. Establishing plants in Canada is an effective foundation for Chinese high-tech manufacturers to build on their global brand reputation.

AUTO MANUFACTURING FDI

Chongqing's automotive sector has developed to become one of the city's cornerstone industries , a direct result of strong growth in domestic demand. With a growing segment of middle class consumers in Southwest China, and a population of 32 million in Chongqing alone, the city has quickly risen to its current position as the third most important automotive industrial bases in China.

Many Canadian municipalities are actively courting FDI from these Chinese auto parts manufacturers, in an effort to reverse the sustained slowdown

of their local automotive industries. However, the majority of these Chinese firms do not see opportunity in entering the North American market at this time. Market saturation is a significant deterrent to these firms, who are currently seeing high returns from supplying demand in China's domestic markets, particularly in the rapidly developing second-tier cities such as Chongqing.

Those that are considering international expansion look to developing markets elsewhere in the world such as South East Asia, Africa, and South

August 6th 2015, Chengdu. Photo by Daichi Ishikawa. A high-precision robotic arm at a robotics design and development plant in Chengdu.





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America, where low labour costs and increasing demand for automotive products point to sustained future growth.

Those suppliers who are interested in the North American market, are primarily incentivized by the availability of more sophisticated technology. These firms often seek partnerships for the purpose of research and development, and may look to sell the products back in China due to the price premium available for the perceived or actual superiority in quality and safety standards.

THREATS

Canadian firms seeking new business in China should do so with the changing economic landscape in mind. While many opportunities remain in the manufacturing sector in China, the broad economic slowdown has hit the sector particularly hard with the Caixin/Markit China Manufacturing Purchasing Managers' Index (PMI) dropping to a two year low in July. Canadian companies wishing to invest in the manufacturing sector in China should do so with expectations of sustained short- to medium-term uncertainties.

Economic reforms are also impacting production inputs. With wages in the traditional manufacturing powerhouses on the coast rising rapidly, the added pressure on margins and profitability could be exasperated by muted domestic demand.

The management and supervision of foreign-owned Chinese facilities is also an area for improvement. Chinese plants tend operate in stand alone from their Western management, with their output intended for domestic consumption.

While local management talent is highly technically skilled with excellent follow-through on formulaic processes, they oftentimes lack the knowledge to troubleshoot fluid production challenges that require experiential learning. Local management teams would benefit greatly from increased training on maximizing quality and output efficiency, with evaluation of performance based on continuous on-the-ground improvement rather than fixed production targets.

With regard to the ICT sector, domestic and foreign competition is intensifying as domestic manufacturing capability moves up the value chain. With this upward transition is a trend for industry consolidation, with Chinese companies developing a broad product or service offering relative to their Canadian counterparts, who tend to be small and medium enterprises with specialized and niche offerings.

Finally, the development efforts of Canada's technology sector are more often distributed and can lack the coordination to compete against larger, vertically and horizontally integrated firms in China. While Canadian industry expertise may be more advanced in a broader sense, systems designed by various individual companies are not necessarily designed to work together as a holistic ecosystem. This can create competitive disadvantages for Canadian companies, particularly when bidding for contracts in diversified technology sectors such as smart cities.

NON-PROFIT & NON-GOVERNMENTAL ORGANIZATIONS

SUMMARY

- The Sichuan Earthquake of 2008 lead to increased interest in social and environmental action with emphasis on income disparity, human rights, and environmental pollution.
- Growth has focused on the community service sectors related to traditional Chinese values of family and community, particularly in LGBT NGOs and programs that target youth volunteerism
- Initiatives such as Chengdu Civil Service Park service as incubators for NPO's and projects
- University student-exchange organization AIESEC has established ties in the sector to provide volunteering opportunities for youth
- Local NPO's struggle with team development and resources
- Foreign-led organizations struggle with regulatory restrictions on fundraising and thus heavily rely on international partnerships and support

AMBASSADORS

Sana Khan  
Monica Xu  
Monique Sereneo

OBSERVATIONS

The tremendous growth of China's economy over the past decade brought with it a parallel increase in social and environmental action. A particular surge in the number of Chinese non-profit organizations happened as a direct result of the 2008 Sichuan Earthquake, sparking new interest in the Chinese population for humanitarian aid, and spurring further growth in the non-governmental sector focusing on income disparity, human rights and environmental pollution.

To investigate the operation and function of NGOs in China, several active organizations were visited including Welfare for Animals, Rotary Fellowship

of Chongqing, Rotary Club of Chengdu, and Chengdu Civil Organization Service Park. Each NGO visited exhibited unique characteristics, in various factors including government support, number of members, status, mission statement, and leadership.

Of particular interest was the Chengdu Civil Organization Service Park, established in 2012 to provide support, resources, and training materials for non-profit start-ups. The park functions as a non-profit incubator, much like incubators for technology startups and R&D projects in Canada, and facilitates the development of local Chinese non-profits up by providing standardized training, mentorship and financial resources.

NON-PROFIT & NON-GOVERNMENTAL ORGANIZATIONS

As a government supported initiative, the Service Park acts as a liaison for developing organizations to navigate the web of government regulations, and helps correct the negative public perception of NGOs that plagued the non-profit sector in the past. Indeed the Park has catalyzed a tremendous shift in the non-profit sector in the region, having assisted with the successful development of over 8000 organizations since 2012.

August 8th 2015, Chengdu. Photo by Monica Xu. JTC China 2016 Ambassadors (from right to left) Martin Nickel (MB), Monique Sereneo, (MB), Moica Xu (ON), Melody Huang (ON), with a representative from the Chengdu Civil Organization Service Park.



Other non-profit organizations in Chengdu however, particularly those of foreign origin or leadership, have not shared in this success. Groups such as Rotary Fellowship of Chongqing, the Rotary Club of Chengdu, and Welfare for Animals, all non-profits that lead by expats, still suffer from the negative reputation that previously tainted all NGOs and have struggled to integrate themselves within the local community.

TRENDS

The analysis of a non-profit sector in a country can reveal social trends and the interests of the local population. There continues to be immense interest and growth in the community service sector that build on traditional Chinese values of family and community, such as youth development and public service facilitation.

The creation of LGBT NGOs is indicative of a growing movement of acceptance amongst Chinese youth, as is the gaining popularity of social apps for LGBT youth. Programs that target youth volunteerism are similarly increasing in popularity, which could further establish a culture of youth volunteerism and foster the growth of the next generation of philanthropists.

OPPORTUNITIES

Transcending the divide between local and foreign-lead non-profit organizations is the interest in partnering with international organizations. The Chengdu Civil Service Park has established connections in Canada through a university student-exchange organization called AIESEC.

NON-PROFIT & NON-GOVERNMENTAL ORGANIZATIONS

This relationship strengthens ties between China and Canada, and provides young people opportunities to contribute to the global society in meaningful ways.

The primary challenge faced by the Rotary Club in China is to establish a strong fundraising and volunteer base in China, which has lead to a strong reliance on international support and initiatives. This opens doors for Canadian groups to visit and volunteer in these organizations, to both promote the work of these non-profits and provide cross-cultural experiences for Canadian youth.

CHALLENGES

With the dichotomy between the two opposing sides of China’s non-profit sector- those with government support (i.e. have registered charity status) and those headed by expats and foreigners- the challenges faced cover a wide spectrum. Rather than facing challenges associated with strict government regulation, most NGOs with government support (all non-profits established through the Chengdu Civil Organization Service Park), struggle with team development and resources. Thus, one holistic approach/resource is not enough to alleviate the problems that the 8000 NGOs face.

On the other side of the spectrum, organizations run by expats (which are mostly not supported by the government) struggle with China’s policy that prevents fundraising. The only support these organizations can receive is through international partnerships. Furthermore, there is a great need for the organization to have a stable number of volunteers, as the nature of expats makes them

mobile and unable to commit in the long-term. Paired with a lack of trust of foreigners by the local citizens and government, these organizations face a glass ceiling that prevents them from flourishing beyond their original level.

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