



An Asia Strategy for Canada

(May 2011)



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Key Findings & Observations



Key Findings

- ◆ **In this survey, the Asia Pacific Foundation of Canada asks Canadians who are engaged in Asia to consider what an Asia strategy for Canada might look like. This includes:**
 - Gauging the value and impact of such a strategy.
 - Looking at how Canada might manage its relations in Asia and in North America.
 - Examining various potential policy actions and dimensions of a strategy for Asia
 - Exploring the various perceptual filters Asia practitioners use to understand Canada's relations with Asia.
- ◆ **Survey findings provide Asia stakeholders in the private and public sectors with insights from a unique audience whose “close to the ground” perspectives can help inform decision making.**

KEY FINDINGS

◆ The Current Context for Canada in Asia:

- Canadians engaged in Asia hold generally negative views of Canada's current role and influence in Asia. They do not feel Canada has a strong political-diplomatic (69%), or economic influence (67%) in the region. The general perception is that Canada's influence in Asia has been on the decline for the past decade (70%). And, they tend to be more critical than complimentary in their views of how active (39%) or inactive (50%) the Canadian government has been in pursuing opportunities in Asia over the past 5 years.
- Asia practitioners feel the current international strategy for Asia is largely ill-defined (58%). Even in sectors, such as immigration, trade, and human rights, where many feel a strategy has taken shape, the sentiment is not strongly held. In others (e.g. defense/security, development assistance, investment), most see largely ill-defined parameters.
- Significant majorities of Asia practitioners believe the impact of having an international strategy with respect to Asia would be quite positive. It would be valuable for Canada's role and influence in Asia (94%); it would matter to Canada's role and reputation in the international community (86%); and it would make a difference to their own work in Asia (80%).

Key Findings (cont.)

◆ Managing Canada's Relations in Asia and North America:

- Asia practitioners believe the Canadian government should focus its bilateral relations efforts on four countries – China (95%), India (87%), Japan (77%), and South Korea (68%). Indonesia also gets special mention (46%). A strong majority – 78% – believes the pursuit of Free Trade Agreements with specific countries in Asia would be effective in establishing Canada as an influential player in the region.
- On a regional level, Asia practitioners believe the Canadian government should place a high priority (78%) on working within regional institutions in Asia as a means to secure a more influential role in the region. However, they express concern about Canada spreading itself too thin by trying to join every regional institution (65%). In this regard, they believe Canada should focus its attention on three main institutions – G20 (76%), APEC (74%), and ASEAN (64%).
- In the context of Canada-U.S. relations, Canadians engaged in Asia believe strongly that Canada's primary focus in engaging with Asia is to focus on its own strategic interests (81%) rather than considering the impact an international strategy with Asia could have on our relations with the U.S (18%). They are not very concerned at all about losing influence with the U.S. if Canada were to actively engage with Asia (13%); instead, they believe engaging more actively in Asia will only enhance Canada's position with the United States (74%).
- Asia practitioners do not buy the argument that Asia's rise is unpredictable, and that Canada should therefore stick to the North American market (14%). Instead, they see Asia as an outlet for Canada to reduce its dependence on the U.S. (87%)
- Nonetheless, it's important for many Asia practitioners that Canada not abandon its historic partners. They support developing strong economic relations with Asia, but feel Canada should not tilt its foreign policy efforts away from the U.S. and Europe (52%).

Key Findings (cont.)

◆ Dimensions of an Asia Strategy for Canada:

- Canadians engaged in Asia see three messages that would be most effective for positioning Canada best in Asia : Canada has the resources Asia needs to develop their domestic economies (87%); Canada is a destination for international education (88%); and Canada is an energy superpower (82%).
- Asia practitioners support a wide range of policy actions for Asia. That said, education and business-related actions occupy four of the top five policy actions Canadians engaged in Asia would most support:
 - Work with provincial governments to develop and strengthen education linkages with Asian countries (48% strongly support).
 - Expand Asia-Pacific Gateway strategy to encourage Asian companies to station their regional head offices in Canada (45%).
 - Develop a federal government led “Canada in Asia” strategy that would include all levels of government and the private sector (44%).
 - Promote a public education policy that puts greater emphasis on teaching about Asia and Asian languages (42%).
 - Develop policies for Canadian SMEs to help facilitate their entry into Asian markets (40%).

Key Findings (cont.)

◆ Perspectives Framing Canada's Role in Asia and the World

- Canadians engaged in Asia are convinced that a global power shift towards Asia is happening, and feel Canada needs to be engaged in the region if it hopes to play a role in global affairs:
 - Strategically, they see Canada's engagement in Asia as a means for Canada to insert itself in the power shift that will likely affect global affairs over the next century (88%).
 - From a public policy perspective, they believe an international strategy for Asia should be at the centre of Canadian policy rather than treated as a niche activity in a few line departments (87%).
 - Perceptually, they feel it's necessary to recognize that Asia is the centre of a global power shift, rather than simply as a set of emerging and fast-growing economies (85%).
- Canadians engaged in Asia believe that any strategy designed to enhance Canada's role and influence in Asia will only be successful if it's driven by a "bottom up" approach with an on-the-ground business presence in Asia (77%), and with engaging the Canadian public in the importance of the region (73%). While some see Canada's role in Asia tied to our economic interests in the region, this view is not as compelling (35% agree vs. 43% disagree).
- A further lens through which Asia practitioners view Asia is much more pragmatic: Canada needs foreign investment to develop our natural resources and infrastructure to get them to market (66%). They're also not convinced that that Canada's role in Asia should be limited to working only with countries who have the same shared values, such as democracy and human rights (60% disagree).

- ◆ **Asia's Value to Canada Transcends the Region Itself.** Canadians engaged in Asia believe they are in tune with the changes going on in Asia and therefore appreciate the potential opportunities for Canada in pursuing an international strategy for the region. Woven throughout the opinions expressed in this survey is their belief that Canada's position and relevance in global affairs over the coming decades may well be shaped and defined by its success in securing a credible role in Asia. Unfortunately, most see Canada falling behind as the centre of global power takes on a distinctly Asian scope; while Asia matters more and more in the world, they see Canada's influence in the region waning. It's largely for this reason that they see significant value in having an international strategy developed specifically for Asia.
- ◆ **Asia is More Than its Economic Relations with Canada.** Asia practitioners readily acknowledge the importance of Canada's relations with Asian countries on the economic front, and think that greater Canadian business on-the-ground activity in Asia is critical to driving influence in Asia. However, they firmly believe that success in Asia will also be determined and measured over the longer term beyond trade and investment balance sheet considerations. For them, it's about changing mindsets, not just pocketbooks, raising the level of "Asia consciousness" among the Canadian public. This is evident in the importance they attribute to public education, to teaching about Asia and Asian languages, to strengthening human ties, and to positioning Canada as a destination for international education. Engaging Canadians about Asia will make it easier for Canada's leaders to make the decisions needed to ensure we reap the benefits from our relations with the region.

Observations (cont.)

- ◆ **Asia Can be a Catalyst for Reframing Canada-U.S. Relations.** Canadians engaged in Asia are unsurprisingly committed to Canada pursuing opportunities in Asia without fear of losing influence in the United States. However, rather than expressing a naïve belief in a renewed “Third Option” which targeted Europe in the 1970s, they seem convinced that the global power shift to Asia in the 21st century means Canada’s involvement in Asia has real potential to reframe Canada’s relations with the U.S. It’s not about minimizing or dramatically changing Canada-U.S. relations, but rather maturing the relationship to the point where Canada is prepared to assert and pursue its own strategic interests in Asia, where it positions itself as an entry point to the North American market rather than standing on the sidelines, and where it builds relevance with the Americans **because of** (rather than in spite of) its relations in Asia. Importantly, Asia practitioners do not see Asia replacing Canada’s historic relationships with Europe and the U.S; instead, they implicitly believe Canada can develop another dimension to its foreign policy, an Asian dimension that will build upon the history our country already has with the region.

Detailed Findings



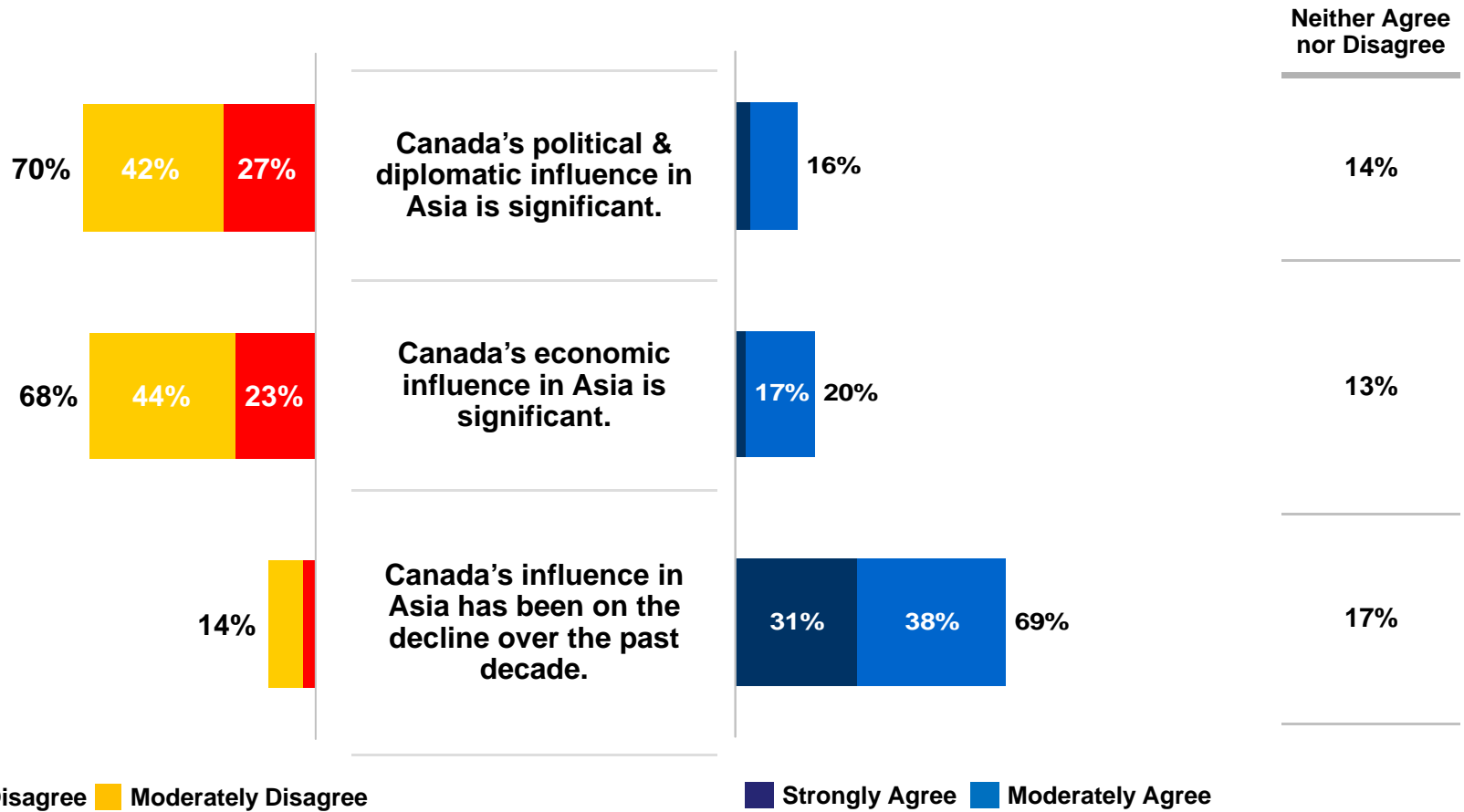


The Current Context for an Asia Strategy for Canada



Perceptions of Canada's Influence in Asia

Canadians engaged in Asia hold generally negative views of Canada's role and influence in Asia. They do not feel Canada has a strong political, diplomatic, or economic influence in the region. Indeed, they believe our influence in Asia overall has been on the decline for the past decade.

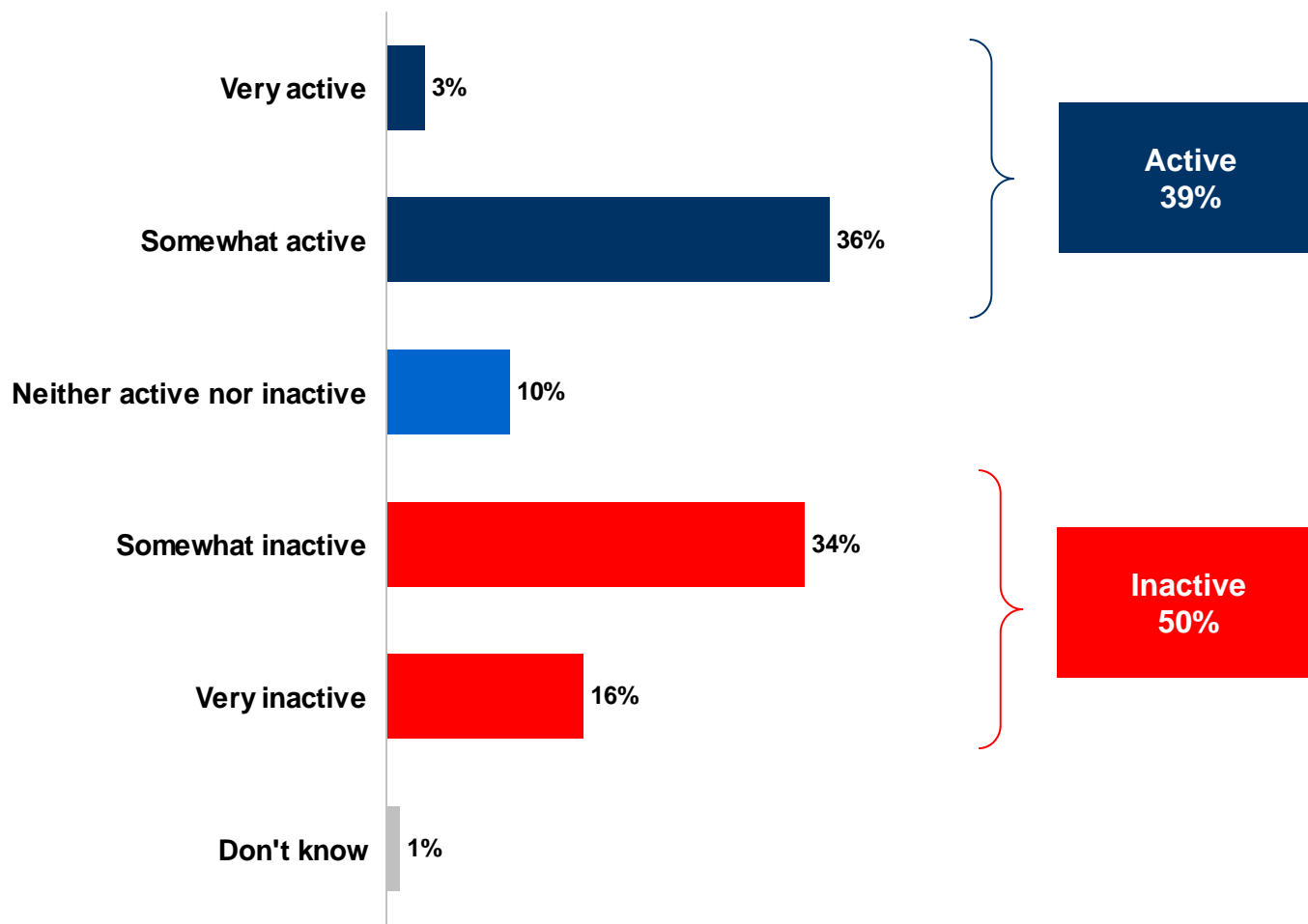


Base: All respondents (n=198)

Q.1 : Overall, based on your personal experience and knowledge of Canada's current position in Asia, please indicate whether you agree or disagree with each of the following statements.

Canadian Government Activity to Pursue Opportunities in Asia in Past 5 Years

Canadians engaged in Asia are split in their views of how active (or inactive) they feel the Canadian government has been in pursuing opportunities in Asia in the past 5 years. Fully half believe the government has been inactive, but a solid four-in-ten hold the opposite view. Of note: strong negative views are eight times as intense as strong positive views.



Base: All respondents (n=198)

Q.2: Generally speaking, how active or inactive do you think the Canadian government has been in pursuing opportunities in Asia over the past 5 years?

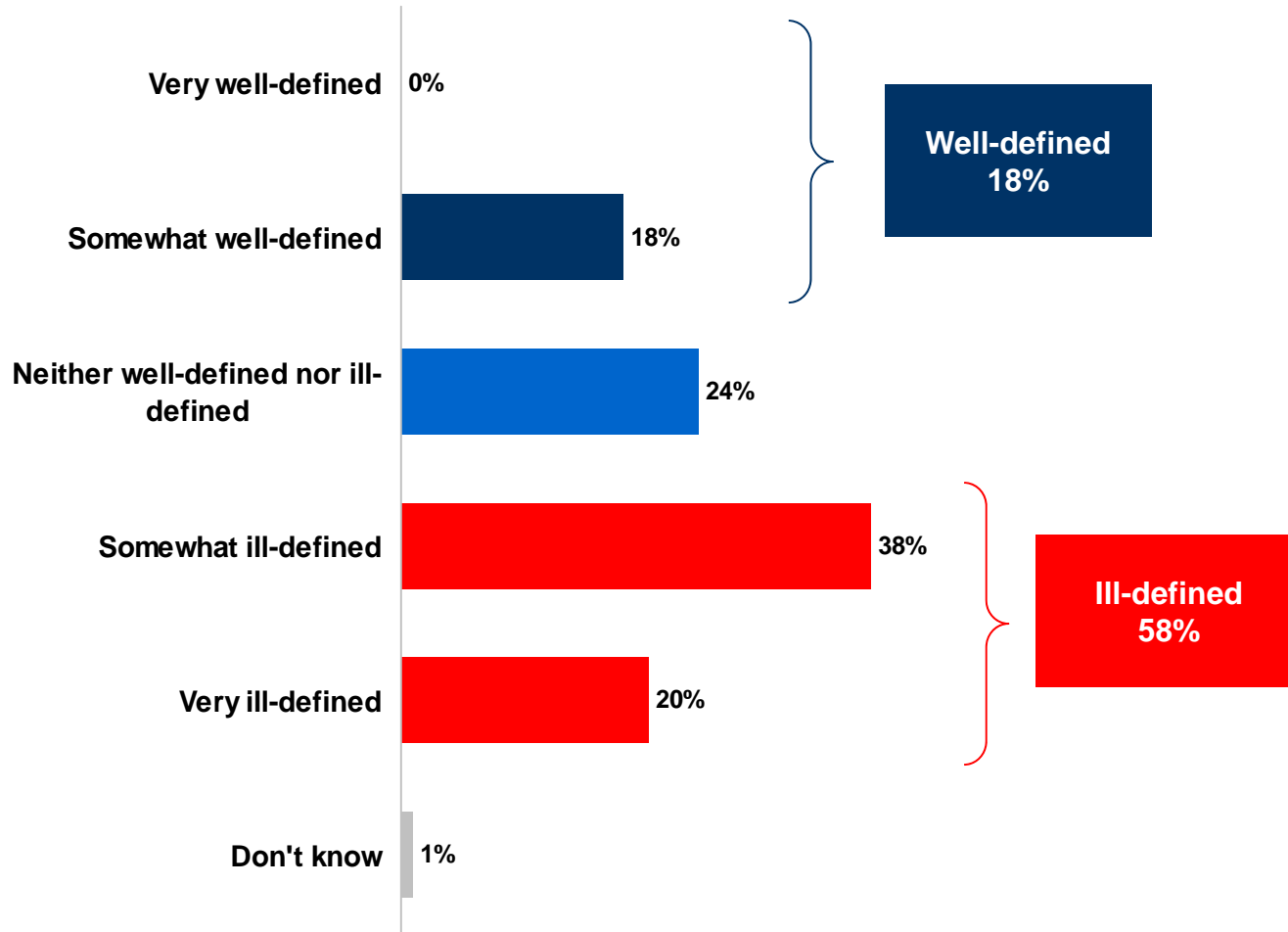
Perspectives on the Potential Value and Impact of an Asia Strategy for Canada



- ◆ **Canadians engaged in Asia feel that the current international strategy for Asia is largely ill-defined (58%).**
- ◆ **Even in sectors, such as immigration, trade, and human rights, where many feel a strategy has taken shape, the sentiment is not strongly held. In others (e.g. defense/security, development assistance, investment), most see largely ill-defined parameters.**
- ◆ **Significant majorities of Asia practitioners believe the impact of having an international strategy for Asia would be quite positive. It would be valuable for Canada's role and influence in Asia (94%); it would matter to Canada's role and reputation in the international community (86%); and it would make a difference to their work in Asia (80%). In each case, the views are held quite strongly.**

Current State of Canada's Strategy on Asia

Canadians engaged in Asia believe Canada's strategy in Asia is largely ill-defined. They hold strong views in this regard.

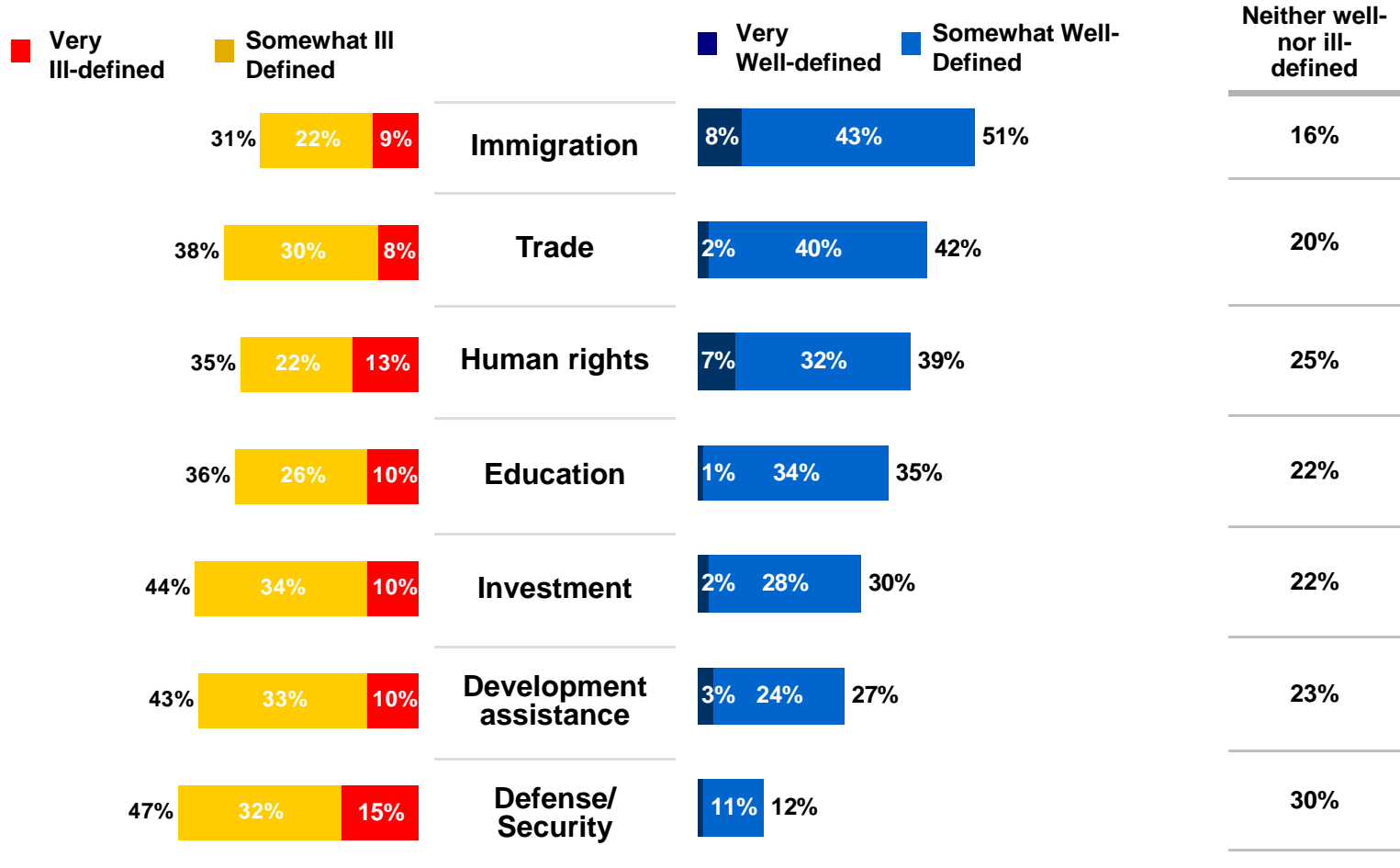


Base: All respondents (n=198)

Q.3: How would you describe Canada's current international strategy with respect to Asia? Would you say it is...?

Current State of Canada's Strategy on Asia in Specific Sectors

Canadians engaged in Asia believe Canada's international strategy in Asia is more defined in some sectors than others (immigration, trade, human rights vs. defense/security, development assistance, investment). Sentiments are not strongly held on either side, a signal perhaps of how unclear Canada's strategy for Asia is at the present time.

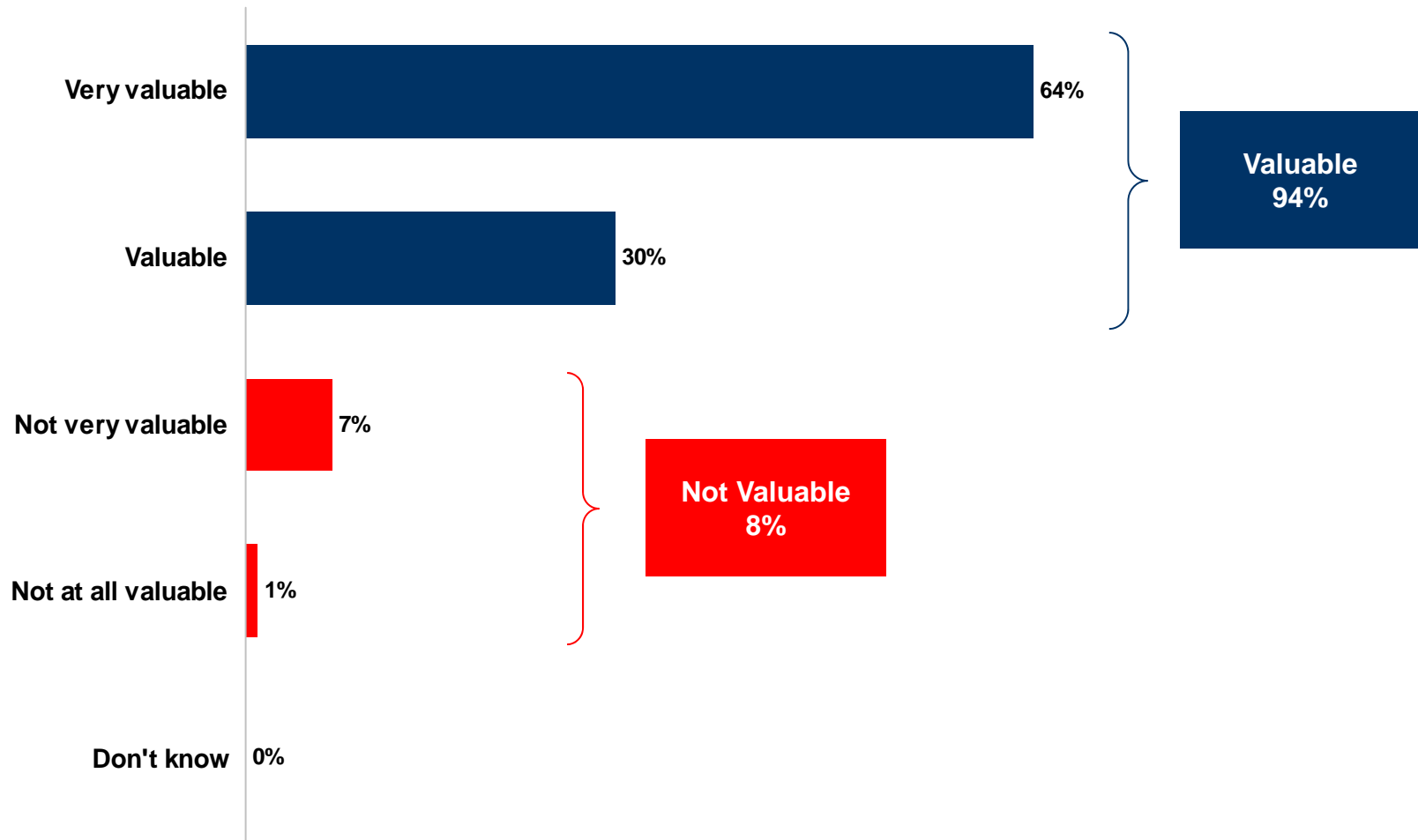


Base: All respondents (n=198)

Q.4 : More specifically, how would you describe each of the following dimensions of Canada's international strategy with respect to Asia?

Value of a Canadian Strategy on Asia for Canada's Role and Influence in Asia

Asia practitioners see great value in having an international strategy for Asia in terms of helping Canada's role in the region. They express quite strong opinions in this regard.

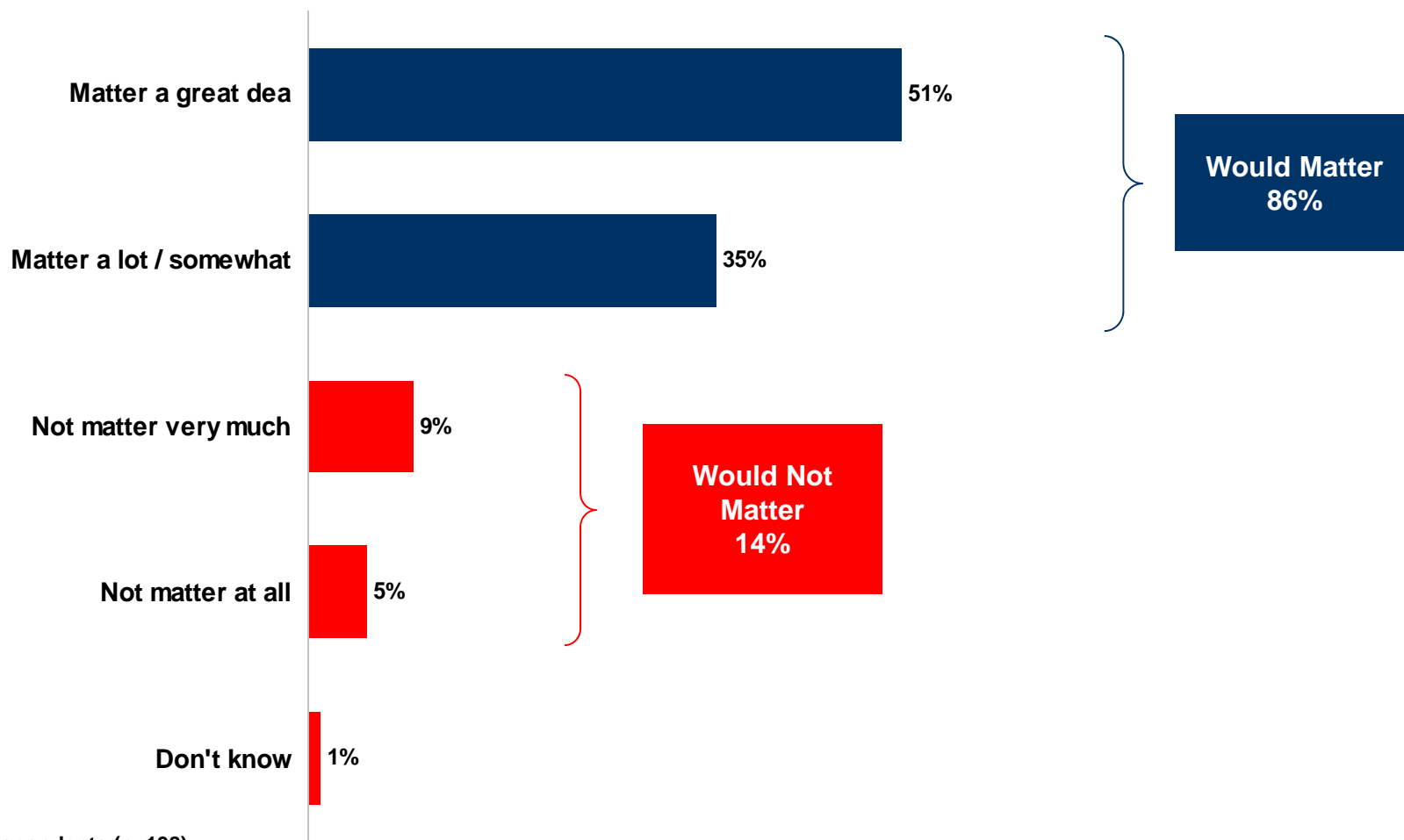


Base: All respondents (n=198)

Q.5 : Overall, how valuable do you think having an international strategy for Asia would be in terms of Canada's role and influence in Asia? Please use a 7-point scale where 1 means not at all valuable, and 7 means very valuable. Here: Very valuable=7, Valuable=5,6, Not very valuable=3,4, Not at all valuable=1,2.

Impact of an Asia Strategy for Canada on Canada's Role and Reputation in Global Community

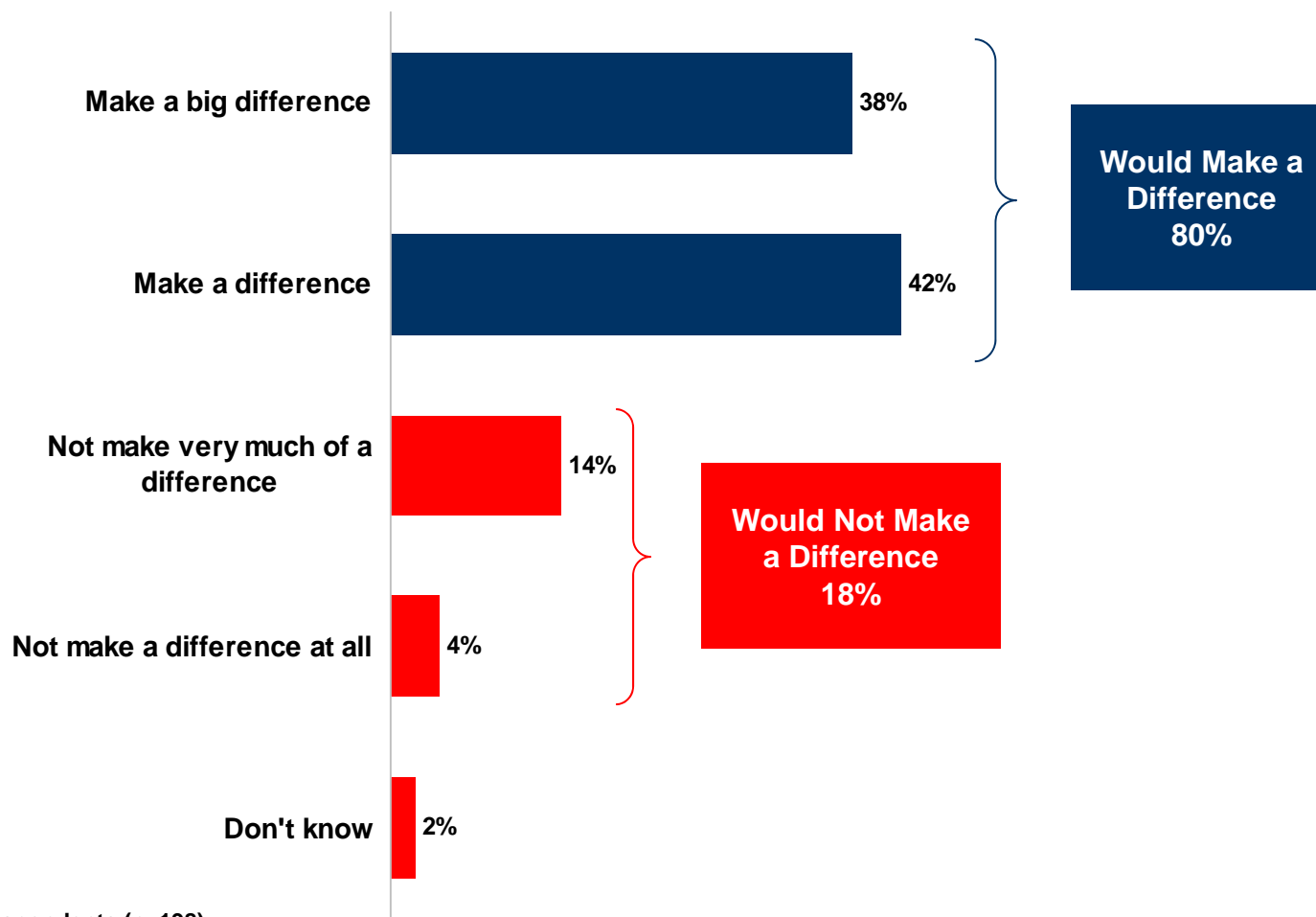
Asia practitioners also believe that having an international strategy specifically for Asia would matter to Canada's role and reputation in the international community. Again, they hold strong views on this front.



Q.6 : Generally speaking, how much do you think it matters to Canada's role and reputation in the international community for the Canadian government to have an international strategy specific to Asia? Please use a 7-point scale where 1 means not at all valuable, and 7 means very valuable. Here: Great deal=7, A lot/somewhat=5,6, Not very much=3,4, Not matter at all=1,2.

Impact of an Asia Strategy for Canada on your work in Asia

The vast majority of Asia practitioners are convinced that having a Canadian international strategy for Asia would make a difference to the work they do in Asia.



Q.7: Based on your own personal experience and work in Asia, how much of a difference would it make to your work in Asia if the Canadian government were to have an international strategy specifically for Asia? Please use a 7-point scale where 1 means it would make no difference at all, and 7 means it would make a big difference to what you do. Here: Big difference=7, A difference=5,6, Not very much of a difference=3,4, No difference at all=1,2.

POINTS OF VIEW
ASIA - PACIFIC

Asia Pacific
Foundation
of Canada

Fondation
Asie Pacifique
du Canada

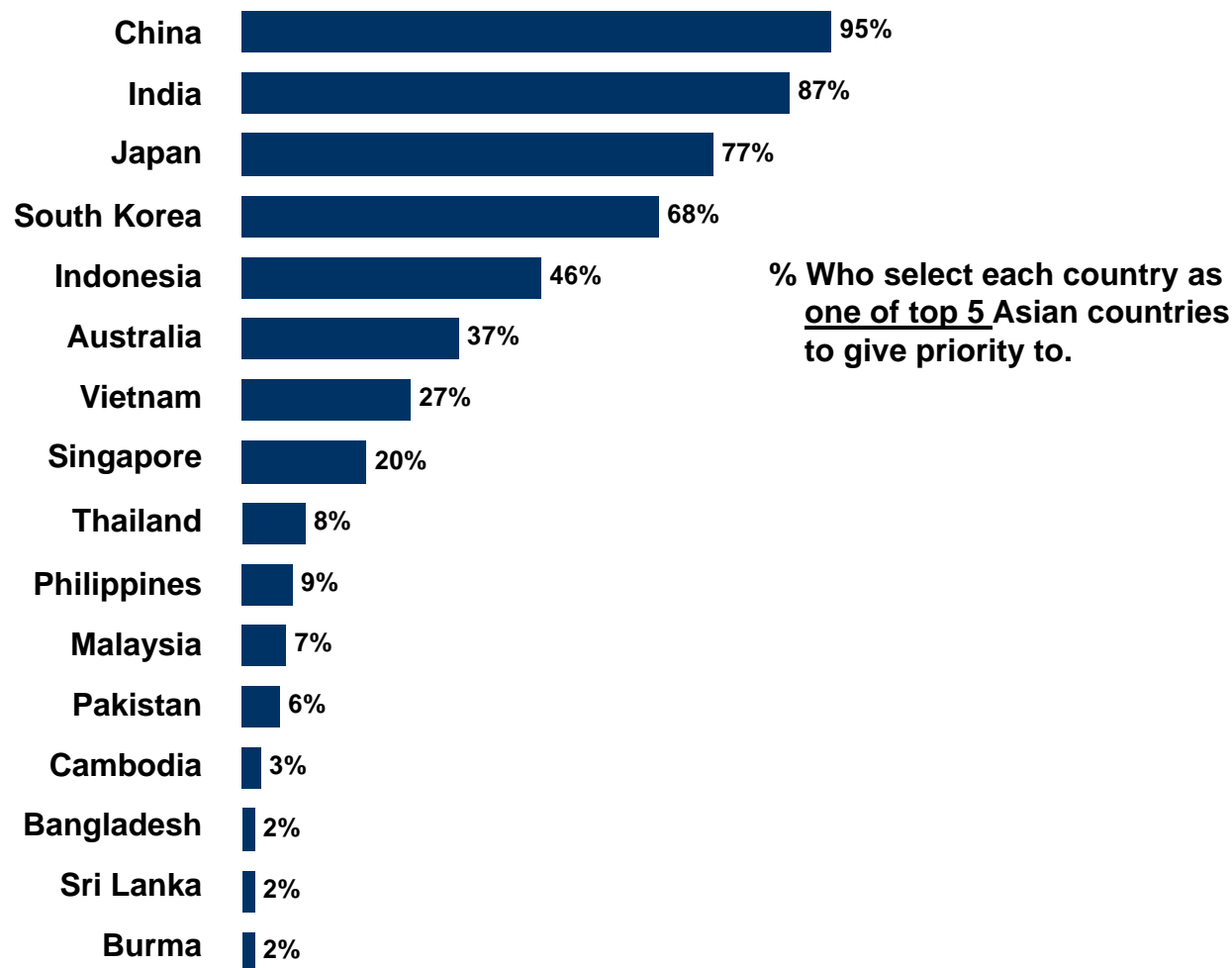


Managing Canada's Relations in Asia and North America



Asian Countries Canadian Government Should Give Priority to in Bilateral Relations

Asia practitioners believe the Canadian government should focus its bilateral relations efforts on four countries – China, India, Japan, and South Korea. Indonesia also gets special mention.

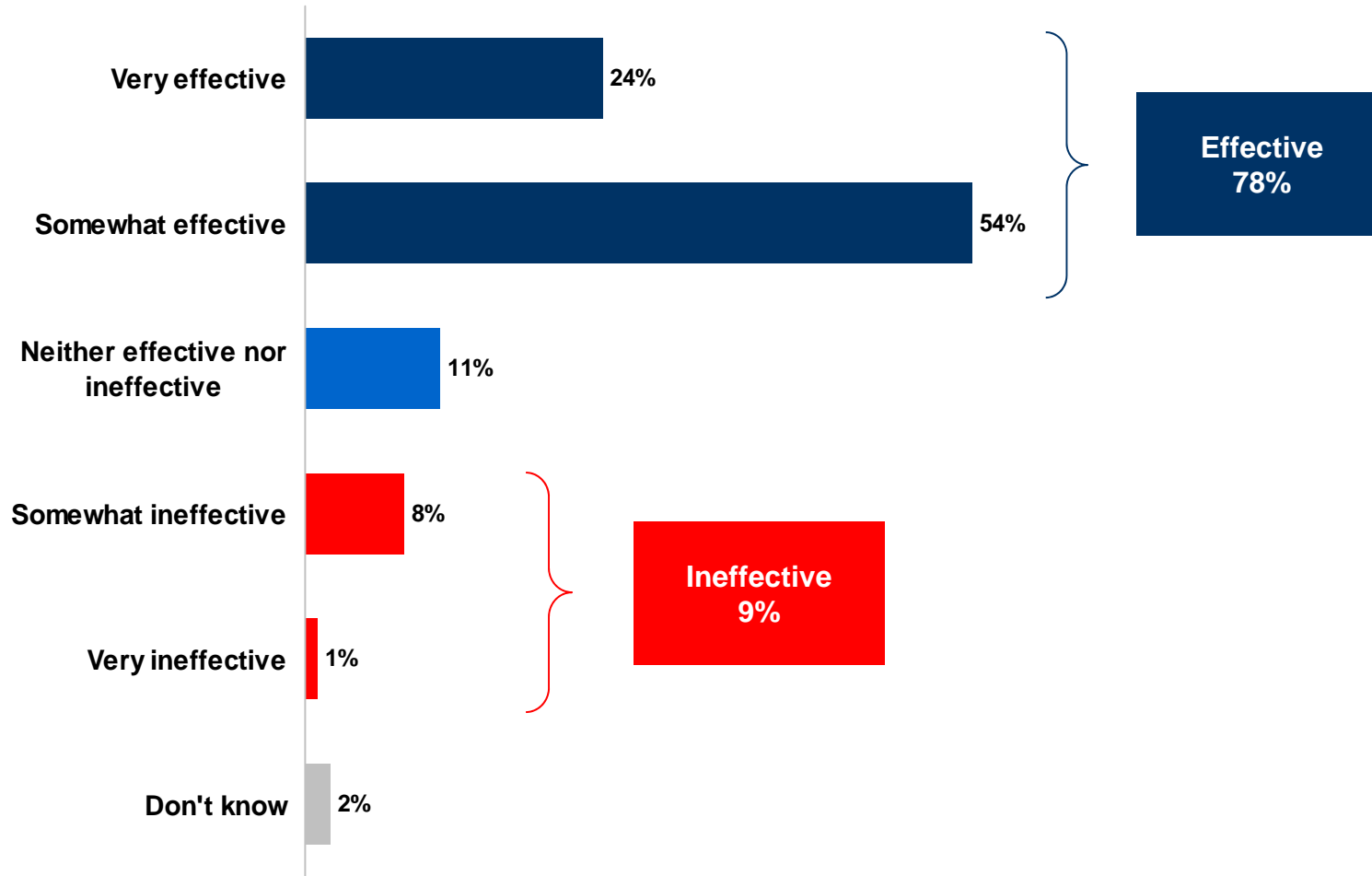


Base: All respondents (n=198)

Q.8 : Thinking about Canada's broader interests in having a more influential role in Asia, which five countries do you think the federal government should give priority to in its bilateral relations in Asia?

Effectiveness of Free Trade Agreements to Enhance Canada's Influence in Asia

A strong majority of Canadians engaged in Asia believe that the pursuit of Free Trade Agreements with specific countries in Asia would be effective in establishing Canada as an influential player in the region.



Base: All respondents (n=198)

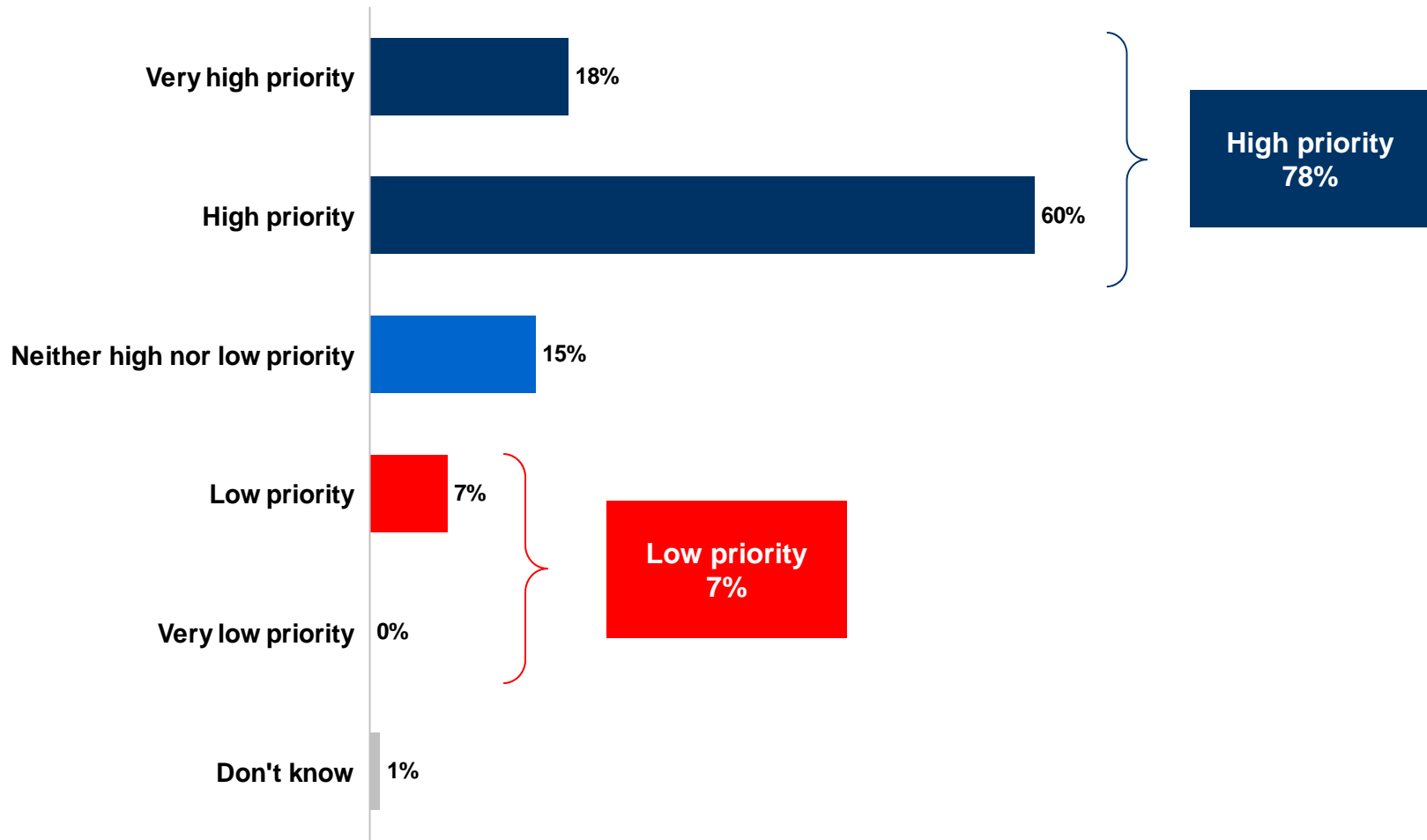
Q.9 : Generally speaking, do you think the pursuit of Free Trade Agreements with specific countries in Asia is an effective or ineffective approach for Canada to establish itself as an influential player in Asia?

Perspectives on Canadian Involvement in Regional Institutions in Asia

- ◆ **Canadians engaged in Asia believe the Canadian government should place a high priority (78%) on working within regional institutions in Asia as a means to secure a more influential role in the region.**
- ◆ **However, while they see some definite gain for Canada to pursue multilateral relations within these organizations, they do express concern about Canada spreading itself too thin by trying to join every regional institution (65%).**
- ◆ **Instead, they believe Canada can secure a more influential role in Asia by focusing its attention on three main institutions – G20 (working with Asian members), APEC (because of its trans-Pacific character), and ASEAN (for its central role in regional affairs).**

Level of Priority Canadian Government Should Give to Working Within Asian Regional Institutions

Overall, Canadians engaged in Asia think the federal government should give priority to working within regional Asian institutions. However, their views are not particularly strong.

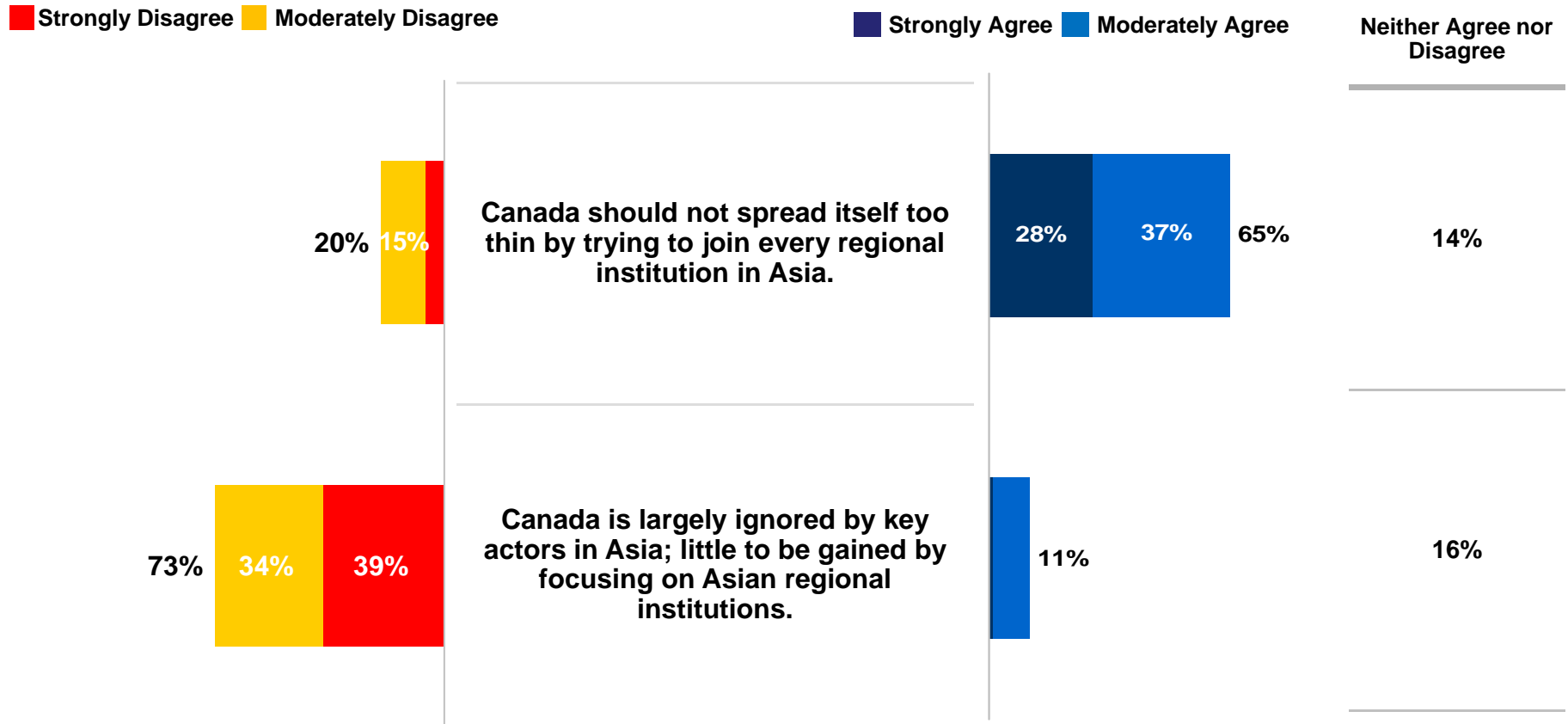


Base: All respondents (n=198)

Q.10: What level of priority do you think the Canadian government should give to working within Asian regional institutions (e.g. ASEAN, APEC, etc.) as a means to secure a more influential role in Asia?

Perspectives on Canada's Involvement in Regional Institutions in Asia

Asia practitioners definitely see some gain for Canada to focus on Asia's regional institutions, but they do not want to see Canada join every regional body and spread its resources too thin.

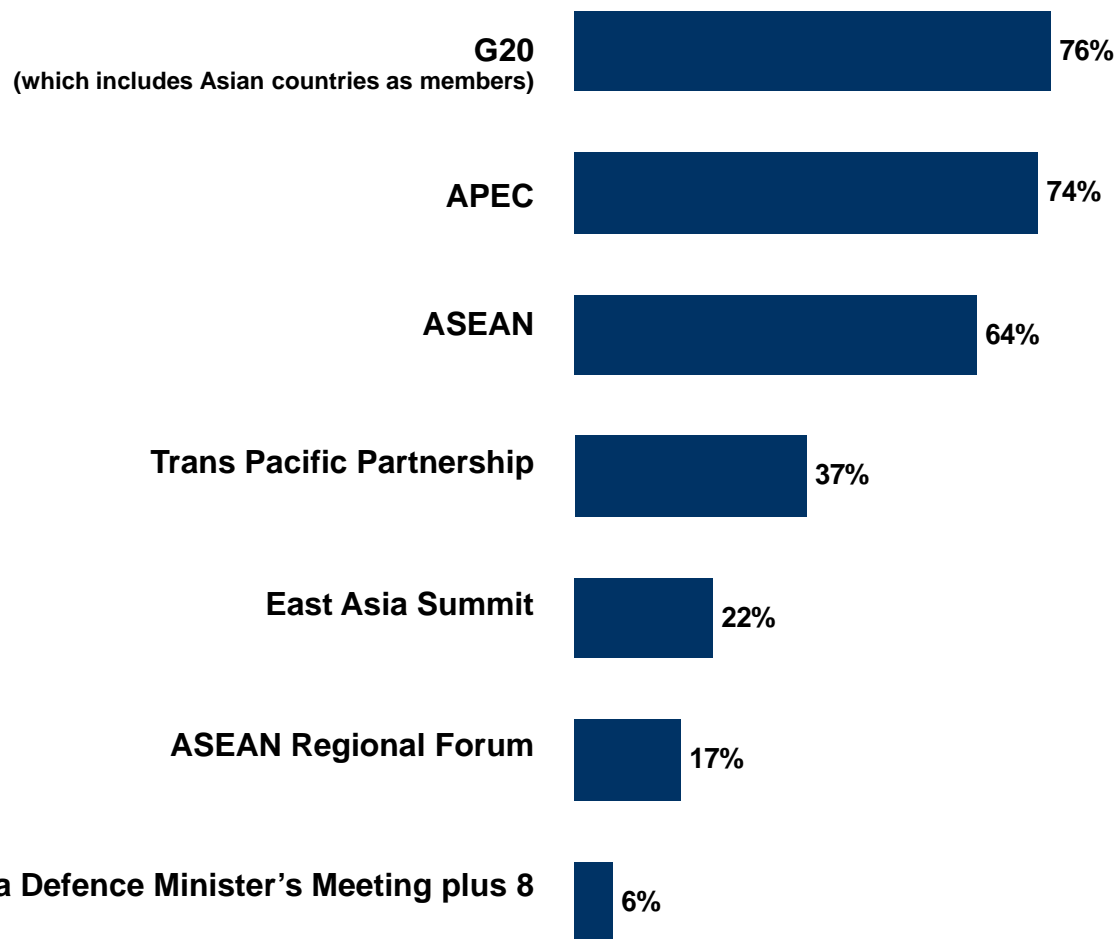


Base: All respondents (n=198)

Q.12 : Overall, based on your personal experience and knowledge of Canada's current position in Asia, please indicate whether you agree or disagree with each of the following statements.

Asian Regional Institutions Canadian Government Should Give Priority To

Canadians engaged in Asia believe Canada's interest in having a more influential role in Asia would be best served by giving priority to the G20 (where it can meet with Asian members), APEC, and ASEAN.



% Who select each country as one of top 3 Asian regional institutions to give priority to.

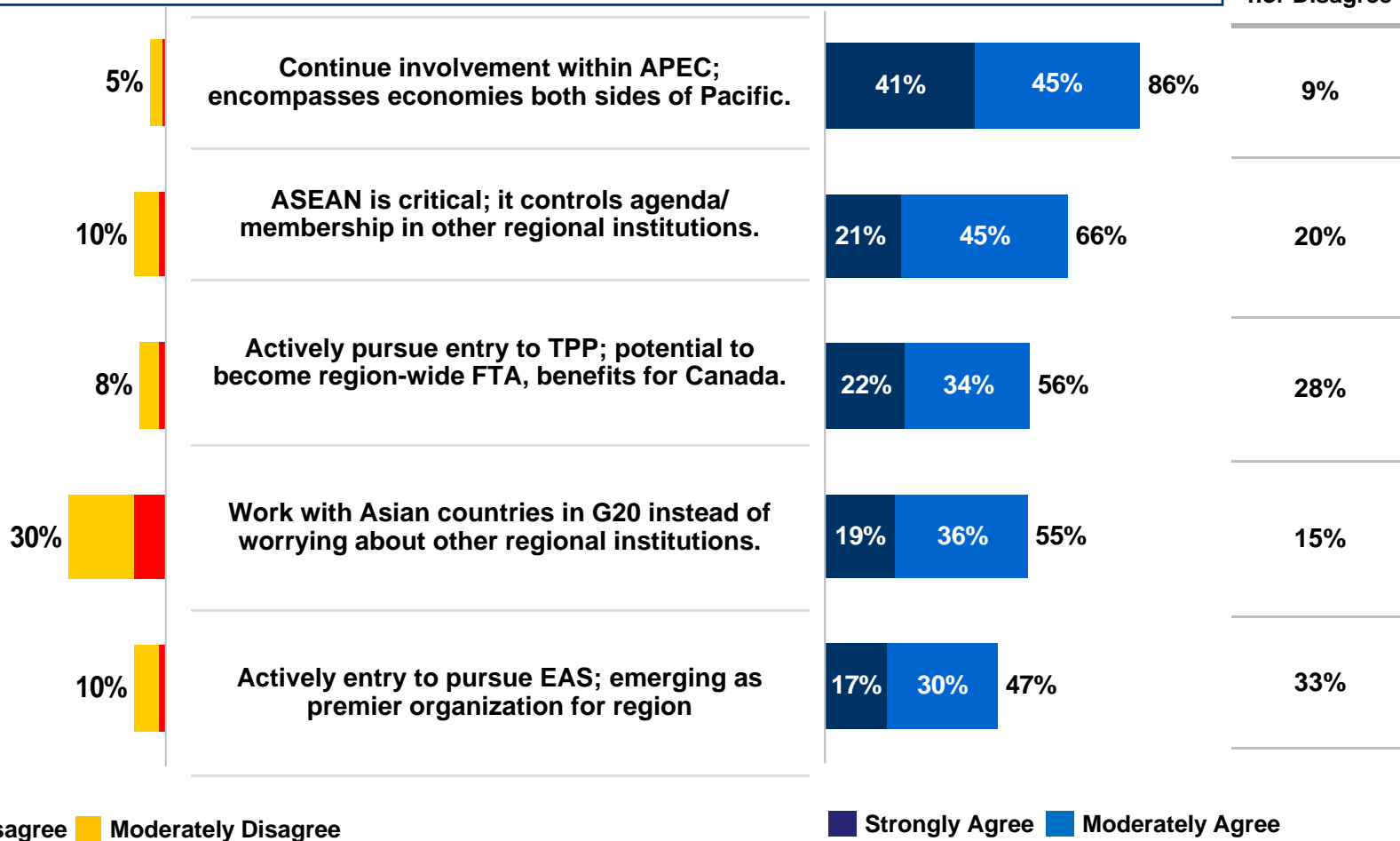
Base: All respondents (n=198)

Q.11 : Thinking about Canada's broader interests in having a more influential role in Asia, which three multilateral institutions do you think the federal government should give priority to in its multilateral relations in Asia?

Perspectives on Canada's Involvement in Specific Regional Institutions in Asia

Asia practitioners see value in Canada continuing its involvement with many of the Asian regional institutions. This is particularly true in the case of APEC, and ASEAN, both of which hold strategic benefits to Canada, APEC for its trans-Pacific character, and ASEAN because of its central role in Asian regional affairs.

Neither Agree nor Disagree



Base: All respondents (n=198)

Q.12 : Please indicate whether you agree or disagree with each of the following statements about Canada's involvement in regional institutions in Asia.

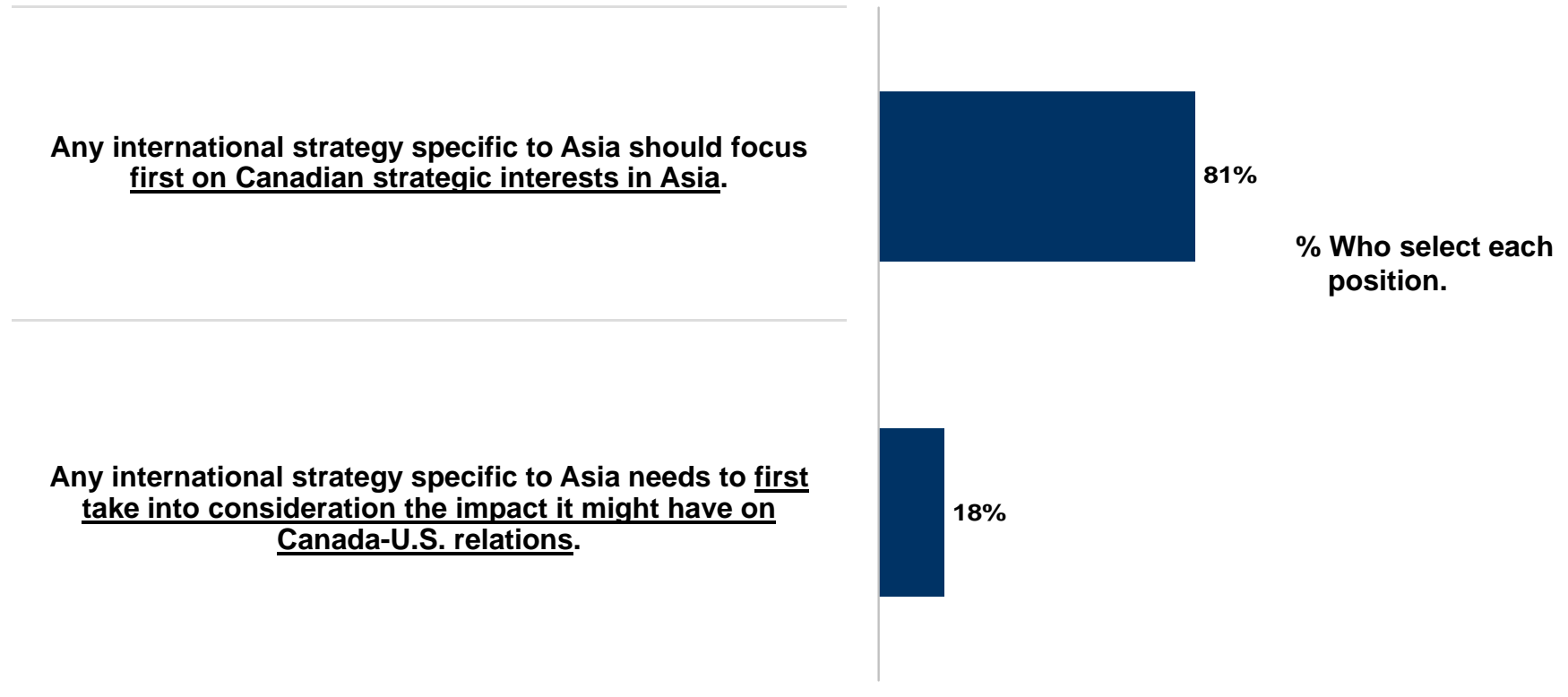
Perspectives on Managing Canada-U.S. Relations in the Context of Asia



- ◆ **Canadians engaged in Asia believe strongly that Canada's primary focus in engaging with Asia is to focus on its own strategic interests. They are not that concerned about losing influence with the U.S. if Canada were to actively engage with Asia. Indeed, they believe engaging more actively in Asia will only enhance Canada's position with the United States.**
- ◆ **Overall, Asia practitioners do not buy the argument that Asia's rise is unpredictable, and that Canada should therefore stick to the North American market. Instead, they see Asia as an outlet for Canada to reduce its dependence on the U.S.**
- ◆ **Nonetheless, it's important for many Asia practitioners that Canada not abandon its historic partners. They support developing strong economic relations with Asia, but feel Canada should not tilt its foreign policy efforts away from the U.S. and Europe.**

Primary Focus: Canada-U.S. Relations or Canada's Strategic Interests in Asia?

Canadians engaged in Asia strongly believe that in developing an international strategy for Asia, Canada's primary focus should be on its own strategic interest in Asia rather than worrying too much about the impact such a strategy might have on Canada-U.S. relations.



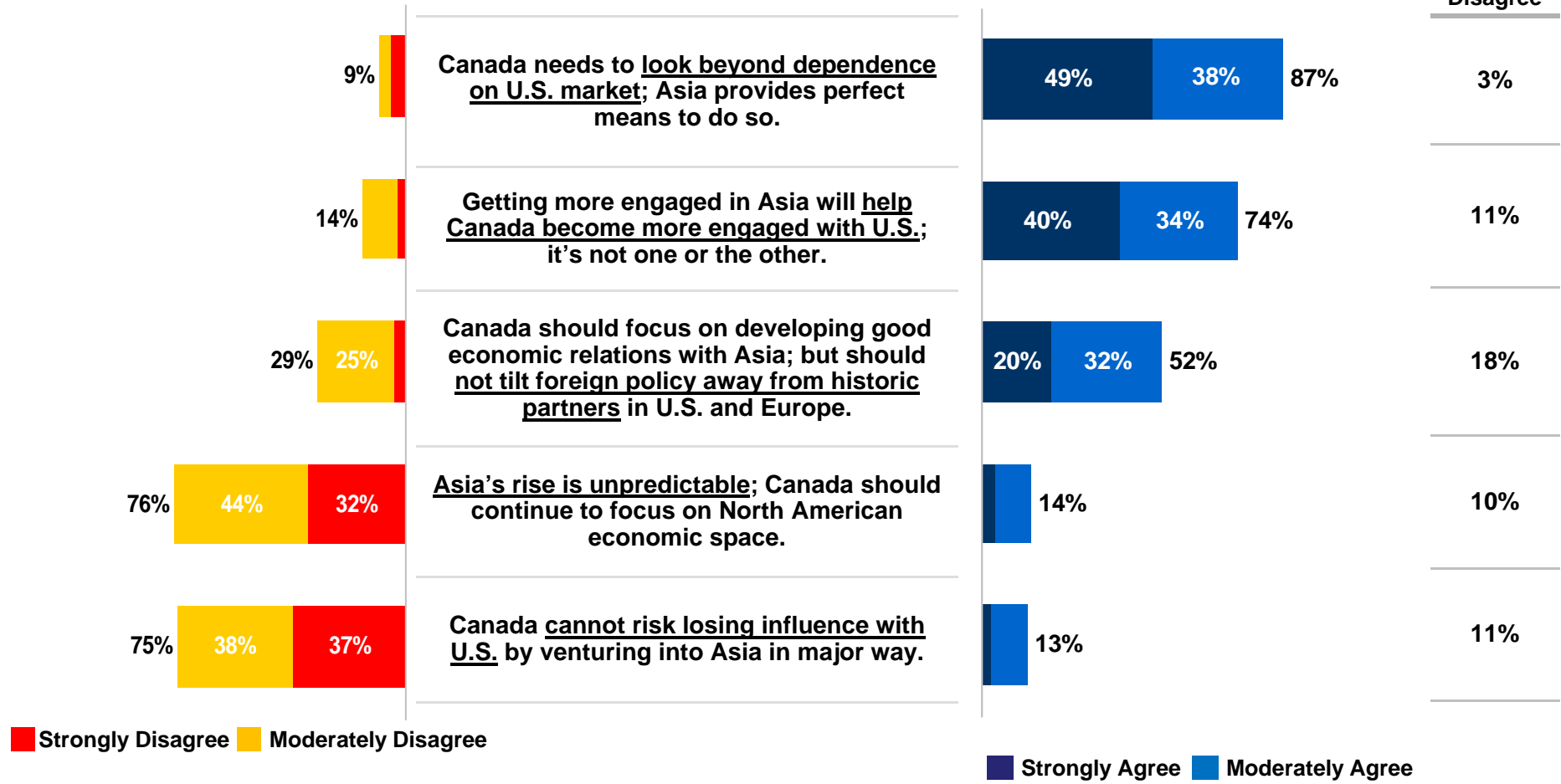
Base: All respondents (n=198)

Q.13 : Which one of the following two positions comes closest to how you feel about Canada pursuing a foreign policy specific to Asia in the context of its relations with the United States?

Perspectives on Managing Canada-U.S. Relations Along With Involvement in Asia

Asia practitioners believe engaging with Asia is a way to enhance its relations with the U.S., and it offers an opportunity for Canada to lessen its dependence on the U.S. market. Most do not believe there is a risk of losing influence with the U.S.. Still, many express a desire to sustain historic relations with the U.S. and Europe.

Neither Agree nor Disagree



Base: All respondents (n=198)

Q.16 : To what degree would you agree or disagree with each of the following statements about Canada's role in Asia in the context of our relations in the North American market? Please use a 7-point scale where 1 means you strongly disagree and 7 means you strongly agree. Here, 7=Strongly agree; 5,6=Moderately agree; 4=Neither agree, nor disagree; 2,3=Moderately disagree; 1=Strongly disagree.

POINTS OF VIEW
A S I A - P A C I F I C

Asia Pacific
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du Canada



Dimensions of a Canadian International Strategy for Asia



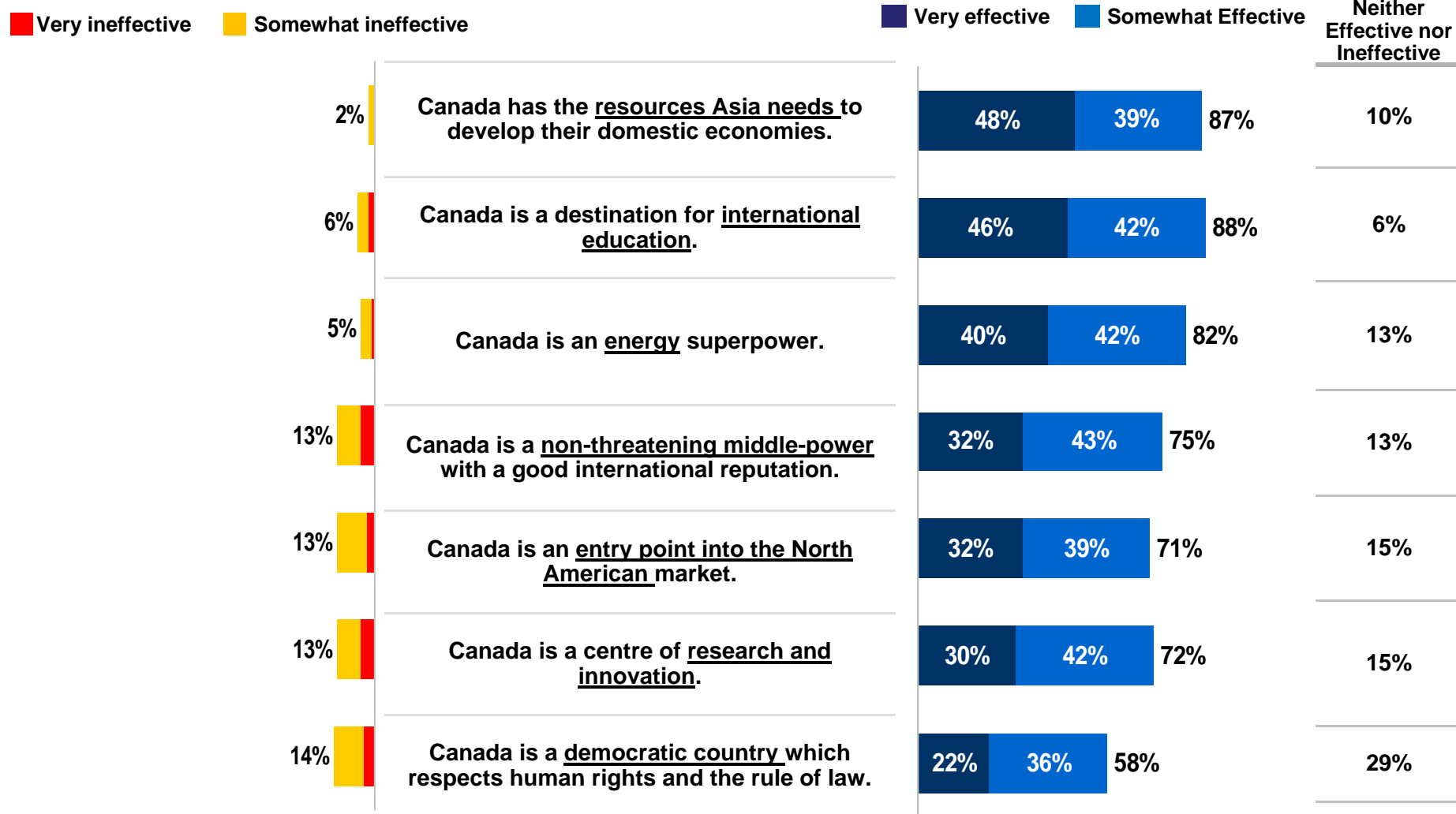
Perspectives on Messages to Position Canada Effectively in Asia



- ◆ **Canadians engaged in Asia think the most effective messages to position Canada best in Asia are those that focus in three areas:**
 - Canada has the resources Asia needs to develop their domestic economies (87%, 48% very effective).
 - Canada is a destination for international education (88%, 46% very effective)
 - Canada is an energy superpower (82%, 40% very effective).

- ◆ **A second tier of messages are also perceived to be quite effective, just not to the same degree as the top three:**
 - Canada is a non-threatening middle-power with a good international reputation (75%, 32% very effective).
 - Canada is an entry point to the North American market (71%, 32% very effective)
 - Canada is a centre of research and innovation (72%, 30% very effective).

Perceived Effectiveness of Key Messages to Enhance Canada's Position in Asia



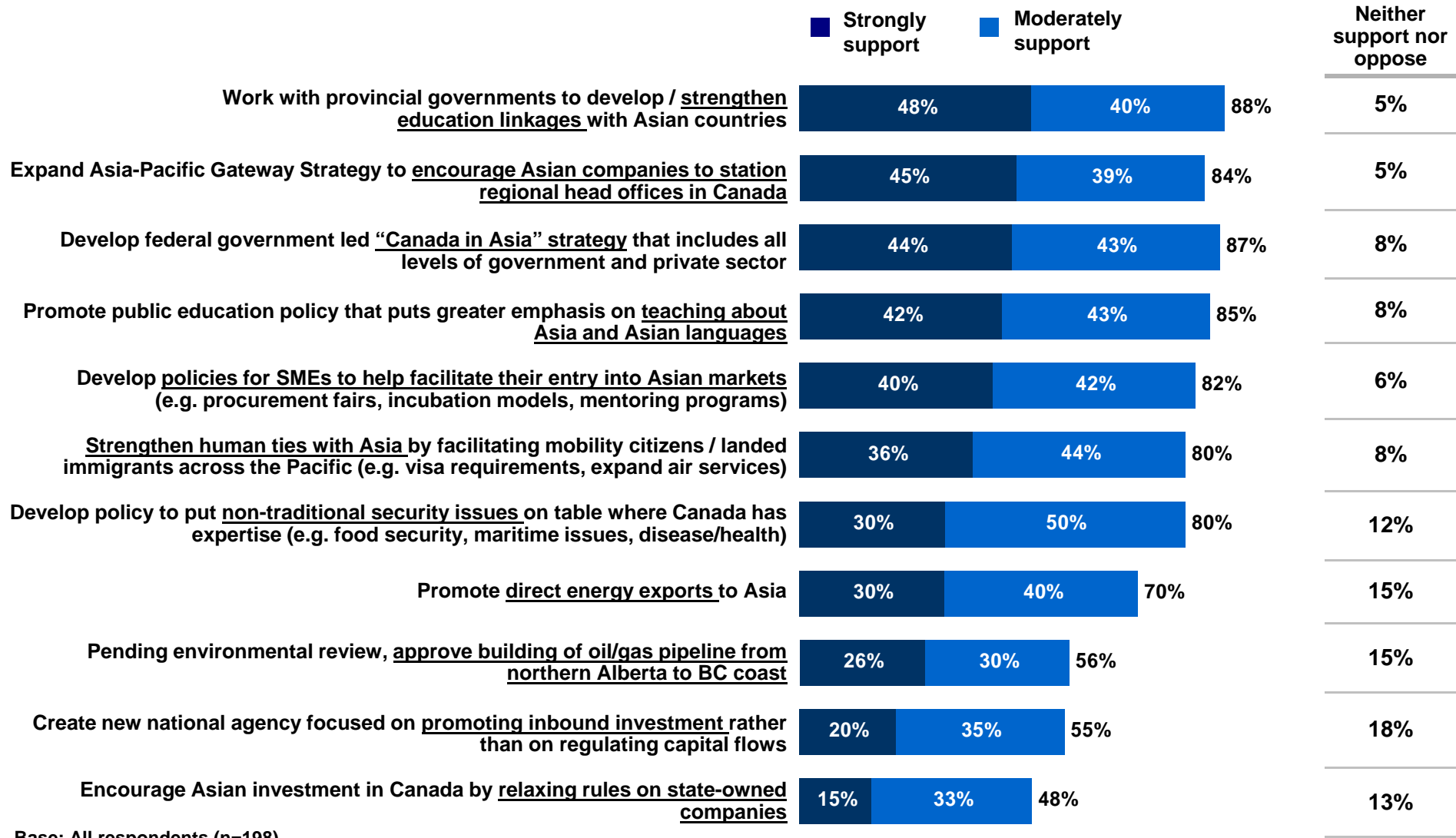
Base: All respondents (n=198)

Q.14 : Based on your own personal experience and knowledge of Asia, how effective or ineffective do you think each of the following messages about Canada would be for enhancing our country's position in Asia?

Support for Specific Policy Actions

- ◆ **Panelists would support a wide range of policy actions for Asia. These touch various areas of trade, investment, education, and business activities. However, certain actions are supported more strongly than others.**
 - Education and business-related actions occupy four of the top five policy actions Canadians engaged in Asia would support the most. These include:
 - **Education:** Work with provincial governments to develop and strengthen education linkages with Asian countries (48% strongly support); and promote a public education policy that puts greater emphasis on teaching about Asia and Asian languages (42%).
 - **Business:** Expand Asia-Pacific Gateway strategy to encourage Asian companies to station their regional head offices in Canada (45%); develop policies for Canadian SMEs to help facilitate their entry into Asian markets (40%).
 - The final action in the top five is to have the federal government to lead a **“Canada in Asia” strategy** that would include all levels of government and the private sector (44%).
 - Asia practitioners are less enamoured with three specific policy actions:
 - Approval of the oil/gas pipeline from Alberta to the BC coast (26% strongly support).
 - Create new national agency focused on promoting inbound investment (20%).
 - Relaxing rules on foreign state-owned investment in Canada (15%)

Priority Federal Government Should Give to Specific Actions or Policies in 2011



Base: All respondents (n=198)

Q.15 : From your own perspective as a person involved in Asia, to what degree would you support or oppose each of the following policy actions for Asia? Please use a 7-point scale where 1 means you strongly oppose the proposed policy and 7 means you strongly support it. Here, 7=Strongly support, 5,6=Moderately support, 4=Neither support nor oppose.



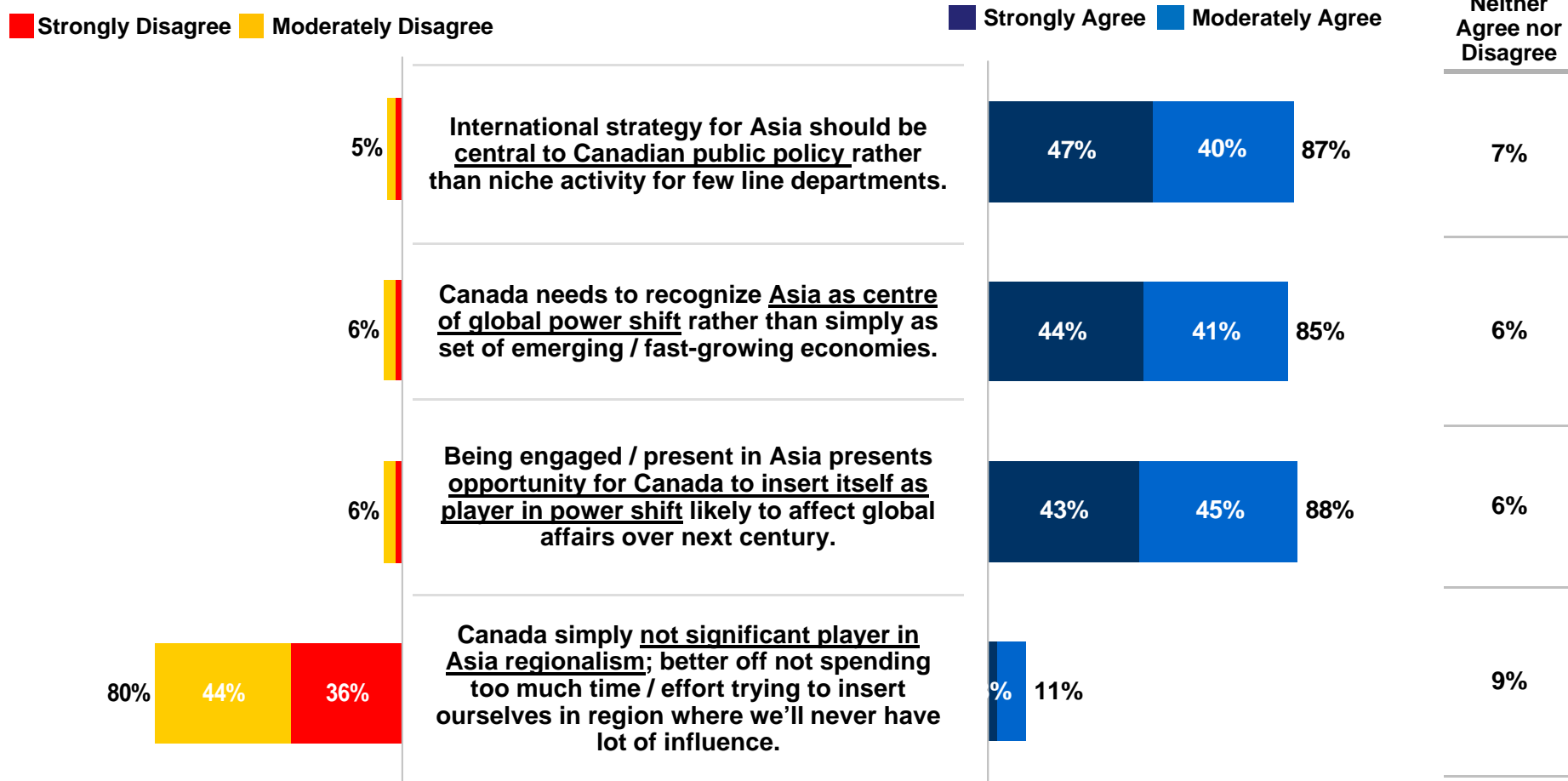
Perspectives Framing Canada's Role in Asia and the World



- ◆ **Canadians engaged in Asia are convinced that a global power shift towards Asia is happening, and feel Canada needs to be engaged in the region if it hopes to play a role in global affairs. In this regard, they share some fairly strong views on how Canada should think about its positioning in Asia:**
 - Perceptually, they feel it's necessary to recognize that Asia is the centre of a global power shift, rather than simply as a set of emerging and fast-growing economies (85%, 44% strongly agree).
 - Strategically, they see Canada's engagement in Asia as a means for Canada to insert itself in the power shift that will likely affect global affairs over the next century (88%, 43% strongly agree).
 - From a public policy perspective, they believe an international strategy for Asia should be at the centre of Canadian policy rather than being treated as a niche activity in a few line departments (87%, 47% strongly agree).

- ◆ **Moreover, they reject outright the notion that Canada is not a significant player in Asia and should therefore not waste much time trying to insert itself in the region (80% disagree, 35% strongly disagree).**

Perspectives on Canada-Asia Relations and Canada's Position in the International Community



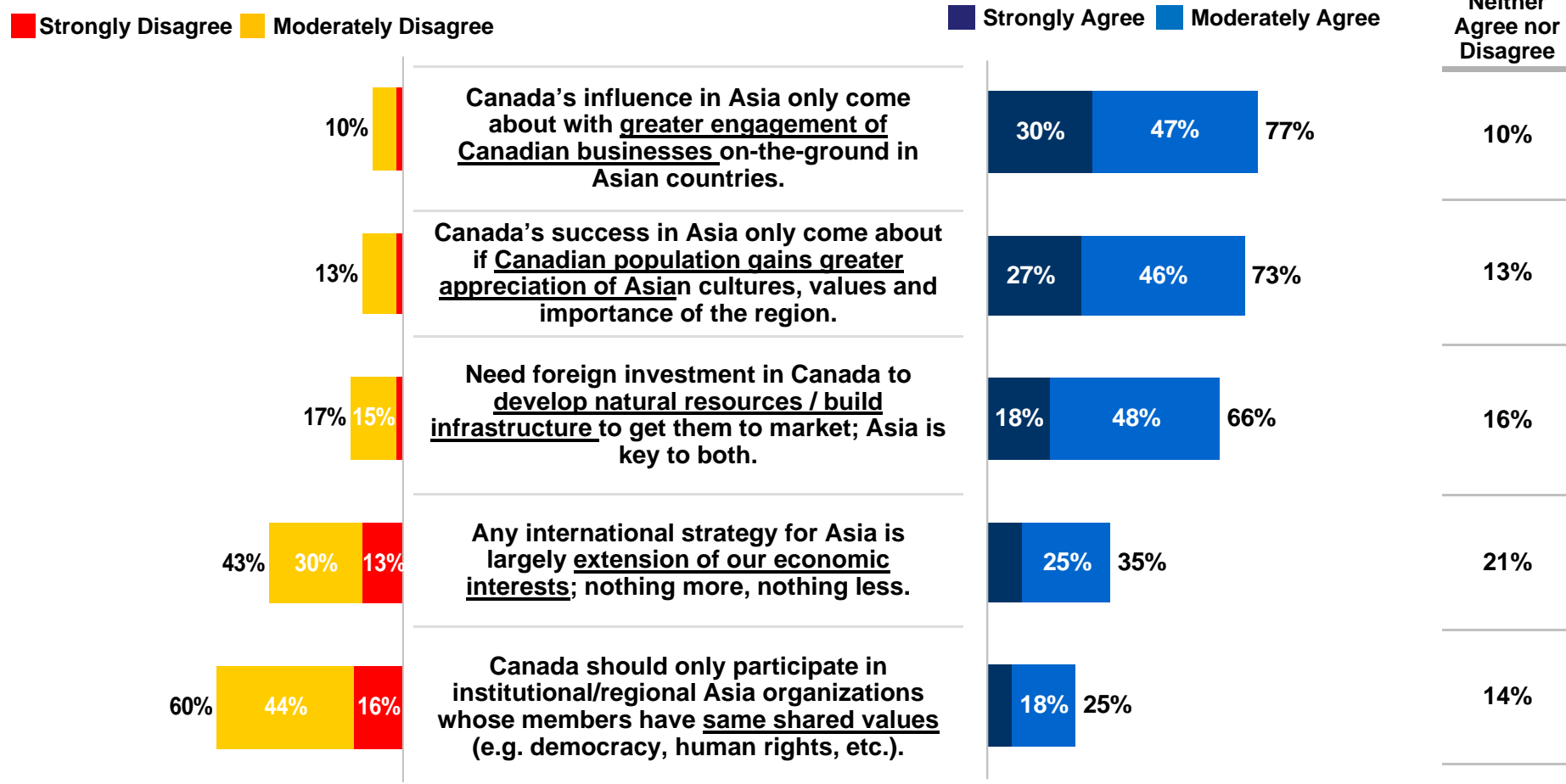
Base: All respondents (n=198)

Q.17 : To what degree would you agree or disagree with each of the following statements about Canada's role in Asia in the context of our country's position in the international community? Please use a 7-point scale where 1 means you strongly disagree and 7 means you strongly agree. Here, 7=Strongly agree; 5,6=Moderately agree; 4=Neither agree, nor disagree; 2,3=Moderately disagree; 1=Strongly disagree.

- ◆ **Canadians engaged in Asia believe that any strategy designed to enhance Canada's role and influence in Asia will only be successful if it's driven by a "bottom up" approach. While some see Canada's role in Asia tied to our economic interests in the region, this view is not as compelling.**
 - Success in Asia will only come about with a bottom-up approach to Asia which includes encouraging Canadian businesses to establish an on-the-ground presence in the region (77% agree, 30% strongly agree), and engaging the Canadian public in the importance of Asia (73% agree, 27% strongly agree).
 - Asia practitioners are not convinced that Canada's interest in developing an international strategy for Asia should be seen as an extension of our economic interests (35% agree, 43% disagree). However, the argument does have some currency.

- ◆ **A further lens through which Asia practitioners view Asia is much more pragmatic:**
 - Asian foreign investment is a key to develop our natural resources and infrastructure to get them to market (66%, 18% strongly agree).
 - Canadians in Asia are not convinced that Canada's role in Asia should be limited to working only with countries who have the same shared values, such as democracy and human rights (60% disagree, 25% agree).

Values Underlying Canada's Role in Asia



Base: All respondents (n=198)

Q.18 : To what degree would you agree or disagree with each of the following statements about the values underlying Canada's role in Asia? Please use a 7-point scale where 1 means you strongly disagree and 7 means you strongly agree. Here, 7=Strongly agree; 5,6=Moderately agree; 4=Neither agree, nor disagree; 2,3=Moderately disagree; 1=Strongly disagree.



Research Methodology



Research Methodology

- ◆ Points of View Asia-Pacific is an opinion panel of the Asia Pacific Foundation of Canada. It comprises 620+ individuals who are engaged in Asia through their professional, research, or personal interests. More than 80 percent of panelists have business or professional interests in Asia, and 70 percent have worked in Asia. As members, these individuals have consented to receive invitations to participate in ongoing APFC surveys on issues related to Canada-Asia relations.
- ◆ Data collection occurred between May 5th and 17th, 2011. A total of 198 people completed the survey questionnaire. Invitations were sent to opinion panel members through a “closed link” using Insite Systems Inc. The response rate of members for this survey is 32%.
- ◆ The final sample was not weighted in any fashion, given that there are no available aggregate statistics against which to compare our sample parameters.
- ◆ The margin of error for the total sample of 198 is **±6.9%**, 19 times out of 20.