

CANAD/ASIA2013

Navigating Asia's Future, Charting Canada's Strategy

Summary Report

Asia Pacific
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Canada



Navigating Asia's Future, Charting Canada's Strategy

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NAVIGATING ASIA'S FUTURE, CHARTING CANADA'S STRATEGY



Dean A. Connor, Canada-Asia 2013 Co-Chair and President and CEO of Sun Life Financial Canada.

“Asia’s economic and geopolitical rise is hardly news for anybody...Now the region’s growth rate has softened and it does have economic, social and environmental challenges to address, but still Asia is set for long-term growth. But is Canada, as a whole, preparing itself for relevance and prosperity in a more Asia centric world? The answer is not fast enough.”

Dean A. Connor, Canada-Asia 2013 Co-Chair and President and CEO of Sun Life Financial Canada.

THE ASIA PACIFIC REGION IS IN FLUX. Its future is far from certain, but its long-term trajectory of growing prominence in the global system is clear. By 2025, the economies of Asia are expected to account for almost 50% of global output, and the combined gross domestic product of China and India is likely to exceed the total output of the G7.

Successfully navigating Asia’s future requires an understanding of the major shifts. Growing inequality, rising nationalism, the push for economic integration, the competition for talent, and the demand for a greener future – these complex drivers are catalyzing change in the region and beyond. As noted by **David Emerson**, Co-Chair of Canada-Asia 2013, “there are some really big fault lines that have been developing for some time now and are not going to go away anytime soon...they’re going to become more difficult.”

Canada has a large stake in the region’s transformation. The Canada-Asia 2013 Conference ‘Navigating Asia’s Future, Charting Canada’s Strategy’ set the scene for a two-day discussion aimed at empowering Canadians with the knowledge and skills to effectively respond to fundamental changes happening across the region. Over 500 leaders from Asia and Canada, representing a broad cross-section of government, business, civil society and academia, met in Vancouver between June 3-5, 2013 to discuss emerging trends in Asia and Canada’s response to them. Among those in attendance were nearly 100 leading experts from Asia affiliated with the Pacific Economic Cooperation Council, as well as 30 next-generation leaders from across the Asia Pacific region.

In his keynote address, His Excellency the Right Honourable **David Johnston**, Governor General of Canada called on participants to: “Infuse others with the spirit of the diplomacy of knowledge. Arouse others to join you in uncovering solutions for the great challenges we face. And then together, all the people in all of our lands can truly build the smart, caring nations and the smart, caring Asia Pacific of which we dream.”



In this spirit, the first day of panel and workshops gave participants an opportunity to focus on key challenges in the region and explore in depth domestic and intra-regional dynamics. On the second day, participants turned to the question of how Canada could engage more constructively in Asia. This report provides a summary of the key findings and recommendations from the conference.

Above: His Excellency the Right Honourable David Johnston, Governor General of Canada
Left: David Emerson, Co-Chair of Canada-Asia 2013 and Senior Advisor, CAI



KEY FINDINGS

KEY DEVELOPMENTS IN ASIA

- While Asia continues to prosper and grow, important internal and regional tensions are emerging which will affect development trajectories.
- Innovation, especially in information and communications technologies (ICT) and life sciences, will be a major pillar of Asia's next stage of economic growth.
- Two major tracks for regional trade integration in the Asia Pacific region are rapidly advancing: the Regional Cooperation Economic Partnership (RCEP) and the Trans-Pacific Partnership (TPP). Neither agreement involves both China and the US.
- As domestic consumption by Asia's expanding middle class grows, there is an opportunity and urgent necessity to liberalize and integrate Asia's financial markets.
- Green growth should be viewed as desirable because it represents a higher quality of growth that will create new and better jobs. Success in adopting green growth models will require long-term commitment, investment and political leadership by governments in Asia.
- Risks to growth in the Asia Pacific region, particularly, growing inequalities across populations, rising food and water insecurity, and devastating natural disasters are increasing.

RECOMMENDATIONS FOR CANADA'S RESPONSE

- Government should convene an annual Asia-forward planning roundtable with the federal cabinet and the leaders of Canadian companies that are active in Asia. The roundtable could help focus the government's Asia strategy, identify challenges, opportunities, and draw up new public/private initiatives.
- Canada needs to expand its engagement with Asia, including through playing a greater role in regional organizations like APEC.
- Canada needs to develop an Asia-ready workforce and entrepreneurs. This begins in schools where Canadian students should be given the necessary skills to succeed in an Asia-centric world.

Opportunities for Canada in Asia's Growing Service Sector

- Government should focus on improving market access for companies through trade negotiations.
- Government should modernize and improve its systems to facilitate further mobility of workers.
- Governments and the private sector should support capacity-building efforts in Asian economies in areas such as intellectual property rights, national safety and consumer product standards.
- Canadian companies should invest in understanding Asian consumers' preferences and requirements and modify their service/ product offerings accordingly.

Building Canadian Influence and Improving its Standing the Asia Pacific Region

- Government should develop a national security policy with regard to Asia.
- Government should take action to respond to messages from its Asian economic partners who are saying that if we want to do more business deals with them, we have to become more reliable and engaged security partners. Some measures the government could take include: joining the region's key security-related forums, including the East Asia Summit (EAS) and the ADMM-Plus meeting of regional defence ministers, and placing more defense attaches on the ground.
- Government should first listen to potential security partner needs and design its assistance to take into account Asian priorities.
- Canada should consider becoming a key player in developing norms and practices that link stability, prosperity and human rights in cyber space.

Opportunities for Canada to Meet Asia's Demand for Clean Technology Innovations

- Government can play a substantial role in expanding the size of Canada's clean tech sector through price signals and other incentives to stimulate green innovation.
- Government should expand the funds it provides to encourage the development and commercialization of innovative clean technologies.
- Government should support and guide the internationalization of SMEs in the clean technology sector.
- Canadian companies should take better advantage of Asian market opportunities for Canadian expertise in the bio-based economy; in training architects, urban planners, engineers, and designers; and in urban planning.
- Private lenders to the clean tech industry should continue experimenting with financing models other than the venture capital model.

Preparing the Next Generation of Canadians for an Asia-Centric World

- Senior leaders from both government and business should convey to young people that learning Asian languages is important for their long-term career interests.
- Government and business should work together to develop re-entry vehicles calling on aptitudes and skills that returnees acquire while in Asia.
- Universities, government and business should work together to create more internships, cooperative programs and work-study programs for Canadian students in Asia.
- Educational institutions should provide students with a broad knowledge of Asian histories and societies as well as inter-cultural competence.

NAVIGATING ASIA'S FUTURE

“WHERE’S THE REGION TODAY? WHERE’S IT GOING?...How will Asia sustain its trajectory going forward? How will growth models be revised to move up the value chain, attract FDI, build more open and efficient capital markets, spur domestic consumption, strengthen governance and foster climates of greater legal and regulatory certainty for local and foreign businesses? And of course, how will Asia address both historically rooted and emerging geopolitical tensions?” These opening questions posed by **Dean A. Connor**, Canada-Asia 2013 Co-Chair and President and CEO of Sun Life Financial Canada, framed the discussion of the first day where discussants delved into the implications of changing patterns of trade, challenges associated with liberalizing and integrating Asia’s financial markets, capacities for innovation, the growing focus in Asia on green growth, and emerging risk factors.

ASIA PACIFIC TRADE TALKS

The trade landscape in Asia is transforming. One major shift is growing inter-regional trade and rising domestic consumption within Asian countries. Intra-regional trade within ASEAN and trade with China accounts for more than 37 percent of ASEAN’s total trade, up from around 26 percent in 2000. In contrast, trade with the United States has fallen from 20 per cent in 2000 to 10 per cent in 2011, and trade with the EU from 15 to 11 percent over the same time period. Connected to this change is the growing relevance of bilateral or regional trade agreements relative to multilateral trade agreements.

Discussants noted that The World Trade Organization (WTO) rules have not kept pace with profound changes that were catalyzed by the end of the Cold War. As one panelist, **Peter Petri**, Carl Shapiro Professor of International Finance, Brandeis University and Senior Fellow at the East-West Center summarized: “We have supply chains, we have the Internet and the IT revolution, and of course, the entry of China into the world trading system. So the world has become much more complicated and we have not been able to update those rules since.”



Peter Petri, Carl Shapiro Professor of International Finance, Brandeis University and Senior Fellow at the East West Center

While participants noted that the stalled Doha round of negotiations was disheartening, they nevertheless indicated a preference for multi-national trade agreements. Panelists, however, were less certain as to what will, or should, come next. Will Asia Pacific trade continue to be governed by the “noodle bowl” of bilateral, regional and other smaller-scale agreements? Or, alternatively, can the region reach a broader and deeper level of convergence? If convergence is possible, what mechanisms and forces might propel that process forward, and what obstacles might stand in the way?

Trade has changed tremendously. I think there are so many issues that have come up because of globalization and integration, that there is no more capability to deal with trade in the old ways. ...There are new issues, social services, investment, non-trade barriers, that are much more important than trade in goods and the problem of tariffs.”

Jusuf Wanandi, Co-Chair of the Pacific Economic Cooperation Council and Senior Fellow and Co-Founder of the Centre for Strategic and International Studies, Indonesia.



Jusuf Wanandi, Co-Chair of PECC



Yunling Zhang, Director of International Studies at the Chinese Academy of Social Sciences

Open and free trade in Asia Pacific has been a long-term regional goal first articulated during the Bogor APEC meetings in 1994. At present, two major tracks for regional trade integration in the Asia Pacific region are rapidly advancing: the Trans-Pacific Partnership (TPP), and the Regional Cooperation Economic Partnership (RCEP). Delegates expressed concern that neither agreement involves *both* China and the US. Some suggested that smaller countries would prefer the US and China to be part of the same agreement in order to decrease the likelihood of countries having to choose between agreements.

A few speakers were encouraged by Beijing’s recent signals that it will give the TPP agreement serious consideration. Others, more skeptical, suggested that China will, and should, focus first on the RCEP and negotiations with Japan and Korea. When asked about China’s participation in the TPP, **Yunling Zhang**, Director of International Studies at the Chinese Academy of Social Sciences, cautioned that without China’s participation, the TPP might have a limited impact. At the same time, he noted that “until now, the official stand is we are studying the possibility and have no clear answer.” He further opined that if Beijing were to pursue the TPP, it would likely want to renegotiate the agreement’s terms: “if China joins, China really would ask for a renegotiation of many things, rather than just simply follow.”

In keeping with the diversity in the region, Asian countries expect trade agreements to play different roles in their domestic economies. Delegates noted that many ASEAN countries are highly trade-dependent and require free trade agreements to create or open freer



From left to right: Peter Petri, Yoshiji Nogami, Apiradi Tantraporn, Antoni Esteveordal, Yunling Zhang

trade environments. Japan, by contrast, has embraced its participation in the TPP as a ‘game-changer’ that will catalyze its transition from low dependence on trade to being more globally integrated. As **Yoshiji Nogami**, President of the Japan Institute of International Affairs said, “TPP, for us, is really more than a trade negotiation...Together with the bilateral EPAs now under negotiation with the EU, Canada, and Australia, I think the TPP will definitely change the trade and investment landscape in Japan.”

TPP’s effect is likely to be felt even by those who are not members. That has been the case with ASEAN, which has been very responsive to extra-regional trade processes, and, with the Latin American nations comprising the Pacific Alliance. As **Antoni Esteveordal**, Manager of the Integration and Trade Sector of the Inter-American Development Bank informed conference participants: “Asia became a big player in Latin America very recently... For many countries in the region...China in particular is the first trading partner already above the US, for example. So, Asia is becoming the new push factor for this regional integration, whereas maybe in the past it was the European Union.”

Harnessing Asia’s Massive Capital Pools

“When you look at Asia’s rapid growth during the past fifty years, this is mostly fed by foreign direct investment and

“When you look at the integration of the market in Asia, ... in terms of financial integration, there is much room for improvement, meaning that for Asians holding Asian assets, across borders, we are talking about ten—maybe less than 20% of this kind of financial market integration within Asia.”

Stephen Yan-Leung Cheung, Dean and Professor of Finance, School of Business, Hong Kong Baptist University (pictured below).



exports to America and Europe. That was good. It was not sustainable, and that era has ended. Asia’s growth in the next fifty years will depend more on broad-based domestic consumption, growth of small enterprises, innovation, and expansion of physical and social infrastructure. Now, this kind of growth cannot be supported by existing financial systems in Asia’s emerging markets.” These remarks by **Julius Caesar Parrenas**, Advisor on International Affairs, Bank of Tokyo-Mitsubishi UFJ, Ltd., aptly describe the opportunity and urgent necessity of liberalizing and integrating Asia’s financial markets.

Massive capital pools that have been accumulated in Asia – including by the rapidly growing ranks of middle class ‘savers’ – are under-utilized. **Masahiro Kawai**, Dean and CEO of the Asian Development Bank Institute argued that the key challenge is the lack of long-term funding, particularly local currency long-term funding. Mr. Parrenas pointed out that in order to develop these markets, “you need liquidity, you need a large and diverse issuer and investor base, especially in the case of Asia, institutions with long-term horizons like insurance companies and pension funds.”

Promising developments in the liberalization and integration of Asia’s financial markets include the growing internationalization of China’s currency, the *renminbi* (RMB), which is not yet fully convertible to capital accounts. If successful, this move will broaden the range of options available to traders and investors looking to invest in China.

Another encouraging development is the leadership that regional groupings such the Asian Development Bank, Asia-Pacific Economic Cooperation, Association of Southeast Asian Nations and ASEAN + 3 are demonstrating by putting forward concrete ideas for better coordination and convergence of regulations and practices.

Financial market liberalization and integration are not without risks: exchange rates are volatile, and emerging economies will need to guard against capital inflows creating asset market bubbles and financial imbalances. It remains unclear how financial markets can better serve low-income households and small enterprises. Higher administrative costs involved in serving a large number of small depositors and small borrowers act as a disincentive for banks, as is having a branch presence in remote areas of countries composed of thousands of islands, such as Indonesia and the Philippines. Innovation in mobile and branchless banking, while it would require significant adjustments in current regulation and supervision requirements, could help overcome some of these obstacles and yield enormous benefits.



Masahiro Kawai, Dean and CEO of the Asian Development Bank Institute

The panel also discussed the importance of promoting good governance of financial institutions and increasing transparency. Improved credit reporting systems, legal frameworks to protect customer financial information and solid corporate governance are not fully implemented in many Asian countries and will be important in increasing the stability of their financial systems.

Innovation for New Growth

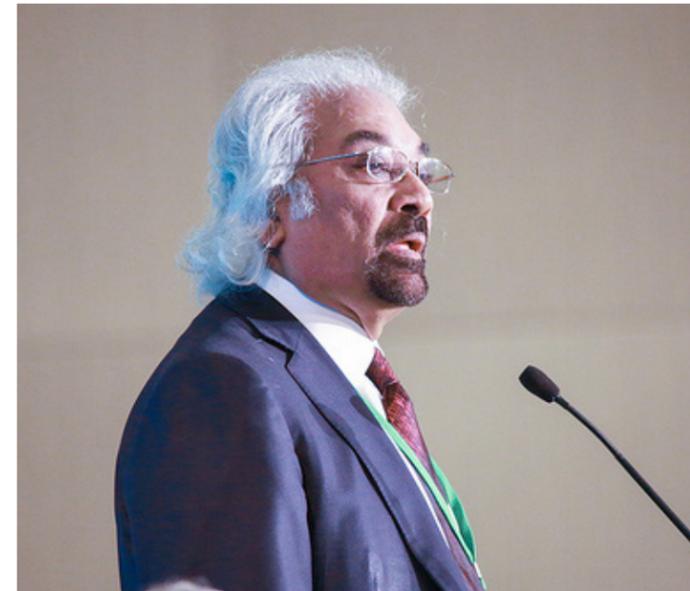
Innovation, especially in information and communications technologies (ICT) and life sciences, will be a major pillar of Asia's next stage of economic growth. Expenditure on global research and development is forecast to total \$1.496 trillion in 2013. Regionally, Asia's share of total global research and development spending (37 percent) is projected to exceed that of the Americas (34 percent) and Europe (23 percent).

Tiger economies such as South Korea, Taiwan and Singapore can claim some earlier successes, and now the region's large emerging economies – China and India – are looking to follow suit. They are doing so by investing in research and development and education systems, creating innovation ecosystems, and in the case of India, trying to reverse the trend of 'leaking' research talent to other countries.

Discussants noted that public policy in Asia and elsewhere can be leveraged in support of innovation: it can be used to foster environments that are conducive to competition and pressure; and it can encourage enlightened and long-term commitments to projects that require large doses of capital and lengthy gestation periods, such as clean technology and renewable

energy projects. **Atsushi Sunami**, Advisor to the Industrial Competitiveness Council of Japan, presented the example of Japan's use of the TPP as an interesting instance of the former. In his view, Japan is hoping that external trade pressure will prompt its agriculture sector to invent 'smart agriculture'. Medical services innovation, especially to treat an aging population, could also become a new source of economic growth.

In contrast, India's challenge, with its younger and poorer population, is how to innovate for the poor while also taking into account India's large population and resource constraints. According to **Rajesh Sawhney**, Founder of Global Superangels Forum of India, India is inherently frugal, and can lead the way by offering "frugal innovation to the world." This will require Indian innovators, and those hoping to sell to India, to 'unlearn' old methods of innovation, which have historically been utilized by wealthy countries with smaller populations. As **Sam Pitroda**, Advisor to the Prime Minister of India on Public Information Infrastructure and Innovations observed, "We are looking at innovations in clusters, schools, colleges, creating a billion dollar fund to look at the bottom of the economic pyramid innovations. ..We have the largest number of poor in the world and as a result, we have the moral responsibility to solve the problems of the poor. And we are committed to it."



Sam Pitroda, Advisor to the Prime Minister of India on Public Information Infrastructure and Innovations

Panelists noted the innovation process is becoming increasingly international, requiring more collaboration with innovators in different parts of the world. Making data available to the public and crowdsourcing were highlighted by **Tom Jenkins**, Executive Chairman and Chief Strategy Officer, OpenText, as important to finding the best talent to work on complex problems.

Green, Sustainable Growth

The concept of 'green growth' has its origins in the Asia Pacific region. **Rae Kwon Chung**, Director of the Environment and Development Division of the United Nations Economic and Social Commission for Asia and the Pacific, noted that the concept emerged in 2005 and gained traction with some government officials in the region who were looking for creative ways to sustain growth amid the rise in resource prices. They saw energy efficiency and resource efficiency as central.

Many Asian countries have quickly embraced the 'green growth' model, with South Korea being an early promoter through its "National Strategy for Green Growth." China recently announced an investment of over \$500 billion in conservation, pollution reduction, and green technology over the next five years. Indonesia also articulated the concept of 'blue economy development,' which focuses on

sustainable use of marine resources. Vice Admiral **Bertrand Aubriot**, Deputy Director of the Strategy and Development DCNS Group, proposed that the Pacific Ocean might be the starting point for trying to get a global agreement on how to manage the oceans and fairly share resources.

It remains to be seen whether these 'green' or 'blue' approaches can drive economic growth. So far, the evidence is limited to the company, rather than country, level. Participants agreed that success will require governments to show political leadership, especially because adopting green growth models will require long-term commitment, investment and high risk, which companies and financial markets alone may not be able to provide or withstand. Some panelists also noted that government can develop the appropriate price signals to make carbon-efficient processes increasingly cost effective relative to carbon intensive alternatives, although discussants did not necessarily agree on the best mechanism to accomplish this. Government may also need to provide assistance to make less carbon intensive forms of energy affordable to all segments of their populations.



From left to right: Sean Shawohwa Wang, Atsushi Sunami, Jim Prentice, Rajesh Sawhney, Tom Jenkins



Rae Kwon Chung, Director of the Environment and Development Division of the United Nations Economic and Social Commission for Asia and the Pacific

Nevertheless, participants did acknowledge that government support for green growth projects can be a tough sell to voters given their expense and long time-horizons.

Consequently, panelists noted that the public cannot be easily frightened into adopting green growth. Rather, leaders need to frame green growth as desirable because it represents a higher quality of growth that will create new and better jobs.

Some participants pointed out that 'Green GDP' is an accurate measure of the quality of growth, as it takes into account growth's environmental costs and depletion of non-renewable resources.



Djisman Simandjuntak, Senior Economist at the Center of Strategic and International Studies

that new technologies are unlikely to provide 'magic bullet' solutions to poverty and that "success cases" can be difficult to replicate. He highlighted the example of the mobile phone, which is credited in several African and Indian case studies as empowering poor merchants and farmers. Contrary to expectations, the introduction of the mobile phone into rural communities in China has had little impact, in part because most farmers are seniors who are not technologically savvy and often do not have good enough eyesight to deal with the small keyboards of new technological devices.

Panelists suggested that government will need to continue to play a strong role in building inclusive and more resilient societies in the region. There is currently a lack of social safety nets such as reliable and sustainable pension, unemployment, and health care schemes. Some also noted that improved educational planning and funding is necessary for specific countries to reach their development goals. Investing in health and education, in particular, would be a logical first step. As an example, **Djisman**



Vice Admiral Bertrand Aubriot, Deputy Director of the Strategy and Development DCNS Group

Risks to Growth

Throughout the day, panelists stressed the need to recognize and address emerging risks to growth in the Asia Pacific region; most notably, growing inequalities across populations, rising food and water insecurity, and devastating natural disasters.

Growth in the Asia Pacific needs to be not only green, but also socio-economically inclusive. Panelists agreed that while absolute levels of poverty have decreased in the region, income inequality is a growing problem to which there are few easy solutions. It was noted that increased integration will likely contribute to, rather than reduce, inequality in the near term, at least in the case of ASEAN. Speakers, such as **Jack Qiu**, Associate Professor in the School of Journalism and Communication at the Chinese University of Hong Kong, cautioned

Simandjuntak, Senior Economist at the Center of Strategic and International Studies in Jakarta, called for Indonesia to invest more in STEM (Science, Technology, Engineering and Mathematics) education so that its future workers can make the transition into higher-skilled manufacturing jobs.

The panel drew attention to new growth challenges linked to increasing water, food, and land insecurity. **Michael Toman**, Lead Economist, Climate Change in Development Research Group and Manager of the Energy and Environment Team at the World Bank, noted that the Asia Pacific region suffers from the same challenge as the rest of the world: "the decline in the rate of productivity growth in agriculture." As such, there is a need for more public and private sector investment into productivity growth in agriculture to allow technology to compensate for land scarcity. In his view, this global problem stems from various challenges including budget cutbacks, reductions in R&D, and various land use and land management policies. A commitment to open trade in food is viewed as critical to preventing countries from investing in uneconomic forms of domestic food production, which have adverse effects on both land and water usage.

Finally, discussants turned to the significant impact that natural disasters are having on development trajectories in the Asia Pacific region. While mortality risk from natural disasters is declining, economic losses are rising, in part because cities that have historically been prone to earthquakes and flooding are continuing to grow in population and economic output. For a collection of countries that the Economic and Social Commission for Asia and the Pacific analyzed last year in Asia, if the GDP growth grew over the last 30 years 13 times, losses from disasters grew 16 times. As a result, natural disasters can worsen poverty. **Kamal Kishore**, Program Advisor for the United Nations Development Programme Disaster Reduction and Recovery Team, noted that while governments in the region are taking important steps to address disaster-related issues, the private sector has been slower to implement solutions that decrease economic loss in disasters. He made the argument that there is a strong business case for investing in risk management and further observed that in China only 3% of the properties with high exposure to earthquakes are insured.

Successfully navigating Asia's future requires an understanding of the complex changes underway. Following a day devoted to describing and analyzing emerging dynamics, conference participants were eager to move into the second day of the conference dedicated to recommending how Canada should position itself in the region.



Michael Toman, Lead Economist, Climate Change in Development Research Group and Manager of the Energy and Environment Team at the World Bank



Kamal Kishore, Program Advisor for the United Nations Development Programme Disaster Reduction and Recovery Team

OPPORTUNITIES FOR CANADA IN THE ASIA PACIFIC REGION

ACROSS THE BOARD, participants at Canada-Asia 2013 agreed that Canada needed to take advantage of the competitive advantage it had, in terms of geographic proximity to Asia, industry expertise in demand in Asia (particularly in service sectors), natural resources, and a diverse Asian Diaspora to step up its engagement with Asia. They further noted that there was no guarantee that a rebounding American economy would have a knock-on positive effect on Canada, and as a consequence, a pivot to Asia was even more important for Canada's future prosperity. Many expressed a sense of urgency and stressed that Canada needed to learn from other countries that had already taken concrete steps to design Asia strategies. Specifically, analysts pointed to Australia's whole-of-country domestic reform approach as mapped out in the 2012 *Australia in the Asian Century* White Paper; the joint trading strategy developed by Chile, Colombia, Mexico and Peru under the umbrella of the Pacific Alliance; and Singapore's strategy of positioning itself as a gateway or 'hub' between China and the West. As a first step in this direction, Mr. Connor proposed that an annual Asia-forward planning roundtable be convened with the federal cabinet and leaders of the Canadian companies that are active in Asia. And that roundtable could help focus the government's Asia strategy, identify challenges, opportunities, and draw up new public/private initiatives.

Opportunities for Canada in Asia's Growing Service Sector

"Today, the money is made in service," said **Jayson Myers**, President and CEO of Canadian Manufacturers and Exporters, underscoring how the rise of the middle class and the growth of cities in Asia have created a demand for new services, such as insurance, pension plans, education, energy infrastructure maintenance, and waste management. Panelists noted that these are areas where Canadian business is globally competitive. They added that some of the attractions of doing business in Asia include a large consumer base with growing incomes and an increasingly well educated workforce.

While a number of Canadian companies, including Blackberry and Sun Life Financial, have been very successful at building a strong client base in Asia, panelists noted that Canadian companies also face many challenges in the region. These include: restrictions on the participation of foreign service providers in various Asian



Jayson Myers, President and CEO of
Canadian Manufacturers and Exporters

Canadian exports to Asia are growing. 11% of Canada's total merchandise exports went to Asia in 2012 versus 8% in 2008. ...Yet only half of Canada's top 100 companies are doing business in Asia. Canadian companies overall are not capturing global opportunities at the rate of OECD peers. So a sense of urgency is needed with more innovation, initiative, and smart risk taking from the private sector, educational institutions, and other organizations, and better coordination between federal and provincial governments....we need a whole country approach in which we can all play a part.

Dean A. Connor, President and CEO of
Sun Life Financial Canada.

markets, low wages for expatriates relative to those they could receive in Canada, lack of experienced local management talent, and underdeveloped regulatory frameworks protecting intellectual property and foreign investment.

In order to address these challenges, participants made four key recommendations. First, the federal government should focus on improving market access for Canadian companies through trade negotiations. We need to pay attention, said **Randolph Mank**, Senior Advisor and Vice-President Asia, Blackberry, "to levelling that playing field through our trade policy negotiations and

[ensuring]...that all of [Canada's] sectors are represented in a way that tries to create some evenness..."

Second, Canadian companies must recognize that Asia is a highly diverse region. "I remind people constantly that Asia is a hemisphere. The psychology of [Asia] being one lump sum is really inaccurate. The marketplace is very complex and incredibly competitive with very high standards, especially from the financial services realm," said **Carol W. Geremia**, President of MFS Institutional Advisors and Co-Head of MFS's global distribution.

Third, while not a universal rule, Canadian companies should consider hiring in-country talent. "We have taken the approach of running our businesses by hiring local employees," said **Ash Sahi**, President and CEO, Canadian Standards Association. "We have not really used transplants or expatriates for our business because we really feel that you need



Randolph Mank, Senior Advisor and Vice-President Asia,
Blackberry

to speak the language, you need to know the culture, you need to know the industry, and it's best to hire local management talent." Another speaker stressed that the region's governments needed to be talking about how to streamline visa processing, and others recommended that Canadian business schools consider expanding opportunities for Canadian companies in Asia to hire Asian graduates.

Fourth, Canadian provincial and federal governments and the private sector should support capacity-building efforts in Asian economies where possible. Areas of collaboration, discussants suggested, include intellectual property rights, national safety and consumer product standards.



Ash Sahi, President and CEO, Canadian Standards Association

Opportunities for Canada to Meet Asia's Demand for Clean Technology Innovations

In his opening to the panel "Green Growth in the Asia Pacific: Canada's Contribution" **Kevin Lynch**, Vice-Chair, BMO Financial Group, challenged panelists to provide concrete recommendations for how Canadian clean tech firms can grasp opportunities in Asia. **Vicky Sharpe**, President, Sustainable Development Technology Canada, noted that Canada has world class technologies for making communities and a variety of industrial processes cleaner. For



Carol W. Geremia, President of MFS Institutional Advisors and Co-Head of MFS's global distribution

example, Canada is a leader in water purification technology, urban planning and mechanisms for increasing the efficiency of oil and gas extraction, amongst other areas. Ms. Sharpe went on to note that Canadian clean technology SMEs are already highly active exporters to regions other than the United States. Canadian clean tech companies currently derive half of their revenues from exports and approximately 44 percent of that export revenue comes from outside of the US.

If you look at the amount of financing [a Canadian cleantech start-up] gets, it's about half the amount that a US start-up will get. And in China, their average deal size is twice that of the US. So the Chinese get four times more money than our Canadian companies receive.

Vicky Sharpe, President, Sustainable Development Technology Canada.

However, Canadian companies face a number of challenges competing in the global clean tech sector. Many of these challenges originate from conditions at home. The most cited barrier is access to capital to develop and commercialize clean technologies. Ms. Sharpe pointed to a "lack of risk capital throughout Canada" putting Canadian clean tech start-ups at a competitive disadvantage to peers in the US or China. Furthermore, much of Canada's innovations are developed by SMEs, which often do not have the know-how or financing to reach foreign markets. To improve the competitiveness of Canada's clean tech sector in Asia, panelists made the following suggestions:

First, government can play a substantial role in expanding the size of Canada's clean tech sector through price signals and other incentives to stimulate green innovation. **André Sorensen**, Associate Professor of Urban Geography, University of Toronto recommended that governments in Canada set more stringent building and energy efficiency codes to spur domestic green innovation that may ultimately be exportable to Asia.

Second, government can and should expand the funds it provides to encourage the development and commercialization of innovative clean technologies. In addition, private lenders to the clean tech industry should continue experimenting with financing models other than the venture capital model. **Nicholas Parker**, Co-Founder and

Chairman of The Cleantech Group LLC, noted how his own company is combining the old British merchant bank model with the venture capital model to create more flexible approaches to clean tech financing.

Third, there should be greater government support and guidance for the internationalization of SMEs in the clean technology sector. Panelists noted that SMEs may need to collaborate to provide the integrated solutions to environmental problems that many customers are seeking as they may be too small to provide them independently.

We have lots of process technology in Canada. Much of it uncommercialized, actually, and sitting inside large companies where they put it to good use, but they haven't necessarily spun it out into independent companies. But that's a huge area, and I'm finding major corporations, privately and publicly held in Asia, are knocking on my door looking for this kind of stuff.

Nicholas Parker, Co-Founder and Chairman, The Cleantech Group LLC.



From left to right: André Sorensen, Vicky Sharpe, Kevin Lynch, Nicholas Parker

Building Canadian Influence and Improving its Standing in the Asia Pacific Region

According to **Fen Hampson**, Distinguished Fellow and Director of Global Security at the Centre for Innovation in Global Governance and concurrently Chancellor's Professor at Carleton University, from the end of World War II until about 1976, the Asia Pacific region was one of the most violent, conflict-prone areas of the world, whereas today it is probably one of the most peaceful. However, this is changing. As **Paul Evans**, Professor at the Institute of Asian Research at the University of British Columbia noted, there is "a general mood that a world of fairly benign security interactions have somehow sharpened..." Resurgent nationalisms have complicated domestic politics and regional issues, not least of all territorial claims.

The rise of China is seen as a critical strategic driver of shifting power dynamics in the region. Beyond the China-US dynamic, Mr. Hampson noted that countries such as India, Indonesia, Vietnam, and South Korea are all "challenging the regional power hierarchy." Moreover, two of the region's great powers – Russia and Japan – are "openly worried about their loss of power and influence in the region." The modernization of armed forces and increased incidents at sea add a more competitive and tense atmosphere in the region.

In part due to this changing environment, Canada has heightened security interests in the region which require attention. Mr. Hampson noted that regional trading partners, specifically Japan and South Korea, but also newer trading partners in Southeast Asia, "have made it very clear that if we want to do business with them and sign new investment and trade deals, we have to be more reliable, engaged and consistent security partners. We simply can't be carpetbaggers, as we shop our wares in the region." Further, as the US-Chinese relationship develops, Canada has "a clear interest in the prudent management of relations."

What will this mean, in practice? First, Canada needs to recognize that some of its priorities in the region may not be at the top of the priority list for our Asian counterparts. To be a more consistent and reliable security partner, Canada will have to listen more closely to their concerns. For example, in the context of the movement of people, Canadians are most concerned with drugs and people smuggling while many Asian countries put refugee problems at the top of their agenda.

Second, Mr. Hampson stressed that "we have to keep up appearances in a region where appearances count. But we're going to have to go beyond that with concrete actions and meaningful activities and serious

forms of engagement that show that we are indeed serious." **Brian Job**, Professor of Political Science and Associate Director of the Institute of Asian Research at UBC, concurred, adding that Canada needed to have patience and persistence in joining the region's key security-related forums, including the East Asia Summit (EAS) and the ASEAN Defence Ministerial Meeting Plus Cooperation (ADMM-Plus) meeting of regional defence ministers. In the case of the ADMM Plus, there is currently no specific provision for granting observer status, but Mr. Job suggested that Canada could request this status by noting that under its own chairmanship of the Arctic Council, eight Asian countries were recently granted observer status of that body. In the meantime, we could be thinking about how to use our membership in the ASEAN Regional Forum (ARF) to make functional contributions to regional security. Humanitarian disaster relief and peacekeeping training are two options.

Third, Canada could bolster its visibility and presence in Asia by placing more defence attachés on the ground, a type of presence that is currently very thin. Another idea for building the next generation of Canadians with Asia expertise would be to launch something like a Canadian version of the Peace Corps in the region.

And finally, **Rex Hughes**, Visiting Professor at the Canada Centre for Global Security Studies at the University of Toronto, addressed the increasingly pressing and prominent issue of cyber-security, which spans a spectrum of concerns from cyber war all the way down to petty crime, with organized crime sitting somewhere in the middle. Cyber issues are by their nature cross-cutting, and to be more effective, the aforementioned regional security organizations like the EAS and ASEAN will have to more fully engage the private sector, which administers roughly 90 percent of the Internet.

According to a 2012 Survey of Canada's Asia practitioners conducted by the Asia Pacific Foundation of Canada, 60% who employ Canadians for Asia-related work say they find it "difficult" to find qualified Canadians with the appropriate level of knowledge and awareness of Asia to help their company/ organizations succeed in the business they do in Asia.

Preparing the Next Generation of Canadians for an Asia-Centric World

David Mitchell, President and CEO of the Public Policy Forum, remarked that it was fitting for the conference to conclude with a discussion that touches on the human dimension in Canada-Asia relations, adding that his own organization had canvassed members of Canadian governments, private sector, universities and NGOs, and that this group overwhelmingly identified the need to boost Canada's "human capital" in the next 3-5 years as a top policy priority. So how is Canada doing?

David Mulroney, Distinguished Senior Fellow at the Munk School of Global Affairs, former Ambassador to China, and current Co-Chair of the Asia Pacific Foundation of Canada's Asia Competence Task Force, characterized Canada's performance as a "mixed bag"; there are "pockets of progress," including a long-standing Mandarin immersion program in Edmonton public schools, but efforts like these need to get to a national scale. They also need to be supported with high-level messaging from senior leaders, and he offered the Australian White Paper and President Obama's support for the



From left to right: Fen Hampson, Brian Job, Rex Hughes, Paul Evans

100,000 Strong Initiative – a pledge to get that number of Americans studying in China over the next four years – as examples. And all speakers concurred that the private sector has a vital role to play in showing leadership. “Young people need to be hearing the message,” Mr. Mulroney said, “that taking on Asian languages is important for their long-term career interest.”

Yet, all panelists agreed that language alone does not complete the picture of Asia competence: a broad knowledge of Asian histories and societies also need to be emphasized, as does intercultural competence and “on the ground experience.” **Stephen Toope**, President and Vice-Chancellor of the University of British Columbia, echoed the general view that Canada is not doing enough to adequately prepare the next generation of Canadians. He cited two examples. The first is that only about 2-3 percent of Canadian university students take advantage of international experience opportunities such as study abroad, co-op placements or internships. Only a small fraction, moreover, choose Asia as a destination. The second is that many successful programs are still at the pilot stage and on a scale that is too small to have the kind of transformative effect that is needed.

Panelists offered concrete suggestions for what Canada could do better or do more of. For example, **Roseann O’Reilly Runte**, President of Carleton University, posited that Canadian companies and government could build institutions and residences in Asian countries, modeled somewhat after a similar type of arrangement in Paris in which the Canadian residents share accommodation with a local student. Companies should see that supporting something like this is in their own interest, she noted, adding that “if Shell wants Canadians to be speaking Chinese, why not provide them [a] place” where they can advance their language skills, which should not be treated merely as an “add-on” skill.

Mr. Toope described another type of novel university-private sector partnership of an MBA program at the University of New Brunswick being structured so that its graduates receive training specifically to work with the Imperial Oil Company. Given the deep need for expertise in language, culture and business culture for Canadians to better understand Asia, he said, we should be creating partnership-based programs like these.

Mr. Mulroney mentioned a program at the BC Institute of Technology (BCIT) that arranges for its students to gain work experience in companies and other institutions in China to give them on-the-ground experience and skills.

Finally, several participants suggested that Canada could do a much better job of more fully and effectively utilizing the resources and programs it already has. One mentioned that the Working Holiday program through which Canada has reciprocity agreements with Japan, Korea and Taiwan, is vastly underutilized on the “outbound” side of Canadians working in these Asian countries. Several other audience members spoke to their own experience of having worked and lived in Asia as English teachers, for example, and then struggling to translate that experience into an Asia-focused career. One speaker offered that it would be valuable to figure out how to position re-entry vehicles that would call on the aptitudes and skills that these returnees had acquired while in Asia.

CONCLUSION

As **Yuen Pau Woo**, President and CEO of the Asia Pacific Foundation of Canada, remarked from the outset, the Canada-Asia 2013 conference sought to focus on the ‘how to’ of strengthening Canada-Asia relations, rather than re-hashing the ‘why’ of Asia’s importance for Canada.

Echoing the strong message sent by International Trade Minister **Ed Fast** to Asian leaders from the Pacific Economic Cooperation Council earlier at the conference, Mr. Woo highlighted “Canada’s commitment to the region, Canada’s determination to stick it for the long haul, to learn about what needs to be done. And I think our friends from Asia were persuaded that Canada not only is back but wants to be back for the long haul. And this conference, of course, is part of our small effort to try to make this happen.”

We hope that the insights and the recommendations that surfaced at the Conference will help leaders and policy-makers in government, business and academia, navigate Asia’s future. Thank you to all of our speakers and attendees for their enthusiastic participation. For more conference details, please visit www.CanadaAsia2013.ca.



Yuen Pau Woo, President and CEO of the Asia Pacific Foundation of Canada



Ed Fast, Minister of International Trade



From left to right: Stephen Toope, David Mulroney, Roseann O’Reilly Runte, David Mitchell

PROGRAM OVERVIEW

Monday, June 3

18:00-21:30 Welcome Reception and Dinner

Moderator: Yuen Pau Woo
President and CEO, Asia Pacific Foundation of Canada

Speakers: Dean A. Connor
Canada-Asia 2013 Co-Chair, and President and CEO, Sun Life Financial

Hon. David L. Emerson
Canada-Asia 2013 Co-Chair, Senior Advisor, CAI, formerly Minister of Foreign Affairs, and Minister of International Trade

Performance by Ms. Wanting Qu, Vancouver's Tourism Ambassador to China.

Tuesday, June 4

7:30 Registration Opens

8:30-10:25 **OPENING PLENARY**
Key Trends Shaping the Asia Pacific

Chair: Dean A. Connor
President and CEO, Sun Life Financial

Moderator: Hon. David L. Emerson
Senior Advisor, CAI, formerly Minister of Foreign Affairs and Minister of International Trade

Speakers: Hideto Nakahara
Member of the Board, Senior Executive Vice-President, Mitsubishi Corporation

Sam Pitroda
Advisor to the Prime Minister of India on Public Information Infrastructure and Innovations

Huibert Vigenevo
Executive Chairman, Shell Companies in China

Jusuf Wanandi
Co-Chair, PECC

Yunling Zhang
Director, Institute of Asia Pacific Studies, Chinese Academy of Social Sciences (CASS)

10:25-10:40 Break

Tuesday, June 4

10:40-12:00 **PLENARY SESSION**
Asia Pacific Trade Talks: Complementary or Cross-cutting?

Chair: Jusuf Wanandi
Co-Chair, PECC

Moderator: Don Campbell
Co-Chair, PECC

Speakers: Antoni Esteveordal
Manager, Integration and Trade Sector, Inter-American Development Bank

Ambassador Yoshiji Nogami
President, Japan Institute of International Affairs, and Chair, Japan National Committee for PECC

Peter Petri
Carl Shapiro Professor of International Finance, Brandeis University, and Senior Fellow, East-West Center

Apiradi Tantraporn
Executive Chair, International Institute for Asia Pacific Studies (INSAPS), Bangkok University

Yunling Zhang
Director, Institute of Asia Pacific Studies, Chinese Academy of Social Sciences (CASS)



Left: Don Campbell, Co-Chair, PECC
Right: Dean A. Connor, Canada-Asia 2013 Co-Chair and President and CEO of Sun Life Financial Canada.



12:00-12:30 PLENARY SESSION
Keynote Address by His Excellency the Right Honourable David Johnston, Governor General of Canada

12:30-13:30 Networking Lunch

13:30-15:00 BREAKOUT SESSION 1
Harnessing Asia's Massive Capital Pools: Financial Market Development and Integration

Chair: **Khee Giap Tan**
 Professor, Lee Kuan Yew School of Public Policy and Chair, Singapore National Committee for PECC

Moderator: **Tom Milroy**
 CEO, BMO Capital Markets

Speakers: **Stephen Yan-Leung Cheung**
 Dean and Professor (Chair) of Finance, School of Business, Hong Kong Baptist University and Hong Kong Committee for PECC

Masahiro Kawai
 Dean and CEO, Asian Development Bank Institute

Julius Caesar Parrenas
 Advisor on International Affairs, the Bank of Tokyo-Mitsubishi UFJ, Ltd.

Songzuo Xiang
 Chief Economist, Agricultural Bank of China

13:30-15:00 BREAKOUT SESSION 2
The New, New Thing: Creativity and Innovation in Asia

Chair: **David Hong**
 President, Taiwan Institute of Economic Research, and Chair, Chinese Taipei Committee for PECC

Moderator: **Hon. Jim Prentice**
 Senior Executive Vice-President and Vice Chairman, CIBC, and former Minister of Environment, Canada

Speakers: **Tom Jenkins**
 Executive Chairman and Chief Strategy Officer, Open Text

Rajesh Sawhney
 Founder, Global Superangels Forum of India

Atsushi Sunami
 Advisor, Industrial Competitiveness Council of Japan, and Deputy Director of Science, Technology and Innovation Policy Program, National Graduate Institute for Policy Studies

Sean Shaohwa Wang
 President, ITRI International Inc.

13:30-15:00 BREAKOUT SESSION 3
Minding the Gap: Promoting Inclusive Growth and Resilient Societies in the Asia Pacific

Chair: **Ambassador Yoshiji Nogami**
 President, Japan Institute of International Affairs, and Chair, Japan National Committee for PECC

Moderator: **Chris Findlay**
 Executive Dean, Faculty of the Professions, University of Adelaide and Vice-Chair, Australian Pacific Economic Cooperation Committee for PECC

Speakers: **German King**
 Consultant for the United Nations Economic Commission for Latin America and the Caribbean, and Advisor to the Industrial Engineering Department at Universidad de Chile

Djisman Simandjuntak
 Senior Economist, Center of Strategic and International Studies (Jakarta) and Chair, Indonesian National Committee for PECC

Khine Tun
 Project Consultant, Economic Research Institute for ASEAN & East Asia

15:00-15:15 Break



Left: *Huibert Vigeveno, Executive Chairman, Shell Companies in China*
 Right: *Ian Buchanan, Senior Executive Advisor, Booz & Co. and Chair, Australia PECC*

15:15-16:45 BREAKOUT SESSION 1
Green Growth: Asia Leading the Way?

Chair: **Ambassador Guoqiang Tang**
 Chair, China National Committee for PECC

Moderator: **Ian Buchanan**
 Senior Executive Advisor, Booz & Co. and Chair, Australian Pacific Economic Cooperation Committee for PECC

Speakers: Vice-Admiral Bertrand Aubriot
Deputy Director, Strategy and Development, DCNS Group

Rae Kwon Chung
Director, Environment and Development Division, United Nations Economic and Social Commission for Asia and the Pacific

15:15-16:45 BREAKOUT SESSION 2
Risks to Growth in the Asia Pacific

Chair: Sangkyom Kim
Vice-President, Korea Institute for International Economic Policy, and Vice-Chair, Korea National Committee for PECC

Moderator: Colin Robertson
Senior Strategic Advisor, McKenna, Long & Aldridge LLP, Vice-President and Senior Research Fellow, Canadian Defence and Foreign Affairs Institute

Speakers: Narongchai Akrasanee
Chair, Seranee Holdings, and Chair, Thailand National Committee for PECC

Peter Chalk
Senior Policy Analyst, RAND

Kamal Kishore
Program Advisor, UNDP Disaster Reduction and Recovery Team

Michael Toman
Lead Economist, Climate Change in Development Research Group, and Manager of the Energy and Environment Team, World Bank

16:45-17:45 Networking Reception



8:45-10:05 PLENARY SESSION
Responding to the Rise of Asia

Chair: Hon. David L. Emerson
Senior Advisor CAI, formerly Minister of Foreign Affairs and Minister of International Trade

Moderator: Hon. John Manley
President and CEO, Canadian Council of Chief Executives

Speakers: John Denton
Advisory Panel for Australian White Paper and ABAC Australia

Charles Morrison
President, East-West Center and Executive Director, US National Committee for PECC

Khee Giap Tan
Professor, Lee Kuan Yew School of Public Policy, and Chair, Singapore National Committee for PECC

Manfred WILHELMY
Executive Director, Fundación Chilena del Pacifico, and Chair, Chilean National Committee for PECC



10:05-10:20 Break

10:20-11:35 BREAKOUT SESSION 1
Addressing the Needs of Asia's Booming Middle Class: A New Market for Services

Chair: Hugh Stephens
Principal, TransPacific Connections, and Vice-Chair, Canadian National Committee for PECC

Moderator: Jayson Myers
President and CEO, Canadian Manufacturers and Exporters

Speakers: Carol W. Geremia
President, MFS Institutional Advisors (MFSI) and Co-Head of Global Distribution, MFS

Randolph Mank
Senior Advisor and Vice-President Asia, Blackberry

Ash Sahi
President and CEO, Canadian Standards Association

10:20-11:35 BREAKOUT SESSION 2
Canada's Role in Promoting a Stable and Prosperous Asia Pacific

Chair: Joseph Caron
Distinguished Fellow, Asia Pacific Foundation of Canada

Moderator: Paul Evans
Professor, University of British Columbia and Institute of Asian Research

Speakers: Fen Hampson
Distinguished Fellow and Director of Global Security, CIGI, and concurrently Chancellor's Professor, Carleton University

Rex Hughes
Visiting Professor, Canada Centre for Global Security Studies, University of Toronto

Brian Job
Professor of Political Science, and Associate Director, Institute of Asian Research, University of British Columbia

11:35-11:45 Break

11:45-13:00 BREAKOUT SESSION 1
Green Growth in the Asia Pacific: Canada's Contribution?

Chair: Denis McNamara
Chair, New Zealand Committee for PECC

Moderator: Hon. Kevin Lynch
Vice-Chair, BMO Financial Group

Speakers: Nicholas Parker
Co-Founder and Chairman, The Cleantech Group LLC

Vicky Sharpe
President, Sustainable Development Technology Canada

André Sorensen
Associate Professor of Urban Geography, University of Toronto

11:45-13:00 BREAKOUT SESSION 2
Preparing the Next Generation: A Turn to Asia

Chair: Ian Buchanan
Senior Executive Advisor, Booz & Co. and Chair, Australian Pacific Economic Cooperation Committee for PECC

Moderator: David Mitchell
President and CEO, Public Policy Forum

Speakers: David Mulrone
Distinguished Senior Fellow, Munk School for Global Affairs, and Co-Chair, National Conversation on Asia Taskforce on Asia Competence

Roseann O'Reilly Runte
President, Carleton University

Stephen Toope
President and Vice-Chancellor, University of British Columbia

13:00-13:05 Closing Remarks

Yuen Pau Woo
President and CEO, Asia Pacific Foundation of Canada

13:05-14:00 Networking Lunch



CONFERENCE LEADERSHIP

Dean A. Connor (co-chair)

President and CEO, Sun Life Financial Canada

Hon. David L. Emerson P.C. (co-chair)

Senior Advisor, CAI

Dominic Barton

Managing Director, McKinsey & Company

Don Campbell

International Co-Chair, PECC

Peter Harder

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Hank Ketcham

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Don Lindsay

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President and CEO, Canadian Council of Chief Executives

David Mitchell

President and CEO, Public Policy Forum

Stephen Poloz

President, Export Development Canada

Hon. John Reynolds P.C.

Strategic Advisor, McMillan LLP

Roseann O'Reilly Runte

President, Carleton University

The Asia Pacific Foundation of Canada, created by an Act of Parliament in 1984, is an independent, not-for-profit think-tank on Canada's relations with Asia.

Headquartered in Vancouver, with a branch office in Toronto, we bring together people and knowledge to provide current and comprehensive research, analysis and information on Canada's transpacific relations.

Asia Pacific Foundation of Canada
Head Office

220-890 West Pender St.
Vancouver, BC
Canada V6C 1J9

Tel: 604-684-5986
Fax: 604-681-1370

Asia Pacific Foundation of Canada
Toronto Office

205-375 University Ave.
Toronto, Ontario
Canada M5G 2J5

Tel: 416-597-8040
Fax: 416-597-1162

CONFERENCE STAFF

Yuen Pau Woo

President and CEO

Eva Busza

Vice-President, Knowledge and Research

Jill Price

Vice-President, Development and Corporate Affairs

Christine Nakamura

Director, Public Relations, Marketing and Policy Co-ordination

Trang Nguyen

Communications Manager

Kerri Parker

Events Coordinator

Alexandra Ho

Project Manager

Jordan Dupuis

Project Manager

Justin Elavathil

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