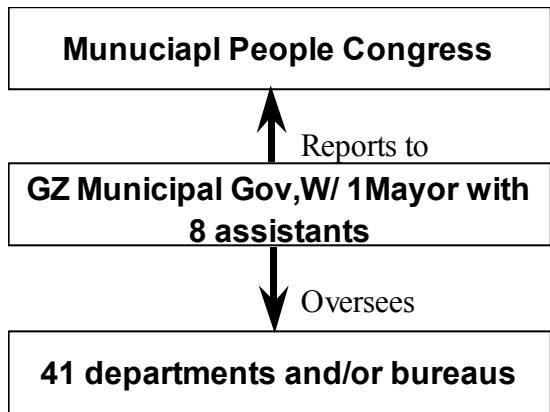


Macro Environment Study of Guangzhou

Executive Summary

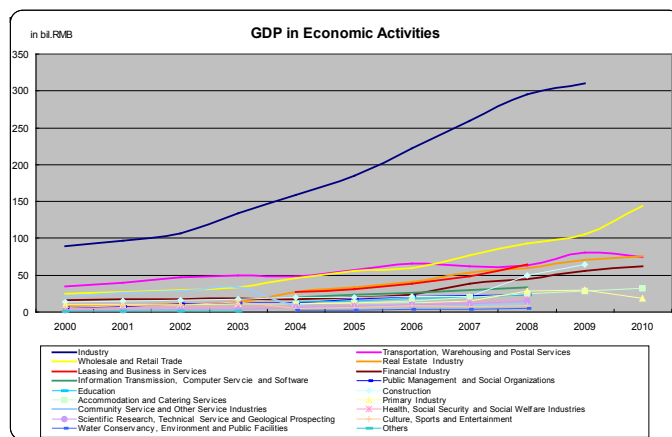
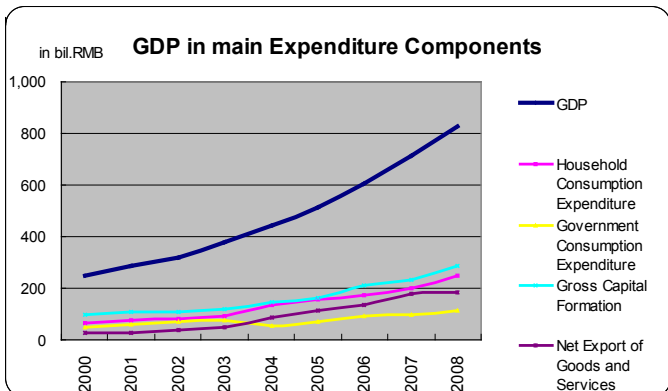
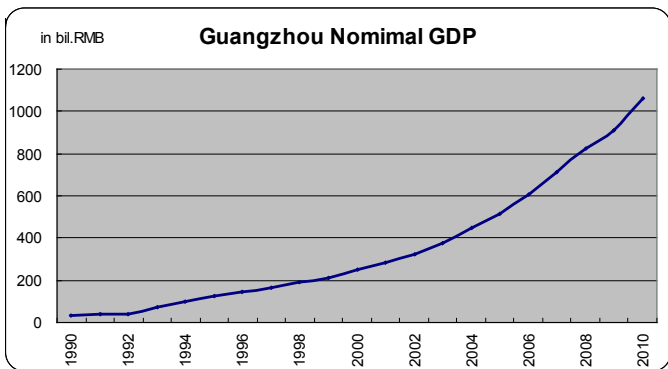
1 Macro Pictures of Guangzhou

1.1 Political Framework

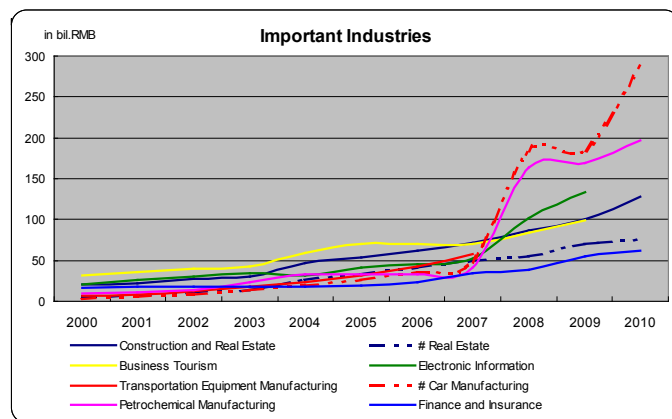


2 Economic Scenario

2.1 Gross Domestic Production (GDP)



2.2 Pillar Industries

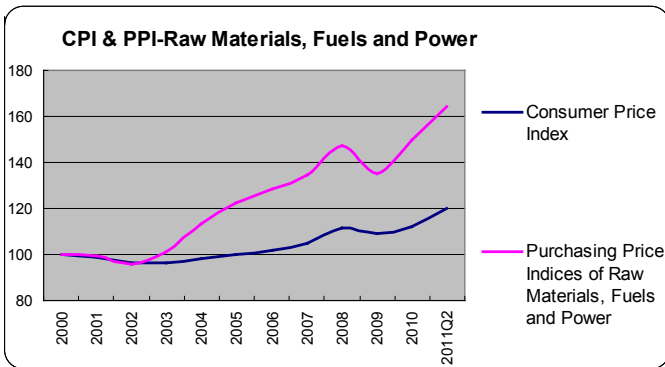
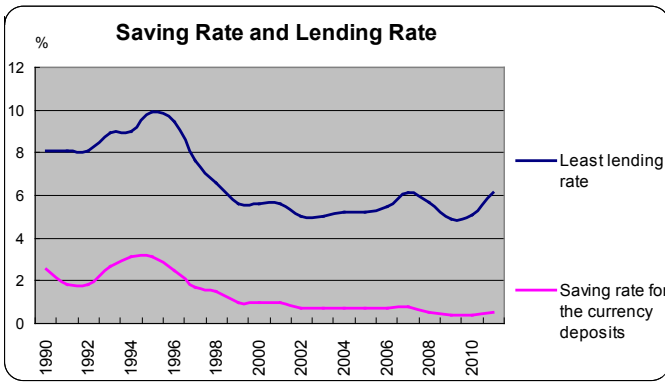
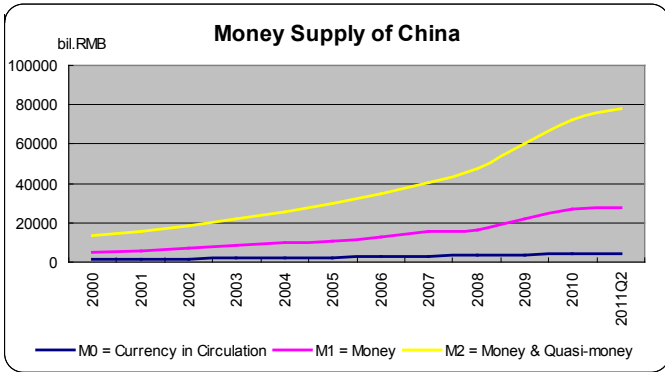


2.3 HR in Guangzhou

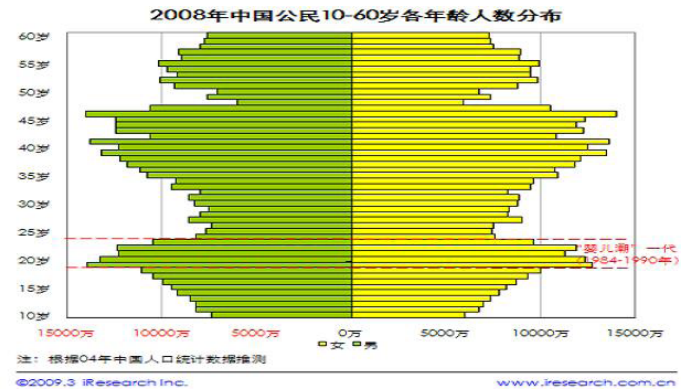
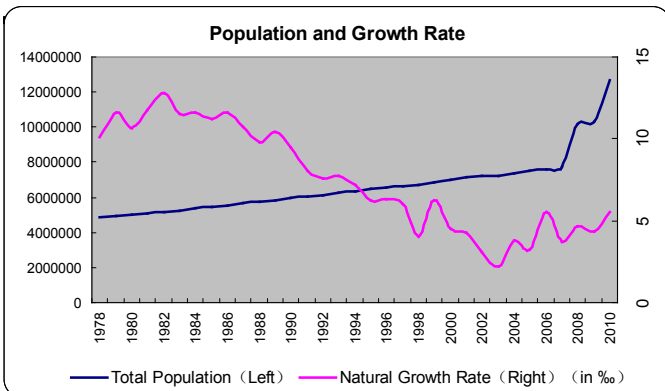
Industries (2008)	Number of Staff
Manufacturing	2530967
Wholesale and Retail Trade	1158095
Primary Industry	799103
Construction	342543
Transport, Storage and Post	337118
Hotels and Catering Services	328647
Services to Households and Other Services	283432
Leasing and Business Services	266760
Education	227161
Scientific Research, Technical Services and Geological Prospecting	177747
Public Management and Social Organizations	144507
Information Transmission, Computer Services and Software	143678
Real Estate	127391
Health Care, Social Securities and Social Welfare	116243
Financial Intermediation	76318
Culture, Sports and Entertainment	51997
Management of Water Conservancy, Environment and Public Facilities	33689

Industries (2008)	Average Yearly Wages (yuan)
Financial Intermediation	123946
Information Transmission, Computer Services and Software	72281
Production and Distribution of Electricity, Gas and Water	71964
Public Management and Social Organizations	69982
Scientific Research, Technical Services and Geological Prospecting	68302
Health Care, Social Securities and Social Welfare	61952
Mining	61892
Education	59960
Culture, Sports and Entertainment	55482
Transport, Storage and Post	50769
Wholesale and Retail Trade	41810
Leasing and Business Services	41120
Construction	34758
Real Estate	34116
Management of Water Conservancy, Environment and Public Facilities	33193
Manufacturing	33124
Services to Households and Other Services	27688
Agriculture, Forestry, Animal Husbandry and Fishery	25246
Hotels and Catering Services	22137

2.4 Money Supply, Interest Rate & CPI



3 Population



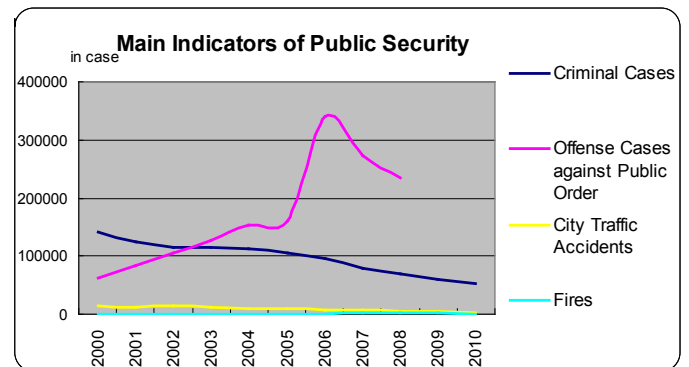
	every 100,000 person		actual persons
	2000	2010	2010
College degree or above	9309	19228	2442075
High School	20443	22923	2911417
Junior high school	37068	36127	4588455
Primary school	23968	15724	1997102
Illiteracy rate	2.32%	0.95%	

4 Social Matter

4.1 Engel Coefficients

	2005	2006	2007	2008	2009	2010
Engel Coefficient for urban area	37.3	37	32.9	33.7	33.2	33.3
Engel Coefficient for rural area	43.2	42.6	42.8	42.3	43.9	45.9

4.2 Crime Rate



4.3 Culture Level

	2005	2006	2007	2008	2009	2010
Libraries						
Number of libraries and reading rooms	13	14	14	15	15	15
Volume (10,000)	1204.19	1325.1	1473.5	1563.3	1685.96	1918
Performances and Exhibitions						
Professional groups	17	17	17	17	15	16
Academies for keeping files	26	26	26	26	28	29
Museum & Memorial	30	30	31	31	31	31
Numbers of exhibitions	205	195	242	213	398	405
No. of audiences (10,000)	359.6	337.5	360.7	421	723.9	779

5 Natural Environments

5.1 Air

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Daily Mean Value of SO ₂ (mg/m ³)	0.045	0.051	0.056	0.059	0.077	0.053	0.054	0.051	0.046	0.039	0.033
Daily Mean Value of NO ₂ (mg/m ³)	0.061	0.071	0.068	0.072	0.073	0.068	0.067	0.065	0.056	0.056	0.063
Annual Concentration of Breathable Particulate Matter (mg/m ³)	—	0.073	0.082	0.099	0.099	0.088	0.076	0.077	0.071	0.07	0.069
The PH Value of the Precipitation	4.71	4.59	4.37	4.64	4.51	4.34	4.41	4.42	4.47	—	—
Volume of Waste Water Discharged (10000 tons)	95434	—	—	—	—	125837	128302	111494	128156	—	—
Volume of Industrial Waste Gas Emission (100 million cu m)	1959.16	2249.22	2355.53	1826.31	2618.88	2342.16	2126.49	1994.63	2435.84	—	—

5.2 Water

	EU 1998	WHO 2011	China 2006
	Parametric value		
Acrylamide	0.10 μg/l	0.5 μg/l	0.5 μg/l
Antimony	5.0 μg/l	20 μg/l	5.0 μg/l
Arsenic	10 μg/l		10 μg/l
Benzene	1.0 μg/l	10 μg/l	10 μg/l
Benzo(a)pyrene	0.010 μg/l	0.7 μg/l	0.1 μg/l
Boron	1.0 mg/l		0.5 mg/l
Bromate	10 μg/l	10 μg/l	10 μg/l
Cadmium	5.0 μg/l		5.0 μg/l
Chromium	50 μg/l		50 μg/l
Copper	2.0 mg/l	2 mg/l	1.0 mg/l
Cyanide	50 μg/l		50 μg/l
1,2-dichloroethane	3.0 μg/l	30 μg/l	30 μg/l
Epichlorohydrin	0.10 μg/l	0.4 μg/l	4 μg/l
Fluoride	1.5 mg/l	1.5 mg/l	0.05 mg/l
Lead	10 μg/l	10 μg/l	10 μg/l
Mercury	1.0 μg/l	6 μg/l	1.0 μg/l
Nickel	20 μg/l	70 μg/l	20 μg/l
Nitrate	50 mg/l	50 mg/l	20 mg/l
Nitrite	0.50 mg/l	3 mg/l	
Selenium	10 μg/l	40 μg/l	10 μg/l
Tetrachloroethene and Trichloroethene	10 μg/l	40 μg/l	60 μg/l
Trihalomethanes — Total		100 μg/l	200 μg/l
Vinyl chloride	0.50 μg/l	0.3 μg/l	5.0 μg/l

5.3 City afforestation and Noise

	2005	2006	2007	2008	2009	2010
Noise						
Urban Area (dB)	55.2	55.2	55	55	55	55.1
Road Side (dB)	69.3	69.4	69.2	69.1	69.2	69.1
Coverage rate of green area	36.38	36.79	37.14	37.46		

Original Contents

Introduction

Guangzhou is the capital city of Guangdong which is near to Hong Kong and Macau. This report reveals a study in Guangzhou in areas of Political, Economic, Population, Social and Natural Environments.

Methodology

Some variables and their corresponding quantifiers are listed out at the start. Data from these perimeters are collected and analysed in an objective manner. The following sections are going to discuss these issues.

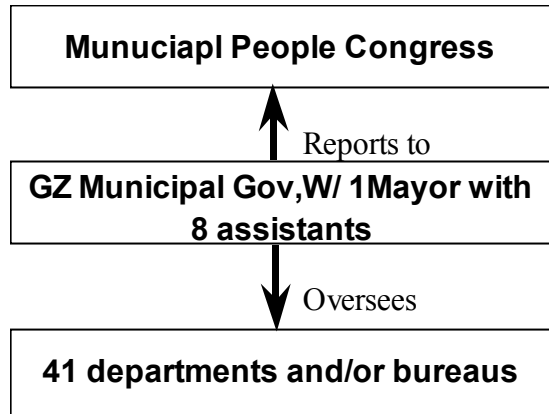
1 Macro Pictures of Guangzhou

1.1 Political Framework

Mayor is the key person who leads the whole Guangzhou Municipal Government. About in year 2006, municipal government took some measurements to change the districts (Source: <http://gd.news.sina.com.cn/local/2005-05-24/1331900.html>).

Up to year 2011, there are twelve districts whose names are Yuexiu, Liwan, Haizhu, Tianhe, Baiyun, Huangpu, Panyu, Huadu, Nansha, Luogang, Zengcheng and Conghua and 41 departments and/or bureaus. (Source: <http://www.gz.gov.cn/publicfiles/business/htmlfiles/gzgov/s2768/list.html>) Table 1 summarizes the governmental structure.

Table 1



Source: <http://www.gz.gov.cn/> 2011

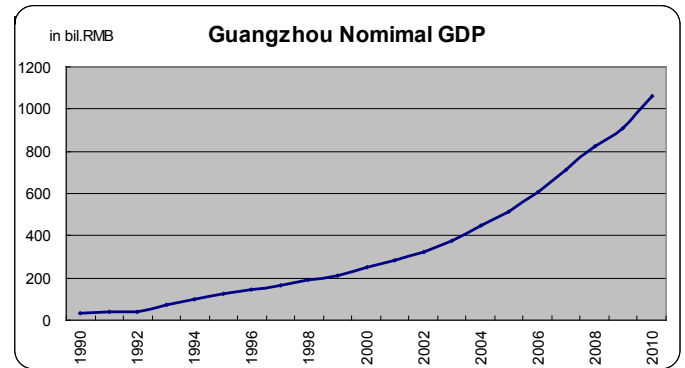
2 Economic Scenario

2.1 Gross Domestic Production (GDP)

The logic in this economic aspect is to look at GDP, Pillar Industries and money supply of Guangzhou. Through these three factors, a brief and essential economic picture of Guangzhou can be described.

GDP is a very significant factor that measures economic activities of a place. The GDP diagram is shown in Exhibit 1.

Exhibit 1



Source: Guangzhou Statistics Department 2011

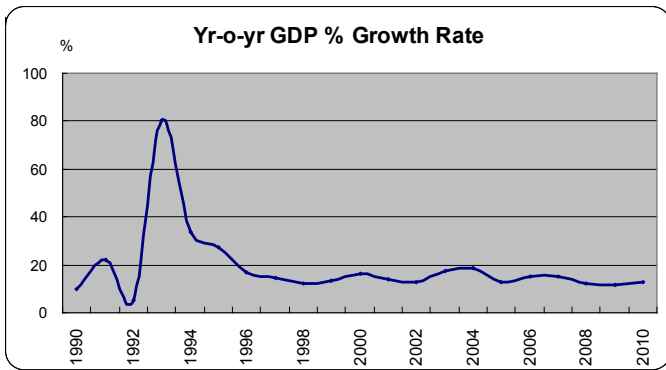
According to Exhibit 1, one can see that the curve of GDP value is getting up year by year. In order to get a clearer mind about the trend, Table 2 and Exhibit 2 will show the growth rate of this GDP.

Table 2

Yr-o-yr GDP % Growth Rate					
1990	10	1998	13	2006	19
1991	22	1999	13	2007	17
1992	5	2000	16	2008	16
1993	80	2001	14	2009	11
1994	34	2002	13	2010	13
1995	27	2003	17		
1996	17	2004	18		
1997	14	2005	15		

Source: Guangzhou Statistics Department 2011

Exhibit 2

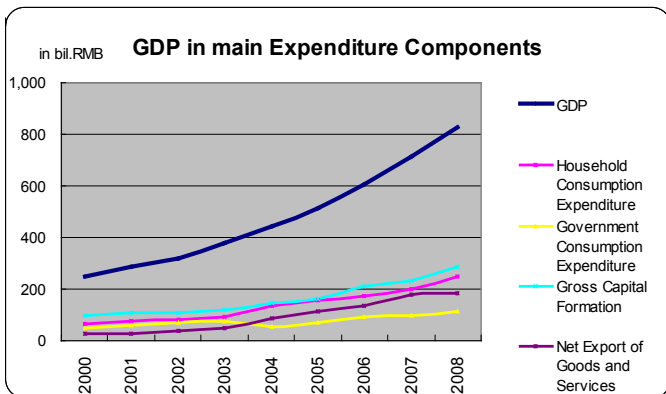


Source: Guangzhou Statistics Department 2011

From Exhibit 2, one can see that the GDP growth rate goes ahead steadily and surely after year 1996. The down trend after year 2008 was caused by the financial tsunami throughout the world.

Exhibit 3 is the GDP value separated by main expenditure.

Exhibit 3

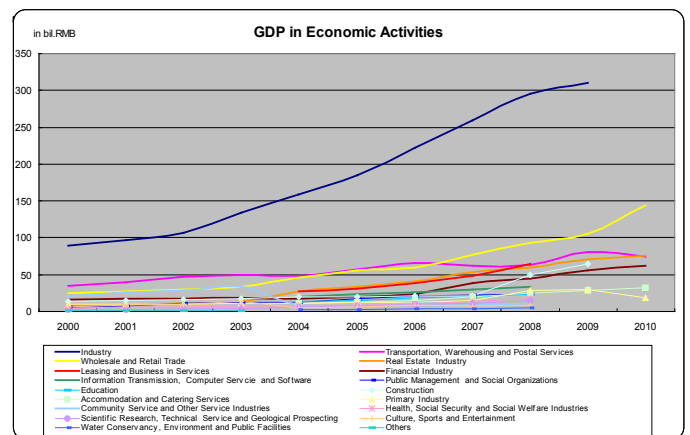


Source: Guangzhou Statistics Department 2011

It is well known that in year 2008, the world economic was hit by financial tsunami fatally. China is the manufacturing country with a large number of US currency deposit. The exchange rate of US/RMB was from about 8 in Jan. 2007 to about 6.44 in Aug. 2011. (Source: People Bank of China). On the other hand, GDP value over estimated is a common phenomenon in China. (Source: <http://review.cnfol.com/100426/436,1594,7598830,00.shtml>) It has occupied the very attention of the state government and leaders of the country. So, even though some evaluated data of GDP was shown in 2010, they are all absent in year 2011.

Exhibit 4 is the GDP value separated by economic activities.

Exhibit 4



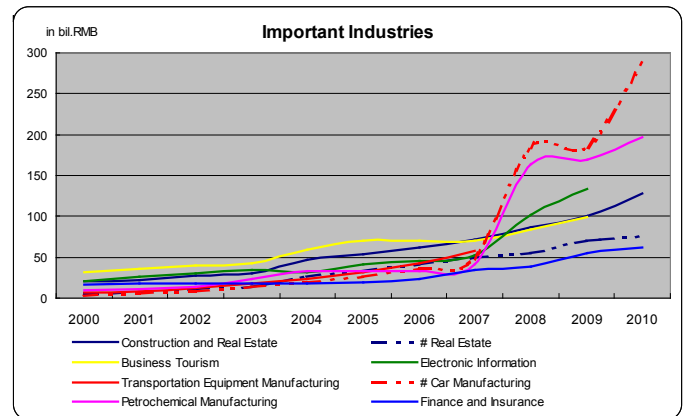
Source: Guangzhou Statistics Department 2011

According to Exhibit 4, Industry can be concluded as the first industry of Guangzhou. But comparing with the previous data, there are full of conflicts. The first one is although Yearbook of Statistics 2010 was published for a long time up to July 21, 2011, the data were still not upload in the website. The second one is data belonging to year 2007 in Yearbook of Statistics 2008 were totally changed in Yearbook of Statistics 2009. The third one is there are two entrances for data of year 2009, one is <http://data.gzstats.gov.cn/gzStat1/chaxun/njsj.jsp> updated on 2010-11-24 and the other is <http://data.gzstats.gov.cn/gzStat1/chaxun/ndsj.jsp> updated on 2011-02-15. The fourth one is Statistics Public Report 2010 said the increase value of “Transportation, Warehousing and Postal Services” was 7.4 bil. RMB and the data was 11.6% increase from year 2009. But the data in Statistics Public Report 2009 was 8 bil. RMB.

2.2 Pillar Industries

In the statistic yearbooks, there are 6 important industries. These 6 industries will be showed in Exhibit 5. But usually, in the statistic public report, only three industries are shown. These three industries are Car Manufacturing, Electronic Product Manufacturing and Petrochemical Manufacturing.

Exhibit 5



Source: Guangzhou Statistics Department 2011

From Exhibit 5, one can see that year 2007 is an amusing year. In that year, the stock exchange of China was volatile. Accompanying with this, all prices of the commodities jumped in a rapid way.

Because of the financial tsunami, it helps municipal government decide to up grade its industries layout and level. According to exhibit 5, the most visible change is the raising of car manufacturing. After financial tsunami, the government encourages its citizens to buy cars in a much lower price. Another visible change is some industries are seal and some are calculated in another breakdown. For example, one industry which name “Electronic Information Industry” is replaced by “Electronic Product Manufacturing”.

2.3 HR in Guangzhou

Table 3 and table 4 will show the HR situation of Guangzhou. Through the tables, readers can see which industry hires most of the employees and which industry offers the most attractive compensation in year 2008.

Table 3

Industries (2008)	Number of Staff
Manufacturing	2530967
Wholesale and Retail Trade	1158095
Primary Industry	799103
Construction	342543
Transport, Storage and Post	337118
Hotels and Catering Services	328647
Services to Households and Other Services	283432
Leasing and Business Services	266760
Education	227161
Scientific Research, Technical Services and Geological Prospecting	177747
Public Management and Social Organizations	144507
Information Transmission, Computer Services and Software	143678
Real Estate	127391
Health Care, Social Securities and Social Welfare	116243
Financial Intermediation	76318
Culture, Sports and Entertainment	51997
Management of Water Conservancy, Environment and Public Facilities	33689

Source: Guangzhou Statistics Department 2011

Table 4

Industries (2008)	Average Yearly Wages (yuan)
Financial Intermediation	123946
Information Transmission, Computer Services and Software	72281
Production and Distribution of Electricity, Gas and Water	71964
Public Management and Social Organizations	69982
Scientific Research, Technical Services and Geological Prospecting	68302
Health Care, Social Securities and Social Welfare	61952
Mining	61892
Education	59960
Culture, Sports and Entertainment	55482
Transport, Storage and Post	50769
Wholesale and Retail Trade	41810
Leasing and Business Services	41120
Construction	34756
Real Estate	34116
Management of Water Conservancy, Environment and Public Facilities	33193
Manufacturing	33124
Services to Households and Other Services	27688
Agriculture, Forestry, Animal Husbandry and Fishery	25246
Hotels and Catering Services	22137

Source: Guangzhou Statistics Department 2011

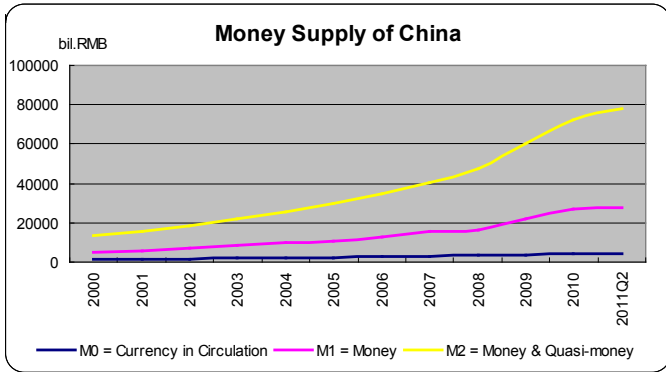
Guangzhou is the capital city of Guangdong Province. Although manufacturing is the pillar industry too, other industries can be developed in a more balance way here. Readers will not see one industry hires more than half of the manpower like Shenzhen.

Except providing the balance environment for employers and employees, Guangdong Provincial Labor and Social Security Department (Guangdong LSS) takes some measurements to make employees work more comfortable and happier also. For according to documents, Guangdong LSS has published the minimum monthly salary from 320 Yuan in year 1995 to 450 Yuan in year 2000, 684 Yuan in year 2005, 1030 Yuan in year 2010 and 1300 Yuan in year 2011. (Source: http://www.gd.lss.gov.cn/gdlss/zwgk/gzzdjw/06gzzdjw/t20070327_42985.htm and http://zwgk.gd.gov.cn/006939748/201101/t20110119_12487.html) In order to reduce disputes, Guangdong LSS also help to survey labour outsourcing situation and push the revision of labour law. (Source: http://gzdaily.dayoo.com/html/2011-07/21/content_1423601.htm)

2.4 Money Supply, Interest Rate & CPI

Guangzhou is an important part of China economy. So here refer to the money supply system of China so as to indirectly indicate money supply of Guangzhou. Exhibit 6 is the picture of money supply in China.

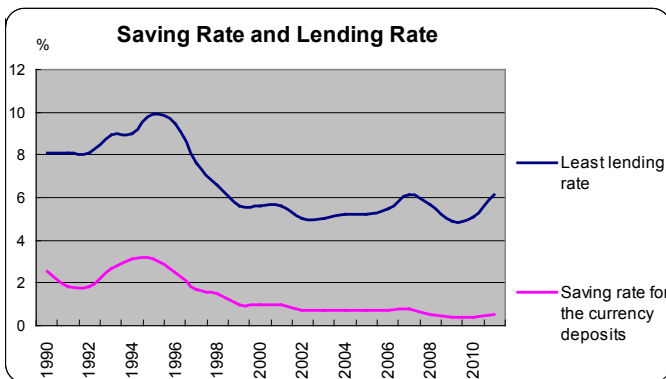
Exhibit 6



Source: the People's Bank of China 2011

Money Supply is negatively correlated with the change of interest rate. Exhibit 7 is the detail of saving rate and lending rate.

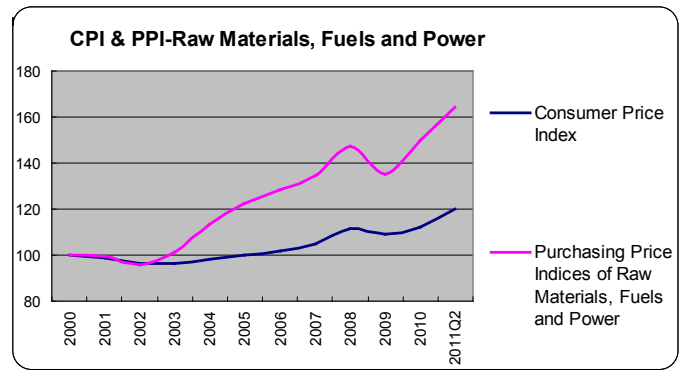
Exhibit 7



Source: the People's Bank of China 2011

Consumer Price Index (CPI) and Purchasing Price Indices of Raw Materials, Fuels and Power (PPI) are the reflections of GDP value and money supply. Exhibit 8 contains all the details.

Exhibit 8



Source: Guangzhou Statistics Department 2011

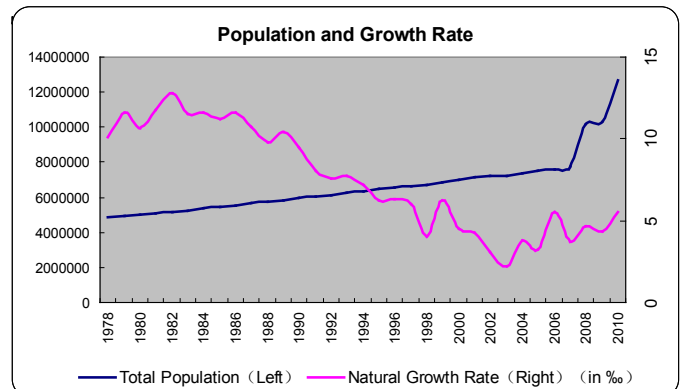
Although state government requires every city control their CPI, according to exhibit 8, one can see that PPI is high up in a sharp trend after year 2009. In this situation, CPI in 2011 Q2 is up to a dangerous number of 119.73 against her country average of 120.

3 Populations

Mostly, the situation of population nowadays reflects a long time prospect of a place.

Exhibit 9 and 10 are the population figure of Guangzhou.

Exhibit 9

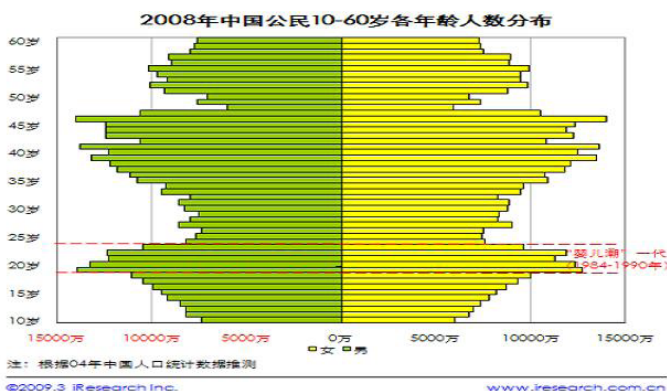


Source: Guangzhou Statistics Department 2011

Comparing with other mainland cities, Guangzhou is a well-developed city. And the municipal government takes very loose measurements to control people inflow and outflow. So according to information, the ratio of natural residents to temporary registration person is about 4 to 5 in year 2010. (Source: <http://www.hnjsw.gov.cn/contents/125/32991.html> and <http://news.hexun.com/2011-05-17/129683907.html>)

Since Guangzhou is a place easy to inflow and outflow, it is hard to calculate the pyramid of it. Exhibit 10 is the picture of whole country in year 2008.

Exhibit 10



Source: <http://ha.studentboss.com/html/news/2009-12-21/44894.htm>

Though pyramid is hard to calculate, education level in Guangzhou is easy to count. Table 6 is the comparison of education level between the 5th and the 6th census.

Table 6

	every 100,000 person		actual persons
	2000	2010	2010
College degree or above	9309	19228	2442075
High School	20443	22923	2911417
Junior high school	37068	36127	4588455
Primary school	23968	15724	1997102
Illiteracy rate	2.32%	0.95%	

Source: Guangzhou Statistics Department 2011

According to table 6, one can see that the education level is much higher than that in year 2000. But the data is too rough to verify.

4 Social Matter

4.1 Engel Coefficients

There is no Gini Coefficient survey data found for Guangzhou too. Instead a coefficient called Engel Coefficient introduced by the United Nations which is adopted by Guangzhou Statistic Department for revealing the living standard and richness of a place is used. Table 7 shows the data.

Table 7

	2005	2006	2007	2008	2009	2010
Engel Coefficient for urban area	37.3	37	32.9	33.7	33.2	33.3
Engel Coefficient for rural area	43.2	42.6	42.8	42.3	43.9	45.9

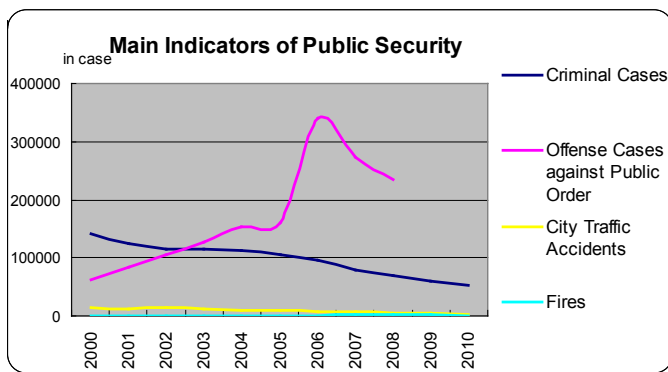
Source: Guangzhou Statistics Department 2011

According to table 7, one can see that there are differences between urban area and rural area. Living in urban area is more comfortable than living in rural area due to higher materials satisfaction.

4.2 Crime Rate

In Guangzhou, it is a little bit hard to measure the crime rate. For there are three kinds of title of the cases – reported, registered and treated. For the statistics only shows the registered number, Exhibit 11 is the number of that.

Exhibit 11



Source: Guangzhou Statistics Department 2011

4.3 Culture Level

The variables being chosen to describe culture are: no. of culture performance, no. of venue, no. of reading room and library books. It is believed that these factors can reflect the level of participation and culture level in a place.

Table 8

	2005	2006	2007	2008	2009	2010
Libraries						
Number of libraries and reading rooms	13	14	14	15	15	15
Volume (10,000)	1204.19	1325.1	1473.5	1563.3	1685.96	1918
Performances and Exhibitions						
Professional groups	17	17	17	17	15	16
Academies for keeping files	26	26	26	26	28	29
Museum & Memorial	30	30	31	31	31	31
Numbers of exhibitions	205	195	242	213	398	405
No. of audiences (10,000)	359.6	337.5	360.7	421	723.9	779

Source: Guangzhou Statistics Department 2011

5 Natural Environments

For a long time, the whole pearl river delta was called the back-factory of Hong Kong. Manufacturing industry is the pillar industry in Guangzhou. Exhibit 4 is the provision of it. The longer the situation lasts, the longer the pollution will be.

5.1 Air

Table 9 is the data of air pollution of Guangzhou.

Table 9

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Daily Mean Value of SO2 (mg/m3)	0.045	0.051	0.058	0.069	0.077	0.053	0.054	0.051	0.046	0.039	0.033
Daily Mean Value of NO2 (mg/m3)	0.061	0.071	0.068	0.072	0.073	0.068	0.067	0.065	0.056	0.056	0.053
Annual Concentration of Breathable Particulate Matter (mg/m3)	---	0.073	0.082	0.099	0.099	0.088	0.076	0.077	0.071	0.07	0.069
The pH Value of the Precipitation	4.71	4.59	4.37	4.64	4.51	4.34	4.41	4.42	4.47	---	---
Volume of Waste Water Discharged (10000 tons)	95434	---	---	---	---	125837	128302	111494	126156	---	---
Volume of Industrial Waste Gas Emission (100 million cu.m)	1958.16	2249.22	2355.53	1826.31	2618.88	2342.16	2126.49	1994.63	2435.84	---	---

Source: Guangzhou Statistics Department 2011

5.2 Water

As a downriver city, water pollution in Guangzhou is a serious matter for a long time. Municipal government has made great decision to change it. In order to show how clear the water now, municipal government launched the swimming campaign across the Pearl River every year since 2006. (Source: <http://www.gz106.net/article-364-1.html>) But about drinking water, people always have their own views. (Source: <http://news.eastday.com/c/20110315/u1a5786186.html>)

The following table 10 will show the comparison of the drinking water standards of EU, WHO and China.

Table 10

Value Date	EU	WHO	China
	1998	2011	2006
	Parametric value		
Acrylamide	0.10 μ g/l	0.5 μ g/l	0.5 μ g/l
Antimony	5.0 μ g/l	20 μ g/l	5.0 μ g/l
Arsenic	10 μ g/l		10 μ g/l
Benzene	1.0 μ g/l	10 μ g/l	10 μ g/l
Benzo(a)pyrene	0.010 μ g/l	0.7 μ g/l	0.1 μ g/l
Boron	1.0 mg/l		0.5 mg/l
Bromate	10 μ g/l	10 μ g/l	10 μ g/l
Cadmium	5.0 μ g/l		5.0 μ g/l
Chromium	50 μ g/l		50 μ g/l
Copper	2.0 mg/l	2 mg/l	1.0 mg/l
Cyanide	50 μ g/l		50 μ g/l
1,2-dichloroethane	3.0 μ g/l	30 μ g/l	30 μ g/l
Epichlorohydrin	0.10 μ g/l	0.4 μ g/l	4 μ g/l
Fluoride	1.5 mg/l	1.5 mg/l	0.05 mg/l
Lead	10 μ g/l	10 μ g/l	10 μ g/l
Mercury	1.0 μ g/l	6 μ g/l	1.0 μ g/l
Nickel	20 μ g/l	70 μ g/l	20 μ g/l
Nitrate	50 mg/l	50 mg/l	20 mg/l
Nitrite	0.50 mg/l	3 mg/l	
Selenium	10 μ g/l	40 μ g/l	10 μ g/l
Tetrachloroethene and Trichloroethene	10 μ g/l	40 μ g/l	60 μ g/l
Trihalomethanes — Total	100 μ g/l	200 μ g/l	
Vinyl chloride	0.50 μ g/l	0.3 μ g/l	5.0 μ g/l

Source: COUNCIL DIRECTIVE 98/83/EC of 3 November 1998 on the quality of water intended for human consumption/ Guidelines for Drinking-water Quality 2011/ Standards for drinking water quality GB5749-2006

Although the standard of GB5749-2006 seems as firm as that of European Community, most of the terms are not required to be testing. And this standard is about 10 years later than that of European standard.

5.3 City afforestation and Noise

As a modern international city, more and more cities pay attention in greening the environment and decreasing noise.

Table 11

		2005	2006	2007	2008	2009	2010
Noise	Urban Area (dB)	55.2	55.2	55	55	55	55.1
	Road Side (dB)	69.3	69.4	69.2	69.1	69.2	69.1
Coverage rate of green area		36.38	36.79	37.14	37.46		

Source: Guangzhou Statistics Department 2011

Conclusion

The world is progressing, so as China and Guangzhou. But nowadays, China is a manufacturing county. It is all known that after financial tsunami, US economy was wounded fatally. The exchange rate between US and China is from the highest 8 to 6.44 in August 2011.

Sometimes, change means challenge. It is an opportunity for government to make progress too. This year, government decides to audit and review GDP value and some relevant data. In this situation, it is unwise to evaluate data before the final data is being published. By viewing the website of municipal statistics, it seems the data is published over late.

It is well known that after financial tsunami, state government committed to stimulate domestic demand. In Guangzhou, the achievement is reflected on the increase of car manufacturing industry. Comparing with table 7, one can image that the living standard in Guangzhou is high and comfortable.

Guangzhou is city with over 2000 years' history. Comparing with Shenzhen, the industries in Guangzhou can be developed in a more balanced way. Job seekers can have more chance to find a suitable job than in Shenzhen.

According to exhibit 8, one can see that CPI increases in a rapid way especially after year 2009. It also reaches to an alarm data 120. It means the living standard in Guangzhou is very high. The prices for living commodities are very high too.

In population aspect, comparing with Shenzhen, although population density is much lower, it still has 1708 person/sq.km. And the layout is quite unbalanced. The highest one is Yuexiu district. The number in this district is 34239 person/sq.km. The average number in major four districts – Yuexiu, Liwan, Haizhu and Tianhe is over 14000 person/sq.km. The lowest is Conghua district with 301 person/sq.km. And the ratio of natural residents to temporary registration person is about 4 to 5 in year 2010.

– End of Report –

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