



STRENGTHENING THE CANADA-ASEAN CONNECTION:

BUSINESS MOBILITY



THE UNIVERSITY OF BRITISH COLUMBIA
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Abbreviations

ABTC	APEC Business Travel Card
AEC	ASEAN Economic Community
AFTA	ASEAN Free Trade Agreement
APEC	Asia-Pacific Economic Cooperation
APF Canada	Asia Pacific Foundation of Canada
AmCham	American Chamber of Commerce
ASEAN	Association of Southeast Asian Nations
Bol	Board of Investment
CABC	Canada-ASEAN Business Council
CAFTA	Canada ASEAN Free Trade Agreement
CanCham	Canadian Chamber of Commerce
CBSA	Canada Border Services Agency
CLMV	Cambodia, Laos, Myanmar and Vietnam
CPTPP	Comprehensive and Progressive Agreement for Trans-Pacific Partnership
EDC	Export Development Canada
ESDC	Employment and Social Development Canada
FTA	Free Trade Agreement
GAC	Global Affairs Canada
ICCC	Indonesia Canada Chamber of Commerce
IEC	International Experience Canada
IRCC	Immigration, Refugees and Citizenship Canada
LMIA	Labour Market Impact Assessment
MFA	Ministry of Foreign Affairs
MPAC	Master Plan on ASEAN Connectivity
NTBs	Non-Tariff Barriers
OGDs	Other Government Departments
PNP	Provincial Nominee Program
PRC	Permanent Residence Card
TCS	Trade Commissioner Service
TPP	Trans-Pacific Partnership
SMEs	Small and Medium Sized Enterprises
UBC	University of British Columbia
VACs	Visa Application Centres
VFS Global	Visa Facilitation Services Global
WHV	Working Holiday Visa

Executive Summary

CANADA-ASEAN BUSINESS COUNCIL (CABC) works to promote trade relations between Canada and the Association of Southeast Asian Nations (ASEAN). Since 2013, the CABC has partnered with private and public sector stakeholders to research and publish on the trade and investment landscapes of Canada and the ASEAN region, particularly on existing barriers that hinder the trade relations between the two markets. Despite regular anecdotal feedback to the CABC that the mobility of businesspeople between Canada and the ASEAN region is a problem, this particular barrier has not been formally researched to date. Accordingly, a research team from the University of British Columbia (UBC) School of Public Policy and Global Affairs (SPPGA) explored the problem through this report and put forward policy recommendations to improve the mobility of businesspeople.

This report identifies why mobility is important for conducting business between Canada and the ASEAN region and explores key mobility-related challenges that Canadian businesses face when trying to enter, operate and expand in the ASEAN market and vice versa, as well as the mobility-related challenges ASEAN businesses face when trying to enter the Canadian market. Ultimately, this report seeks to inform stakeholders who are interested in these markets by providing a comprehensive picture of key elements that impact the mobility of businesspeople.

Key Findings

Mobility: The mobility of businesspeople is a barrier to conducting and expanding trade relations between Canada and the ASEAN region. The extent to which mobility presents itself as a barrier to a business, however, depends on the economic sector it belongs to, its size, and its country of operation.

Visa regulations and processing: Most ASEAN businesses and employees find it challenging to obtain a Canadian business visa. Lack of clear visa requirements, lengthy processing times, unclear visa rejection letters, and lack of direct access to embassies and consulates, are among the challenges related to obtaining a Canadian visa.

Work-Permits and related regulations: Most mobility-related challenges that Canadian business people face in ASEAN are related to securing work-permits due to the complicated administrative processes, lengthy processing time, policies, and expatriate quota system that exists in most ASEAN countries.

SMEs vs Large Corporations: Small and Medium-Sized Enterprises (SMEs) are more likely to experience mobility challenges than larger enterprises. Larger corporations tend to have dedicated staff or immigration consultants handling applications.

ABTC Card: The process for obtaining the APEC Business Travel Card (ABTC) is difficult for non-resident Canadians, which deters interested businesses from accessing it and finding it useful.

Available services: Despite an existing network of Canadian government and non-government services that are available across the ASEAN region, businesses in Singapore are perceived to have greater access and are better connected to these services. In contrast, those operating from the other ASEAN countries are less likely to utilize these services.

Canada vs Australia-New Zealand: Australia's and New Zealand's policies towards the mobility of businesspeople are considered to be very efficient and accessible when compared to the Canadian policies, such as the bond system and the different business visa categories.

Canada vs the US: Canadian businesses that operate in the ASEAN region with operations in the US find the US visa process for the short-term movement of employees as well as intra-company transfers easier than the Canadian process. The direct access to the US embassy and the blanket intra-corporate transfers have made the movement of employees and executives between the ASEAN region and the US easier for Canadian companies.

The data for the report that led to the conclusion of these findings was collected through interviews with business representatives (primarily members of the CABC), governmental officials, Chambers of Commerce and think tanks both in Canada and the ASEAN region. This data was complemented with secondary research from both academic and practitioner/policy-based literature (see Appendix A for more details on methodology).



SECTION II

Introduction

THE RELATIONSHIP BETWEEN CANADA AND THE ASEAN REGION is rapidly growing in importance, as both sides recognize the opportunities that emerge from closer cooperation and greater economic integration. In light of shifting global trade patterns, Canada is looking for opportunities to expand and diversify its economic ties beyond its traditional trading partners, and the ASEAN region offers extensive potential for Canadian businesses. As more research focuses on this economic relationship, certain challenges to conducting business have come to light, including business mobility, which members of the Canada-ASEAN Business Council have identified as a hindrance to free movement of business representatives between Canada and ASEAN.

Defining 'Mobility of Businesspeople'

For the purpose of this report, the mobility of businesspeople is defined as the movement of people, both short-term and long-term that is generated by economic activity. It involves short-term work-related travel to an irregular place of work for such as attending a meeting or the longterm relocation of individuals to a different office in another country.

This report aims to provide insight into barriers relating to obtaining visas and work permits by looking into current visa regulations and visa accessibility for business travel between Canada and the ten ASEAN member countries. Ultimately, it seeks to inform public policy makers and businesses who are interested in entering these markets by providing a holistic picture of key elements that impact the mobility of businesspeople between Canada and ASEAN. Some of the factors mentioned in the report are beyond the scope of this research and will require further analysis, as will be noted further on.

The main body of this report consists of the following sections:

1. Policy Challenge

This section defines the project description as well as its focus and aim. The scope of the project focuses on the mobility of businesspeople between Canada and the ASEAN region and aims to explore the factors that attribute to it to understand Canada's economic position in the region.

2. Background

This section introduces the ASEAN region and provides further context to the policy challenge through an overview of the evolution of Canada-ASEAN trade relations and existing barriers to trade between the regions.

3. Data presentation and analysis

This section presents the collected data in an organized way, both through text and graphs/charts, and draws conclusions in an attempt to present data collected from field research. This section provides an overview of the participants involved, the importance of the ASEAN region and travel for Canadian businesses, national visa processes and regulations, relevant mobility considerations in the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), existing initiatives like the ABTC, mobility and other-related challenges.

4. Government and Non-Government Resources

Canadian governmental and non-governmental support organizations active in the ASEAN region are introduced, primarily focusing on explaining the ways they work and can be utilized by businesses and highlighting the resources that they provide to different audiences, especially how they support the mobility of businesspeople.

5. Comparative Analysis

Canadian visa regulations are compared with those of Australia and New Zealand, and the US, which are relatively comparable economies and competitors to Canada with strong existing trade relationships in the ASEAN region, thus offering possible best practices for Canada to adopt. This section analyzes the similarities and differences between each country's regulatory frameworks towards individuals from the ASEAN region. Furthermore, it sets a deeper context for the policy challenge by comparing the overall trade relations between Canada and each country as well as the trade relations between the ASEAN region and Australia, New Zealand, and the US.

6. Case Studies

Five case studies are presented throughout the report to illustrate particular challenges faced by businesses as well as relevant initiatives offered by the government. During field research, the research team identified key interviews that could serve as potential case studies and followed up with interviewees to fully capture selected challenges and initiatives.

7. Policy Recommendations

The policy recommendations are directed towards the CABC for consideration in its advocacy to the Government of Canada. The recommendations include education, advocacy, updating information systems, administrative changes, and developing policies; each divided into three time periods, short-term, medium-term and long-term for increased proficiency during implementation.



SECTION III

Policy Challenge

Project Description

The mobility of businesspeople has been identified by Canadian businesses operating in the ASEAN region as one of the barriers that hinders Canada's plan of Trade Diversification by strengthening its economic connectivity with the ASEAN region. Barriers to mobility have been reported by Canadian businesses operating in the ASEAN region, however, there has not been a formal capture of the full nature and extent of the problem. Accordingly, this project seeks to provide an overview and analysis of travel-related challenges to determine to what extent mobility hinders Canada and ASEAN's economic partnership.

Project Focus and Aim

The project focuses on understanding the two-way mobility challenges that businesspeople encounter when traveling between Canada and the ten ASEAN member countries, namely Brunei Darussalam, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand, and Vietnam. It aims to provide insight on current visa regulations and visa accessibility for business travel between Canada and each ASEAN country by looking into barriers relating to obtaining business visas and work permits. Barriers include entry requirements, recognition of qualifications, and administrative obstacles to application processes (e.g. processing time, cost, language barriers, etc.).



SECTION IV

Background

CANADA IS LOOKING FOR OPPORTUNITIES TO EXPAND its economic ties beyond its traditional trading partners. In 2018, over 75 percent of Canadian exports were sent to the United States.¹ Growing US trade protectionism policies manifested in the renegotiation of trade agreements and targeted tariffs on key Canadian exports have generated doubt in the Canada-US trading system and exposed Canada's trade and economic vulnerability.² In the face of transforming trading practices and alternative trade opportunities that emerging markets offer, the Government of Canada is committed to strengthening its economic and trade relations with non-traditional partners including ASEAN countries.³ Accordingly, Canada's Trade Diversification Strategy aims to increase non-U.S. exports by 50 percent by 2025.⁴

ASEAN as a regional economic bloc is the fifth largest global economy accounting for 6.3 percent of the world economy.⁵ In 2018, the region recorded annual GDP growth of 5.1 percent compared with the global average of 3.6 percent.⁶ Over the last two decades, the region recorded continuous GDP per capita growth; while member countries have managed to reduce extreme poverty in the region from 14 percent in 2000 to 3 percent in 2013.⁷ The ASEAN region’s GDP has seen a positive trend through the period of 2000-2018, where it has doubled in a decade (USD1.8 trillion) and almost fivefold the value in 2000 (USD 0.6 trillion).⁸ The ASEAN region’s GDP is forecasted to exceed USD4 trillion by 2022 while exports are expected to rise from the current USD 1.3 trillion to USD 2.8 trillion by 2025.⁹ Various factors have contributed to the regions’ sustained growth and have changed its trade and business landscape, including sound fiscal and investment policies as well as a growing labor force.¹⁰

The region’s growth is, among other factors, driven by its favorable demographics. As of 2019, the region has a total population of 650 million people, accounting for 8 percent of the global population, out of which 58 percent are under the age of 35.¹¹ With a growing GDP per capita, 65 percent of the region’s population is set to become middle class by 2030, boosting the purchasing power of the region.¹²

FIGURE 1.
Ease of doing business ranking of the ASEAN countries, World Bank 2019

Country	Rank
Singapore	2
Malaysia	12
Thailand	21
Brunei	66
Vietnam	70
Indonesia	73
Philippines	95
Cambodia	144
Laos	154
Myanmar	165

There is an increasing foreign direct investment (FDI) inflow into the ASEAN region. In 2018, the region received USD155 billion FDI increasing its global share of FDI inflows to 11.5 percent.¹³ The region promises stable and strong return on investments; with a diverse range of sectors and positive economic indicators, which further boost investor confidence. This is shown through the World Bank's Ease of Doing Business report, where ASEAN countries ranked as high as 2 in the index for the 2019 ranking. The report measures various indicators including the ease of starting a business, credit access, tax system, property rights, cross border trade and enforceability of contracts among others.¹⁴ No matter the indicators vary from country to country, but the mix of culture and economic sectors attracts diverse investments from across the world.

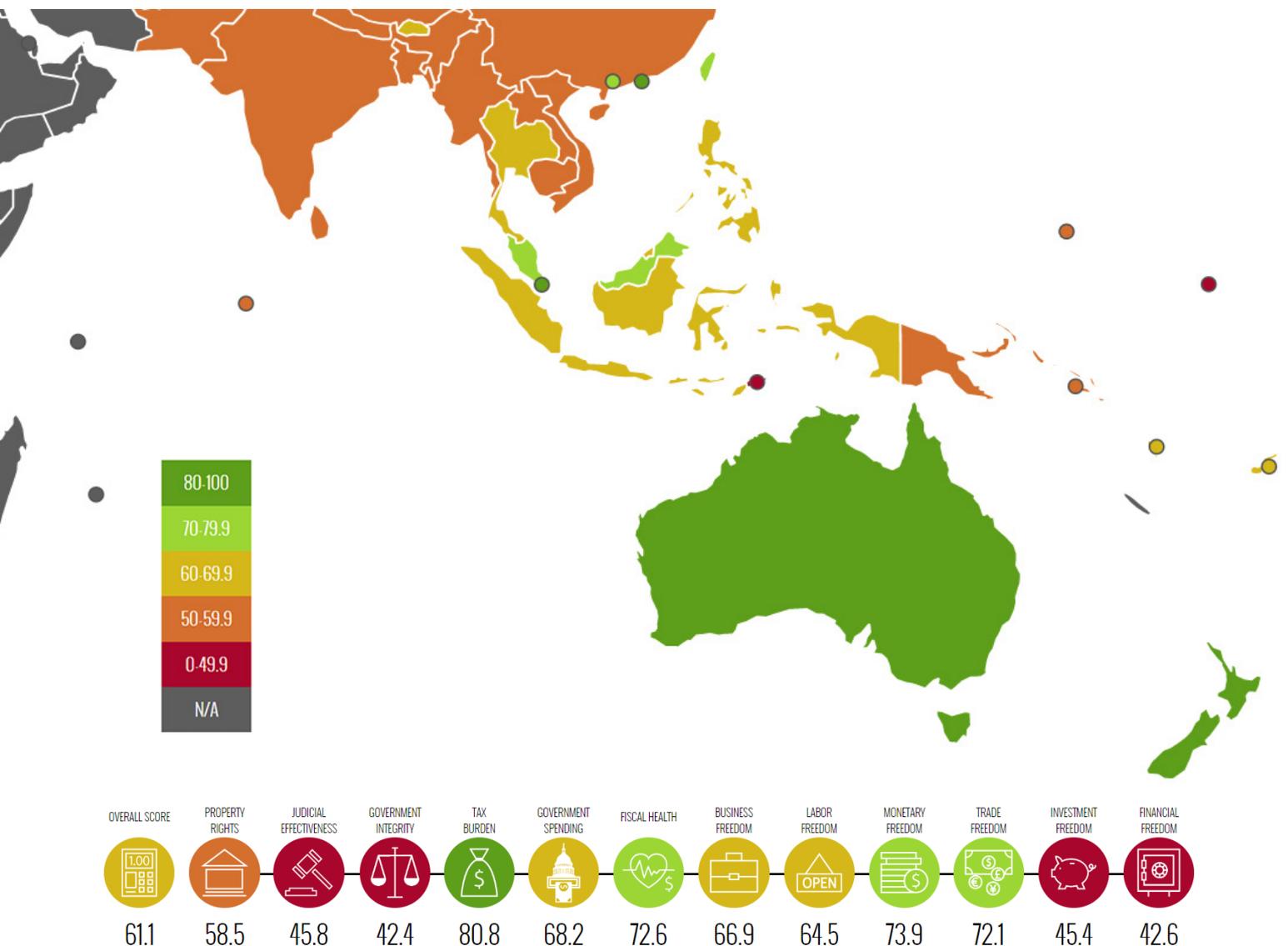


FIGURE 2. 2019 Index of Economic Freedom as measured across the ASEAN Region

Canada and ASEAN Formal Government Dialogue

ASEAN was founded in 1967 and established a formal dialogue with Canada in 1977, establishing cooperation on political and security issues, regional integration, economic interests, inter-faith dialogue, transnational crime and counterterrorism, disaster risk reduction and other areas. This relationship has expanded over the years with the adoption of the Joint Declaration on the ASEAN-Canada Enhanced Partnership in 2009, with the signing of the Canada-ASEAN Joint Declaration on Trade and Investment in 2011 to enhance their economic partnership, and with the appointment of a Canadian Ambassador to the ASEAN region in 2016. Canada has diplomatic representation in all 10 ASEAN member countries.

In 2016, an agreement was reached to explore the potential for a Canada-ASEAN Free Trade Agreement (CAFTA). The projected economic growth from the Government-led feasibility study was conducted that analyzed the priorities of both Canada and the ASEAN region and the potential economic benefits of the CAFTA.¹⁵ As of 2019, the exploratory stages of the Free Trade Agreement have been finalized. Reports and commentaries have been published in support of an ASEAN-Canada FTA citing the various challenges that it can address in relation to enforcement of laws and regulations, protectionism, non-tariff and investment barriers, among others.¹⁶

FIGURE 3. Canada-ASEAN Snapshot



\$4.3 billion (USD)

Canada's exports to ASEAN (2016)



\$12 billion (USD)

ASEAN's exports to Canada (2016)



\$25.1 billion (USD)

value of two-way trade between Canada and ASEAN, its 6th-largest trading partner



\$2.7 billion

Since 2000, Canada has provided this in development assistance to ASEAN and its member states



23,000+ students

from the ASEAN region currently study in Canada



Canada is a transitional member of the APEC Business Travel Card (ABTC) which aims to foster ease of travel within the ASEAN region

Currently, the ASEAN region is Canada's sixth-largest trading partner while Canada is ASEAN's fifteenth-largest trading partner with two-way trade reaching CAD25.1 billion in 2018.¹⁷ The ASEAN region and Canada's trade exchange has increased with an annual average rate of 5.7 percent since 2004.¹⁸ In 2016, ASEAN's merchandise exports to Canada reached USD12 billion while Canada's merchandise exports reached USD4.3 billion.

Barriers to Trade

Earlier publications supported by the CABC have identified and analyzed the opportunities, challenges, and general operating conditions Canadian businesses face in the ASEAN region. The 2019 the CABC report, consistent with previous publications, reported that 92 percent of Canadian businesses surveyed were optimistic about the region's overall profitability.¹⁹ The ASEAN region's considerable growth, the rise of its middle class, national governments' emphasis on infrastructure as well as increasing regional integration, were all identified as major factors contributing to the growing economic interest in the region.²⁰

Canadian businesses operate across the ASEAN region and work in various economic sectors from information technology to manufacturing and construction. The 2016 Canada-ASEAN Business Survey reported that the majority of Canadian firms have plans to further expand their businesses in the region. Subsequently, the 2019 the CABC report indicated that Canadian firms with operations in more than six countries in the region have increased from 10 percent to 20 percent between 2016 and 2019. In 2017, the majority (63 percent) of Canadian firms achieved profitability within 3 years of operations.²¹

Canadian businesses face several challenges in the ASEAN region. Though there are variations across the ten countries, the following were identified by previous the CABC reports as challenges that Canadian businesses face across the region.

FIGURE 4.

Challenges faced by Canadian businesses in the ASEAN region, CABC 2019

HR Obstacles

- Visa applications
- Cost-efficient and reliable labor
- Hiring and retaining local management
- Personal Security

Economic Barriers

- Obtaining financing/capital
- Burdensome local tax structure and tariffs
- Office leasing costs

Policy and Regulation

- Mobility
- Preferential treatment of local firms
- Non-tariff barriers (license regulations and permits)
- Restrictions on foreign investment and ownership

Political and Structural

- Corruption
- Inconsistent application of laws and regulations
- Political change and instability

While there are multiple obstacles in doing business between the ASEAN region and Canada, this project focuses on mobility of businesspeople, which in comparison to other obstacles has not been explored in previous publications. In 2016 the CABC survey reported the issue of visas in relation to the ASEAN region students as a challenge. According to the report, 45 percent of surveyed businesses indicated obtaining a Canadian visa for training or business-related travel as cumbersome.²² As per the report, Vietnam, Myanmar, Thailand, and Indonesia are identified as having particularly burdensome visa processes and labour mobility requirements. Similarly, the 2019 the CABC report identified challenges related to immigration and visa processes between Canada and the ASEAN region mainly in relation to education and internship collaboration between the two trading partners.²³ Challenges in relation to cost, lack of adequate information on the immigration website and lack of direct access to Canadian embassies/high commissioners for inquiry are highlighted as major challenges in the Canadian visa and immigration process.

The ASEAN Region and Regional Intermobility

Established in 1967 by Indonesia, Malaysia, the Philippines, Singapore, and Thailand, ASEAN is a regional organization that promotes cooperation between Southeast Asian countries. Brunei, Cambodia, Laos, Myanmar, and Vietnam joined the organization between 1984 and 1999. The ASEAN grouping aims to facilitate security, economic, socio-cultural and political cooperation among member countries.²⁴

Accelerating market and economic integration is the key driver for the organization. The signing of the initial ASEAN Free Trade Area agreement in 1992, which was followed by several trade agreements including the ASEAN Trade in Goods Agreement (2010), has led to the reduction and near elimination of tariffs among member countries.²⁵ Similarly, ASEAN has negotiated and signed trade agreements including FTAs with other major trading partners including China (2002), India (2003), Japan (2008), Australia and New Zealand (2010). In 2015, the ASEAN Economic Community (AEC) was established to transform ASEAN into a single market regional bloc with free movement of goods, services, investment, skilled labor, as well as capital.²⁶

The mobility of people contributes to increased trade and regional integration. ASEAN, to achieve regional integration and economic development goals, works to coordinate and harmonize member countries' visa and immigration policies to ease travel within and to the region. In 2006, member countries signed the ASEAN Framework Agreement on Visa Exemption to facilitate intra-ASEAN travel.²⁷ By signing this framework, member countries agreed to allow citizens of the ASEAN region to travel within the region for up to 14 days without a visa.²⁸ The agreement provides flexibility in implementation as it allows member countries to increase or reduce the number of visa-exempt days and refuse admission as they see fit.²⁹ Further, member countries can suspend this agreement, if there is a threat to their national security or public health.³⁰ Through the years, this agreement has also been complemented by bilateral agreements to ease travel between member states.

Another key ASEAN policy initiative to improve mobility in the region is the ASEAN Master Plan on Connectivity, adopted first in 2010 and updated in 2015. The vision of the Master Plan on ASEAN Connectivity (MPAC) 2025 is to increase connection seamlessly and comprehensively within ASEAN to “promote competitiveness, inclusiveness, and a greater sense of community.”³¹ The MPAC 2025 has five key focus areas, namely: sustainable infrastructure, digital innovation, seamless logistics, regulatory excellence and people mobility.

In relation to the mobility of people, MPAC 2025 has introduced multiple initiatives to support the ease of travel through adequate provision of travel information and streamlining of member countries visa application processes, among other initiatives. MPAC 2025 has an objective to standardize e-visa applications for member countries that have e-visas. International best practices on e-visas are sought/used to develop and provide a step-by-step approach to guide ASEAN member countries transition to e-visas. Currently, Singapore, Vietnam, Indonesia, Cambodia, Thailand, Malaysia, Myanmar and Laos provide e-visas.

From the infrastructure side, current objectives to combat low intra-regional mobility include the development of aviation, road, rail and maritime infrastructure.³² Though it's unclear as to how some of the policy actions in the Master Plan are being implemented in terms of scope and time, the existing policy frameworks and the signs of progress that have been witnessed over the years are indications that the ASEAN region is making efforts to improve intra-ASEAN mobility.

Bilateral vs. Multilateral Relations

Immigration and visa policies are primarily national issues that are decided and processed by individual countries as per their internal policies and regulations. ASEAN as a regional organization has a mandate to facilitate regional integration and promote its economic development and security. As the movement of people is one of the key components of regional integration, the ASEAN region works to coordinate and harmonize ASEAN countries' visa and immigration policies, both among member states and third countries. Accordingly, to ease non-ASEAN travel to the region, the ASEAN Tourism Strategic Plan for 2011-2015 formally initiated the process to explore and advocate for a single ASEAN visa and sub-regional visas.³³ Through the single visa system, the ASEAN region aims to boost overall economic activity in the region particularly in the tourism sector. Using an online platform, the visa will allow travelers to enter all countries in the region with a single visa. The eligibility criteria, including eligible countries as well as the types of visas included, are not made public yet.³⁴

For the Canadian government to approach policy-making with the ASEAN region, there are many considerations to be made, but the most important is often which approach to take, a bilateral or multilateral approach. ASEAN as a regional organization has created a mandate to facilitate regional integration and promote its economic development and security. As the ASEAN region looks to harmonize visa processes, the question will be, should Canada explore a multilateral visa policy with the ASEAN region, or should it continue to create visa policies bilaterally.³⁵



SECTION V

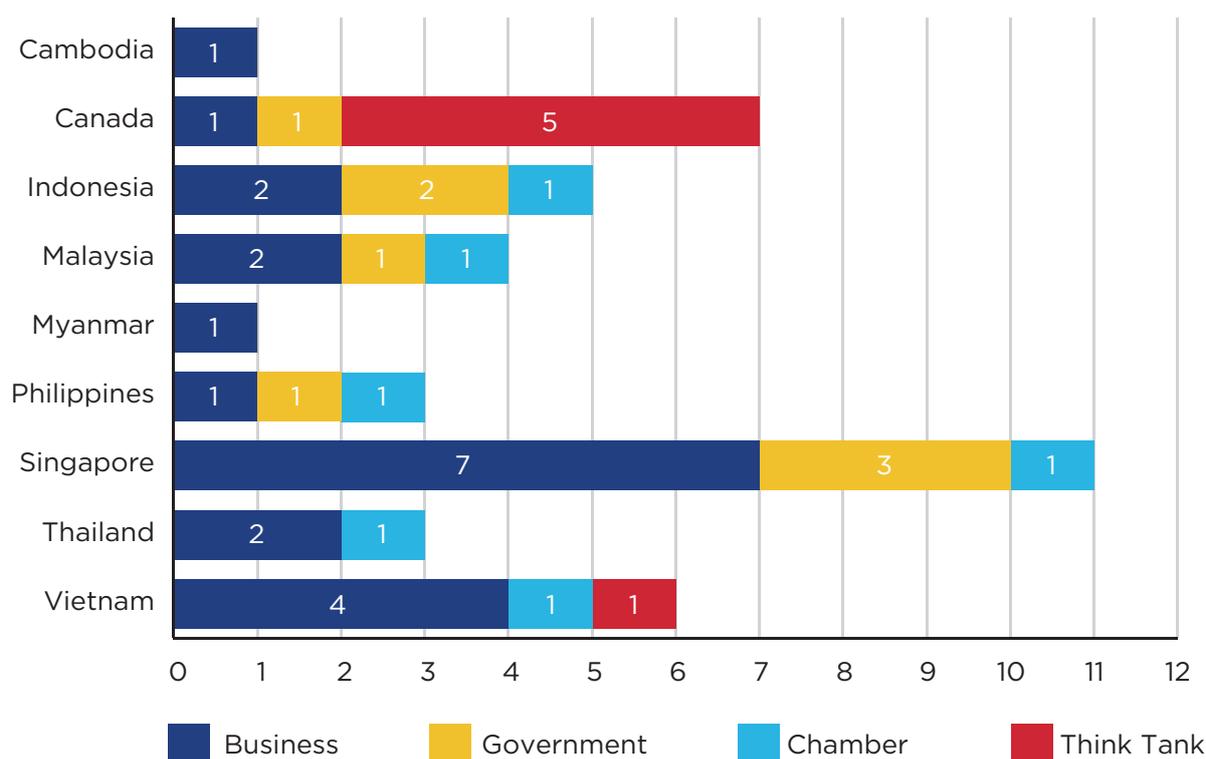
Data Presentation and Analysis

THE FOLLOWING SECTION PROVIDES AN OVERVIEW of the participants that were interviewed for this report, drawing particular attention to the economic sector they belong to, their size, and their country of operation. Following this overview, the section delves into the importance of the ASEAN region for Canadian businesses and the importance of travel to ASEAN-Canada trade relations. A detailed presentation of the different visa processes and regulations of each of the 10 ASEAN member countries and Canada, as well as the particular mobility-related challenges they encounter, is provided in this section.

Overview of Participants

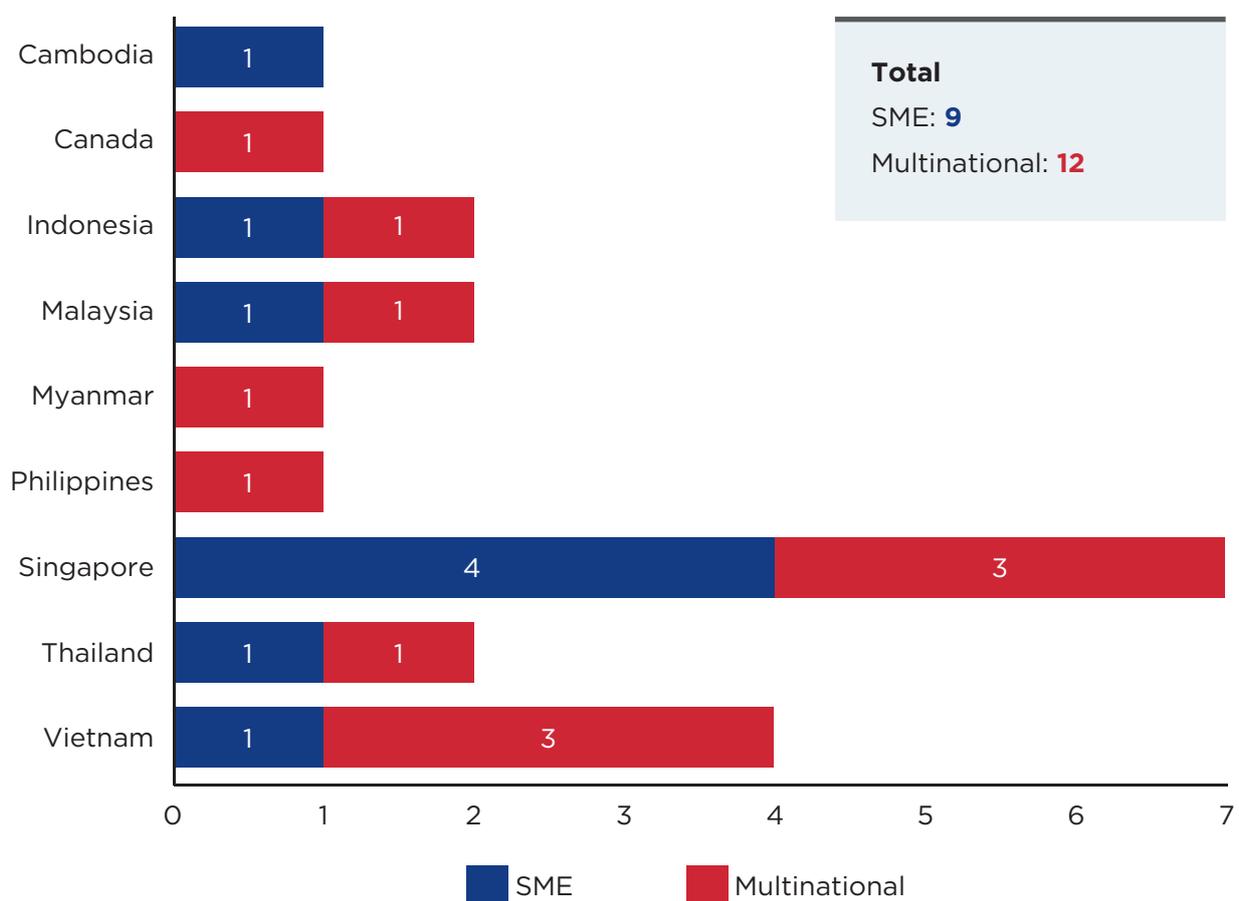
The UBC research team interviewed a total of 41 participants, including 21 businesses, 8 government representatives, 6 Canadian Chambers of Commerce, and 6 think tanks (as shown in Figure 5 below).

FIGURE 5. Breakdown of participants by country and type



As illustrated by Figure 6 below, the 21 businesses varied in size, from large enterprises (more than 250 employees) to SMEs (less than 250 employees). Majority of the businesses were SMEs, while some were well-established large-sized businesses. Most of the large enterprises did not experience any issues with visa mobility when it came to their executives. However, employee transfers were still somewhat problematic depending on the selected employee, their education level and the purpose of the travel. It is important to note that large enterprises tend to have dedicated team members that deal with visa applications, which alleviates the difficulty that the visa application process usually presents. On the contrary, SMEs tend to have less resources available. Thus, while the rules are the same for all, the capacity of the latter group to deal with the process puts SMEs at a disadvantage.

FIGURE 6. Breakdown of Businesses interviewed by Country and Size



Almost all of the government officials interviewed, who varied from provincial representatives and trade commissioners, as well as think tanks were aware of the difficulties that SMEs face in regard to establishing their businesses. These difficulties are often tenfold when establishing a business in a foreign country. Consequently, it is very apparent that SMEs experience greater difficulties when applying for visas for their employees to enter Canada or for representatives getting work permits in ASEAN countries.

During an interview with DFDL, a law firm that specializes in a variety of sectors including tax and investment in South and Southeast Asia, Managing Partner, Martin Desautels noted that for SMEs it is most certainly a challenge to obtain visas and work permits for their employees. DFDL provides visa consultancy services for businesses, but for SMEs to hire DFDL or other consultants to prepare their visa applications would be costly. Even for larger companies, it is an incurring cost. Thus, based on findings, SMEs experience disproportionate difficulties in obtaining visas and navigating visa processes. It was also noted by multiple interviewees that the difficulty of visa attainment is heavily associated with the economic sector of the SMEs, such as the manufacturing sector (see Visa Processes and Regulations below).

SMEs, as drivers of the economy, are a high priority area for the Canadian Government, however, more work remains to provide meaningful support to access and succeed in the ASEAN market. The government has been working to engage SMEs and provide support through Trade Commissioner Services (TCS), diplomatic missions and other government departments such as Export Development Canada (EDC). For example, initiatives such as the CTA aim to support SMEs with an existing technology, product or service exploring opportunities in foreign markets.

“One of the biggest problems is programs and opportunities are not effectively communicated.”

— Shawn Watson, CEO Senescence Life Sciences

The interviews indicate that the problems SMEs face are different from those faced by large enterprises. This fact will be further discussed and analyzed throughout the report, but it is worth emphasizing that the diversity of the business and stakeholders interviewed by the UBC team has reinforced this. The emphasis on the unique challenges that SMEs face was mentioned in the majority, if not all, of the interviews conducted. While statistical figures are not available in regards to the percentage of SMEs in the ASEAN region, it is important to note that in Canada 97.9% of businesses are small-sized, and 1.9% are medium-sized.³⁶ As noted by most interviewees, SMEs are the backbone of the Canadian economy and, as such, their experiences and challenges must be addressed and tackled.

Importance of the ASEAN Region for Canadian Businesses

For Canadian businesses, Southeast Asia is an emerging market with untapped potential in comparison to the US and European markets, with which Canada has held strong economic ties for many years. Canadian Government officials in the ASEAN region believe that this is due to multiple factors. The first is a lack of education on the different opportunities that the ASEAN region has to offer. Secondly, the geographical distance between Canada and the ASEAN region can be problematic. Lastly, cultural differences can present a barrier for a deep economic relationship between Canada and the ASEAN region. However, due to current tensions in the international market and global governance uncertainties, there is a growing interest amongst Canadians to participate in the ASEAN market. This growing interest reflects an increasing change of attitudes towards the diversification of Canada's economy. However, the BC government's representative in Singapore explained that Canadian companies who wish to enter the region need to choose how much risk they are willing to take, but Canadian businesses who are interested in the region, tend to be risk averse.

The region presents extensive potential for Canadian businesses. Firstly, Singapore, Malaysia and Thailand rank higher than Canada in terms of ease of doing business. The World Bank (2019) ranked Singapore second, Malaysia twelfth and Thailand twenty-first out of 190 countries while Canada ranked twenty-third.³⁷ Secondly, according to Canadian businesses, there has been a general realization that they need to become more cognizant of the opportunities Southeast Asia presents; particularly by younger managers and entrepreneurs who take a more proactive role in starting businesses in new regions. They understand that the cost-advantage of doing business in the ASEAN region is the key. Lastly, as previously mentioned, the growing tensions between the

US and China, and the change in posture by the Chinese Government is generating instability in the market and, with time, it is forecasted that more businesses will move their production out of China and explore neighbouring countries.

The 2019 Canada-ASEAN Business Outlook Survey shows that there remains widespread optimism among businesses towards the future of the region, as well as strong support for a free trade agreement. The survey reveals that the optimism towards the future of the Canada-ASEAN partnership is tied to the successful experience and strong profitability of Canadian businesses already operating throughout the region. When interviewed, most Canadian businesses working in the region agreed that there is a relatively positive perception of Canadians in the market, which promotes their presence in the region. However, their presence requires the establishment of local partnerships, as reliable partners are essential (and in many ASEAN countries, mandatory) to doing business due to local investment regulations, which will be elaborated further on.

Many businesses hinge hopes on economic growth through stronger trade ties with the ASEAN region, which are difficult to establish due to the diversity of the region. While the establishment of a free trade agreement between Canada and the ASEAN region would support economic growth, a multilateral deal poses the challenge of securing bilateral trade deals with all 10 ASEAN member countries. The Government of Canada and the ASEAN member states launched exploratory discussion on the possible Canada-ASEAN FTA (CAFTA) in 2017, followed by public consultations in 2018.³⁸ The joint feasibility study highlights the benefits of a deeper integration, looking beyond tariff elimination, and aiming to increase investments and trade facilitation services. However, the next steps remain unclear, except the realization of the need to create a comprehensive FTA between both the trading partners.³⁹ A series of challenges exist in terms of establishing and enforcing common laws and regulations, which would be better addressed if businesses had a greater understanding of the possible benefits of such treaties. For example, under the current Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) agreement, most Canadian businesses are unaware of how the arrangement impacts their business directly. Many businesses do not know of the existence of the agreement itself, which shows an existing knowledge gap.

To put this into perspective, Singapore and Malaysia provide concrete examples of the strategic significance of their geographical locations. For Canadian businesses working in the ASEAN region, Singapore represents the hub of trade, finances and investment. According to the majority of businesses, Singapore is usually the first stop for Canadian businesses,

particularly from the services sector since it is positioned at the centre of the region, with strong physical infrastructure, high ease of mobility, visa free access, minimum language barriers and provisions of a safe and secure environment.

Singapore is the smallest country in the ASEAN region, with very few natural resources. It is dependent on other countries for 90% of its food supplies which are imported mostly from neighboring countries, such as Thailand and Indonesia.⁴⁰ However, the country attracts global investment through a business friendly-regulatory environment for local and foreign companies, and is ranked as the one of the world's most competitive economies.⁴¹ Singapore, as a growing economy with new industries and sophisticated systems, generates demand for foreign skilled workers, as the local citizens alone cannot meet the high labor demand. Expatriates coming to Singapore add to the vibrancy of the country by bringing in new skills and expertise and complement the local workforce. The Singaporean government has identified 23 sectors of focus that require particularly skilled foreigners.⁴² As noted by one of the interviews, the country also offers a lot of opportunities in the clean technology sector, which is a sector of interest for Canada, especially in the province of British Columbia. Many Canadian start-ups come to Singapore to raise funds while keeping their Initial Public Offerings (IPOs) in Canada. The Singaporean government also offers grants and financial support, which makes starting a business much easier.

As another example, many Canadian businesses interviewed have favourable views towards Malaysia for long-term business growth. It is ideal for new businesses due to its tech friendly business environment and foreign investment policies, such as zero personal tax, corporate tax, and a 10-year withholding tax exemption. Its geographical location next to Singapore also gives it a strategic position for Canadian businesses, as it is comparatively cheaper in terms of labour and cost of doing business. Its visa immigration process is also significantly easier than in other ASEAN countries, as will be further elaborated on (see Visa Processes and Regulations below).

Ultimately, it is important to note that economic and trade diversification is high on the agenda of the Canadian Government, and the ASEAN market presents a unique opportunity for diversifying from traditional markets.

Importance of Travel

Technological advancement and digital communications have not been able to replace or overcome the necessity of international travel, which remains as an important component of global business relationships. According to a 2018 report by Trip Actions, more than 90 percent of surveyed global businesses indicated that face to face meetings are still the primary forms of communication to establish and maintain business relationships.⁴³ However, the movement of businesspeople is hampered by various factors including visa access. Visa access and immigration decisions are centred on national security, economic, health and labor market assessments, and many other factors, which can make it difficult for countries to strike a balance between these concerns.⁴⁴ Due to these and similar factors, visa and immigration policies are often difficult to reform in a short time period and requires significant national effort as well as bilateral and multilateral cooperation to reform and ease visa processes. Trade and tourism are among the key reasons that countries increasingly consider as reasons to easing visa processes and related travel requirements.

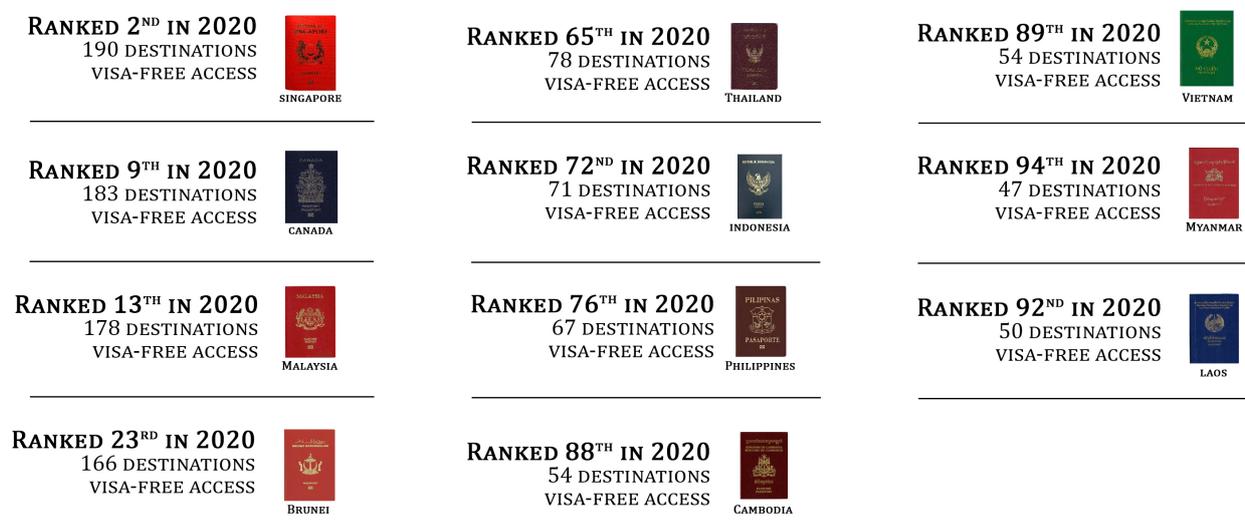


FIGURE 7. Global Passport Ranking 2020

The ASEAN region is gaining momentum and recognition steadily across the globe, as trading with the bloc shows promising to many. For any foreign business to establish itself in the region, it is highly recommended that they have a local presence or strong personal relationships on the ground. The connections and work needed to establish a business cannot be done virtually, rather it requires constant personal interaction. For example, the Country Director of Hatch Indonesia, a Canadian engineering company with headquarters in Vancouver, explained that it took the company about two to three years to finalize its first contract in Indonesia. The company mostly works through a tender process and could not compete against local and international businesses that were already established locally. They had to develop their local presence to establish the necessary connections and understand the market and how competition worked in the local context. With the company's executives traveling almost every week between Jakarta and Vancouver, they currently do not have any expatriates working in Indonesia. It is cheaper and more effective for the company to have employees commute for client meetings and work on technical designs remotely.

Canadian business reported that Canadian penetration within the ASEAN market remains low in comparison to the US, Australia, or other global markets. In the Indonesian example, while the country has worked towards connecting with diaspora communities, it struggles to integrate expatriates into the system, and maintains a very stringent policy towards hiring foreign workers in comparison to other ASEAN countries.⁴⁵ Canadian businesses working in Indonesia, including Hatch, express that expatriates face a number of travel-related challenges such as the difficulty of the immigration process which tends to be complicated, vague, and adds to the cost of bringing foreigners.

Travel is essential for most executives as is demonstrated by CEO Shawn Watson and his team at Senescence Life Sciences, in Singapore. The nature of their business requires him and other members of his team to travel within the ASEAN region, and to Canada and the US to promote and educate doctors, pharmacists, health professionals, and other potential clients about their products to potential clients. Most trips are short, about 3 days, but very frequent. Travel is necessary for the expansion of his business and ensures the production line remains efficient. He also noted that Canadian products are generally very well trusted in the ASEAN region, however, to negotiate and finalize contracts, physical presence of the business is very important. Business owners of SMEs, and entrepreneurs, like Shawn Watson, find there is a need for them to travel more frequently in order to build themselves a clientele in the



market, establish their name and create loyalty and trust for continued business. The Southeast Asian culture, as indicated by Canadian businesses established in the market, is built on person-to-person relations, which requires individuals to be present in order to build trust before any deal or contract can be finalized. Canadian businesses find this a significant difference from doing business in Europe or the US. Hence constant travel is essential to initiate and materialize business relations within the region.

Importance of travel varies across different economic sectors. IT companies such as Bluzelle, which operate out of Singapore, find working across the globe convenient, and do not feel the need to travel since virtual interaction is sufficient for their business needs. However, the majority of businesses in the manufacturing sector stress the significance of travel and especially travel undertaken by their technical staff, engineers and sales/business development teams. This usually involves short-term travel, which would require a business visa, however, longer travel often entails project work and working on engineering sites. Some businesses require frequent travel by their technical staff between Canada and their manufacturing sites in the ASEAN region for training, maintenance and in response to urgent requests to repair machinery. Organizations like Dan-D-Pak Foods, based in Vietnam, have only one technical staff member who constantly travels between plant sites in Canada and Vietnam for machinery repair and maintenance, as no other employee has been able to get a Canadian visa. Mobility, especially for technical staff and skilled labour is an issue for the company; however, it is not a challenge for the senior management and executive team members.

Businesspeople who travel to the ASEAN region multiple times a year quickly exhaust their passport pages with visas, which leads them to renew their passports multiple times a year. This was more frequently observed for businesses in tertiary markets, which require constant movement of their employees, such as insurance companies, immigration consultants, and investment brokers, to name a few. This process can often prove to be costly and time consuming.

Moreover, multinational organizations believe in the importance of building capacity for their staff. They understand that transferring employees from one country to another can be helpful for developing leadership in the company by giving them the opportunity to gain different perspectives and skills. It promotes skill transfer from the developed countries to the developing countries and vice versa. For example, a multinational organization in Singapore expressed that knowledge transfer through mobility helps Canadian employees gain exposure, and benefits employees from the ASEAN region learn from the best global practices.

Business related travel between the ASEAN region and Canada is not confined to short-term travels. As the Canadian government has policies to allow skilled workers to permanently settle in Canada, a few businesses do provide opportunities for their employees to permanently transfer to positions based in Canada. For example, Poeta Digital, a global product development agency based in Calgary, with offices in Seattle and Ho Chi Minh city, takes the extra step of assisting its employees throughout the immigration process. They have a defined transition plan through which high performing workers who are interested in relocating, send their application to the company which then works on their immigration process and prepares them for the move. English tutoring is provided to them and the entire immigration paperwork is filed for them. Once an employee successfully lands in Canada, the company continues to support them with accommodation during their initial adjustment period. Thus far, Poeta has successfully relocated two employees from their office in Vietnam to Canada while another three are undergoing the application process.

TABLE 1 Case study No. 1
The Importance of Travel – Xpansionize



YEAR FOUNDED

2017

SECTOR

Business consultancy

NUMBER OF EMPLOYEES

20 full-time staff and a pool of 30 consultants

COUNTRIES OF OPERATION

Canada and Malaysia

Business Overview

Xpansionize launched in 2017 as a consulting firm that offers skilled and technical assistance to clients on global business opportunities. It offers business development consulting, coaching, and support services for business expansion strategies. Xpansionize operates through two main approaches; the first is by offering consulting services to Canadian companies who are expanding or moving into ASEAN. Secondly, they bring clients and potential investors from ASEAN into Canada.

How does mobility impact the business?

As a Canadian citizen, partner Neil Williams does not experience direct challenges to travelling, however, the challenging aspects of travel emerge when potential investors from ASEAN attempt to travel to Canada to visualize and pursue investment opportunities. In this context, visa issues create lengthy and unnecessary hurdles for those with the resources to invest, which leads them to turn their attention and funds elsewhere. Xpansionize estimates that approximately 50% of their clients who desire to come to Canada have had their visa applications denied due to ‘non-administrative reasons’. Xpansionize recognizes the difficulty that exists in attaining visas for clients and ensures that all applications they put forth for their clients include all required paperwork and support letters necessary to prevent any possible delays. Neil Williams himself has identified the difficulties, which face the mobility of businesspeople as the biggest issue facing his company and is hopeful that a potential trade agreement could possibly mitigate these challenges.

Mobility: Visa Processes, Regulations and Challenges

Businesses across Canada and the ASEAN region may perceive mobility as a challenge depending on multiple factors, including the size of their business, their economic sector, and their country of operation. The bilateral relationship that a businesses' country has with Canada, is extremely important and consists of multiple layers such as the strength of their economic ties, the country's political stability, possible security challenges or lack thereof, and the level of complexity to operate on ground in accordance with governmental policies and regulations.

Majority of interviewed Canadian businesses operating in the ASEAN region, acknowledge that mobility across Canada and the ASEAN region is a challenge for their businesses, but it is not the biggest barrier for their growth. Many other factors contribute to challenges that they face, however mobility is not a priority of their concern.

Businesses expressed their frustration towards the Canadian visa or permit application process, particularly towards the lack of explicit reasons for rejection. If an application is rejected, the candidate remains unsure about the requirements and is unaware about how to proceed differently when re-applying to ensure a successful application. Nationals of ASEAN states feel that Canadian laws and processes are not reciprocal to that what ASEAN countries offer, which are seen to facilitate the ease of movement and travel access across the region. Individuals across the ASEAN region find visa constraints to vary across nationalities, making the process more challenging for some more than others. (e.g. Filipino nationals, Indian nationals, etc.).

Visa applications are not evaluated based on a company's credentials but rather rely on the screening of the individual employee who is planning to travel. Overall, it is more likely that visa applications of technicians or technical staff and trainees get rejected than those of executive members or the managerial staff, who have stronger bank statements and travel history to secure their return to their country of origin, which is fundamental for all visa applications. As previously noted, larger companies have the resources to hire dedicated staff to manage visa and immigration processes; however, smaller companies often cannot afford to hire such a team to process applications.

ASEAN businesses have also expressed that long processing times are a hassle. The application to obtain a Canadian visa and/or work permit can take up to three months, which requires pre-planning, including forfeiting one's passport for a lengthy period. Most businesspeople cannot afford to let go of their passports, as that would limit their travel, even within the

ASEAN region. Businesses also compare the Canadian system and visa procedures with Australia (see [Australia/New Zealand under section VII](#)), which has Electronic Travel Authority (ETA), an electronic visa process, that is electronically linked to one's passport.⁴⁶ It is applicable for short-term stays; tourism or business visits such as attending a conference, meetings; or for any other reasons. Canadian businesses state that the process has increased not only the mobility between Australia and the region, but it has also helped them in terms of business transactions. However, currently the ETA facility is utilized by a few countries, including Canada, and (in ASEAN) Malaysia, Brunei and Singapore.

A representative for a Canadian multinational corporation in Indonesia, who prefers to maintain anonymity, mentioned that their company has been operating in Indonesia for 20 years and has thousands of employees hired worldwide, many of whom need to constantly travel for multiple reasons, including training. Sending individuals to Canada, especially to work, is a difficult process. The business revealed that:

“Although the employees we send to Canada are highly experienced and [have] strong ties to the country, the rejection of their application to go to Canada is often based on claims such as the lack of strong links with the country of origin. This is problematic as we provide a support letter to show their ties with the organization and their employment status, however, that is not found to be sufficient.”



Following are details of visa regulations and mobility challenges faced by the ASEAN countries and Canada in relation to business movement:

Visa Regulations and Mobility Challenges by Country		
	Indonesia	34
	Malaysia	39
	The Philippines	40
	Singapore	40
	Vietnam	42
	Thailand	43
	Brunei	44
	Myanmar	44
	Cambodia	44
	Laos	45
	Canada	46

Indonesia

Regulations in Indonesia differ greatly across regional governments and the Central Government. The country has 34 provinces, which are further divided into 400 regencies, all of which have their own local government procedures and act as key administrative units providing services in accordance to their internal policies and regulations. Indonesian businesses, however, feel that things have been swiftly changing for the last 5 years. The government is focusing on harmonizing all policies under the Central Government, so they remain consistent across all regions. Currently all regencies make their own mobility laws. Businesses feel that once policies, such as visa regulations are placed under the Central Government, issues regarding mobility and travel to Indonesia would improve.



Due to the complex governance structure of Indonesia, the process to obtain business visas and work permits is also complicated. If a Canadian is entering Indonesia for a meeting, then a VOA (Visa on Arrival) is available; otherwise, if the intention of the trip is to stay over a week or a site visit, then a business visa is required before arrival. As part of the application, the individual travelling needs to include all the different regions in the country that he or she is planning to visit as part of their trip. Foreigners also require a visa to visit mining and other natural resource sites, as the Government of Indonesia regards these sites as special assets of the country.

While an Indonesian business visa is granted to individuals who wish to attend seminars, conferences, or unpaid training, an Indonesian work permit is granted to individuals who wish to work in exchange of a wage and/or other forms of salary compensation. If visiting a work site such as a factory or a mining operation, individuals are not allowed to touch or use any equipment/machinery under a business visa as doing so would require a work permit. Expatriate hiring in Indonesia is managed through the following process:⁴⁷

TABLE 2. Employment of Foreigners in Indonesia

Stage/Process	Explanation
<p>Expatriate Placement Plan</p> <p><i>RPTKA (Rencana Penempatan Tenaga Kerja Asing)</i></p>	<p>The company hiring an expatriate(s) needs to have its expatriate placement plan approved from the government a year in advance of the intended hiring.</p>
<p>Expatriate Work Permit</p> <p><i>IMTA (Izin Mempekerjakan Tenaga Kerja Asing)</i></p>	<p>After RPTKA is approved, the company applies for IMTA, with the expatriate's documents, to the Ministry of Manpower, in partnership with a local partner (if foreign company). A letter of recommendation is requested from the regional government, the Head of Regency Officer, who then authorize the expat to work locally. The letter states the project and the work site. Government issues IMTA to the expatriate, which is the official work permit. Maximum duration 1 year.</p>
<p>VITAS</p> <p><i>Visa Tinggal Terbatas</i></p>	<p>IMTA is converted to VITAS as a limited stay permit visa.</p>
<p>KITAS</p> <p><i>Kartu Izin Tinggal Terbatas</i></p>	<p>VITAS is replaced by KITAS upon the arrival of the expatriate in Indonesia, which is limited stay permit card. Permits allow stay up to maximum 2 years.</p>
<p>KITAP</p> <p><i>Kartu Izin Tinggal Tetap</i></p>	<p>After two consecutive years of living in Indonesia on a KITAS, a temporary permit can be converted into a permanent stay permit card. KITAP is valid for 5 years.</p>

The validity of work permits in Indonesia range from one month to twelve months depending on the type of industry. Different work permits with their respective validity are as follows:

- **Urgent or Emergency Work Permit.** Validity of 1 month. Urgent jobs and jobs that need immediate action. This permit is allowed in order to prevent any detrimental consequences to the business.
- **Temporary Work Permit.** Validity of 2 to 6 months, a temporary work permit is applicable for foreigners in sectors such as trading, services, and consulting. It also applies to foreign workers or laborers in sectors such as maintenance and installation of machinery.
- **Long Term Work Permit.** Valid for 7 to 12 months for expats at higher management level such as managers, directors, and commissioners.

In our research, businesses express that renewing KITAS is challenging as the process requires expats to leave the country. Expatriates usually hire an agent to process the KITAS application and have to bear the costs associated with leaving the country and the stay in a foreign country, until the permit is renewed

Moreover, RPTKA needs to be in place a year in advance as all positions to be filled by expatriates need to receive approval from the government in advance, to show that local expertise is not available and thus the need of a foreigner is justified for the post. For expatriates a work permit needs to be renewed if the company expands to more regions than what is currently approved. Businesses are also charged USD 1,200 annually, for every expatriate that they hire, by the Skill and Development Fund.⁴⁸ This fund is maintained by the Central Government to use towards training Indonesians on the positions that expats are occupying. Expatriates are also not eligible to work and obtain a work permit for the following departments: Human Resources, Quality Control and Inspection, Legal Entity, Supply Chain Management and Health, Safety, and Environmental Affairs.

Headhunting companies sometimes become outsourcing companies that pre-apply to the government on behalf of the business that requires foreign workers for a specific post. The business would then use the headhunter's Expatriate Placement Plan and hire expatriates through them instead of going through the entire process themselves. This becomes an added, unnecessary cost to the business.

“If we are hiring an expat next year, then we need to start planning for it this year and include it in the business plan.”

— Mr. Suyanto Mahdiputra, the Country Director of Hatch.

Hatch, a Canadian engineering consulting firm, always has approximately 10 to 12 expatriates approved on the expatriate plan for their Jakarta office. According to the government’s regulations, for each expatriate working at any company, nine locals must be hired to balance the local-foreigner ratio in a way that benefits national development. The government quota applies to all businesses as per the one-year plan negotiated through the company’s HR team (as noted in [table 2](#)).

Accounting for all the requirements and costs to hire expatriates in Indonesia, smaller businesses face greater challenges hiring expatriates than larger corporations. Foreigners need to have a temporary work permit processed, in order to move between a company’s global office into Indonesian office. Businesses also find it difficult to navigate government websites, complicated regulations, long processing times, and lengthy paperwork. They also express that the policy fluctuations and uncertainty have not only reduced the number of foreigners in Indonesia, but it has also caused a decline in foreign direct investment (FDI).

Businesses also state that those who have direct connections with the local government or the Canadian government (mostly larger corporations), face less mobility challenges. Many individuals enter Indonesia on a tourist visa since the 30-day visa free access allows them to enter the country to attend work-related events such as meetings and conferences. A representative of PT Hatfield, an environmental consultancy firm working in Jakarta with headquarters in Vancouver, explains that many individuals who come to visit or work in Indonesia never stay beyond the 30-day limit, as they have families waiting for them back in Canada and simply do not want to overstay.

TABLE 3 Case Study No. 2

National vs. Regional Regulations in Indonesia - Hatch

YEAR FOUNDED	SECTOR
1955	Engineering consultancy
NUMBER OF EMPLOYEES	COUNTRIES OF OPERATION
25 in Indonesia; over 9,000 globally	Australia, Brazil, Canada (headquarters), Chile, China, Colombia, India, Indonesia, Oman, Peru, Russia, Saudi Arabia, South Africa, United Arab Emirates, United Kingdom, and the United States

Business Overview

Hatch is the largest Canadian private engineering company in Indonesia. It is an employee-owned firm that provides engineering, project design and management, and operations consultancy service in the mining and metals, energy, and infrastructure sectors. Hatch has expertise in providing services in more than 150 countries.

How does mobility impact the business?

Regional and global travel is important for the operation of Hatch. Suyanto Mahdiputra, Hatch’s Indonesia Country Director, travels almost weekly within the region and beyond. Short-term travel of employees between Indonesia and Canada is not a challenge for Hatch. However, bringing in Canadians to work in Indonesia for a longer period especially at the mining and smelting plant operations under a work permit called KITAS is been a lengthy and complex process.

Although the work permit requirements and processing for foreign worker visas are centralized at the national level, one would need to secure a recommendation and authorization from the local government in which a foreign worker will be working at before it can be processed at the central government, namely the Ministry of Manpower. The challenge is that each of the 428 local governments/regencies has a certain degree of political autonomy that can vary between regencies. Securing a work permit could take up to three months in certain regions. For a company like Hatch, who has operations in different regions in the country, relocating Canadian employees from one work site to another requires securing authorization from each local authority. Additionally, Indonesian law requires companies

who hire foreign nationals to submit a prior approval of its Manpower Plan, typically one year in advance, describing the expertise requirement and the number of foreign nationals that the company plans to mobilize to Indonesia. Due to the nature of project-based works that Hatch is servicing, it faces a challenge to be able to present its manpower planning a year in advance. It has made bringing in foreign employees costly for Hatch and sometimes would require assistance from headhunting companies to hire foreign nationals.

“Hatch is a global and agile company, where we as an organization are used to tackling challenges and adapt successfully into the local customs of working in every region.”

— Suyanto Mahdiputra, Indonesia Country Director

Malaysia

In Malaysia, Canadian businesspersons can obtain a Social Visit Pass (SVP), allowing a stay for up to 90 days. The government rarely allows extensions to the SVP visa, which would require strong justification, such as inability to travel out of Malaysia or a serious illness. Expatriates working in Malaysia are mostly issued the Professional Visit Pass (PVP), valid for 12 months for technical staff; and the Employment Pass (EP), valid for up to 5 years. A business which plans to hire expatriates needs to apply for an Expatriate Post from the Expatriate Committee (EC) or the Quota Approval, through the Expatriate Service Division (ESD) and file applications with the Malaysian Expatriate Talent Service Centre (MYXpats Centre).⁴⁹



TalentCorp, a national agency driving Malaysia’s talent strategy towards becoming a dynamic capacity-building hub, enables expats from key sectors to enter the country through a 10-year work visa.⁵⁰ Through this agency expatriates are not restricted to the company that brought them in, rather they have the flexibility to work for other companies. If a foreigner is unemployed at any point during the 10 years, but continues job hunting, the visa does not expire. The visa also enables individuals to bring in their families.

The Philippines

Canadian businesspersons traveling to the Philippines do not require a visa and can stay for up to 30 days. However, expatriates need to apply for an Alien Employment Permit (AEP), a legal document from the Philippines Department of Labour and Employment, which allows foreign nationals to work in the country. The AEP is valid for a year and is applied by the company the individual is planning to work for. The idea of the permit is to prove to the government that the work the expatriate is doing is not through replacing a local resident but is due to lack of domestic expertise. Expatriates often enter the country on a visitor visa, after which the business applies for a work permit from the government.



To hire an expatriate, the local business is required to sponsor the foreign national's work permit application, known as the Special Work Permit (SWP), issued for up to 6 months of stay (for short stays),⁵¹ and the 9(G) visa or the Pre-arranged Employment Visa for periods of stays more than a year (extendable annually for up to 3 years).

The Philippines is a labour exporting country, wherein one in ten Filipinos live abroad (about 10 million Filipinos, spanning over 170 countries)⁵² and each year more than 1 million citizens travel abroad to find work.⁵³ The Philippines government requires every Filipino seeking to work overseas to obtain an Overseas Employment Certificate (OEC). The OEC verifies a Filipino's status as a legal overseas worker. It provides a sense of protection of their rights while they are working abroad.

Singapore

Singapore issues employment passes to expatriates as work permits, which are valid for up to two years. Once issued, expatriates can apply for a dependent pass for their family and eventually for Permanent Residency (PR), which takes an average processing time of six months and is valid for five years. There are a number of different types of visas offered by the Singaporean government, which are clearly stated on the Ministry of Manpower's website, and include:



- **Employment Pass:** For foreign professionals, managers and executives.
- **EntrePass:** For eligible foreign entrepreneurs wanting to start and operate a new business in Singapore.
- **Personalized Employment Pass:** For high-earning existing Employment Pass holders or overseas foreign professionals.

- **S-Pass:** For mid-level skilled staff. For semi-skilled foreign workers in the construction, manufacturing, marine shipyard, process or services sector.⁵⁴

Holding incorrect visas can cost individuals/companies large fines, up to SGD 30,000 and even imprisonment.⁵⁵

Canadian businesses expressed that the number of expatriates is decreasing in Singapore due to the government's drive to hire locals. Singapore, similar to Canada's Labour Market Impact Assessment (LMIA) policy, has a Singapore-First Policy, which states that in order to employ a foreigner the company must first ensure that no local can take on that particular post. This policy is managed by the Ministry of Manpower. The only exception to this quota is for senior members of larger multinational organizations. The Ministry of Manpower also provides an online system for calculating work permit quotas and the number of S-Pass holders a business can hire depending on the sector and the local knowledge and expertise available.⁵⁶ Although both Canada and Singapore impose similar employment restrictions, Canada does not limit the number of work permits that can be issued to a company. Some businesses have theorized that the reason why Singapore limits the number of work permits is due to the small size of the country.

Interviewees in Singapore expressed that mobility is not the biggest challenge for the majority of the businesses operating in the country, as they can communicate easily and travel freely while working out of Singapore. They also expressed that about 10 years ago, mobility might have been a challenge to doing business in Singapore, but nowadays technology permits interface communication, reducing the need for person-to-person interaction, especially for businesses in high-tech industries. Most businesspeople surveyed feel that traveling once a year was enough to check on their businesses and upkeep relationships with clients. While this may be applicable to the IT sector only, interviewees from other sectors did not share this opinion.

Canadian businesses in Singapore find that the long-term relocation of their employees presents a challenge. Businesses find the work visa application in particular to be long and tedious to complete because they have to apply months in advance for required background checks which include a 10-year family history check. Thus, planning and understanding the visa processes is fundamental, hence, businesses usually account for such applications in their business plan.

Vietnam

The hiring and employment of expatriates in Vietnam follows a system, whereby the Immigration Department allows entry to the country (visa status) and the Labor Department provides work authorization (work permits) and also specifies which economic sectors expatriates can work of.



In Vietnam, a work permit is required when working for more than three months. Businesses file for the work permit applications with the provincial Ministry of Labor, Invalids and Social Affairs (MoLISA) before the foreign worker can commence employment.⁵⁷ Work permit processing times take up to 10 business days and are valid for a maximum of three years. Temporary Residence Cards (TRC) are granted to foreigners who hold work permits valid for one year or more, as well as senior management. A TRC is issued by the immigration agency under the Ministry of Public Security and is valid from one to five years depending on the visa type. Foreigners find the process of obtaining the work visa and then subsequently a PR, very long and complicated.

The Permanent Residence Card (PRC) gives foreigners long-term status in Vietnam, which is valid for 10 years and can be re-issued. In order to obtain a PRC, an individual should have previously held a TRC. Only expatriates who have a legal residence and earn a living in Vietnam are eligible to apply for the PRC. The PRC is conditional to expats who:

- work towards the development of Vietnam;
- are awarded a medal or title by the government;
- reside temporarily in Vietnam for three or more consecutive years while being sponsored by a Vietnamese citizen living in Vietnam (e.g. parents, spouse or children);
- are scientists or experts recommended by the head of a ministerial or governmental agency.

Canadian businesses in Vietnam, similar to most businesses in the region, believe that the mobility challenge cannot be evaluated in isolation. They feel that mobility is a two-part challenge affected by multiple changing regulations and policies across the ASEAN region and deep-rooted cultural differences of business practices between Canada and the region. In order to overcome the challenge of mobility, the differences need to be understood and acknowledged by the businesspeople, which requires more effort than simply changing visa policies.

Thailand

Canadian businesses find the process of obtaining work permits to Thailand particularly challenging. The immigration laws in Thailand are relatively strict in comparison to the rest of the ASEAN region, with severe penalties for offenders.⁵⁹ While unskilled laborers renew their work permits every two years, skilled labourers such as lawyers, engineers and other technical expatriates must renew their work permits every year, 90 days before expiry.



To work in Thailand, all expatriates need Non-Immigrant B visas prior to entry.⁶⁰ For short work assignments of up to 15 days, expatriates enter Thailand through the Urgent Work Permit (UWP), which can be extended for up to a month. While an extended work permit is required for longer stays, which can be granted for up to four years.

Thailand, like Singapore, has an established quota for foreign employment, which dictates that 75% of the jobs need to be held by locals across all companies, leaving 25% of the posts open for expatriates. However, foreign businesses through incentives provided by the BoI (Board of Investment) of Thailand, can invest in the Eastern Economic Corridor (EEC) and other special economic zones as targeted by the government.⁶¹ EEC is a special economic zone –consisting of three provinces –created for specific identified sectors by the government which include mining, technology, agriculture, engineering services and others. The BoI provides businesses with corporate tax exemptions, allows them to hire foreigners without a quota, and grants land ownership. The aim of the incentive is to promote foreign investment into Thailand, which also allows companies to run without local investment, as foreign businesses in the rest of the country require 51% local partnership.

BoI-registered companies can also apply for work permits, renewals and visas through an online system, known as the Single Window System, which reduces the wait time. Through the BoI, foreign investors and skilled professionals, working in the thirteen S-Curve industries (or Thailand’s targeted industries), can also apply for four-year Smart Visas to live and work in Thailand.⁶²

“BoI is a big challenge for foreign businesses working in Thailand. There is no clear procedure or regulatory framework to follow. You need a lawyer with strong connections to bypass the red tape.”

— CanCham Thailand

Brunei

The Government of Brunei facilitates businesses to hire expatriates through short-term visas, known as the Professional Visit Pass (PVP), valid for up to three months. For most of the foreign nationals, the visa is required to be obtained by the individual before they enter the country, however Canadians nationalities (including some other nationalities) are given a 30-day extension period to apply for the visa after they land. For long-term stays, the expatriates need to apply for the Employment Pass (EP), valid for two years, which is approved by the Ministry of Energy, Manpower & Industry (MEMI), Labour Department, and the Immigration Department. Foreign workers can also apply for a Special Pass, for assignments up to six months.



Businesses who plan to hire foreign nationals need to apply for a labor quota from the government, receive clearance and endorsement, after which it applies for foreign worker license or LPA (Lesen Pekerja Asing).⁶³ After the license is received, the foreigner undergoes medical examination at accredited health centres in Brunei, after which they can apply for the work visa.

Myanmar

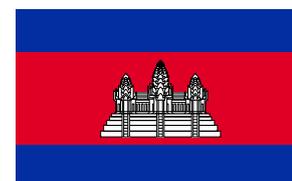
Work permits are available for foreigners investing in Myanmar, under the Foreign Investment Law or the Myanmar Special Economic Zone Law. Even under an approved work permit, foreigners need to apply for Stay Permit or Multiple Journey Special Re-Entry Visa separately from the government, for stays beyond 70 days.



Work permits and business visa applications require a letter of invitation from the employer, which includes all related details of the visit as well as that of the traveler. A letter of invitation is also required from a local Myanmar business, whose senior management, such as the owner or the managing director, state themselves as the guarantor of the expatriate entering the country.

Cambodia

All foreign nationals working in Cambodia obtain an E-class visa, or the business visa, after which individuals can apply for a work permit through an online system, established by the Ministry of Labor and Vocational



Training (MLVT).⁶⁴ The initial E-class visa is valid for 30 days, and can be extended to up to one year. One month and three-month visas are single entry into the country, while six month and twelve months visas are for multiple entries. After the work permit is secured by the expatriate, the individual applies for an Employment Card, which records history of employment of his/her employment in Cambodia.

All work permits and employment cards, regardless of their issuance date, are valid up to December 31st, after which they need to be renewed between January 1st till March 30th. Failure to apply for a renewal in the given timeframe levies a fine of USD 219.

Before the hiring of foreign nationals, businesses require quota approval from MLVT, as Cambodia allows maximum 10% of a company's workforce to be foreign. The business needs to prove that local skill set is not available to perform the job that they require.

Laos

Business visa is required for business travel into Laos, which can be applied through the embassy or the consulate. Businesses need to provide a cover letter from the employer or the sponsoring company, along with an official business letter explaining the purpose of the trip.



Laos provides a number of work visa/permit options to foreign nationals, which include:

- **Expert Visas (E-B2)**: for employment in international organizations or non-government organizations
- **Investor Visas (NI-B2)**: for foreign investors investing in a local business. The visa is usually applied by foreign investors, stockholders, directors, deputy directors and technical officers.
- **Labor Visas (LA-B2)**: for foreign nationals working in Laos on a fixed employment contract.⁶⁵

The work visas are obtained for the expatriates by the hiring company, through the Ministry of Foreign Affairs in Vientiane. Work visas are available as single entry or multiple entry visas, which can be obtained for a period of three months, six months or one year, and can be renewed until completion of the work or business contract, however usually up to 5 years.

Businesses need approval of foreign quotas from the Ministry of Labor and Social Welfare before the hiring of expatriates; while the ration of foreign to local workers is set by the government at 15 percent to 85 percent for those undertaking physical labor, and 25 percent foreign to 75 percent local for professionals and skilled labor.

Canada

There are various federal and provincial government departments and agencies in Canada responsible for various aspects of cross-border mobility of business persons. For example, the Immigration, Refugees



and Citizenship Canada (IRCC) is the government body responsible for immigration, issuance of visas, granting of citizenship and refugee claims into Canada and the Employment and Social Development Canada (ESDC) and Service Canada are responsible to access applications of foreigners working in Canada and how that impacts the local job market. The Canadian Border and Services Agency (CBSA) is responsible for the administration of the immigration policy and security at the Canadian borders.

Businesspersons who are not allowed visa free access into Canada may enter through business visa and can remain in the country for maximum six months (refer to Appendix C for list of countries). In case an extension is required, the individual has to apply for a work permit. Business visas are provided to foreign nationals who enter Canada for training, meetings, sales, and other similar activities. Under the business visa, they can also provide after sales services which includes machinery repair, training of equipment/machinery to maintenance staff, installation of machinery, and software/hardware upgrades.

Businesses who wish to hire foreign workers need to apply through ESDC, who performs labor market impact assessment, (as per Canada's Labour Market Impact Assessment (LMIA) policy), for which the business needs to apply through the online portal.⁶⁶ The labor market impact report assesses the effect the foreign national employee will have on the domestic labor market of the specified geographical area, where the expatriate plans to work. Businesses also need to provide a transition plan to the government which details how they plan to train a local Canadian worker for transitioning into the role that the foreigner is handling.⁶⁷ The transitional plan would include training details and a timeframe commitment as to when the transition would take place. The foreign nationals' employment quota for each business who wishes to hire expatriates ranges between 10 to 20 percent, depending the skill level and the industry.

For workers in Canadian companies established outside of Canada, or those in a Canadian company which has a business relations with a foreign company, the employees may be eligible to intra-company transferee, for which they are provided with work visas.⁶⁸ Only senior management and executives of the company are given the transfer provision. The local

Canadian business also needs to demonstrate its capacity and prove that foreign nationals are being directed by the local entity, during their stay in Canada. Qualified intra-company transferees apply for work permits and are exempt of LMIA.⁶⁹

Canada also provides temporary work visas which includes, working holiday visas, international co-op assignments, academic exchanges, and young professionals exchange, for nationals of countries with whom it shares reciprocal bilateral relations. No such official arrangement has been made with any of the ASEAN member states.

To facilitate foreign nationals' visa processing, the Government of Canada has set up Visa Application Centres (VAS) across the globe, which provide visa administrative support services to applicants. These centres are managed by private companies who are contracted by the government. Their duties as facilitation centers include, sending visa applications and passports to the Canadian visa office, taking biometrics of applicants on behalf of the government, providing support in completing applications, and providing access to online applications at the center. VACs accept applications for study permit, work permits, visitor visas and travel documents for permanent residents.⁷⁰ VFS Global (Visa Facilitation Services Global) is the VAS for the ASEAN region. (for details of the centres and location refer to Appendix C).

The availability of VFS centers across regions in the ASEAN countries has been noted by some of our interviewees to be challenging. For instance, there are two VFS centres in Indonesia (Jakarta and Bali), which take in applications from across the country.⁷¹ Canadian immigration requires first time travelers to Canada to appear at the VFS office for biometrics. Businesses, especially those located in cities other than Jakarta or Bali, have to travel to the VFS office, which they find tedious to manage, as it adds to their cost and time. The VFS offices are generally found to be over-crowded, with long wait times, and processing delays as they handle applications for multiple countries simultaneously.

As mentioned earlier, PT Hatfield, working in Jakarta, wishes to send Indonesians to Canada for training; however, the organization finds the process very complicated and vague. The requirements for visa applications are not clear in addition to the process being very time-consuming. Hatfield's representative states, "We have a good working relationship with the Embassy. However, visa applications for our employees to work in Canada for a short period are often rejected. We want to move people from Indonesia to Canada for their capacity building."

Malaysians require a visa to come to Canada while Canadians can enter Malaysia without a visa. As per the Malaysian Consul General in Vancouver, the two governments are in conversations to get Malaysians visa-free access into Canada. Malaysian businesses also express the need of a reciprocated visa process and find the Canadian visa application to be complicated. In their view, it is easier to get a US visa than a Canadian visa. In order to get a Canadian visa in Malaysia, individuals need to visit the Kuala Lumpur VFS office, which sends their passports to Singapore, where the visa is processed within two to three weeks. Businesses explain that they thoroughly review all the requirements for the visa application to ensure their passport is not held for longer than the estimated processing time, to avoid delays.

Research shows that the tertiary sector is the most impacted economic sector by the restrictions on the movement of people across Canada and the ASEAN region, as it is labor intensive by design, and requires mobility for greater collaboration. Neil Williams, Managing Director of Xpansionize, a Canadian consulting firm based in Ottawa with headquarters in Malaysia, states that mobility is their biggest challenge against growth and expansion. His company supports Canadian businesses to move into the ASEAN region by connecting them with local partners and investors in the region and providing financial analysis and forecasting to validate existing opportunities. Xpansionize also helps bring ASEAN investment into Canada. In such instances, he specified that it is easier for Canadian businesses to come to the ASEAN region than the other way around. Most of his clients want to invest in Canada with the long-term plan of eventually immigrating permanently. He states that:

“For private businesses (foreign investment into Canada), challenges to obtaining a visa or permit end up slowing down the economic movement because some investors are not willing to invest until they come and see the opportunities in Canada themselves. We try to make the process as smooth as possible when we try to bring in a delegation to Canada and so we have to come up with a compelling package for visa applications.”

The Philippines Consul in Vancouver noted that for businesses to come into Canada, the visa process is very slow and complicated. Due to the Canadian employment protection policies, businesses are limited in the number of foreigners they can hire. For example, this greatly hinders the restaurant industry, where employers prefer hiring Filipinos to produce better quality dishes that align with the traditional standards.

Although larger Canadian organizations working out of Singapore perform thorough security checks for the employees they hire, they remain concerned regarding the usual rejection of work visa applications of their employees. They believe this fact speaks to the complex nature of the process and the lack of reciprocity between the two countries. In the case of visa rejection, the individual/business can reapply or submit a judicial review. Common reasons for rejection include failure to prove applicant's ties to his/her country of origin, missing documents such as letters of employment, inadequate source of funding, unable to prove establishment of business, criminal and poor health records, etc. SMEs find the process of obtaining visas particularly difficult especially if they are a newly established business and may not necessarily have strong credit histories or bank statements.

The Canadian Immigration office in Singapore explains that Canada is quite advanced in terms of regulations related to the mobility of workers. It follows a standard process under which processing times vary depending on the country, the region and the time of year (staff changes/vacation/leave time). A common peak time for applications is during the summer months, around June, which leads to delays in visa processing. Note that each country's economic relationship with Canada is also a significant factor in visa processing. For example, visas for member countries of Canada's FTA with the Pacific Region are issued visas in accordance with the terms agreed upon in the FTA. Though, the requirements are mostly the same regardless of visa type.

The CEO of Service Links, has first-hand experience of how commonly visa applications to Canada get rejected, and that there is a greater chance of applications being accepted after a second attempt. If the visa application gets rejected the second time, the applicant has the right to take his/her case for a Judicial Review at the Federal Court of Canada. However, court appeals are costly and are not easily accessible. The first step of the process is to submit an appeal with the Immigration Appeal Division, which hears appeals on immigration-related matters, including sponsorships, removal orders, and residency obligations. If the appeal is dismissed, the appellant has 15 days to file an Application for Leave and for Judicial Review to the Federal Court to review the decision.⁷²

Visa regulations and their related challenges vary across Canada and each ASEAN member country, impacting the movement of the business people between the two markets. It is important to note that the impact of mobility cannot be measured or fully captured in isolation, but it is essential to understand it in conjunction with relevant visa regulations and application processes. The following sections elaborate how trade arrangements and different visa categories and other related services can help support the mobility challenge.

TABLE 4 Case Study No. 3
SME Experience - Poeta Digital



YEAR FOUNDED	SECTOR
2005	Technology
NUMBER OF EMPLOYEES	COUNTRIES OF OPERATION
100	Vietnam, Canada, and the USA

Business Overview

Poeta Digital is a global product development agency with almost 15 years of experience building custom software for a wide variety of business sectors and sizes, from Fortune 50 to Start-ups. Poeta specializes in creating World Class - Enterprise-grade Mobile, Web apps (iOS, Android, browsers), Data Systems Integration, Workflow Automation, and Data Visualization.

How does mobility impact the business?

While short-term mobility is not a priority for Poeta, the company is interested in supporting its staff to relocate to Canada permanently (long-term mobility). Poeta prides itself on having the ability to build capacity and scale talent. CEO and founder, Tim Nguyen, explained to the research team that the company supports the development of its staff members, as it wants all of its offices to operate at similar capacities and skill level. Accordingly, it wants to provide opportunities for its Vietnamese employees to emigrate and gain international experience like Tim himself was able to gain. He wants to equip Vietnamese people with the necessary knowledge and resources to pursue their dreams and eventually invest in Vietnam to grow their economy.

In 2018, Poeta started an initiative named 'Global Talent' to help Vietnamese employees emigrate to Canada and vice versa. The initiative helps Vietnamese employees to understand the requirements for immigrating into Canada and supports them throughout the immigration process, including completing all the required paperwork, passing language proficiency test (IELTS), overcoming idiosyncrasies, and understanding and adjusting to a new environment. To best support its staff, Poeta relies on its internship program. Every year, 2 to 3 Canadian interns join the staff at the office in Ho Chi Minh City. Their priority is to help the Vietnamese staff members who are participating in the Global Talent Plan to study for the IELTS.

“We couldn’t have achieved what we have today if it weren’t for our international footprint; and Asia is a large component of our success story.”

— Tim Nguyen, CEO and founder, Poeta Digital

Student Internships

Internships in Canada are not defined in the Immigration and Refugee Protection Act (IRPA) or its regulations. The Canadian Government considers any foreign nationals coming into Canada to be entering the labour market and so regardless of whether the internship is paid or not, they are required to apply for a work permit.⁷³ The only exceptions to the work permit requirement is if the individual applying qualifies for an “LMIA exemptions for International Mobility Program workers (i.e., foreign students studying or associated with institutions abroad).”⁷⁴ Those who are not work permit exempt and would like to pursue an internship in Canada will need their prospective employers to obtain a positive LMIA from ESDC. In addition to this requirement, employers would also need to make an employment offer through IRCC and would need to pay a compliance fee before the foreign national can submit their permit application. These visa regulations are often too problematic for businesses and so they often opt for hiring local interns.

Canada offers the International Experience Canada (IEC) Program, which provides the opportunity to travel and work abroad. Under this program there are three possible categories of bilateral agreements which fall under the umbrella of internships; Working Holiday, Young Professionals, and International Co-op (internships).⁷⁵ The IEC program consists of reciprocal, bilateral agreements between Canada and different countries which allows youth to travel in work in certain countries. Unfortunately, no such agreement exists with any of the ASEAN countries. Government officials in Singapore noted that while discussions are in progress between Canada and Singapore, no formal agreement has occurred.

Student internships are an important part of most businesses’ operations, providing hands-on experience to students and a new pool of potential employees for businesses. Internship programs often rely on the exchange of local students with Canadian or international students. Most businesses

interviewed agree that it is problematic to hire interns from Canada and bring them to an ASEAN country, and vice versa, so they rely on local interns only. This is the case for the majority of countries including Malaysia, and Thailand. At most, countries hire interns from other ASEAN countries but not from Canada, for which there is often little interest and is not worth the strenuous visa processes. One of the most problematic elements of interns for the Canadian government is the fact that the concept of “intern” does not translate into the Immigration Act of Canada, whether it is paid or unpaid. Consequently, any intern coming into Canada requires a work permit, which can result in a lot of legal legwork whereas hiring local interns is less challenging and burdensome.

In Singapore, Trade Commissioners advised that Canadian universities have requested an arrangement with Singapore to hire Canadian interns for a short period of time; however, Canada is not yet a partner country for Singapore. Alternatively, Canadian universities have attempted to create their own initiatives for exchange in order to bypass this legal grey area and advance the future of their students. For example, the National University of Singapore and the University of Toronto have partnered to create a 10-month program to promote entrepreneurship and innovation.

Discussions about a youth mobility agreement between Canada and Singapore, which is capped at 25 years in Singapore and 30 years in Canada, have been ongoing. There seems to be disagreement on the basics for such an agreement. In Singapore, student exchanges can only take place through a recognized university, which is not a requirement in Canada, as noted by Canadian Government officials in Singapore. Moreover, Singapore has been stringent in approving the list of universities it wants Singaporean students to go to.

“We want to first focus on moving our employees and then we can start thinking on how to move interns.”

— PT Hatfield, Indonesia.

In Malaysia, the majority of businesses interviewed only hire local interns, and feel that interns tend to gravitate towards Australia or the EU for a variety of reasons, including geographical proximity, better established relationships, and existing policies that simply make it easier to hire Malaysian interns. In the Philippines, on the other hand, a lot of interns take an interest in Canada due to existing programs, such as the APF's Canada Asia Connect program, which facilitates the process of hiring Filipino interns. According to the consul general of the Philippines in Vancouver, there are currently five thousand Filipino students in Canada which points to a significant ease of access for students who can pursue potential internships.

Working Holiday Visa (WHV)

A Working Holiday Visa (WHV) is a permit that allows young people to legally live and undertake employment in the country issuing the visa without undergoing the usual expenses of finding work in advance. Most WHV are offered under reciprocal agreements between certain countries to encourage travel and cultural exchange between their citizens.

In Canada, the WHV program is managed by International Experience Canada (IEC) and provides temporary work permits to young people from over 30 countries to legally live and work in Canada.⁷⁶ The permits are valid for either 12 or 24 months depending on the applicants' citizenship. The Working Holiday Visa program is bilateral in nature and requires Canada to negotiate terms with other governments in order to secure such a program. Currently, Canada does not have a WHV arrangement with any of the ten ASEAN countries.

Singapore has a working holiday visa arrangement with 13 other countries. A Senior Trade Commissioner in Singapore explained that the Canadian government has been trying to negotiate a WHV arrangement with Singapore, but negotiations have been unsuccessful as there is minimal demand of the government to create such a program. Thus, the Singaporean government has not taken a keen interest in advancing the visa arrangement with Canada. But it is important to note that there is an existing knowledge gap regarding the demand and the potential of creating a WHV arrangement between Canada and the ASEAN region, which can be further investigated, and if developed, could possibly help overcome a number of mobility related challenges.

Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP)

The Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) is a free trade agreement between Canada and ten other countries, including Brunei, Malaysia, Singapore and Vietnam, which Canada signed on December 30, 2018. Of the four ASEAN countries included in this agreement, only Singapore and Vietnam have ratified the agreement. There are various reasons for why Brunei and Malaysia have not yet ratified the FTA. For Malaysia, the agreement was signed prior to the government taking office in May of 2018 and the government is currently reviewing its implications on the Malaysian economy.⁷⁷ For Brunei, the government has committed to ratifying the CPTPP by early 2020.⁷⁸

Once all countries ratify the agreement, it is anticipated to be one of the biggest free trade agreements, with 11 participating countries representing 500 million people, and 13.5% of the global GDP.⁷⁹

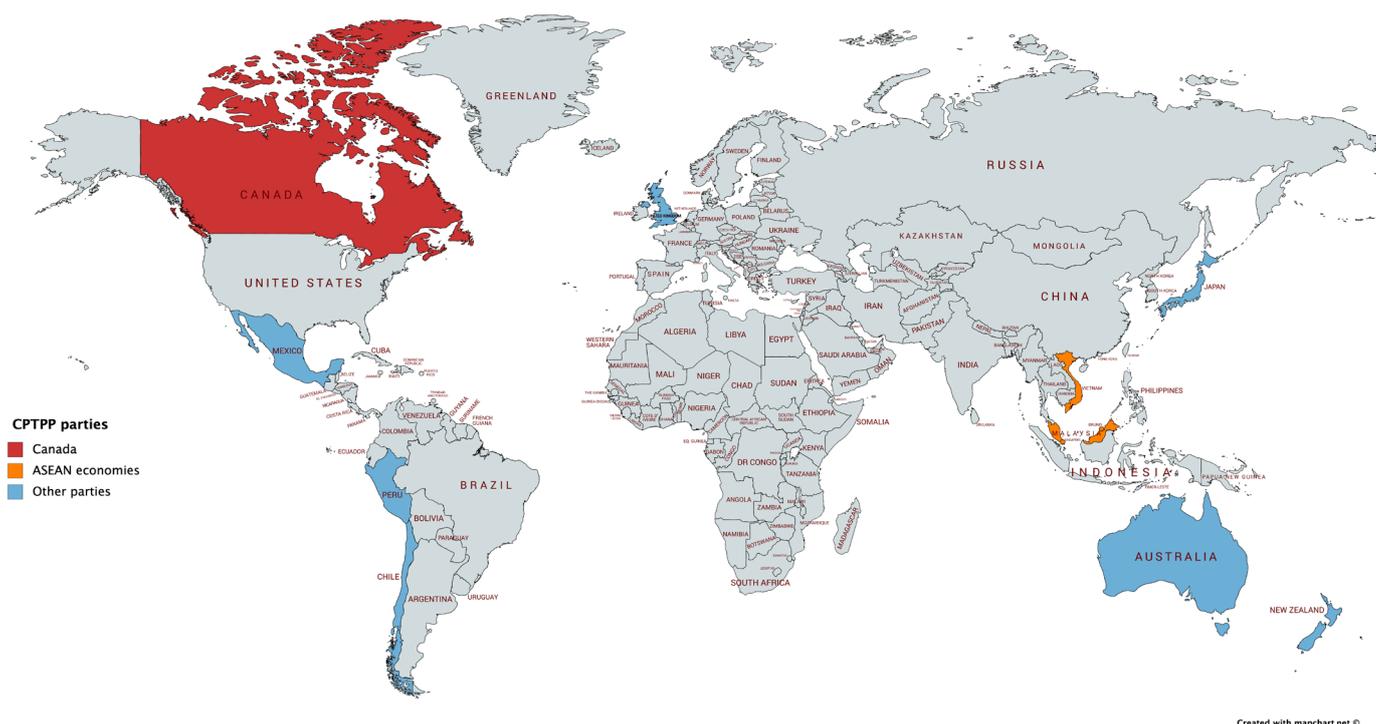


FIGURE 8. Signatory members of the CPTPP

The CPTPP promises great potential to increase economic ties as well as guarantee access to different markets for the Canadian economy. Through the CPTPP Canadian businesses gain market access to Malaysia and Vietnam. Table 5 below highlights some of the benefits of the CPTPP for Canadian businesses.

Table 5. Benefits of the CPTPP for Canadian Businesses

Benefits of CPTPP for Canadian Businesses⁷⁸		
Temporary Entry	Temporary entry commitments from CPTPP partners for professionals and highly skilled technicians, intra-company transferees, investors, and business visitors.	
Financial Services	Upon the full implementation of the CPTPP, there will be enhanced investment protection for Canadian investors, with future commitments and FTAs with Vietnam and Malaysia.	
Investment	Canadian investors benefit from investment protection provisions, including against expropriation and denial of justice, and mechanism for the resolution of investment disputes.	
Tariff Elimination	Agriculture and Agri-Food	94% of exports to CPTPP will be duty-free
	Automotive and Auto Parts	Canada's 6.1% tariff on passenger vehicle imports will be phased out over four years while its up to 8.5% tariff on auto parts was removed upon the enforcement of the CPTPP agreement
	Industrial Products	99% of product exports to CPTPP countries are duty free
	Fish and Seafood Products	100% will be duty free, going into CPTPP countries
	Forest Products	100% of exports into CPTPP countries will be duty-free

The CPTPP incorporates all provisions of the Trans-Pacific Partnership (TPP) Agreement except those explicitly identified for suspension. It contains some unique provisions, including Chapter 12, namely *Temporary entry for businesspeople*. Canada’s temporary entry commitments in free trade agreements gives businesses the ability to move key personnel from one location to another and access highly skilled global talent on a temporary basis. Chapter 12 of the CPTPP includes four categories of businesspeople that these entry commitments apply to: business visitors, intra-company transferees, investors, and highly skilled professionals and technicians. They are not subject to numerical restrictions, like quotas, and do not require an economic needs test (referred to in Canada as a LMIA).⁸¹

Table 6. Mobility Chapter of the CPTPP

Chapter 12: Temporary Entry for Businesspeople	
Business visitors	Eligible for stay up to six-months with possible extension. Canada took reciprocal commitments with all CPTPP members.
Intra-corporate transferees	<p>Eligible for stay upto three-years with possible extension. Canada took reciprocal commitments for <i>executives</i> and <i>managers</i> with Australia, Brunei, Chile, Japan, Malaysia, Mexico, New Zealand, and Peru.</p> <p>Canada took reciprocal commitments for <i>specialists</i> with Australia, Brunei, Chile, Japan, Mexico, New Zealand, and Peru.</p> <p>Canada took reciprocal commitments for the entry and work authorization of the <i>spouses</i> of intra-corporate transferees with Australia, Brunei, Chile, Japan, Malaysia, and Mexico.</p>
Investors	<p>Eligible for stay up to one-year with possible extension. Canada took reciprocal commitments with Australia, Brunei, Chile, Japan, Mexico, Peru, Singapore, and Vietnam.</p> <p>Canada took reciprocal commitments for the entry and work authorization of the <i>spouses</i> of investors with Australia, Chile, Japan, and Mexico.</p>

Chapter 12: Temporary Entry for Businesspeople

Highly skilled professionals and technicians

Eligible for stay up to one-year with possible extension. Canada took reciprocal commitments for *professionals* with Australia, **Brunei**, Chile, Japan, **Malaysia**, Mexico, and Peru; these commitments do not cover occupations in the fields of public health or social services.

Canada took reciprocal commitments for a limited list of *technicians* with Australia, Chile, Japan, Mexico, and Peru. Canada's CPTPP commitments for professionals and technicians are subject to knowledge, education, experience, and wage requirements.

Canada took reciprocal commitments for the entry of the *spouses* of professionals and technicians from Australia, Chile, Japan, and Mexico.

Despite the great potential, awareness and understanding of the agreement remains low, as was demonstrated by multiple interviews. In Singapore, majority of the businesses interviewed expressed a lack of general understanding of how the agreement could encourage businesses to expand. In Vietnam, it was seen as a business success if someone had knowledge about what the CPTPP was. Businesses expressed that the Government of Canada should support to bridge the knowledge gap by educating businesses on what the CPTPP would mean for their growth. This knowledge gap also presents an opportunity for organizations such as the CABC, and others, including Chambers of Commerce, to take on the responsibility and ensure that their existing and potential members are presented with the necessary information.

APEC Business Travel Card (ABTC)

The Asia Pacific Economic Cooperation (APEC) is a regional economic forum established in 1989 to leverage the growing interdependence of the Asia-Pacific. APEC's 21 members economies include Australia, Brunei Darussalam, Canada, Chile, China, Hong Kong, Indonesia, Japan, Malaysia, Mexico, New Zealand, Papua New Guinea, Peru, The Philippines, Russia, Singapore, Republic of Korea, Chinese Taipei, Thailand, the United States, and Vietnam, aim to create prosperity for the people of the region by promoting growth and by accelerating regional economic integration.⁸²

APEC Business Travel Card (ABTC), a mobility-related initiative, is meant to foster ease of travel (short-term business travel) within the APEC region by streamlining the entry process into APEC member economies. The card also enables holders to travel in the region without needing a visa and to use fast-track lines to enter and exit each APEC economy's international airports. Successful applicants from fully participating economies are issued with a five-year card that serves as the entry authority to other fully participating economies who have granted pre-clearance for short-term business travel of up to 60 or 90 days.

Note that Canada and the US are not fully participating economies but rather hold a transitional member status. Canadian and American citizens can use the ABTC for expedited processing at customs both in the APEC region and when returning home, but it does not grant visa-free access to other participating economies, through the ABTC program, when entering Canada or the US.⁸³

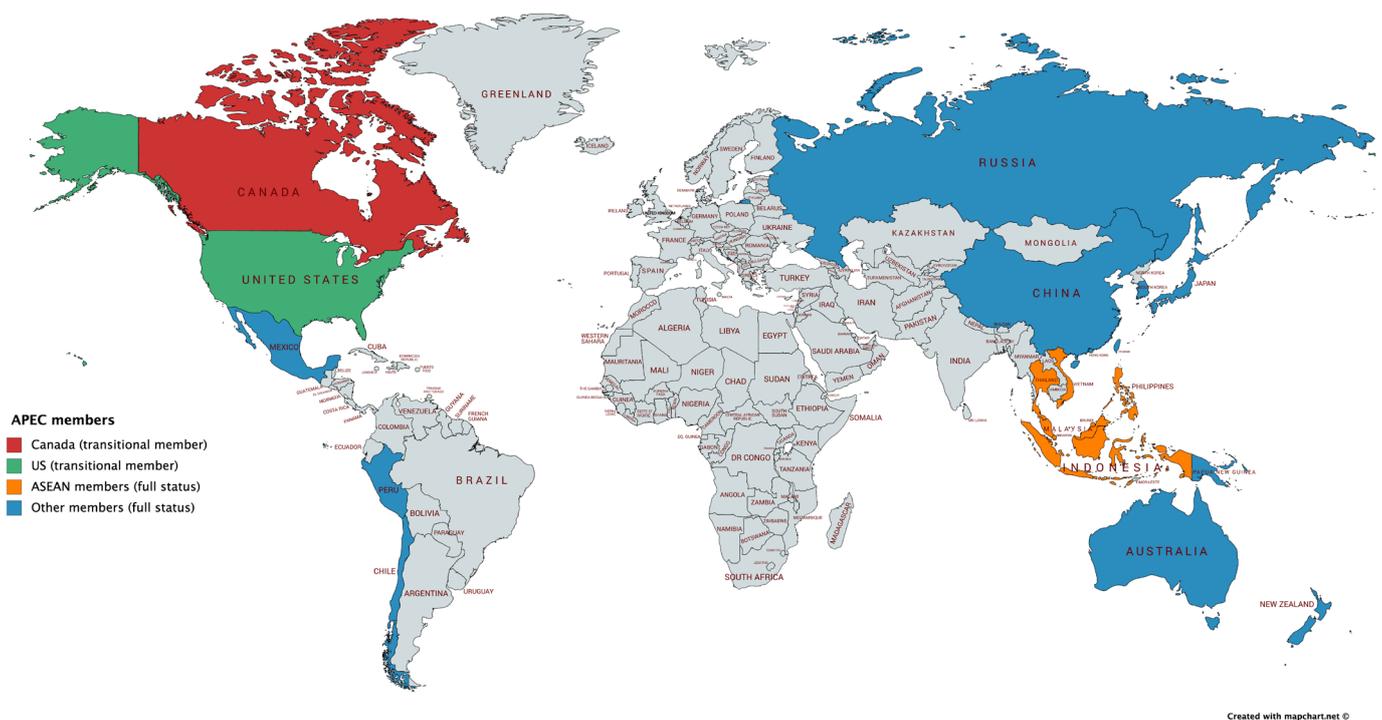


FIGURE 9. APEC Member Economies

In our research, knowledge of the APEC card by the businesses was found to be limited. Most businesses knew about it but did not have it; and of those who did, only half found it useful. For example, in Indonesia, most respondents did not have the card, as travel within the ASEAN region was not an issue for them. For those traveling to Canada from the ASEAN region, the card offers no assistance as visa is still required. The status of Canada's ABTC membership puts Canada at a competitive disadvantage

with Australia and New Zealand who, as full members of APEC, can provide ASEAN citizens with short-term visa-free access to their countries.

Moreover, the advantages of an APEC card were not understood by most participants, who felt that the possible advantages of holding the card did not outweigh the costs of acquiring it—particularly the long process one has to go through to obtain it. Reciprocity was also a concern for most participants. In Singapore, some of the respondents had the APEC card, all of whom agreed that the card is attractive due to the ability to skip lines but continued to show concern about the long process of acquiring it.

For Canadians, one of the most pressing challenges in applying for the APEC card is the fact that the application process is not easily accessible. The application process requires a mandatory security interview, conducted in-person by a CBSA officer at a Canadian airport, with no alternate options. Thus, while the process to get the card is straightforward, it is not convenient, which creates a significant barrier for those hoping to obtain it. The card remains valid for 5 years, but participants have to go through a yearlong process to apply before they receive it. Also, Canadians applying for the card must be NEXUS members prior to applying, while the card's validity ends once the passport expires or if NEXUS membership is revoked. Lastly, the most troublesome challenge is the fact that Canada is not a full signatory member, which means that the card is less beneficial for Canadians hoping to use it to enter member countries without a visa and for member countries hoping to use the card to enter Canada. For Canadians the biggest advantage of holding the card is that it gives individuals access to designated APEC lines, hence reducing wait time for immigration at the airports, and was found most useful by frequent travelers and those who had to travel between busy airports.

In September 2018, the CBSA in partnership with the CABC hosted a pilot event in Singapore to facilitate NEXUS enrolment and process APEC applications for non-resident Canadians. The process required individuals to have NEXUS clearance in order to apply through the event; however, due to lack of prior notice to arrange the required clearance, many businesses were unable to benefit from it. Also, the short notice did not give many Canadians enough time to plan and travel to Singapore from other Southeast Asian countries. Many businesses believe that such facilities can be more useful and have a greater impact if CBSA creates a small setup in the ASEAN region or have such opportunities provided to the Canadians with a greater frequency, which would help process their security clearance and issuance of cards. This would provide businesses more flexibility, replace the need to travel to Canada for the sake of the security clearance interview, and help them schedule their travel plans better.

TABLE 7 Case Study No.4

Short-term Visa Process Challenge – Dan-D-Pak



YEAR FOUNDED	SECTOR
1989	Food processing and manufacturing
NUMBER OF EMPLOYEES	COUNTRIES OF OPERATION
700 (year end 2019)	Canada, the US, Vietnam, China, Taiwan, and Hong Kong

Business Overview

Dan-D-Pak is a Canadian global corporation that was founded in Richmond, British Columbia. The Company manufactures and distributes a variety of nuts and has expanded well beyond Canada and currently operates in multiple countries. Their portfolio includes more than 2,000 SKUs sold globally. DanD foods as an organization also sell their products in countries such as France and Australia.

How does mobility impact the business?

Employee travel from Vietnam is a necessity in maintaining the efficiency of the production line. When machines are damaged the time frame for the production and shipment of goods is lengthened. There is a demand for more Vietnamese technicians to travel to Canada to maintain production equipment and to train staff stationed in Canada. Most of the machines Dan-D-Pak factories use are purchased in Asia, primarily Japan. Nguyen Huynh Nghia (Tim) has been the Group CFO of Dan-D-Pak for five years. He operates out of the factory in My Phuoc 3 Branch in Binh Duong Province (Vietnam). Currently, Dan-D-Pak only has one Vietnamese technician that is able to travel to Canada and the US, for machinery repair and maintenance. He travels approximately two to three times a year. Although the company would like to send more technicians to Canada, due to challenging visa processes, attempts for other technical staff to travel to Canada have been denied. During the five years he has been working for Dan-D-Pak, he is only aware of one technician that has obtained a Canadian visa and about 2-3 that have been denied.

“Only one technician from the [Vietnam] team has been able to obtain a visa to travel to Canada. He travels 2-3 times a year to both countries for machinery repair and maintenance. The application of 2-3 of our technicians has been rejected. They received a standard rejection letter. The requirement for skilled immigration should be realistic; the requirement for a university degree or diploma doesn’t consider skilled labor experience. In addition, the conditions for intra-exchange of skilled employees for a specific time should be implemented and disseminated by Canadian Embassy to Canadian invested companies in Vietnam so that we can utilize the global resource particularly in skilled employees’ allocation.”

– Nguyen Huynh Nghia (Tim), Group CFO

Other Challenges

In the process of conducting research on the visa mobility issue between Canada and the ASEAN region, some interviewees alluded to the existence of non-mobility related barriers that require immediate attention. The following is a breakdown of some of the reoccurring issues identified through the interviews conducted

Knowledge Gap

As mentioned earlier in the CPTPP section and ABTC sections, throughout multiple conversations with different stakeholders, there was a consensus towards an existing knowledge gap when it comes to ASEAN as a region and the business and development opportunities that are available. There is an overall lack of awareness of the size and sophistication of the Southeast Asian market. Canadians have often limited their knowledge to Singapore alone. For example, even though Indonesia is the fourth most populous nation in the world and the world’s 10th largest economy in terms of purchasing power, most Canadians are unaware of its economic potential and its technological advancement.⁸⁴

“In the West, we are ignorant about Southeast Asia. We think that Asia is just China and India. There is an assumption that most Southeast Asian countries are poor emerging markets.”

— Pavel Bains, Bluzelle

Most importantly, as referenced by the majority of interviewees, Southeast Asia is in many ways more technologically advanced than North America (e.g. cashless structure, fintech revolution, ICT, use of artificial intelligence, renewable energy, etc.). Despite this fact many businesses in the region feel that most Canadians assume the region is underdeveloped, which can hinder investment. As noted by interviewees, investors and Canadian businesses are hesitant to enter and expand into the region due to a limited understanding of its social and economic diversity. While the majority of interviewees expressed concern over this gap, they also noted that there has been a government push towards educating the public on the opportunities that the ASEAN region presents for Canadians through the trade diversification strategy.⁸⁵

Cultural Difference

An extension of the knowledge gap is the lack of cultural awareness when it comes to countries in ASEAN. Cultural differences were also identified by majority of the businesses interviewed as an important challenge that is not always realized by businesses coming in from Canada for the first time. For example, to start a business in Indonesia or Malaysia, businesspeople must be physically present as the culture in most ASEAN countries is heavily dependent on interpersonal relationships. Potential partners prefer having one-on-one meetings rather than phone conversations or Skype meetings since they intend to build a personal relationship that could lead to a business partnership. Often, finding local partners helps Canadian businesses navigate the challenges of doing business in a new environment. Local partners can provide access to local government resources, local knowledge, and in-person support when traveling is not possible. Thus, understanding the cultural uniqueness of every individual ASEAN country is crucial to business development.

Direct Flights

For most businesses, the lack of direct flights from Canada to the ASEAN region, and vice versa, presented one of the bigger challenges related to mobility. The time lost in travel has a large opportunity cost for individuals and their businesses. Studies have demonstrated the importance of direct flights to economic connectivity and the role it plays in generating investment.⁸⁶ The significance of direct flights was highlighted by multiple interviewees from different countries; including businesses in Indonesia, Singapore, Malaysia, and Vietnam. Currently, there are two direct flights, operated by Philippines Airlines from Vancouver and Toronto to Manila seven days a week. Increasing the number of direct flights between Canada and the different ASEAN countries would decrease the opportunity cost of reaching either location. In addition, it also increases the trade of cargo items such as perishable foods and other time sensitive products.

With increased access to the internet more business partnerships have been made possible, as people can connect globally, which has also created a need for mobile businesspeople.⁸⁷ Air travel is necessary to endorse the movement of capital through people, giving businesspeople the opportunity to meet in person and establish economic relations, also as mentioned earlier a part of cultural connect. This necessity can often be problematic in ASEAN countries due to the geographical distance between them and Canada. Flights that are longer than 12 hours or over 6,000 miles have restrictions for flight crews, are more expensive to operate and, therefore, less frequent.⁸⁸ For this reason, some countries such as those in the ASEAN region are less likely to have direct flights, decreasing the opportunity to establish business connections.⁸⁹ On average by increasing the number of airports in a city under 6,000 miles from other major cities, increases the city's GDP by 0.8 percent.⁹⁰ Although Singapore has a well-developed airport, as a result of its geographic distance and the lack of direct flights to and from global cities, the country loses the opportunity to effortlessly connect with a large populous and tap into global economic activities.⁹¹

Challenging Local Policies

Businesses also noted that the lack of a strong relationship between Canada and any given ASEAN country is a significant barrier to conducting business in the region. For example, in the absence of formal bilateral agreements between Canada and an ASEAN country, issues such as tax policies, employment quotas, etc. can prove to be problematic. Throughout the interview process, majority of the businesses quoted highlighted local policies that challenge their ability to conduct business.

Policies that impact hiring processes as well as business ownership were also identified as significant challenges for some businesses. In some cases, it is as simple as understanding the local laws and abiding by them, while in others it requires local partnership and equity sharing, in order to be able to operate in any given country. The effects of these policies could be mitigated by FTAs and other governmental agreements and initiatives

The following table highlights select examples of challenging policies, which are not necessarily unique to the ASEAN region or Canada, but are in place by many global countries:

TABLE 8. Relevant Policy Challenges in the ASEAN Region

Policy Challenge

Citizen-first policies

Many global economies give preference to hiring domestic labor before opening positions to expatriates.

In Singapore, for example, in order to get a work permit the foreign business needs to demonstrate that there isn't a Singaporean business that accomplishes the same. Similarly, for hiring the business needs to prove the need of hiring the expatriate, showing that local expertise is not available. All businesses have to follow the defined foreign employee quota limits. This policy is not unique to Singapore but is followed by many ASEAN countries, and by Canada to protect and support local talent.

Shareholder Ownership

Some countries like Thailand have laws which determine ownership of a business based on the nationalities of its shareholders.

For example, a Canadian company operating in Thailand with 51% of shareholders being American nationals would be considered as an American company rather than Canadian. In the case of Thailand, a Thai company limits foreign business ownership to a maximum of 49%, meaning foreigners can hold no more than 49% of the shares (unless it is a part of the EEC). The 49% limit for certain business activities can be exceeded or exempted if a Foreign Business License is granted. This license is complicated to access and is given to foreign-owned businesses that are unique and do not compete with domestic businesses. This policy is not unique to Thailand but is followed in many countries globally.

Central versus Regional Policies

Laws and regulations, and their enforcement vary across the ASEAN region, and for countries like Indonesia, they vary between the regional governments and the Central Government.

Indonesia, with 34 provinces and more than 400 regencies, have local government procedures and key administrative units providing services separated from the Central Government. The Central Government retains the authority of policymaking in areas including the utilisation of natural resources and national planning. Because the term regencies is used so loosely, there is often confusion between devolution of authority within the government hierarchical structure.

Restrictions on foreign investment and ownership

In order for foreign businesses to operate in the ASEAN region, they require equity sharing and/or partnerships with local businesses as per the country's policy and investment quota system. The foreign investment quota varies across the countries, and within a country across different economic sectors as well.

For example, in Indonesia, a 51% local investment/partnership is required in order to establish a foreign business. It is challenging for foreign businesses to enter a new market and find trustworthy local partners, which greatly deters foreign investment. This policy is not unique to Indonesia but is followed in many countries globally.

Enforcement of FTAs and Capacity Building Initiatives

The enforcement and implementation of FTAs can present a challenge as is demonstrated by the CPTPP. For example, as noted in various interviews, the CPTPP has not been enforced equally across all signatory countries, which inherently impacts businesses in an unequal manner by giving advantage to some over others. The regulatory structures of the different governments that have signed onto the agreement has created conflicting policies that are affecting businesses in each country differently. The disparity between the economic development of each member of the CPTPP is a key factor in the implementation of terms and conditions, an issue that the Canadian government should take into consideration and attempt to address. This also gives the Government of Canada the opportunity to take a leadership role and implement capacity building initiatives in different economic sectors of the ASEAN region. These capacity building initiatives could aim to promote economic diversification, business development, resource management, training activities to improve institutional capacities and digital advancement of businesses, helping improve their capacities in becoming more competitive and hence more responsive to future agreements.



SECTION VI

Governmental and Non-governmental Support Organizations

CANADA'S MINISTER OF INTERNATIONAL TRADE DIVERSIFICATION

(‘diversification’ was added to this title in 2018) aims to intensify its efforts to increase trade partnerships across the world. The Minister’s mandate letter, issued in August 2019, highlighted Canada’s Trade Diversification Strategy, which focuses on the work of Trade Commissioner Service, Export Development Canada and Invest in Canada.⁹² The letter states that the Ministry should devise a strategy “to increase trade with key global markets whether or not a trade agreement already exists, with a particular focus on the Asia-Pacific region.”⁹³ It also aims to expand on trade agreements with “Mercosur, the Pacific Alliance, [the ASEAN region], China, and India;” which further exhibits the emphasis of the Canadian government towards economic diversification and expansion.

The Government of Canada provides several support services to its businesses abroad. Some of the most significant resources available in the ASEAN region, which Canadian businesses highlighted in our interviews, include the following:

Embassies/Consulates/Provincial Representatives

Canadian diplomats across the globe work to build networks, gather information as well as increase Canadian visibility in order to influence and support trade and economic partnerships. In recognition of the ASEAN region's importance, Canadian provinces such as Ontario, British Columbia, Alberta and Nova Scotia have deployed their own representatives across the ASEAN region. Their aim is to represent each province's individuality, attract exchange of investments to their strongest sectors, educate the businesses regarding the local rules and regulations, help create local partnerships for Canadian businesses, and encourage student exchange.

British Columbia, for example, has three offices in the region (Indonesia, which covers Thailand; Singapore, which covers Vietnam; and Malaysia). The BC provincial office is currently focusing on five sectors, which include international education, ICT (clean technology), natural resources, renewable energy, and aerospace. All in all, the provinces support the Canadian government's goal of trade diversification and promotion by supporting businesses as they enter the ASEAN market.

The Canadian Ambassador to ASEAN

In 2016, Canada opened its dedicated mission to the ASEAN region and appointed its first ambassador for the ASEAN region. The main priorities of the mission include:

Capacity building especially for increased market access. Creating a platform to conduct trade and to ensure commitments are respected. Specific focus is aimed towards agriculture and food products.

Increasing Public-Private partnerships in the region to increase foreign direct investment.

Through this mission, Canada aims to carry out its goal of diversification and begin negotiations for FTAs and other agreements. Canada's first round of Exploratory Discussions for an FTA was also concluded with the ASEAN region in September 2019, to assess the potential for a free-trade agreement with the region.⁹⁴ Of the 9 key areas that were identified within the discussions, mobility was not brought up as a main challenge or point of discussion in the exploratory phase.

Trade Commissioner Service (TCS)

The Trade Commissioner Service (TCS) of Canada helps companies navigate international markets. With services in more than 160 cities worldwide, trade commissioners provide business insights and access to a network of international contacts to better support Canadian businesses. Two of the main tasks Trade Commissioners are assigned include assisting businesses in learning how to export (i.e. apply for financial support; join a trade mission or attend networking events; and access guides and statistics on how to do business abroad) and familiarizing them to emerging markets (i.e. access up-to-date information and reports on markets and sectors abroad; plan for tariffs, sanctions, and controls; and learn about Canada's free trade agreements).⁹⁵

The Canada Border Service Agency

Canada Border Services Agency (CBSA) is the government agency responsible for border protection, and immigration enforcement to facilitate the movement of people and goods. Immigration enforcement is one of the main areas of focus for CBSA as it's the first point of contact for immigrants in Canada. In relation to immigration enforcement, CBSA has a mandate to screen and examine individuals entering Canada.⁹⁶ The application process for the APEC card is facilitated by the CBSA. As noted earlier, to access this card, Canadians need to schedule an appointment with CBSA at least 3 months in advance, and they then must physically attend an interview at a Canadian airport. This often presents Canadian businesses operating in the ASEAN region with a problem as scheduling an appointment or an interview in advance and having to travel back to Canada is not always a viable option.

Export Development Canada (EDC)

Since 1944, Export Development Canada (EDC) has served as Canada's export credit agency. In partnership with other financial institutions, and through collaboration with the Government of Canada, the EDC provides insurance and financial services, bonding products and small business solutions to Canadian exporters, investors and international buyers. It also supports Canadian direct investment abroad and investments into Canada.⁹⁷

Canada-ASEAN Business Council (CABC)

Established in 2012, the CABC works to facilitate increased trade and investment in the Canada-ASEAN economic corridor through policy advocacy, networking, and education. The council is the main connection between the Canadian private sector in the ASEAN region. The CABC's mission is to educate and guide its members toward concrete commercial opportunities and to facilitate the creation of a sustainable Canada-ASEAN business corridor. The CABC hosts the Canada-ASEAN Business Forum, in addition to a number of sector-specific events across the region and in Canada. Based in Singapore, the CABC has recently launched its first Canadian office in Calgary, Alberta.

Canadian Chambers of Commerce

The Canadian Chamber of Commerce (CanCham) has offices across the ASEAN region, including Malaysia, Indonesia, Thailand, Philippines, Vietnam, Singapore, and Cambodia. The primary role of CanCham is to protect and advocate for the interest of the business community to government agencies as well as provide services such as consultation and networking opportunities to help Canadian businesses succeed in the ASEAN region. It should be noted that CanCham are local groups but are not connected formally with each other or with the Chamber in Canada.

Canadian businesses in the ASEAN region express that the presence of CanCham is particularly important for new businesses entering the market and for potential businesses who are exploring the region. CanChams can introduce new businesses to relevant local partners, market regulators, and help create a network of similar businesses to support each other. CanCham's presence across the ASEAN region remains small in terms of resources and membership, in comparison to the American and Australian Chambers, both of which maintain a strong market presence due to the large number of their respective national businesses on ground.

SECTION VII

Comparative Analysis

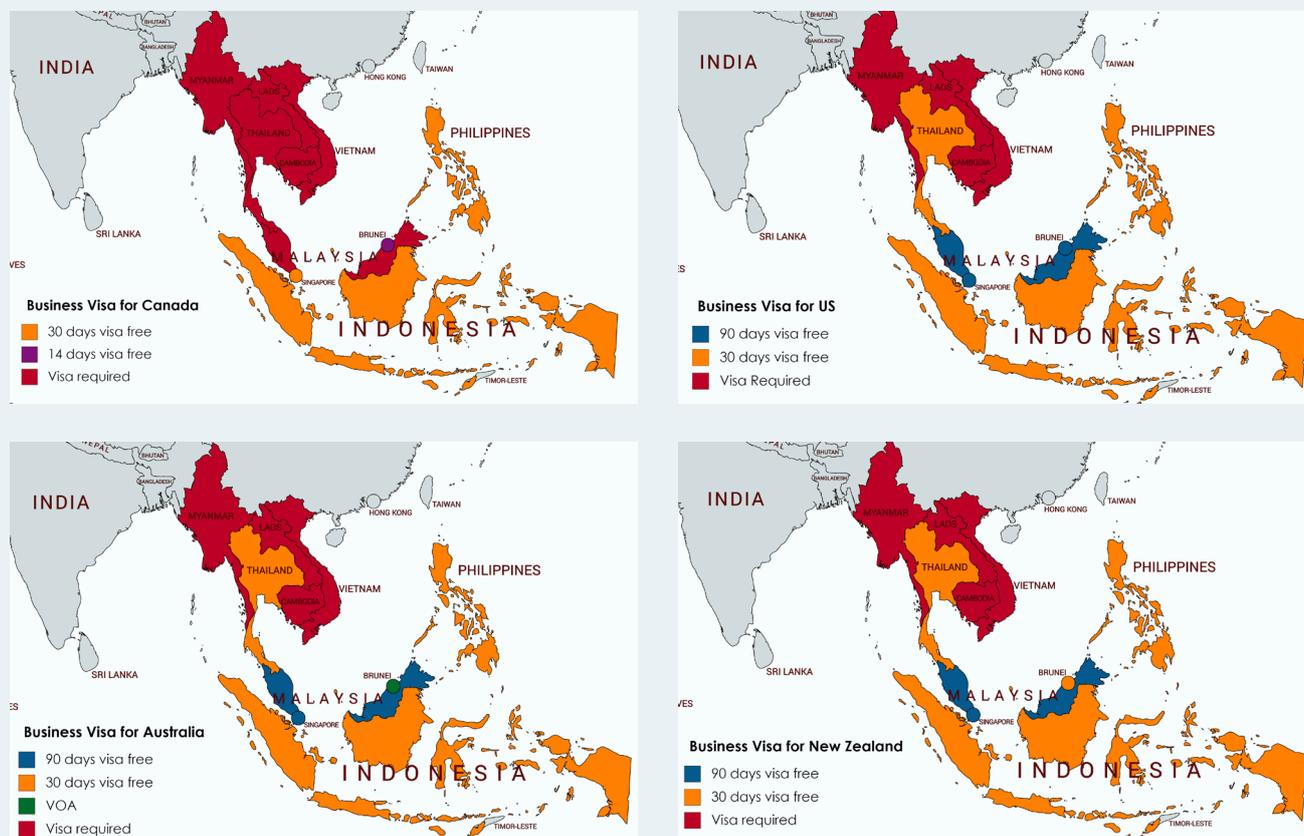


FIGURE 10. Comparison of business visa regulations set for ASEAN member countries into Canada, the US, Australia and New Zealand

AS CANADA WORKS TO DIVERSIFY ITS ECONOMY and build its economic relationships with ASEAN member countries, it must consider the initiatives taken by its main competitors in the region to advance trade relations. The US, New Zealand and Australia are three of the most active countries in the ASEAN region. The following is a comparative analysis of the short-term visa regulations and intra-company transfer policies of the three countries towards ASEAN member countries.

United States of America

US Economic Relations with the ASEAN Region

The US has a strong diplomatic, economic and security partnership with ASEAN countries. The signing of the US-ASEAN Trade and Investment Framework Agreement (TIFA) in 2006 formalized the economic relations between the US and the ASEAN region.⁹⁸ The US has trade and investment agreements with all member countries including a FTA with Singapore. The ASEAN region is the fourth largest export market for the US comprising 5.2 percent of all US exports in 2018.⁹⁹

Visa Regulations

The US offers different types of visas for business travellers. Most business travellers require a temporary B1/B2 visa to enter the US. The validity of the visa period differs across the ASEAN countries from one-month visa issued to Burmese citizens to ten years multi-entry visa issued to citizens of ASEAN countries such as the Philippines and Thailand. Similarly, the temporary US visa rejection rate varies across the region with Malaysia having the lowest US visa rejection rate of 4.94 percent while Laos has the highest rejection rate of 64.06 percent in 2018.¹⁰⁰ Most interviewed Canadian businesses with operations in the US noted that US business visa application and access for ASEAN business travellers and employees is straightforward and easy compared to Canada. They particularly mentioned that the requirements and the processing time are clear and fair.

Singapore and Brunei are among the 39 countries which are eligible for the US Visa Waiver Program, which allows visa-free business travel to the US for up to 90 days.¹⁰¹ Business travellers to the US through the Visa Waiver Program must obtain authorization through the Electronic System for Travel Authorization (ESTA) before travel. It's a reciprocal program where eligible VMP countries also offer free-visa travel access for up to 90 days to US citizens.¹⁰²

The L-1 visa allows foreign companies that operate in the US to transfer executives and managers for up to seven years and employees with “specialized knowledge” for a maximum period of five years.¹⁰³ Businesses that have operated in the US and at least in one other foreign country for at least one year are eligible to transfer employees using the L-1 visa.¹⁰⁴ This visa category also allows foreign companies to send executives and managers to set up a business in the US. Eligible employees must have worked in the company for at least one year before the transfer.

The regular processing for L-1 application involves petition by the employer to the United States Citizenship and Immigration Services (USCIS) and if approved, followed by an application for an L-1 visa by the employee at the respective US embassy. For an extra fee, expedited processing is available where an application will be processed within 15 days than regular application processing that can take a long time.¹⁰⁵

For large multinational companies with employees of more than 1000 and have annual revenue of at least 25 million, the US immigration system offers the blanket L-1 visas petition option. If businesses get approval under the L1 corporate blanket, they can transfer several employees annually without applying to USCIS to get approval for individual employees.¹⁰⁶ It significantly reduces the visa processing time and cost. Canadian businesses that operate in the ASEAN region and have a presence in the US find the blanket L-1 visa process convenient to transfer employees using the corporate blanket system as it significantly reduces processing time and cost.

Overall, compared to Canada, most interviewees find the US immigration system for business visitors and employee transfers simpler and more accessible. In addition to the blanket L-1 visa application, direct access to US embassies/consulates as well as the availability of expedited processing was noted as particularly advantageous for mobility of businesspeople between the ASEAN region and the US by Canadian companies.

Australia and New Zealand

Australia and New Zealand Economic Relations with the ASEAN Region

Australia and New Zealand have been partners with ASEAN member economies for more than 40 years. While each country has distinctive interests, both share strong economic and political ties with Southeast Asia. The ASEAN region is among the top five trading partners for Australia¹⁰⁷ and New Zealand.¹⁰⁸ The finalization and implementation of the ASEAN Australia New Zealand Free Trade Agreement (AANZFTA) in 2009 has led to an even stronger trade flow and investment. Both Australia and New Zealand in addition to the multilateral AANZFTA and CPTPP free trade agreements, have bilateral FTAs with Singapore, Thailand and Malaysia.

Visa Regulations

Australia and New Zealand have different visa systems applicable to the ASEAN region and vice versa. Both Australia and New Zealand's visa policies require citizens of most ASEAN countries to obtain a visa to enter and work in their countries. There are different categories of visas that are applicable to ASEAN business travelers and to enter Australia and New Zealand.

In Australia, business visas are issued to individuals who visit Australia for a short period of time to conduct activities such as exploring business opportunities, negotiating contracts, and participating in meetings and exhibitions.¹⁰⁹ Business travelers are required to apply for a visa and fulfill the requirements including providing proof of business background and means of sustenance, and if requested by immigration officers, submit a medical assessment certificate. Business travelers can submit a paper application or online application to obtain a business visa.¹¹⁰ Singapore, Malaysia and Brunei are eligible for an Electronic Travel Authority (ETA) business visa. The ETA is an electronic authorization to enter Australia that electronically links visas to one's passport. The ETA provides multi-entry access for a period of 12 months with up to 3 months stay per visit.¹¹¹ In 2019, Australia immigration had on average approved 93 percent of all business visa applications. The ASEAN-6 have a business visa approval rate ranging from 90 to 99 percent.¹¹²

Australia has multiple business visa categories depending on the position of a business person in a company or sponsor of the business traveller. Accordingly the visa categories include business owner, senior executive, investor visas as well as state/territory sponsored business travelers.¹¹³ These types of visas are considered as provisional and business travellers once they obtain one of these visas can, for example, apply for a business owner visa that will allow them to stay in Australia indefinitely.¹¹⁴ ASEAN businesses that have operations both in Canada and Australia mentioned that these visa categories ease the visa application process as it doesn't put together all business travelers in one category and differentiates those with established local business relations.

Likewise, all business travelers from ASEAN countries except Brunei, Singapore and Malaysia need a visa to travel to New Zealand. Brunei, Singapore and Malaysia can travel to New Zealand with New Zealand Electronic Travel Authority (NZeTA) which is valid for 2 years for a stay up to 90 days per visit. The New Zealand immigration policy provides a framework and special category for intra- corporate transfers for specialist personnel, senior managers, or executives. The Intra-corporate transferee visas are issued for a minimum of one year and can be extended to six

years. New Zealand has the lowest business visa rejection rate for ASEAN countries.¹¹⁵ For instance, Vietnam has the highest business visa application from 2009 to 2020 with 50,939 applications out of which only 218 were rejected.¹¹⁶

The AANZFTA and similar trade agreements address issues of tariffs and other barriers to trade in goods, services, and investments as well as the movement of businesspeople. The easing of visa and travel requirements for businesspeople is one of the key components of the AANZFTA and other trade agreements. Through these trade agreements, signatory countries offer special visa arrangements or exemptions from regular visa and work permit procedures such as labor market assessment to ease temporary movement of businesspeople.¹¹⁷ As signatories to AANZFTA, Australia and New Zealand that have restrictive (strict) visa and immigration policies and processes, similar to Canada, have now integrated policies to ease the mobility of businesspeople.

All the FTAs that Australia and New Zealand signed have different provisions and commitments regarding movement of people both in relation to short term business visas and intra company transfers. Australia's commitment under the AANZFTA exempts the intra-company transfer of executives, senior managers, "specialist" and independent executives to work in Australia without undergoing labor market assessment for varied periods of time.¹¹⁸ For instance, under the agreement executives and senior managers can stay up to 14 years with an initial stay of 4 years.¹¹⁹ New Zealand has similar commitments under the AANZFTA where executives and managers can obtain a work permit without undergoing labor impact assessment for an initial stay of three years.¹²⁰ In contrast to Australia, specialists undergo labor market assessment to work in New Zealand.

Australia and New Zealand have working holiday visa programs that offer youth from ASEAN countries the opportunity to work and live in their countries for up to 12 months. Both countries extend the program to Malaysia, Thailand and Vietnam while Australia also includes Indonesia and New Zealand includes Singapore and the Philippines.¹²¹

In terms of visa application processing, the Australian immigration system, though discretionary and left to immigration officers, provides an option to post bonds to guarantee that visitors will leave Australia after their business engagement or before their visa expires. Australian business organizations and chambers of commerce are eligible to sponsor business visitors.¹²² New Zealand has a similar system where the immigration office may require the posting of a bond to guarantee that business visitors

return to their countries within the specified visa period.¹²³ Some of the Canadian businesses interviewed viewed the Australian and New Zealand bond system as a good alternative to ease travel of ASEAN employees to Canada for a short time visit for meetings and trainings.

Similar to Canada, both Australia and New Zealand have outsourced visa collection services to VFS Global in the ASEAN region. The Visa Application Centre collects all the necessary documents for processing by the concerned Australian and New Zealand Embassies in the region. In contrast to Canada, the Australian immigration system has a scheme to register and maintain a database of approved migration agents that can provide assistance and submit visa applications.¹²⁴

To understand the significance of these comparisons please note the following table which illustrates Canada's economic indicators in comparison to Australia, New Zealand, and the US. While Canada's geography may not assist its position with the ASEAN region, its economic indicators place it in a competitive position with the other countries. Canada needs to realize its trade and investment potential and its competitive advantage over other similar economies, making policies and regulations which support mobility, helping overcome the challenges, and hence support increased growth for the domestic market.

TABLE 9. Economic Indicators Analysis in reference to ASEAN: CA-AUS-NZ-US ^{125, 126, 127}

Country	Canada	Australia	New Zealand	United States
Languages	English, French	English, Aboriginal languages	English	English
Population (million)	37.589	25.168	4.929	327.352
GDP (2018) (billion)	USD 1,713.3	USD 1,433.9	USD 204.9	USD 20,544
GDP per capita (2017)	USD 45,032	USD 53,800	USD 42,940	USD 59,531
GDP Growth Rate (%) (2018)	1.9	2.81	2.99	2.86
GDP Ranking (2018)	10	13	52	1
Inflation Rate (%) (2018)	2.24	1.98	1.65	2.44
Unemployment Rate (%)	5.83	5.29	4.25	3.89
Exports to ASEAN	USD 6.5 billion (2017)	USD 23.6 billion (2017)	USD 3.84 billion (2017)	USD 111 billion (2017)
Imports from ASEAN	USD 16.8 billion (2017)	USD 33.8 billion (2017)	USD 5.39 billion (2017)	USD 192 billion (2017)
Foreign Direct Investment to ASEAN	USD 12.2 billion (2017)	USD 26 billion (2017)	USD 2.8 billion (2017)	USD 328.8 billion (2017) (stock)

Country	Canada	Australia	New Zealand	United States
Foreign Direct Investment from ASEAN	USD 399 million (2017)	USD 24.7 billion (2017)	USD 4.9 billion (2017)	USD 27.5 billion (2017) (stock)
Main Imports into ASEAN	Fertilizers Machinery Cereals Wood Pulp Electrical and Electronic Equipment	Crude petroleum Wheat Coal Gold Livestock (seafood) Copper Nickel (2016)	Dairy products Meat Logs Fruit Wood Pulp Wastepaper (2017)	Electrical Machinery Agriculture Products Aircraft Mineral Fuels Optical and Medical Instruments (2018)
Main Exports from ASEAN	Electrical and Electronic Equipment Machinery Rubber Apparel (2012)		Petroleum Products (2017)	Electrical Equipment Machinery Agriculture Products Knit Apparel Woven Apparel Footwear (2018)

SECTION VIII

Policy Recommendations

THE FOLLOWING LIST OF RECOMMENDATIONS is presented on the basis of their ease of implementation, transferrable best global practices, cost-effectiveness and ease of application in Canada. The recommendations have been divided into three sections consisting of short-term, mid-term, and long-term. These categories imply a general time frame in relation to how quickly they can be implemented, while the long-term recommendations might require policy changes and a more rigorous process of application, thus anticipating a longer period. Each of the recommendations refers to a specific problem/section, which has been referenced in the report.

Short Term

1. ASEAN member states should collectively create a comprehensive online resource for visa and work permit applications.

To address the concerns of interviewees who noted that visa requirements and related information of ASEAN member countries is often difficult to obtain, we recommend creating an online resource, as a one-stop-shop regarding all visa processes, requirements and links to official visa portals for all 10 member countries. This would improve information delivery through a more accessible and centralized, official location, giving applicants confidence to use online resources. It will also help alleviate the confusion surrounding visa requirements and application processes which ultimately helps save time and money, making the process much more accessible. By improving functionality, this would also deter cases of scam through fake websites.

For more information on this recommendation, please see [Section V: Mobility](#).

2. The Government of Canada should provide detailed rejection letters, making them more specific, especially for business visa and work permit applicants.

Most businesses whose visa application was rejected by IRCC, explained that the rejection letter they received lacked substantial reasoning as to why the application was denied. They do not receive a clear explanation of the requirements that were not met or the documents that were found missing by the immigration office and are left with no option but to re-apply. Without a clear idea of why their application was denied the first time, applicants are most likely to repeat the same mistakes again and face rejection a second time. A detailed letter of rejection would help businesses and individuals with visa and work permit applications to better understand the process and increase their chances of getting visa approval on their first attempt, making the process more efficient for both the applicant and the immigration officer processing the application.

For more information on this recommendation, please see [Section V: Mobility](#).

3. The CPTPP should be ratified and implemented by all signatory Countries.

The Governments of Malaysia and Brunei should ratify the CPTPP and the Government of Vietnam should implement the agreement as agreed upon. Brunei and Malaysia have signed onto the CPTPP but have yet to ratify the agreement. Since the FTA includes provisions on the temporary entry of businesspeople, skilled technicians, intra-company transferees, etc. ratifying the agreement would mitigate many of the mobility challenges that businesses face.

Vietnam would also benefit from implementing the provisions of the CPTPP, specifically the mobility terms. The CPTPP would benefit all three countries, as well as Canada as it would lead to improved mobility, better trade relations and easier access to each market.

Medium Term

4. The Government of Canada should build initiatives focused on capacity building activities within the ASEAN region to support better economic integration between Canada and the ASEAN region.

As noted by interviewees and presented throughout the comparative analysis section on Canada with Australia, New Zealand and the US, the latter three countries not only maintain stronger economic ties with the ASEAN region but also greatly invest in capacity building initiatives and activities in ASEAN member countries. Such initiatives and activities not only help increase the knowledge of these foreign countries of the ASEAN region, but also build local confidence towards these foreign markets and bridge the knowledge gap regarding culture, social and economic norms. This bridge indirectly supports foreign exports in the region. Currently, Canada, through strategic initiatives taken by Global Affairs Canada, is investing in similar knowledge creation activities in four APEC economies, including Vietnam, Peru, Indonesia and the Philippines; with the aim to foster sustainable development of the region's MSMEs.¹²⁸ Canada should further leverage its expertise in offering training, toolkits, institutional mechanisms and guidance notes to ASEAN's economic sectors that match Canada's economic priorities and expertise as a global leader sharing its international best practices with its partners. Infrastructure building and knowledge-creating activities help support bilateral relations and negotiation powers across economies. Simultaneously, the Canadian government should also invest on promoting and educating Canadian businesses and investors on the opportunities available in the ASEAN region, with a focus on expanding economic relations through trade, investment, technology, and innovation.

For more information on capacity building, please see [Section V: Other Challenges](#).

5. To alleviate concerns surrounding application processing times, the Government of Canada should introduce an expedited business visa application process.

By charging an additional fee, the IRCC can provide the option of expedited visa applications in cases where travel was not foreseen or predicted in advance. This option would ensure that last-minute travel for business reasons is not impossible. Similar to the US expedited model, this option would require documentation to explain the urgency of the travel or to demonstrate that delayed travel would result in significant loss of opportunity. This option, upon demonstrated success, can be extended to cover non-emergency situations. With or without extension, this option would be accompanied by higher fees.

For more information on this recommendation, please see [Section V: Mobility](#).



Long Term

6. The Government of Canada should develop a blanket visa approval process for Canadian businesses operating in the ASEAN region.

Similar to the US corporate blanket system, we recommend Canada to implement a system which would provide general visa approvals for Canadian businesses (multinational companies and medium sized enterprises) operating in the ASEAN region, for short-term business visas. This pre-approval would be given to a company for its employees so that they may travel on short notice and consequently reduce visa processing time. Companies would only be approved for these types of visas upon rigorous security clearance by Canadian Government officials. Such a process would also shift some of the responsibility on the companies to ensure that the employees they nominate for travel are not a flight or security risk. Once an initial corporate blanket has been granted, employers would need to provide the information of specific employees as the need for travel arises. Through the blanket system, the visa processing time and procedures will be reduced significantly. It would be the responsibility of the business to get clearance after submitting required business-related documents to the Canadian office, to satisfy all initial security requirements. IRCC could define conditions and necessary requirements for the due diligence process. The Embassy could maintain a list of pre-approved businesses, and each time an employee from such a company applies for the visa, his/her application will be proceeded with the business approval for travel. If an employee of a Canadian business fails to comply with Canadian laws and regulations, then the company could be fined with a travel ban placed on its employees for 5 years.

For more information on this recommendation, please see [Section V: Mobility](#) and [Section VII: Comparative Analysis](#).

7. The Government of Canada should establish a Bond system to ensure that employees and business travellers are less of a flight risk and would allow for easier inter-company transfer visa processes.

A security bond between the value of CAD 5,000 to CAD 15,000 would be collected prior to an employee's entry into Canada and would be returned upon the expiry of their visa. The applicant would be part of a local organization/business in Canada that is willing to sponsor them and guarantee their departure from Canada, and who pays for the bond on their behalf. Similar to the previous recommendation on a blanket visa approval process, the guarantee coming from an established company creates an accountability measure at the business level. Ultimately, the priority is to place said bond model to ensure visa access as well as complying to the security concerns. Australia currently maintains a similar security bond mechanism, whereby the sponsor pays for the bond for the visitor visa, refunded once the visitor leaves and has complied to all visa conditions.

For more information on this recommendation, please see [Section V: Mobility](#) and [Section VII: Comparative Analysis](#).

8. The Government of Canada should create an additional visa category, specific for businesses who maintain relations with a Canadian company.

Australia has a separate category for business visa applications for business executives and owners as well as businesses who maintain relations with a local company. This additional visa category would help differentiate businesses applying for entry as executives, business owners or sponsored travelers who already maintain local relationships or have regional presence. As mentioned by some of our interviewees, this would help to expedite the business movement, reduce time lags and support businesses for whom visa processes and work permit delays translate into large business costs.

For more information on this recommendation, please see [Section V: Mobility](#) and [Section VII: Comparative Analysis](#).



SECTION IX

Conclusion

ASEAN IS A MULTILATERAL ORGANIZATION with no authority over the individual regulatory frameworks for business travel and work permits across each ASEAN member country. While FTAs and other agreements should be considered through a multilateral approach for maximum effectiveness, a bilateral approach may be the only option to resolve mobility-related challenges due to the nature of immigration and border security. As noted, mobility is important for a business' ability to conduct business in the ASEAN region as face to face meetings are a crucial element for businesspeople to build lasting fruitful partnerships with investors and other businesses based in ASEAN. Technology has not yet managed to bridge the gap of what can be done virtually and what requires physical attendance. As elaborated throughout the report, mobility is not an isolated issue that can be resolved on its own, but rather it is dependent on multiple factors such as cultural awareness, available services and resources, local regulations, and bilateral or multilateral agreements.

The interconnectedness of these issues creates an opportunity for Canada to mirror similar initiatives as those taken by Australia and New Zealand. Canadian economy stands at par with Australia and New Zealand; however, their resource allocation and development initiatives differ greatly when it comes to the ASEAN region. It is important for Canada to support and participate in more capacity building initiatives in ASEAN in order to both promote Canadian businesses in the region and attract investments into Canada. Unfortunately, the extent of this comparison falls outside the scope of our research, but it may be worthwhile to conduct an in-depth assessment of initiatives by Australia and New Zealand in the ASEAN region and how these initiatives correlate with their economic relationship.

Please note that some of the elements which affect mobility fall beyond the scope of this report and consequently they were not addressed in the recommendations (i.e. Direct Flights, etc.). Further work and analysis need to be conducted to address other factors which may have an impact on mobility, as noted in the Other Challenges section. The policy recommendations suggested aim to provide solutions to some of the challenges faced by participants of the research project, which are implementable, cost-effective, and are based on global best practices.

To improve business mobility and foster economic connectivity, it is important to work cohesively to improve all the other relevant factors. Canadian and ASEAN governments as well as organizations such as the CABC are working to bridge the disconnect between Canada and the ASEAN region and raise awareness of the vast economic opportunities that are available. However, most of the burden falls on businesses, entrepreneurs and investors to educate themselves, and on the Canadian government in particular to not only support businesses through incentives but to also advertise them effectively.

Appendix

Appendix A. Methodology

This report primarily relies on qualitative research. Data was collected through interviews with business representatives, governmental officials, Chambers of Commerce and think tanks, regarding the importance of business mobility between Canada and the ASEAN region. This data was complemented with secondary research, in both academic literature and practitioner/policy-based literature.

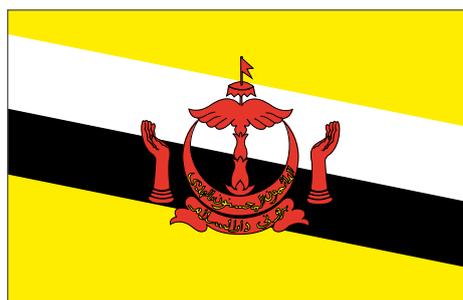
Primary research

The research team conducted semi-structured interviews in person in Canada, Indonesia, Singapore and Vietnam and over the phone with individuals in Cambodia, Malaysia, Myanmar, the Philippines, and Thailand.¹³⁰ There were several factors that accounted for why Indonesia, Singapore and Vietnam were selected as fieldwork destinations. First, most regional headquarters, including the CABC's head office, are in Singapore. Second, Singapore and Vietnam are part of the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), which has positioned both countries as key target markets for Canadian businesses. Lastly, Jakarta, Indonesia hosts both the Canadian Ambassador to ASEAN as well as the ASEAN Secretariat.

Secondary research

The research team conducted literature reviews to identify what has already been written on the research topic. Some key documents reviewed include the seven reports published by the CABC; Taxback 2014 Global Mobility Survey report; Immigration, Refugees, Citizenship Canada (IRCC) visa requirements for citizens from ASEAN countries; visa regulations of each country related to business visas and work permits; Canada and ASEAN government documents and national reports with the most recent visa statistics available; and global datasets by international organizations such as the World Bank's ease of doing business dataset.

Appendix B. ASEAN Countries Snapshots



Brunei Darussalam (Brunei)

Languages: **Malay, English**

Population: **0.434 million**

GDP: **CAD 18.29 billion (2018)**

GDP per capita: **42,096.01 (2018)**

GDP Growth Rate: **-0.23% (2018)**

GDP Ranking: **130 (2018, World Bank)¹³²**

Inflation Rate: **0.15% (2018)**

Unemployment Rate: **9.3% (2018)**

Canadian Imports from Brunei (2019):

- Fats, Oils & Waxes Products
- Animal Products
- Base Metal Products
- Textiles Products
- Machinery, Mechanical and Electronic Products
- Specialized Institutions

Canadian Exports to Brunei (2019):

- Machinery, Mechanical and Electronic Products
- Specialized Institutions
- Vegetables Products
- Base Metal Products
- Food Products
- Plastics, Rubber Products

Bilateral Exports with Canada

- 2017: **CAD 3,197,964**
- 2018: **CAD 6,473,170**
- 2019: **CAD 8,773,940**

Bilateral Imports with Canada

- 2017: **CAD 5,411,194**
- 2018: **CAD 7,524,226**
- 2019: **CAD 392,546**



Kingdom of Cambodia (Cambodia)

Languages: **Khmer, Chinese, Vietnamese, French, English**

Population: **16.253 million (2018)**

GDP: **31.85 billion (2018)**

GDP Growth Rate: **7.25% (2018)**

GDP per Capita: **CAD 1,959.50 (2018)**

GDP Ranking: **109/204 (2018, World Bank)**

Unemployment Rate: **N/A**

Inflation Rate: **2.39% (2018)**

Canadian Imports from Cambodia:

- Textile Products
- Dress Accessories
- Leather and fur Products
- Miscellaneous Articles
- Vehicles and Equipment
- Plastics and Rubber Products

Canadian Exports to Cambodia:

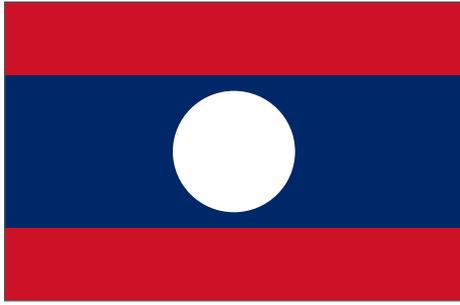
- Leather and fur Products
- Vehicles and Equipment
- Machinery, Mechanical and Electronic Products
- Wood Products
- Textile Products
- Vegetable Products

Bilateral Exports with Canada

- 2017: **CAD 51,484,253**
- 2018: **CAD 78,423,162**
- 2019: **CAD 73,246,945**

Bilateral Imports with Canada

- 2017: **CAD 1,293,845,374**
- 2018: **CAD 1,474,745,499**
- 2019: **CAD 1,704,536,621**



Lao People's Democratic Republic (Laos)

Languages: **Lao, French, various ethnic languages**

Population: **6.78 million**

GDP: **CAD 23.94 billion (2018)**

GDP per capita: **CAD 3,532.89 (2018)**

GDP Growth Rate: **6.5% (2018)**

GDP Ranking: **117 (2018, World Bank)**

Inflation Rate: **2.04 (2018)**

Unemployment Rate: **Data unavailable**

Canadian Imports from Laos (2019):

- Machinery, mechanical and electronic products
- Textiles Products
- Chemical Products
- Dress Accessories
- Vegetables Products
- Plastics, Rubber Products

Canadian Exports to Laos (2019):

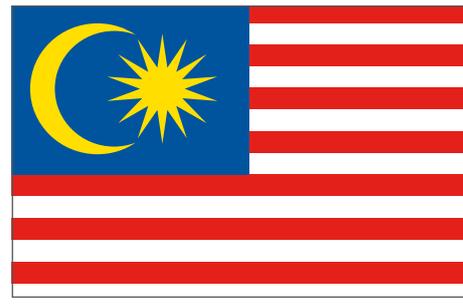
- Machinery, Mechanical and Electronic Products
- Plastics, Rubber Products
- Chemical Products
- Specialized Institutions
- Vehicles and Equipment
- Food Products

Bilateral Exports with Canada

- 2017: **CAD 6,131,998**
- 2018: **CAD 3,423,708**
- 2019: **CAD 2,843,830**

Bilateral Imports with Canada

- 2017: **CAD 31,412,247**
- 2018: **CAD 65,297,533**
- 2019: **CAD 47,576,945**



Malaysia

Languages: **Malay (Bhasa Malaysia), English, Hokkien, Cantonese, Tamil**

Population: **32.385 million (2018)**

GDP: **460.19 billion (2018)**

GDP Growth Rate: **4.72% (2018)**

GDP per Capita: **CAD 14,210.06 (2018)**

GDP Ranking: **36/204 (2018, World Bank)**

Unemployment Rate: **3.33%**

Inflation Rate: **0.97% (2018)**

Canadian Imports from Malaysia:

- Machinery, Mechanical and Electronic products
- Specialized Instruments
- Plastics and Rubber Products
- Base Metal Products
- Miscellaneous Articles
- Fats, Oils and Waxes Products

Canadian Exports to Malaysia:

- Chemical Products
- Vegetable Products
- Machinery, Mechanical and Electronic Products
- Base Metal Products
- Fats, Oils and Waxes Products
- Plastics and Rubber Products

Bilateral Exports with Canada

- 2017: **CAD 718,592,624**
- 2018: **CAD 784,122,140**
- 2019: **CAD 802,876,777**

Bilateral Imports with Canada

- 2017: **CAD 2,786,783,798**
- 2018: **CAD 2,981,805,759**
- 2019: **CAD 2,847,246,374**



Republic of the Union of Myanmar (Myanmar)

Languages: **Burmese (ethnic languages widely used)**

Population: **52.832 million (2018)**

GDP: **89.04 billion (2018)**

GDP Growth Rate: **2.10% (2018)**

GDP per Capita: **CAD 1,685.30 (2018)**

GDP Ranking: **71/204 (2018, World Bank)**

Unemployment Rate: **4%**

Inflation Rate: **3.48% (2018)**

Canadian Imports from Myanmar (2019):

- Textile Products
- Dress accessories
- Leather and fur Products
- Plastics and Rubber Prod.
- Veg. Prod.
- Animal and products

Canadian Exports to Myanmar (2019):

- Vegetable Products
- Paper Products
- Vehicles and Equipment
- Plastics and Rubber Products
- Chemical Products
- Machinery, Mechanical and Electronic Products

Bilateral Exports with Canada

- 2017: **CAD 39,706,695**
- 2018: **CAD 34,679,502**
- 2019: **CAD 50,887,740**

Bilateral Imports with Canada

- 2017: **CAD 121,536,267**
- 2018: **CAD 131,216,988**
- 2019: **CAD 182,873,970**



Republic of Indonesia (Indonesia)

Languages: **Bahasa Indonesia**

Population: **264.162 million (2018)**

GDP: **1,327.86 billion (2018)**

GDP Growth Rate: **5.17% (2018)**

GDP per Capita: **CAD 5,026.70 (2018)**

GDP Ranking: **16/204 (2018, World Bank)**

Inflation Rate: **3.20% (2018)**

Unemployment Rate: **5.34%**

Canadian Imports from Indonesia (2019):

- Textile Products
- Machinery, mechanical and electronic products
- Plastics and Rubber Products
- Dress accessories
- Food Products
- Base metal Products

Canadian Exports to Indonesia (2019):

- Vegetable Products
- Paper Products
- Chemical Products
- Vehicles and Equipment
- Machinery, mechanical and electronic products
- Animal and Prod.

Bilateral Exports with Canada

- 2017: **CAD 1,728,798,130**
- 2018: **CAD 2,147,186,309**
- 2019: **CAD 1,930,415,327**

Bilateral Imports with Canada

- 2017: **CAD 1,730,740,683**
- 2018: **CAD 1,759,919,035**
- 2019: **CAD 1,814,773,437**



The Philippines

Languages: **Filipino, English**

Population: **106.60 million**

GDP: **CAD 429.67 billion (2018)**

GDP per Capita: **CAD 4030.68 (2018)**

GDP Growth Rate: **6.2% (2018)**

GDP Ranking: **39 (2018)**

Inflation Rate: **5.21% (2018)**

Unemployment Rate: **5.33% (2018)**

Canadian Imports from Philippines (2019):

- Animal & Products
- Mineral Products
- Wood Products
- Chemical Products
- Machinery, Mechanical and Electronic Products
- Food Products

Canadian Exports to Philippines (2019):

- Machinery, Mechanical and Electronic Products
- Base Metal Products
- Food Products
- Textiles Products
- Mineral Products
- Plastics, Rubber Products

Bilateral Exports with Canada

- 2017: **CAD 842,466,658**
- 2018: **CAD 980,083,694**
- 2019: **CAD 727,769,676**

Bilateral Imports with Canada

- 2017: **CAD 1,392,453,217**
- 2018: **CAD 1,450,950,575**
- 2019: **CAD 1,625,764,272**



Singapore

Languages: **English, Malay, Mandarin, and Tamil**

Population: **5.6 million**

GDP: **CAD 468.97 billion (2018)**

GDP per capita: **CAD 83,170.68 (2018)**

GDP Growth Rate: **3.23% (2018 ,World Bank)**

GDP Ranking: **34 (2018)**

Inflation Rate: **0.44% (2018)**

Unemployment Rate: **2.13% (2018)**

Canadian Imports from Singapore (2019):

- Machine, Mechanical and Electric Products
- Chemical Products
- Mineral Products
- Food Products
- Base Metal Products

Canadian Exports to Singapore (2019)

- Machine, Mechanical and Electric Products
- Specialized Products
- Chemical Products
- Vehicles and Equipment
- Base Metal Products
- Plastics and Rubber Products

Bilateral Exports with Canada

- 2017 **CAD 1,305,174,940**
- 2018 **CAD 1,201,622,334**
- 2019 **CAD 1,523,655,448**

Bilateral Imports with Canada

- 2017 **CAD 1,006,008,001**
- 2018 **CAD 1,262,265,110**
- 2019 **CAD 1,201,541,107**



Thailand

Languages: **Thai, Ethnic and regional dialects**

Population: **67.793 million**

GDP: **CAD 632.78 billion (2018)**

GDP per capita: **9,334.02 (2018)**

GDP Growth Rate: **4.13% (2018)**

GDP Ranking: **25 (2018, World Bank)**

Inflation Rate: **1.06% (2018)**

Canadian Imports from Thailand (2019):

- Machine, Mechanical and Electric Products
- Food Products
- Plastics, Rubber Products
- Vegetable Products
- Precious Metals/Stones
- Vehicles and Equipment

Canadian Exports to Thailand (2019):

- Machine, Mechanical and Electric Products
- Vegetable Products
- Paper Products
- Chemical Products
- Base Metal Products
- Leather, Fur Products

Bilateral Exports with Canada

- 2017: **CAD 730,602,951**
- 2018: **CAD 780,542,080**
- 2019: **CAD 895,144,027**

Bilateral Imports with Canada

- 2017: **CAD 3,302,647,508**
- 2018: **CAD 3,561,898,369**
- 2019: **CAD 3,744,061,343**



Vietnam

Language: **Vietnamese, English, French**

Population: **94.58 million**

GDP: **CAD 313.34 billion (2018)**

GDP per capita: **CAD 3313.15**

GDP Growth Rate: **7.08% (2018)**

GDP Ranking: **10 (2018, World Bank)**

Inflation Rate: **3.54% (2018)**

Unemployment Rate: **2.21% (2018)**

Canadian Imports from Vietnam (2019):

- Machine, Mechanical and Electric Products
- Textiles Products
- Dress Accessories
- Miscellaneous Articles
- Base Metal Products
- Animal Products

Canadian Exports to Vietnam (2019):

- Mineral Products
- Vegetable Products
- Animal Products
- Chemical Products
- Machine, Mechanical and Electric Products
- Food Products

Bilateral Exports with Canada

- 2017: **CAD 1,052,288,885**
- 2018: **CAD 1,080,556,308**
- 2019: **CAD 993,141,676**

Bilateral Imports with Canada

- 2017: **CAD 5,083,835,376**
- 2018: **CAD 5,387,423,929**
- 2019: **CAD 6,985,967,737**

Appendix C. Travel Requirements Comparison

Comparison of Business Visa Requirements

	US - ASEAN	ASEAN - US	Australia - ASEAN	ASEAN - Australia	New Zealand - ASEAN	ASEAN - New Zealand	Canada - ASEAN	ASEAN - Canada
Singapore	Not required (up to 90 days)	Not Required	Not required (up to 90 days)	ETA (up to 90 days stay)	Not required (up to 90 days)	NZeTA (up to 90 days)	Not required (up to 30 days)	Not Required, only eTA
Vietnam	Required	Required	Required	Required	Required	Required	Required	Required
Indonesia	Not required (up to 30 days)	Required	Not required (up to 30 days)	Required	Not required (up to 30 days)	Required	Not required (up to 30 days)	Required
Philippines	Not required (up to 30 days)	Required	Not required (up to 30 days)	Required	Not required (up to 30 days)	Required	Not required (for stay up to 30 days)	Required
Thailand	Not required (up to 30 days)	Required	Not required (up to 30 days)	Required	Not required (up to 30 days)	Required	Required. Max stay 90 days	Required
Malaysia	Not required (up to 90 days)	Required	Not required (up to 90 days)	ETA (up to 90 days)	Not required (up to 90 days)	NZeTA (up to 90 days)	Required. Valid for stays up to 90 days.	Required
Myanmar	eVisa required (valid for 28 days)	Required	Required	Required	Required	Required	Required	Required
Laos	Required	Required	Required	Required	Required	Required	Required	Required
Cambodia	Required. Available on arrival at some ports	Required	Required. Available on arrival at some ports	Required	Required. Available on arrival at some ports	Required	Required	Required
Brunei	Not required (up to 90 days)	Not required (up to 90 days)	VOA (up to 30 days)	ETA (up to 90 days)	Not required (up to 30 days)	NZeTA (up to 90 days stay)	Not required (up to 14 days)	Not Required, only eTA

Appendix D. Canada-ASEAN Visa Regulations

	Singapore	Vietnam	Indonesia	Philippines	Thailand
Business Visa for Canadians	Not required (for stay up to 30 days)	Required	VOA for meetings. Business visa required for site visit or a stay longer than a week, for stay up to 3 months.	Not required (for stay up to 30 days)	Required. 1 year multiple entry visa can be issued. Max stay 90 days
Canada Visa Approval Rate 2018 - Temporary Visitor Visa	70%	76%	90%	76%	82%
Canada Visa Approval Rate 2018 - Work Permit	59%	86%	85%	72%	77%
Average Processing Time Work Permit (IRCC)	35 days	86 days	20 days	52 days	52 days
Number of days to get Business Visa to Canada (IRCC)	7 weeks	7 weeks	9 weeks	6 weeks	4 weeks
Visa Requirement into Canada	Not Required, only eTA	Required	Required	Required	Required
Number of days to get Visitor Visa to Canada (IRCC)	-	16 days	9 days	14 days	7 days
Work Visa Arrangement for Canadians	Canadians require employment pass, available for 180 days. S-Pass. Have to pay taxes above 180 days	3 months maximum work visa after which a TRC is issued followed by a PRC	Work permit required to work on machinery/site. LoR requested from regional government, then WP application sent to Central Gov. 3 months processing time. Annual renewal. Need to have work permit before entry.	SWP granted for up to 6 months, and can be extended. Work permit not required at the time of entry.	UWP issued for up to 30 days, for short assignments. WP extended from 1 to 4 years. Non-immigrant B visa required prior to entry
Working Holiday Visa	No	No	No	No	No
Internship arrangements by Canada	Not covered in immigration act, require work visa	Yes	No	Yes	Yes
CPTPP Membership	Yes	Yes	No	-	-
Quota System for locals (investment and Labour)	Labor quota 80% locals, 20% international. Varies across sector/type	No defined ratio of local to foreign workers	51% local investment required. 90% local hires, and 10% expatriate	-	51% local and 49% foreign investment. Labor 75% local, 25% foreign
APEC Card Membership (ABTC)	Yes	Yes	Yes	Yes	Yes

	Malaysia	Myanmar	Laos	Cambodia	Brunei
Business Visa for Canadians	Required. Valid for stays up to 90 days with multiple entry	Required. Letter of Recommendation required from local business.	Required	Required	Not required (up to 14 days)
Canada Visa Approval Rate 2018 - Temporary Visitor Visa	-	-	-	-	-
Canada Visa Approval Rate 2018 - Work Permit	-	-	-	-	-
Average Processing Time Work Permit (IRCC)	-	-	-	-	-
Number of days to get Business Visa to Canada (IRCC)	5 weeks	6 weeks	6 weeks	6 weeks	No information available
Visa Requirement into Canada	Required	Required	Required	Required	Not Required, only eTA
Number of days to get Visitor Visa to Canada (IRCC)	17 days	13 days	21 days	9 days	-
Work Visa Arrangement for Canadians	Multiple work permit options available such as PVP and EP. Require issuance of the permit before entry.	Require a letter of invitation from a local business, a letter of employment and company registration along with a stay permit	Require a visa agent to apply for visa. Facilitation fee to be paid to agency, otherwise long wait	Work permit and employment card required after E-class (business) visa	Short visas, (PVP) for up to 3 months; can be extended to EP for maximum 2 years. Require issuance of the permit before entry.
Working Holiday Visa	No	No	No	No	No
Internship arrangements by Canada	Yes	Yes	Yes	Yes	No
CPTPP Membership	Yes	No	No	No	No
Quota System for locals (investment and Labour)	Local investment required. Joint Partnership 50-50. Employment quota approval needed	-	10-20% local investment. Local Quota 75% local and 25% foreign for skilled jobs; 85% local and 15% foreign for physical labor jobs	Labor quota: 90% local, 10% foreign	
APEC Card Membership (ABTC)	Yes	No	No	No	Yes

Appendix E. Canadian Government Resources in the ASEAN Region

	Canadian Visa Office	VFS Global Office	Provincial Presence from Canada	TCS	CanCham
Singapore	Singapore	Singapore	Yes. BC (covers Vietnam), QC, AB, ON	Yes	Yes
Vietnam	Ho Chi Minh	Hanoi, Ho Chi Minh	Covered by BC remotely	Yes	Yes
Indonesia	Jakarta	Jakarta, Bali, Surabaya	BC (covers Thailand)	Yes	Yes
Philippines	Manila	Manila, Cebu	BC	Yes	Yes
Thailand	Bangkok	Bangkok	Covered by BC remotely	Yes	Yes
Malaysia	(Singapore)	Kuala Lumpur	BC	Yes	Yes
Myanmar	-	Rangoon	-	Yes	No
Laos	(Bangkok)	None	-	Yes	No
Cambodia	(Bangkok)	Phnom Penh	-	Yes	Yes
Brunei	(Singapore)	None	-	Yes	No

SECTION XI

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SECTION XII

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SECTION XIII

Client Profile

THE CANADA-ASEAN BUSINESS COUNCIL (CABC)



was established in 2012 at the request of Canada’s Minister of International Trade. Its official mandate is to “facilitate increased trade and investment in the Canada-ASEAN economic corridor through policy advocacy, networking, and education.”¹²⁹ The CABC has sixty members, including leading Canadian enterprises such as the National Bank of Canada, Sun Life Financial, and OpenText. The CABC is a registered non-profit in Canada and is headquartered in Singapore.

The CABC supports its Members through:

- **Policy Advocacy:** Work closely with the governments of the 10 member countries of ASEAN to represent members’ interests and concerns as well as provide a platform through which to enact change.
- **Education:** Educate our members and stakeholders about Canada-ASEAN trade and its many opportunities, by providing region and industry specific resources to help companies make the right decisions at the right time.
- **Networking:** Create, maintain, and grow commercial interests within the Canada-ASEAN economic corridor. To this end, the CABC works towards providing high-quality networking events with the intention of providing members with concrete opportunities to build and grow their organizations.

Contact Information

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SECTION **XIV**

Team Profile

THE RESEARCH TEAM consists of five students in the Master of Public Policy and Global Affairs (MPPGA) at the University of British Columbia (UBC) led by Assistant Professor Kai Ostwald. The team members are:



Alessia Rodríguez Di Eugenio

Born and raised in Venezuela, Alessia completed a BA (Hons) in International Relations, Political Science, and Sociology at the University of Toronto. Alessia's undergraduate interdisciplinary learning experience gave her a deep understanding of the myriad complexities of the world, sparking her interest in public policy and global affairs. Alessia volunteers at the Canadian Centre for Victims of Torture as an interpreter for Spanish-speaking asylum seekers. Her last work experience as a legal administrative assistant at a midsize firm in Toronto introduced her into the fundamentals of debtor-creditor law and procedure. Alessia hopes to strengthen her understanding of international geopolitics, gain new skills in the design and implementation of public policy, and attempt to address the question of the exclusion of the developing South. Her goal is to contribute to the social and economic development of Venezuela and Latin America at large. Her passion for development stems from her philosophy that the best policies should seek to empower and integrate developing countries and their particularities as against exclusion and further dependency.



Anam Imtiaz Elahi

A Pakistani-Canadian, split between the two countries, Anam graduated from McGill University in 2012 with a Major in Economics and a Minor in Mathematics and Finance. She holds more than 5 years of work experience, where she has assumed management roles in Microfinance Institutes, SME Financing and an advocate for Access to Finance, holding her last position with a USAID funded project as an SME Finance Specialist. She is passionate about working on projects and assignments which bring Economics, Finance and Policy Development together; strongly supporting and working for assignments in education finance, financial literacy, sustainable energy solutions, and social development. Through the MPPGA Program, Anam wishes to gain professional insight and develop deeper understanding on areas of policy design, problem solving and implementation of strategies. She believes that efficacy of policies, financial inclusion and better educational opportunities are the key catalysts of economic change for developing economies.



Hadir Ali

Hadir graduated from Simon Fraser University with a bachelor's degree in Political Science. She speaks Arabic fluently and believes that the biggest impact on her policy interests has been her travels. Her consistent travels to and from Egypt has positively contributed to her exposure and understanding of policy and governance. Specifically, the comparison between Canada and Egypt, and their vast differences, has led to her strong interest in public policy. Her work background varies greatly from teaching English in Egypt to working as a credit counsellor at the Canadian Imperial Bank of Commerce and working in finance at the City of Surrey. Her academic interests lie in refugee crises and conflict resolution. Her ultimate goal is to use the MPPGA program to develop a career in policy and international affairs within the context of security and human rights.



Somi Ajagu-Amamgbo

Somi recently graduated from Queen's University with a Bachelor of Arts Honors in Global Development Studies. She was born in Port Harcourt, Nigeria. She moved for the first time at three years old and since then has had the privilege of living and studying in the U.S.A., Canada and the United Kingdom. Somi's undergraduate degree was broad in nature; she learned about many factors of development and hopes to build upon her knowledge with this Master of Public Policy & Global Affairs program. She is specifically keen to learn more about the policy-oriented barriers to implementing more renewable energy sources worldwide. In addition, one of her aspirations is to work as an advocate for policy changes that will better the lives of people in developing nations and to mitigate their need to search for greener pastures.



Zeynya Alemayehu

Zeynya has worked for the last five years as a research and program officer at the African Peace and Security Programme, a joint program of the African Union and the Institute for Peace and Security Studies, Addis Ababa University. Prior to that, she worked as a Legal Assistant for two years. She has an LLB degree from Bahir Dar University and a Master's degree in Peace and Security Studies from Addis Ababa University. Her area of interest lies in African and global governance and security issues. Through the MPPGA program, she intends to acquire policy analysis knowledge and skills on issues related to security and governance.



Kai Ostwald

Kai is an Assistant Professor with a joint appointment in the Department of Political Science and the School of Public Policy & Global Affairs. He is also the Director of UBC's Centre for Southeast Asia Research and a Faculty Associate at UBC's Institute of Asian Research. Kai specializes in comparative politics, particularly the political economy of development and ethnic politics. His work has been published in numerous journals including *American Political Science Review*, *Politics Groups and Identities*, *Political Science*, the *Journal of East Asian Studies*, *Pacific Affairs*, and the *Journal of Southeast Asian Economies*. He has also published numerous policy reports and book chapters. His research largely focuses on Southeast Asia, particularly Malaysia, Indonesia, Singapore, and Myanmar. He has been active in several development projects in the region, including a multi-year capacity building project in Myanmar supported by the International Development Research Centre of Canada.

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