

## Doing Business in China, & Black Tie Banquet, Llandudno, North Wales

Mike Blyth, Senior Partner, Development Business Associates. Mr Andrew Wright, Senior Partner, Rowlings Law Ltd. Dr. Wei Shi, Director of the Confucius Institute at Bangor University. Danielle Blyth, Chief Accountant, Welsh Slate Ltd. Mr Patrick Barnard, Director of GWL. Prof. Liying Zhang, Co-Director of Confucius Institute. Mr Laurie Beevers, Managing Director of WHI Stockbrokers, Mr Paul I. B. Weston, Director of WHI Stockbrokers.



On January 24<sup>th</sup> 2013, the NorthWales Business Club (NWBC's) organised a China Britain Business Council (CBBC) Seminar and Black Tie Banquet at The Imperial Hotel, Llandudno. Mr. Stephen Phillips, Chief Executive of CBBC made a speech on "China and specifically doing business with China". CBBC is the leading British organisation promoting trade and investment between the UK and China. The objective of CBBC is to assist any British company or organisation to do business in China. In addition, CBBC organises missions to the Chinese market; identifies business opportunities; and provides research as well as a range of other practical services for UK companies in this market. CBBC also hosts inward delegations from China, arranges events in the UK and China, and hosts business events for senior Chinese leaders visiting the UK. Dr. Wei Shi, Director of Confucius Institute and Prof. Liying Zhang, Co-Director of Confucius Institute were invited to attend the Seminar. Esteemed guests dined and networked, with scintillating and animated conversation, David W. Williams, the Chairman of NWBC, welcomed Dr. Wei Shi and Prof. Zhang to this Seminar. The two Directors had conversation with Mr Andrew Wright, Senior Partner, Rowlings Law Ltd, about the legal issues related to Chinese economy, and with Stephen Phillips, Chief Executive of CBBC, about possible cooperation in the future.

David W. Williams excelled by bringing China Champion Stephen Phillips to North Wales. Stephen, CEO of CBBC with 23 offices across China and UK to help UK to sell to China, spoke about China with eloquent detail. He said that he first fell in love with China when sent to Barclays Merchant Bank in Hong Kong 23 years ago. He was working on one of the first Mergers and Acquisitions (M&A) deals by a Chinese Company, he later assisted Chinese airlines rid themselves of Tupolev flying death traps, helping them to finance the purchase of western aircraft. He also worked on infrastructure deals and all his projects introduced him to a most generous Chinese hospitality – and most generous of all is the gift of whisky at the signing of deals!

Later Stephen went into business on his own with Chinese colleagues from blue chip multinationals. He said the best advice he was ever given was a famous idiom from Sun Zi - written around 500 BC: " ..if you know your enemies and know yourself, you can win a hundred battles without loss !" Above all Stephen advised any young person starting out on a career today to learn Mandarin, increasingly the most important language and said his biggest regret was he had not done this sufficiently well himself. Turning to China's role on the world stage economically and politically, Stephen said that sadly China was often cast in a negative light in the UK media. But China's unstoppable rise means that by 2030 China's middle class will likely have tripled in size offering golden opportunities to those who will engage with them. Stephen then turned to opening our eyes in detail to the incredible business opportunity that China represents. He said the British business must get out from hiding its "light under the proverbial bushel" and get out there and sell with same open gusto as the Americans, Germans and French! He also mentioned that over 100,000 Chinese students are studying in Britain. He emphasized that the relationship with China is not just about trade - the stronger that friendship develops, the stronger the rest of our relationships will be. There can be no trade without building trust and peace. Stephen concluded his riveting presentation with an overview of the elaborate support available from CBBC, providing unparalleled access for UK business going there for the first time and launching their business.

The evening ended with a stream of praise and thanks from the top table to the honoured guest who was loudly applauded by all present.

The evening ended with a stream of praise and thanks from top table to the honored guest who was loudly applauded by all present as he left the room.



David W. Williams, the Chairman of NWBC, welcomed Dr. Wei Shi and Prof. Liying Zhang to this Seminar. From Left to right: Mike Blyth, David W. Williams, Prof. Liying Zhang, and Dr. Wei Shi.



Two Directors had conversation with Stephen Phillips, Chief Executive of CBBC, about possible cooperation in the future. From Left to right: David M. Berry, Berry Limited, Danielle Blyth, Chief Accountant, Welsh Slate Ltd, Dr. Wei Shi, Mike Blyth, Stephen Phillips, and Prof. Liying Zhang.

## **China and specifically doing business with China**

by Stephen Phillips, Chief Executive, China-Britain Business Council (CBBC )

Good evening ladies and gentlemen.

It really is a great honour to have been invited to address you this evening on a topic that is very close to my heart - China and specifically doing business with China. My only regret today is that whilst this is my third visit to Llandudno, every single visit has been in December or January. I really do need to get my planning better!

As I am sure you all appreciate, China is such a huge topic and such a complicated beast in some ways that I will probably not cover even half of the subjects a diverse audience like this would like to hear about. But I will be very happy to take questions – and attempt to answer them - at the end.

Over the next half an hour I plan to cover the following topics.

**FIRSTLY I thought I would start by sharing with you how I became involved with China. Why did I get the China bug and why I do I still find it so fascinating and all-consuming after more than 20 years; I would like then to set the scene a bit by briefly considering China's position in a global context, both economically and politically. I will then share my thoughts on where I think the main opportunities will lie over the next few years; I would then like to touch on some of the common challenges and hurdles that businesses can face – no discussion on China is complete without doing so. And FINALLY, I would like to say a little bit about the China-Britain Business Council and how we can help companies here in North Wales seize the China opportunity.**

### **So how did I get involved with China?**

My involvement in China began back in 1989 when I moved to Hong Kong with the Barclays Group to what was Barclays Merchant Bank before it morphed into BZW and then Barclays Capital. Of course Hong Kong then was still British, but the first transaction that I worked on was one of the earliest M&A deals by a Chinese company, called CITIC, which bought a 20% stake in Hong Kong Telecom in early 1990. It is only with hindsight that I realise what an important milestone that was in so many different ways.

The early 1990s also saw me finance some aircraft for two of the Chinese airlines who were beginning to acquire western-made aircraft to replace an ageing Tupolev fleet. That provided my introduction to Chinese hospitality - and in particular the role that drinking plays in it. In fact a very heavy session of whisky drinking following the signing of one of the deals explains my life-long dislike of whisky ever since! The very whiff of whisky takes me back 20 odd years.

Throughout the 1990s I worked on a number of infrastructure projects in China directly reflecting the changing stages of reform and growth, first in transportation infrastructure and then in downstream oil and gas.

And I knew the need for such investment from first-hand experience. I remember in 1993 flying to Shanghai and then having a hair-raising journey of about 6 hours by a battered car in the dark of night, dodging cattle and heavy trucks without



headlights to an inland city. Today, that journey can be made by high speed train and takes just 1 hour and 15 minutes – and with a guaranteed seat to boot. I will come back to how China's investment in infrastructure is changing the economic landscape in ways that are very important for us all to understand.

**But back in mid 90s, I don't think anyone I knew foresaw quite how much or how quickly China would change.** In fact most people were rather dismissive. I remember too in the mid 90s making one of the most memorable pitches of my life. Together with some colleagues we had wended our way to a remote oil town on the coast to bid for an advisory role on a new refinery project. Before the presentation, our host, a diminutive lady who ran the existing refinery complex hosted us for lunch. It was yet another alcohol fuelled affair, but tempered by the knowledge that we would need to make a two hour presentation straight after lunch. What I hadn't counted on though was that our own chief rep for China and half the audience saw no need for any such restraint and that we ended up presenting to a room of people that were in and out of slumber and - to my acute embarrassment - accompanied by the not-so-quiet snoring of our chief rep throughout!

After some 15 years as a banker - long before 'banker' became the dirty word it sadly seems to be these days - I decided to leave the big corporate world, becoming a founder of a start-up that eventually had operations in Hong Kong, mainland China, Taiwan and Malaysia. This was another powerful learning experience for me – in fact the most powerful of my career. My co-investors were all Chinese, but with backgrounds in blue-chip multinational organisations. What was fascinating - and educational - was how they reverted to cultural norms overnight. I don't say this to imply anything in a bad way - it wasn't. It was just different. Really quite different. But it has certainly helped me understand the environment I operate in better. Thinking back this reminds me of the best piece of advice I think I was ever given - from a Chinese boss - who said always put yourself in the shoes of the other person before you take any action. With the benefit of hindsight I am pretty sure that this was his simplified version of a famous idiom from the famous Art of War by Sun Zi - probably written around 500BC - which says:

**So it is said that if you know your enemies and know yourself, you can win a hundred battles without a single loss. If you only know yourself, but not your opponent, you may win or may lose. If you know neither yourself nor your enemy, you will always endanger yourself.**

Fast forward to today, I have now been at CBBC for almost 7 years and live and breath China 24/7 and split my time between here and China roughly fifty fifty. Despite

this, **the only thing I know with absolute certainty is quite how little I now about the country. It is too big, too diverse and too fast changing.** But I am in good company, as most Chinese I know are in the same boat!



**Before I move on I do want to just mention the biggest mistake – or my greatest regret – was not applying myself to learn Chinese properly.**

**Certainly my advice to any teenager or young person starting out on their career would be to knuckle down and learn what will only become a more and more important language. I would encourage you all to pass that message on!**

### **Let me now turn to China on the world stage**

I don't think there can be anyone in the UK now who is not aware of the inexorable rise of modern China. Sadly it is all too often cast in the media here in rather negative terms, but there is no denying what China has achieved in the last 30 years is remarkable change.

But there is - in my view - far more to come. Take the economy for instance. In 2010, China accounted for around 9% of nominal global GDP compared to the US at 24% and the EU 27%. Fast forward to 2030 and forecasts from the IMF and Standard Chartered see China moving to 24%, whilst the EU slips to 14% and the US 12%. Some might argue – with good reason – that this will just see China return to its natural place in the world order that has been distorted by the gains seen in the west as a consequence of the industrial revolution.

At the same timeline, the size of the middle class in the EU will remain more or less static, whilst in China it will very likely triple. That is a seismic shift – and commercially an exciting prospect. But the real question for UK plc will be how to tap into this and I will come back to this later. Of course the growing economic might of China is just one part of the overall picture. I think it would be fair to say that the shift of economic power is not being fully matched by a shift political power. China is still standing on the sidelines on some key global issues - for instance Syria. This in a large part reflects China's non-interventionist stance. Many think that China has to step up to plate in this regard. China's response tends to be along the lines 'don't forget we still have 400 million people in poverty and have complex challenges at home as a developing country'. I can see both points of view. But as an economic superpower China, I think, will need to match this with political will. But this is big picture geo-politics. Of more interest to - and relevance for - business is two other aspects of politics.

First, the geopolitics of Asia is becoming a bit more complex and I am sure you are all aware of the tensions with Japan over the Diaoyutai islands - as well as territorial disputes in the South China Sea with a number of ASEAN countries. This is all against the backdrop of a shifting US foreign policy that is seeing more focus on Asia – the so-called pivot towards Asia. The long and short of it is that tensions are running high. What we all need to see is cool heads over these issues – the last thing the global economy needs right now is for Asia to languish.

The other main area that business needs to keep tabs on is domestic politics and the issues that are faced. The new leadership team faces pretty fairly complex issues: tackling corruption; addressing acute environmental issues; and creating a more fair, more balanced society where income inequality has got out of hand. And it is clear these issues are uppermost on the agenda.

I think it is worth saying, despite what many people here think, these issues are hotly debated in society and the advent of Weibo - China's equivalent of Twitter - means that these issues are really at the fore of domestic politics. How the new leadership teams gets to grips with these issues could have a ripple effect around the globe.

Perhaps now I can turn to something a bit more upbeat:

### **The China Opportunity**

The first thing to say that China isn't a single, homogenous market and that there are huge regional differences. Indeed the best analogy is to think of China like you think of the EU. Each Chinese province is more or less the size of a European country – and the local culture and practices are just as diverse. Perhaps I can now share some thoughts on where we at CBBC see the main opportunities for British business in China. No one can deny the past 30 years in China have been remarkable, culminating recently in China becoming the world's 2nd largest economy. But "what comes next?". What needs to be on our collective radar for doing business with China over the next decade? And what are the practical implications? So now I'd like to share some of our observations at CBBC about what is driving change – and hence opportunity – in China.

The new Chinese Leadership has said it wants to rebalance China's economy so that citizens enjoy a higher standard of living. The UK with its market-based approach and expertise in legal and financial services, education, science, technology and healthcare, is well positioned to partner China. However, our relationship is not just about trade and investment.

In the months and years to come we have to turn to other priorities. Last year's inaugural People-to-People Dialogue offers a good platform to continue building links in the areas of education, science and technology, culture and media. Over 100,000 Chinese students are now studying in the UK and a significant number of British students study in China. And we continue to welcome more and more Chinese tourists to the UK.

These are people-to-people ties, and the stronger they are, the stronger the rest of our relationship. The importance of this cannot be underestimated. The UK is neck and neck with Germany as the top EU investor in China, even though this is not the general perception in China. So far, just 4% of Chinese outbound investment is in Europe, but the good news is the UK has the highest proportion of that investment – with over 500 mainland Chinese organisations from a broad range of sectors now investing in the UK. These include Huawei, China Mobile, Bank of China, Shanghai Automotive and so on.

**The UK welcomes high-quality investment from Chinese companies.** In the last year we have seen a number of important announcements, including China Investment Corporation's investments in Thames Water and Heathrow Airport; the State Administration of Foreign Exchange's investment in Veolia; and Huawei's decision to invest a further £1.3bn here, creating up to 700 new jobs. The UK is a safe place to invest and has more to offer. I firmly believe Chinese companies recognise this and act on it. And, of course, the emergence of Chinese companies that are "going global" will generate new forms of opportunity for collaboration in the UK, China and – importantly – in third countries, for example, in the African continent. But be in no doubt that - looking at the statistics as they stand and given

to be doing more in and with China. We have world beating products and services across a number of sectors and we need to be more 'ballsy' about promoting our expertise. And it is important that this done in a concerted and coordinated way - particularly in China itself. It is an unfortunate national trait that we in this country have a tendency towards self deprecation. It's a generalisation, I know, but when we have world beating technologies and world beating products we tend not to shout about it enough – we hide our collective 'lights' under the proverbial



‘bushel’. That needs to change and we need to become much more vociferous – especially in highly competitive markets such as China.

### **So, getting back on track, what are the drivers of change in China and where do we see the opportunities?**

First is the ongoing process of urbanisation. Some 45% of China’s 1.3 billion people now live in cities - but this number is expected to increase to 55-60% by 2020. At CBBC we carried out a comprehensive analysis of the impact of urbanisation and the consequent emergence of China’s regional cities as economic powerhouses 3 years ago. It is in these regional cities that we expect to see the most rapid economic growth with the wave of development continuing to pass through the strata of Chinese cities. 2nd tier cities are now at the stage 1st tier cities were 5 or 10 years ago, and 3rd tier cities will reach this level over the next 10 years - probably much sooner. And opportunities are becoming evident in so called 4th tier cities and beyond. This means the number of more affluent, more developed cities will continue to increase in both number and geographical spread, generating new opportunities in goods and services. And it is interesting to note here recent research by Credit Suisse, stating that China’s household wealth is set to more than double to US\$ 35 trillion by 2015 if the country maintains its historic growth rates. The key to future success will be to understand patterns of demand. We hear from our members in consumer-driven sectors that they already need to take a very granular approach to their market research – demand and tastes vary hugely across China, even between cities in close proximity to each other.

Another trend worth watching is the creation of city clusters as metropolitan areas spread, and the interplay between different cities increase. For example, there are the extended urban areas of Beijing-Tianjin-Hebei in the northeast of the country; the Yangtze River Delta in the east; and the Pearl River Delta in the south. But we have also seen the emergence of city clusters such as those in Liaoning Province, encompassing Shenyang, Dalian and Anshan; the pairing of Chengdu and Chongqing in Sichuan Province; on the Shandong peninsula; and on the central China plain, which brings together Zhengzhou, Luoyang and Kaifeng. And so the list goes on.

They will potentially make it possible to cover a larger area of China and access a much larger market from a relatively small number of localised bases. And so to the 2nd driver. As the size and scale of China’s cities increase, the need for sustainable development becomes ever more pressing, creating new opportunities for UK companies to work with Chinese counterparts.

There are already MoUs with Wuhan, Chongqing, Changsha and Hangzhou in this field. But, across China, initiatives are being created for smart, clean, green, and energy efficient infrastructure and buildings. In industry, demand already exists for the re-use and recycling of waste water, solids and air - areas where the UK is very strong. A 3rd driver is the increased demand that urbanisation places on public services – and healthcare provision is a good example. China is

The NHS is one of the most respected health systems in the world, which works with industry and private providers to deliver care to the whole UK population, free at the point of need. We have expertise across clinical disciplines, and in some of the areas where China is looking to develop its own capabilities, such as primary care, the development of advanced healthcare facilities and infrastructure, training and education, and the regulation of medicines.

The Prime Minister has appointed one of the most experienced members of the Government, Ken Clarke, to lead engagement in this sector. This should translate into more opportunities in areas such as medical devices and equipment; pharmaceutical R&D; healthcare IT; health insurance; and collaborative research on traditional Chinese medicines.

As an example of increased collaboration in the pharma sector, Alliance Boots – a CBBC member company – recently acquired a 12% stake in Nanjing Pharmaceutical Company- one of China’s largest pharmaceutical companies. On completion of the transaction, Alliance Boots will be the second largest shareholder in Nanjing Pharma with Board and operational management representation.

Migration patterns and demographics will also be powerful drivers of change in the coming years. Migrant workers who return home from coastal areas will take with them the skills they have developed to establish local businesses, driving a diversification of industry across the country. And the increase of available work in 2nd and 3rd tier cities will take even more people off the land. As a result, agriculture will have to become more efficient – something the government is pushing for anyway.

As a result, the UK & China signed a Food Security Action Plan in 2009 to explore ways in which the two countries can work together in a sector in which the UK has an enormous amount to offer.

### **As in many other parts of the world, China has an increasingly ageing population.**

Today, the over 60s make up 12.5% of China’s population. This will grow to 17% by 2020. By 2030, the working population will fall from the current 60% to under 55%. This will drive a changing pattern of demand for public services and create opportunities for insurance and other savings products. We hear a lot about China “moving up the value chain”, but an increasingly ageing population provides an imperative to do so. With fewer workers, productivity will need to increase, margins will need to be higher, and efficiency savings will be more important. There will be the need for more automation and more technology, playing to the UK’s strengths in advanced engineering, advanced manufacturing and science and technology. Long-term shifts in demographics are already contributing to shortages of workers in some parts of China – and to rising wages, made possible by productivity improvements in many sectors. Rising wages, of course, will have a knock-on effect for discretionary spending. A significant re-adjustment of the economy towards consumption will generate new opportunities, especially in retail and services.



And it should go hand in hand with a relative shift of economic gravity towards inland areas – another reason for placing so much importance on regional cities. I am very lucky in my job to get to visit many of these regional cities in the far flung corners of China. Invariably the hospitality is tremendous.

After one such welcome I recall

### **So what are the challenges of doing business in China?**

Sadly these don't change very much year by year.

The most common problems that are encountered are bureaucracy, variable enforcement of laws and regulations, inconsistent interpretation, enforcement of IP (by the way, the laws themselves are quite well developed), corruption, ability secure licences, protectionism, the ability to enforce contract terms and local competitions access to preferential finance and tax subsidies.

### **China Outbound**

Furthermore there are a number of common impediment to growth and these include labour shortages, higher labour costs First, for business that are new to the market is the lack of familiarity.

### **About CBBC**

For those of you who don't already know, CBBC is the leading organisation in this country helping companies grow and develop their business in and with China. Day-to-day, we support British companies of all sizes and in all sectors by offering practical advice and insights via our network of 10

offices across the UK and 13 in China. Our China network is as good as any from any other country in the world, and is, I think, the jewel in the crown. It means that we can provide unparalleled access for British companies looking to enter the Chinese market for the first time, or to expand their existing operations into new parts of China, We work in close partnership with UK Trade & Investment and the Foreign and Commonwealth Office, as well as others like the CBI, IOD and Chambers of Commerce.

### **Conclusion**

I am sure that China's rise will continue to offer significant opportunities for UK companies well into the future. There will undoubtedly be bumps along the way, but time is of the essence if UK businesses want to make the most of the opportunity. China's growth will continue to attract investors from around the world and, of course, domestically. In no doubt, it is already a competitive landscape. The UK is well-positioned to partner with China over the next decade. And China wants to work with the UK. But we need more of our companies to engage with China and we need to encourage our companies to have a real and sustained hunger for developing their China-related business. All too often I hear from Chinese businesses, trade organisation and the government that our competitors are more aggressive, more hungry to win business. So we need to encourage more UK companies to proactively develop their China related business and to foster a passion for doing so, because the companies we see having the greatest success are those whose people have a real enthusiasm for China - and that is what very often sets them apart.

Thank you! I should be delighted to take any question you might have.

## **Cooperation talks between Confucius Institute and Coleg Menai**

By Liying Zhang and Yan Li



Cooperation talks between the Confucius Institute and Coleg Menai

On January 23th 2013, the two Directors of the Confucius Institute at Bangor University visited Coleg Menai and had a meeting with ESOL (English for speakers of other languages) Manager Ms Lyn Lording-Jones and Ms Debbie Tebbutt. Lyn extended a warm welcome to the two guests on behalf of ESOL and introduced the general situation of Coleg Menai. Coleg Menai is one of the three member colleges of Grŵp Llandrillo Menai, which is Wales' largest Further Education Institution and one of the largest FE college groups in the UK, focusing on providing the skills that ensure competitiveness and success for the North Wales economy, by widening opportunities through an expanded curriculum and offering improved progression opportunities for learners. Coleg Menai offers a wide range of courses with excellent progression opportunities, either to university or to the world of work, while the ESOL Centre in Bangor offers a wide range of courses and qualifications for local students from North Wales and for international students from all over the world.

Dr. Shi made a brief introduction of the Confucius Institute, and Prof. Zhang expressed the desire to cooperate with Coleg Menai in the provision of Chinese courses and Chinese culture promotion. Finally both sides believe that the way forward is that Chinese culture promotion activities could be carried out first, and Chinese courses could follow during the holidays. The activity venue would be at the Confucius Institute at Bangor University and Coleg Menai in turn according to the needs of the situation. The conversation lasted more than an hour, and both sides considered there would be great scope for cooperation in the future.

From Left to right: Dr. Wei Shi, Director of the Confucius Institute, Ms Debbie Tebbutt, Ms Lyn Lording-Jones, ESOL Manager, and Prof. Liying Zhang, Co-Director of the Confucius Institute.



## Meeting with Beijing Yinfan Education & Cultural Communication Co., Ltd

By Mike Blyth and Yan Li

On January 16<sup>th</sup> 2013, Prof. Liying Zhang, Co-Director of the Confucius Institute had a meeting with Mr Tao Jiang, CEO YFCZ (Beijing Yinfan Education & Cultural Communication Co. Ltd.) at the Confucius Institute, Mike Blyth, Senior Partner DBA (Development Business Associates) and Ms Xiaoyue Wang, Deputy to CEO YFCZ also attended the meeting. At first Prof. Zhang welcomed all the guests most warmly to the meeting. She outlined the aims of the China North Wales Trade Conference (CNWTC) planned for September 2013. CEO Jiang Tao explained the wide ranging interest and remit of the YFCN

and his hope for successful cooperation. He expressed his willingness for YFCN to contribute in every way possible to the success of the CNWTC. CEO Jiang Tao also outlined the work and goals of YFCN. He said the focus of YFCN is on trade, cultural and artistic exchanges between China and rest of the world. CNWTC offers professional and expert teams in areas like International Consultancy and Marketing Research, Education & Training, Conferencing & Showbiz Events Management, International Trade Events and Exhibitions. Prof. Zhang asked Mike Blyth to give an overview of Business and Commercial Interests in North Wales. Mike listed the wide range of North Wales Business & Commercial interests. The meeting lasted more than an hour and was most friendly and productive.



Meeting with YFCZ. From left to right: Ms Xiaoyue Wang, Deputy to CEO YFCZ, Mr Tao Jiang, CEO of YFCZ, Mike Blyth, Senior Partner of Development Business Associates, Prof. Liying Zhang, Co-Director of Confucius Institute.



### **Chinese Knot**

Chinese Knot is a decorative handicraft with strong Chinese folk art characteristics. It could be a cup pad and even can be a ring!

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