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Chinese Immigration in Portugal: Cultural Integration, Festivals and the Economic role of the Golden Visas

Maria Leonor Teixeira Brás

10/2024

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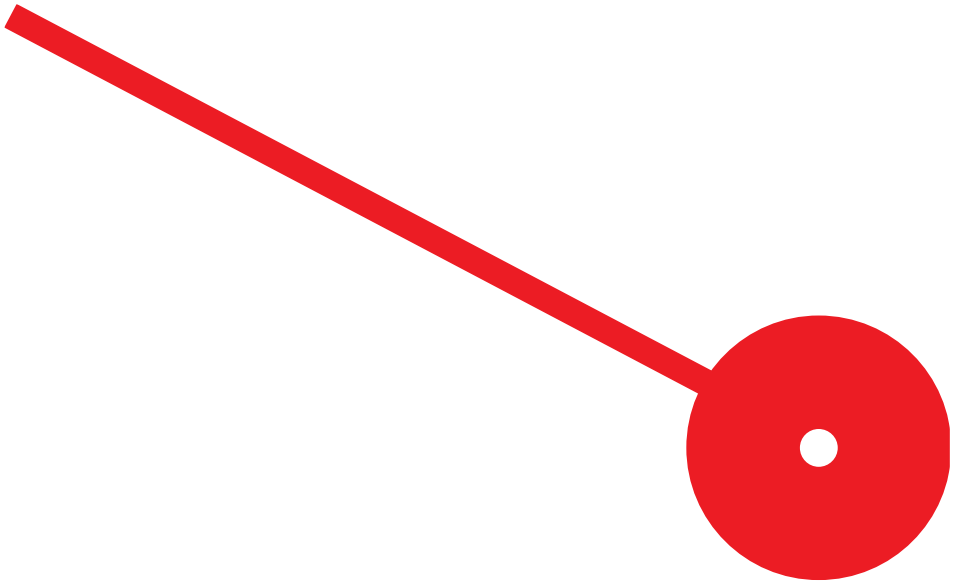

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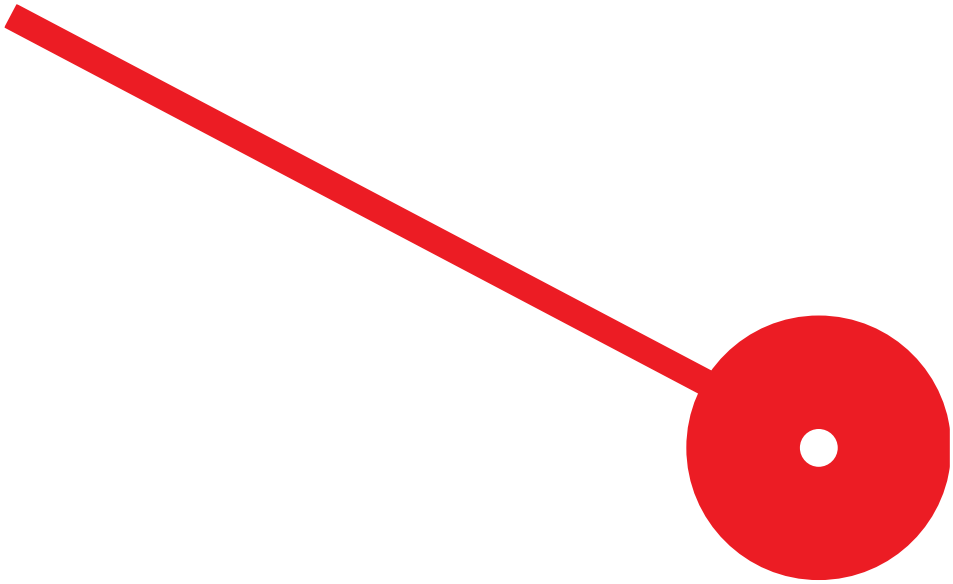
Maria Leonor Teixeira Brás

Master's Dissertation presented to Instituto Superior de Contabilidade e Administração do Porto/Porto Accounting and Business School to obtain the Master's Degree in Intercultural Studies for Business under supervision of professor Sara Costa



Dedication

To my family and friends that never let go of my hand when the days where less shiny and the will to continue kept fanding.

A simple thank you will never be enough.

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To my parents, because without them, the opportunity of this degree wouldn't be possible; it was with your unfading support and belief in me, that the will to continue to the end was possible; many times, the negativity consumed me but you always found a way of bringing me up. I will be forever grateful for your support.

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Last, but not least, I would like to thank my supervisor, professor Sara Costa, for the help, guidance and patience. Without her, this work wouldn't be possible and for that I'm sincerely grateful.

Resumo:

A presente dissertação examina a integração cultural e econômica dos imigrantes chineses em Portugal, com ênfase nas dimensões culturais, educacionais e de investimento, especialmente por meio do programa de Vistos Gold. O estudo investiga de que maneira a imigração chinesa, facilitada por esse programa, influencia o mercado imobiliário e a economia portuguesa, ao mesmo tempo em que analisa os desafios sociais, como a especulação imobiliária e a exclusão social. Adicionalmente, a pesquisa destaca a relevância das celebrações chinesas, como o Ano Novo Chinês e o Festival das Lanternas, como instrumentos para fomentar o entendimento intercultural. A educação e a aprendizagem da língua portuguesa são também discutidas como elementos cruciais para a integração. A dissertação realiza uma análise crítica do equilíbrio entre os benefícios econômicos proporcionados pelos Vistos Gold e os desafios à coesão social, sugerindo uma abordagem mais inclusiva para otimizar os benefícios culturais e econômicos da imigração chinesa.

Palavras chave: Imigração Chinesa; Vistos Gold; Impacto económico; Integração Cultural

Abstract:

The present dissertation examines the cultural and economic assimilation of Chinese immigrants in Portugal, with an emphasis on cultural, educational, and investment aspects, particularly through the Golden Visa initiative. The research evaluates the influence of Chinese immigration, enabled by this program, on the Portuguese real estate sector and overall economy, while also addressing social issues such as real estate speculation and social exclusion. Furthermore, the study highlights the significance of Chinese cultural celebrations, including the Chinese New Year and the Lantern Festival, as mechanisms for fostering intercultural dialogue. The role of education and the acquisition of the Portuguese language are also considered essential components of the integration process. This dissertation provides a critical assessment of the interplay between the economic advantages associated with the Golden Visa program and the challenges posed to social unity, advocating for a more inclusive strategy to enhance both the cultural and economic contributions of Chinese immigrants.

Key words: Chinese Immigration; Golden Visa; Economic Impact; Cultural Integration.

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Abbreviations List

AIMA- Agência para a Integração, Migrações e Asilo

APR- Portuguese Association of Real Estate Developers and Investors

ARI- Autorização de Residência para Atividade de Investimento

BCP- Banco Comercial Portugues/ Millenium

CCP- Chinese Communist Party

CTIEC- China Triumph International Engeneering Co.

EDP- Energias de Portugal

EEA- European Economic Area

FDI- Foreign Direct Investment

GDP- Gross Domestic Product

ICBC- Industrial and Commercial Bank of China

ICUP- Confucius Institute at University of Porto

IMI- Municipal Property Tax

IMT- Municipal Tax on Property Transfers

IOM- International Organization for Migration

IRN- Institute of Registries and Notary

IRS- Internal Revenue Service

IS- Stamp Duty

KMT- Kuomintang or National party

NHR- Non-Habitual Resident

PIIGS- Portugal, Ireland, Italy, Greece, and Spain.

PRC- People's Republic of China

PRI- Portuguese Residence for Investors

RBI- Residence by investment

ROC- Republic of China

SEF- Portuguese Immigration and Borders Service

SIS- Portuguese Security and Intelligence Services

WTO- World Trade Organization

INTRODUCTION

Chinese immigration to Portugal has experienced a consistent increase over recent decades, significantly influencing both the economic landscape and cultural dynamics of the country. In an era characterized by globalization, Portugal has emerged as a desirable location for Chinese immigrants, drawn by investment prospects offered through initiatives like the Golden Visa, as well as the desire for improved living conditions. This research investigates the cultural and social integration of Chinese immigrants in Portugal, with the economic implications of Chinese golden visa investments in Portugal; Focus as well on the effects of the diplomatic ties between the two nations, the use of cultural celebrations as a means of fostering and deepen connections, and the importance of education and language acquisition in facilitating successful integration into society.

The central research question guiding this study is: How can investment programs, cultural festivities, and education promote the integration of Chinese immigrants into Portuguese society? The research aims to analyze how economic and cultural dimensions intertwine and contribute to the integration of Chinese immigrants, while also discussing the barriers that still exist for full integration.

By adopting a qualitative methodology and review of existent literature, based on document analysis and a critical review of educational and cultural programs, the main objectives are to explore Chinese migration flows through time and in Portugal; to analyze the economic impact of the Golden Visa programme and the Chinese investments in the country originated by the same; To explore how some Chinese festivities can contribute to a better understanding of their culture and how language learning leads to a better understanding among communities.

Migration is a significant global phenomenon that has garnered extensive scholarly attention, particularly regarding its economic, social, and cultural ramifications in both the countries of origin and those of destination (McKeown, 2010; Guo, 2021). Chinese diaspora expanded beyond Asia changed after the 19th century (Yijing, 2015). This migratory trend underwent considerable transformation, particularly following the implementation of China's reform policies in 1978 (Skeldon, 1996), leading to a more

vibrant and entrepreneurial Chinese diaspora. Chapter I delves into the historical trajectories of Chinese migration, emphasizing the socioeconomic and political factors that lead Chinese individuals to seek opportunities abroad, including in Portugal, by provides a foundational historical context.

In recent years, Portugal's Golden Visa initiative has emerged as a significant mechanism for attracting foreign investment, particularly in the aftermath of the 2008 financial crisis. Research conducted by Dos Santos and Strohmaier (2024) illustrates the effects of this program on the real estate sector, while also addressing associated risks such as speculative practices or money laundering. Chapter II delves into these issues, analyzing some of the Portuguese migratory policies and their respective types of visas, as well as the influence of Chinese Golden Visa investors on the Portuguese market and economy, providing a comprehensive assessment of the advantages and potential challenges linked to the program. The public opinion on the program assumes a very important role when it comes to the closure of the programme by the Portuguese government in 2023.

The theme of cultural integration is equally important. The study by Fengyang (2016) underscores the critical role that culture and education play in facilitating the integration of immigrants, thereby fostering intercultural understanding. Chapter III addresses this topic, by examining Portugal-China relations; Chinese immigrants have assimilated into Portuguese society through the observance of cultural festivities and the acquisition of the Portuguese language, while also emphasizing the significance of educational and diplomatic initiatives in supporting this integration process. The chapter aims to provide a clear read on how language learning contributes to the inclusion of immigrants in a society.

This research is significant as it provides a comprehensive perspective on the economic and cultural effects of Chinese immigration in Portugal. By connecting cultural elements, including festivals and language acquisition, with the economic ramifications of the Golden Visa program, this study enhances the overall comprehension of Chinese immigration and its assimilation into Portuguese society. Furthermore, the critical examination of the Golden Visa initiative introduces a novel viewpoint to the discussions surrounding its social consequences.

CHAPTER I – CHINESE MIGRATION FLOWS AND DIASPORA

1. Chinese Migration Flows and Diaspora

1.1 Definition of Migration Concepts

1.1.1 Emigration

Emigration can be defined as the process of relocating from one's home country or habitual residence to another country. From the standpoint of the country of origin, the country of destination becomes the individual's new recurrent residence, as the International Organization for Migration (IOM) describes. Emigration is always present in every country, from Portugal to China; individuals choose to leave their home countries daily, migrating from one place to another for countless reasons.

The Emigration Observatory (n.d) adopts the United Nations' broad definition of emigrant, which refers to individuals who relocate from one country to another for a minimum of twelve months or longer. According to current international standards, the emigrant population is determined based on birthplace, with emigrants being individuals who have resided in a foreign country for at least one year, different from their country of birth. Therefore, Chinese emigrants are individuals born in China but currently reside in Portugal. However, the descendants of these emigrants born in Portugal cannot be classified as emigrants, even if they hold Chinese citizenship.

Over decades, there has been a focus on highlighting the dangerous effects of emigration on the country of origin, especially when it comes to the departure of many skilled individuals from their home countries, resulting in a decrease in both the quantity and quality of the workforce, known as the brain drain. However, this connection is more complex since negative consequences are counterbalanced by positive impacts in the country from which emigration originates. In several developing countries, emigrating eases labor markets that cannot cope with population growth, indirectly reducing unemployment rates. (Ferreira, 2017)

When individuals migrate to more developed nations, it positively impacts their critical thinking abilities and those around them. Additionally, the success of family members who have excelled academically and professionally abroad inspires individuals who choose to remain in their home country, motivating them to enhance their professional qualifications. Also, a stable network of emigrants and diaspora in the destination country with connections to their country of origin is important, with Ferreira

(2017) defending this network as a determining element to strengthen bilateral trade relations and attract foreign direct investment to the home country.

The exit of a family member to a different country helps to uplift the family's ability to assist the education of those who stay via remittances or act as an inspiration for young people to do well in their academics. Remittances are defined by Banco de Portugal (n.d) as the income sent by residents from one country to another, and it is a positive outcome of emigration. For many countries, remittances represent an important source of income for families that help boost growth and development. Emigrant Remittances strongly influence the economy and are higher than those from immigrants.

Compared to the Bank of Portugal, the Emigration Observatory[1] also mentions the importance of these transfers made by emigrants residing in a foreign country and how to measure them. It can be done by using the currency of the beneficiary country or its economic significance as a percentage of the beneficiary country's GDP, which includes both personal transfers and salaries of workers. Personal transfers include all current transfers sent or received by households; workers' salaries include wages earned by temporary workers or those hired on a seasonal basis. So, emigrants have a positive impact on the economy of the country where they are currently living.

Ferreira (2017) tells us that emphasizing only the "brain drain" may lead to misunderstandings once the transfer of skills (brain drain/brain gain) is not constant and changes significantly depending on factors like a nation's investment in citizen education, its capacity to appeal to professionals from other countries, the benefits offered to prompt overseas-educated individuals to come back or job availability in the homeland. In emerging countries, people who have gone overseas for education or work and returned to their home countries hold essential positions in academia, businesses, and government organizations, possessing impressive skills and expertise deserving of great admiration.

To fully maximize the benefits of emigration for the local and national development of countries of origin, it is essential to put in place supportive and coherent policies. These benefits will only be effectively utilized if these policies are in place. For example, China and India have set up multi-sector agencies to help returning emigrants reintegrate into society, making them stand out. Moreover, they reward migrants who want to start businesses in their native lands, generating investment and business

[1] The organization mentions what are the remittances and their importance;

prospects. Besides, initiatives exist to promote the repatriation of highly skilled immigrants and operational systems to assist in obtaining dual citizenship. Also, financial education initiatives and other strategies are used to reinforce the entire process.

1.1.2 Immigration

While emigration refers to the departure of an individual from their home country to another, immigration refers to the opposite. An example of immigration is when a Chinese individual comes to Portugal for work or living reasons. This definition is supported by the Legal Information Institute from Cornell Law School (n.d), which describes immigration as the movement of people with the common goal of residing in a new country. It is important to note that this immigration process does not apply to those who intend to travel temporarily, such as tourists, exchange students, or temporary workers.

Each nation has unique immigration policies and laws, leading to variations in the requirements and processes for individuals to be recognized as immigrants. For Nolasco (2016), immigration is seen as a beneficial solution to address labor shortages in the workforce.

Over centuries, societies have mutually influenced, invigorated, and enhanced one another through diverse cultures and human movements. Immigration is crucial in the host country's labor market, human capital, and economic growth. It addresses labor shortages, promotes entrepreneurship and innovation, and assists in managing the demographics of nations with aging populations. According to Ferreira (2017), these migratory movements have a significant economic impact and present a substantial opportunity for global prosperity. Migration to developed countries, in particular, can boost the world GDP, leading to more favorable economic outcomes than removing trade and capital flow barriers.

Within European labor markets, immigrant workers are viewed as a means of strengthening the workforce in countries with aging populations. The aim is to increase the working-age population to maintain equilibrium in social security funds. Immigrants tend to contribute more taxes and social benefits to their host country than they receive in return. However, Ferreira (2017) argues for a structural overhaul of the European space

to integrate immigrants with varying qualifications and skills to supplement local workers or address critical shortages in specific sectors.

It is crucial to take into account various factors when a country develops strategies and policies to secure the successful integration of migrants into the host communities and nations by ensuring access to employment and education for those entering the country and seeking a better life, combating trafficking and other criminal activities, protecting migrants' rights, and effectively mobilizing resources. Migrants play a significant role in enhancing the economies and cultures of their host countries by introducing fresh perspectives, innovative ideas, and technologies, thereby boosting human capital development, fostering economic growth, and generating employment opportunities and entrepreneurial ventures.

The idea that immigrants "steal" jobs from a country's nationals is based on the misconception that the number of jobs in an economy is limited to the same country's national residents. As consumers of goods and services, investors, and entrepreneurs, these minorities often create new job opportunities and expand the labor supply in economies by establishing small or more significant businesses (Ferreira, 2017). Immigration also plays a role in shaping the evolution of identities. The rise of anti-immigration sentiments, often fueled by a lack of social cohesion, can be attributed to the perception of immigration as a threat to national identities despite numerous instances of successful integration.

However, all these positive effects of migration on development do not mean that there are no potential risks from the influx of immigrants. Countries of origin can suffer the loss of highly qualified people (brain drain). In contrast, host countries may fail to fully use migrants' skills or subject them to discriminatory or exclusionary practices. The restriction of legal migration channels for low-skilled workers can lead employers to resort to irregular migration and illegal trafficking schemes, for example. Migrants working in the informal sector are particularly subject to precarious working conditions and vulnerable to abuses and violations of their rights. As Ferreira believes (2017), restricting immigration solely to highly skilled sectors and roles is economically illogical, considering the actual requirements of the job market and regarding human and labor rights.

According to Eurocid[2], the Portuguese stance on migration must be more consistent. It has transitioned from being viewed as a nation of emigrants within the EU, where individuals depart in pursuit of improved financial prospects, to now being recognized as a destination for immigrants and foreign nationals seeking to reside and work.

1.2 From China to the World: a view on Chinese Migration

1.2.1 Chinese Migration Flows Through Time: Historical and Socio-economic causes of Migration

1.2.1.1 Imperial Period (XV-XIX)

The first encounter between China and Europe goes back to the time of the sea expeditions between the XV and the XVI centuries, during the Ming Dynasty, a period marked by opening and building relations with the European continent through these routes. Guo (2021) states that small Chinese communities were already establishing themselves fundamentally in Southeast Asia. The interest in this area can be related to the European interest in overseas trade, colonization, and new settlements. However, this openness was interrupted by the fact that the sea routes started to become packed with pirates and Western settlers. The government implemented measures to fight these problems, restricting or banning sea trade, resulting in the cessation of emigration flows by keeping the Chinese people away from sailing (Yijing, 2015).

The migration flows from China started to change after the beginning of a new dynasty, the Qing dynasty (1644-1911). Much nineteenth-century migration was followed from merchant and labor circuits across Southeast Asia (McKeown, 2010). Still, international Chinese migration also occurred, creating new overseas settlements beyond Asia linked to European colonialism (Guo, 2021). For Mckeown (2010), the Chinese population migrated under labor obligations or debts to other Chinese merchants, employers, or American employers in the American colonies.

The British Hegemony during the Industrial Revolution changed the country's social and market forces by increasing the demand for materials like food, quickly setting

[2] Jacques Delors European Information Center;

off its interest in Chinese products without any interest in trade (Guo, 2021). Instead, the British brought opium, resulting in the two Opium Wars (1839-1842 and 1856-1860), which managed to steal the accumulated wealth of the country as well as the purchase of silk, porcelain, and tea. Following the wars, the Chinese economy was in a very fragile state and very much destabilized.

The easy adaptation of the Chinese immigrants to diverse climates led them to prefer to work in England and in America, where, following the thoughts of Guo (2021), after the transatlantic slave trade was abolished in the 1800s, a labor shortage occurred, with many Chinese employees now working in the railway's construction. Even during the gold rush, these events resulted in a mass migration, creating new Chinese diasporas beyond the southeast of Asia, aiming at the Americas, Australia or Europe. However, the Chinese population endured exploitative working conditions and ended up suffering from racism in their destination countries.

1.2.1.2 Migrations during the Republican Period (1912-1949)

The end of the Qing dynasty was succeeded by a period known as the Republic (1912-1949) after the Xinhai Revolution[3] took place. The country was again adapting to a transition in its political system, going from a monarchy to a republican state. The Chinese communities living overseas began to increase in importance once they became a bridge between the new Republic of China and overseas Chinese communities, which originated with the creation of the Overseas Chinese Federation (with Shanghai as its base). Overseas communities could now assist in politics and economics and enroll in diplomatic activities, all through the Federation (Yoshida, 2023).

The enhanced status of Hong Kong as an emigration port in the later stages of migration can explain why both Hong Kong and Cantonese frequently appear prominently in the historical narrative of overseas migration (McKeown, 2010). Hong Kong's role as an emigration port increased after 1912, with a notable rise in the number of emigrants during the Republic.

[3] A crucial point in history that led to a rebellion against the government, ending the dynasty;

After the creation of the Republic of China (ROC), Dr. Sun Yat-sen[4] attempted to reform the country, resulting in the creation of the National Party or Kuomintang (KMT). The KMT remained in power till 1949. Dr. Sun handed the provisional presidency of the republic to Yuan Shih-Kai, the head of the northern army at the time since he did not possess military power. Later, Yuan managed to gain control of the party and began admitting communists into the KMT. The first communist, Li Ta-Chao, founded the Chinese Communist Party (CCP), which led to the union between the parties, the United Front. As Cucchisi (2002) affirms, KMT started to massacre communist members across the country, ending the United Front. Mao Tsé-Tung, now leader of the CCP, wanted to fight nationalism; in a way, he strengthened his party while the nationalists focused on the country's governance issues.

The imminence of a Japanese invasion became real, and in 1937, China was invaded; the parties KMT and CCP once more came together as the second United Front in an attempt to drive out the Japanese (Cucchisi, 2002). The Sino-Japanese war left KMT weakened and without population support, allowing the CCP to seize power in 1949, after the eventual end of internal party rivalries.

China endured until Japan's unconditional surrender, but with tremendous cost; at least 14 million lives were lost, and about 15 percent of the population was displaced (Vaz-Pinto, 2015). This period can be described as the period with the most migrations, either internal to the civil war or external to other overseas communities. Since it was marked by war, the country was left in a fragile state, with famine and inflation also being factors in mass migration.

1.2.1.3 Migrations during the Communist Period (1949-1978)

Mao Zedong established the People's Republic of China (PRC) in 1949, shortly after the civil war and the Japanese invasion. It is estimated that several hundred thousand Chinese individuals migrated to Hong Kong and Macau, many of whom were affiliated with the Kuomintang (KMT), as well as intellectuals and entrepreneurs. Guided by the principles of Marxism-Leninism-Mao Zedong Thought, there was a pressing need for a

[4] In its youth, Dr. Sun visited the west and came to the realization that the democratic system would be the most appropriate form of government for China;

comprehensive transformation of Chinese society. Economically, the PRC initiated an ambitious land reform and collectivization program, which began with efforts to mitigate foreign influence (van Dongen, 2022).

Controlling migration became a top priority, so these earlier methods were combined with Soviet practices for population management. Entry and exit laws were modeled on those of the Soviet Union. Internally, China instated a migration control system, according to van Dongen (2022). With a similar approach, Hagen and Speelman (2022) note that significant ideological considerations and a lack of experience in immigration governance marked migration management during this period. Ethnic Chinese returnees and newcomers from the diaspora were placed on state-owned farms, which did not provide avenues for complete integration, resulting in citizenship challenges that persisted for generations.

China implemented a household registration system known as hukou, which is a system designed to restrict unauthorized internal migration and to uphold a developmental model where rural agriculture supports urban industrial growth. It was implemented before the Great Leap Forward (1958-1961) when rural collectivization and the creation of communes resulted in the collapse of agriculture production, which led thousands to die from famine, and some managed to escape illegally to Hong Kong and Macau, as seen as Hagen and Speelman (2022).

With the start of the Cultural Revolution (1966-1976), all ties with relatives abroad were cut, and the government began persecuting those who opposed the regime (van Dongen, 2022). The diaspora engagement was not viewed with confidence; for the government, all those living in capitalist countries were considered suspects or traitors for not being loyal to the regime. Only over the years did Mao Zedong come to recognize the diaspora's economic importance.

The Communist period was challenging. Until late 1979, the country adopted a closed foreign policy toward the West.

1.2.1.4 Migrations after the Reform and Opening Period (after 1978)

After Mao Zedong passed away in 1976, the Deng Xiaoping government initiated the “Reform and Opening Up,” introducing foreign investment into the economy and focusing on education. However, one of the main points this reform brought was a change in the migration flow. According to Skeldon (1996), the significant decisions made in December of 1978 to liberalize the Chinese economy and engage with the global community inherently and overtly enhanced interactions with foreign individuals, leading to increased migration.

Deng succeeded in consolidating the Chinese Communist Party's support for his reformist vision and the future direction of Communism. According to De Freitas (2019), his approach, termed “Socialism with Chinese Characteristics,” needed economic modernization, a new development strategy, and a long-term outlook, accompanied by extensive reforms of both the Chinese economic framework and the State apparatus.

A significant driver of this extensive internal migration was the decollectivization of agriculture, coupled with the increasing income disparity between urban and rural locals, mainly as coastal cities experienced commercial growth beginning in the 1980s. This period saw labor and entrepreneurial migrants shaping new diasporic patterns (Miles, 2020). The reforms initiated in 1979 marked a pivotal moment in the development of free markets and the accumulation of personal wealth, which provided more individuals with the opportunity for mobility, as articulated by Skeldon (1996).

Deng Xiaoping's reforms were extensive, encompassing various domains such as the economy, politics, culture, education, foreign relations, and advancements in science and technology. These reforms transformed China's institutional framework, stimulating and enhancing productive forces to foster social and economic prosperity and growth. They were in response to the need to encourage more students to enter a specialized workforce, which would be crucial for China's subsequent economic recovery and expansion, as highlighted by De Freitas (2019).

Skeldon (1996) states that the volume and complexity of migrations have risen since 1979. The recent wave of population migration from China can be classified into four primary types, which may not be entirely exclusive of one another: settlers, students, contract laborers, and illegal migrants.

1.2.2 Migrants Characteristics

While analyzing Chinese immigrants' characteristics, it is easier to divide the topic into three sectors: their socioeconomic profile, their motivation to migrate, and finally, the type of visa or migration program.

1.2.2.1 Socioeconomic Profile

Low qualification workers:

According to Li (2018), a vast majority of Chinese immigrants, mainly from Zhejiang province, have low levels of qualifications, so they usually work in the traditional textile and catering industries and live in an endogamous social and family environment, which stimulates the continued use of a common language, in general rule, these Chinese workers have difficulties with the Portuguese language, so they choose to work in Chinese shops or restaurants because they can communicate more easily (Fengyang, 2016).

Qualified Professionals:

The economic pursuits of Chinese migrants are progressively diversifying and broadening to encompass various sectors, including professional and technical fields such as law and accounting. Li (2022) states that China is leading in sending international students abroad. This phenomenon is driven by a job market that is becoming increasingly competitive and demanding, compelling young Chinese individuals to pursue education and training at international institutions to enhance their skills and qualifications.

Investors and entrepreneurs:

Chinese entrepreneurs exhibit a high degree of dynamism and a willingness to embrace change and innovation. These enterprising individuals dedicate extensive hours to their ventures and seek to minimize expenses to build their capital. They recognize the

significance of being opportunistic, strategic, and inventive. Furthermore, the younger generation of entrepreneurs has adopted numerous values in Western culture, including an appreciation for creativity, innovation, assertiveness, practical communication skills, professionalism, and the ability to integrate diverse perspectives (Zapalska & Edwards, 2001).

1.2.2.2 Motivation to Migrate

Economical:

Rodrigues (2012) tells us that mobility is connected to economic and social opportunities. In an era characterized by increased globalization, migration has emerged as a viable option for numerous individuals, serving as a pathway to realize their cosmopolitan aspirations. The pursuit of financial gain, elevated expectations, and a rich imagination are significant factors that influence migration. With that, social aspiration can be deeply influenced by the aspirations towards acquiring wealth and success. These future-oriented ideas enable individuals to uphold dignity when migrating to poverty.

Educational:

The international placement of students for training purposes is a significant method for promoting technology transfer. Often, the insights gained during this experience yield far-reaching effects that exceed initial expectations, and students who return can significantly influence their home communities. This phenomenon was notably evident due to China's open-door policy to foster international exchange (Skeldon, 1996) a great attempt to bring Western ideas into the country and a younger qualified generation.

Stability and safety:

Numerous Chinese migrants have consistently sought improved living conditions for their families and the stability and security provided by a host country. The assurance of establishing a business is a significant consideration; for instance, the

Golden Visa offers a degree of protection to enterprises in economies that are closely associated with the European Union (EU) and demonstrate robust recovery potential. Additionally, political stability plays a crucial role (Li, 2022).

1.2.2.3 Types of Visa or Migration programs

Working migrants:

Migrant workers have emerged as an essential component of China's labor force; however, they face significant vulnerabilities regarding their health and employment rights. This demographic often endures substandard working environments and various occupational risks, frequently working extended hours ranging from 10 to 12 hours daily, six to seven days a week. As the primary workforce in China's manufacturing sector, these conditions adversely affect the work capacity and overall productivity of migrant workers (Han et al., 2014).

International Students:

Ideally, China wanted all the students to return to being versed in foreign technology to contribute to economic development. What is clear, however, is that many of those who go back have done so to take advantage of the opening-up of the Chinese economy and have business links there (Skeldon, 1996). Addressing the difficulties of residing and working in a foreign country enables individuals to develop greater adaptability and cultural awareness, thereby improving their employability prospects. This concept is explored in the research conducted by Huan and Turner (2018) on the construction of employability from the perspective of Chinese postgraduate students.

Golden Visa:

Many Chinese migrants find Portuguese society very stable and secure. The Portuguese Golden Visa has become positively accepted by investors and entrepreneurs

when they establish businesses or invest in the country (Fengyang, 2016). It is a type of visa with much demand since Chinese migrants can acquire citizenship by simply investing and being granted access to other European markets if the goal is to internationalize and compete in the European sphere or globally.

1.2.3 Chinese Diaspora in the 21st Century

Over thirty years, marked by significant economic, political, and social changes, Beijing has transformed its migration policies, re-establishing itself as a prominent country for migrant outflows. This shift has led to a new knowledge-based and entrepreneurial diaspora, increasingly engaged with the homeland. This engagement can be understood as the Chinese government's strategic pursuit of material and non-material resources to support domestic growth. Additionally, attracting the Chinese diaspora aims to foster amicable relations between China and the global community. The focus on economic development has been crucial for China's progress, with a vigorous pursuit of foreign direct investment, remittances, and donations from ethnic Chinese, as articulated by Thunø (2018).

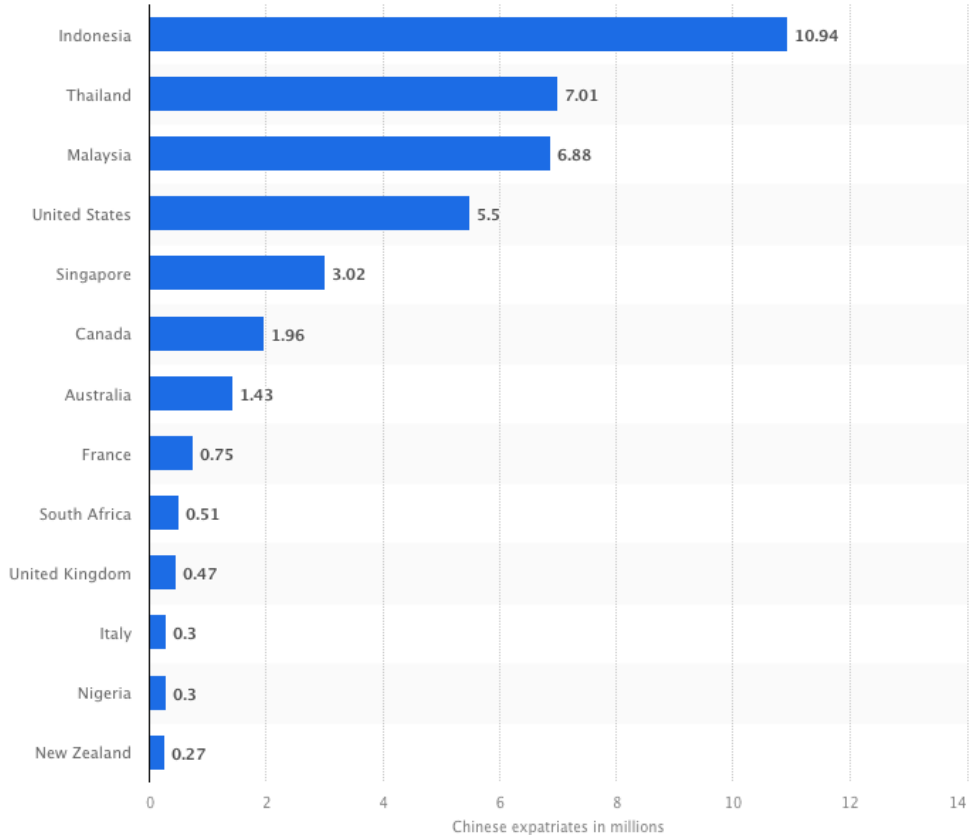
Guo (2021) asserts that as transnational migration increases, the modern overseas Chinese community becomes more hypermobile, resulting in a broader global distribution of this population. Although determining the exact size and scale of this demographic presents challenges, it can be visible a notable shift in the distribution patterns of overseas Chinese over the centuries.

It is important to note that while Chinese migration can be traced back to the twelfth century, the numbers were relatively small and primarily limited to Southeast Asia until the mid-nineteenth century when large-scale migration occurred to regions such as the Americas, Australia, Oceania, Europe, and Africa, this last in the mid-1990s, several Chinese employees ventured into the import and wholesale trade in countries including Ghana and South Africa (Miles, 2020). Despite an intense concentration in Asia, the overseas Chinese population has extended its presence to nearly every part of the globe.

Chinese migration to prominent immigrant-receiving nations, including Australia, Canada, New Zealand, and the United States, is anticipated to persist in its upward trend, as Guo (2021) predicts. However, the most significant relative increase in

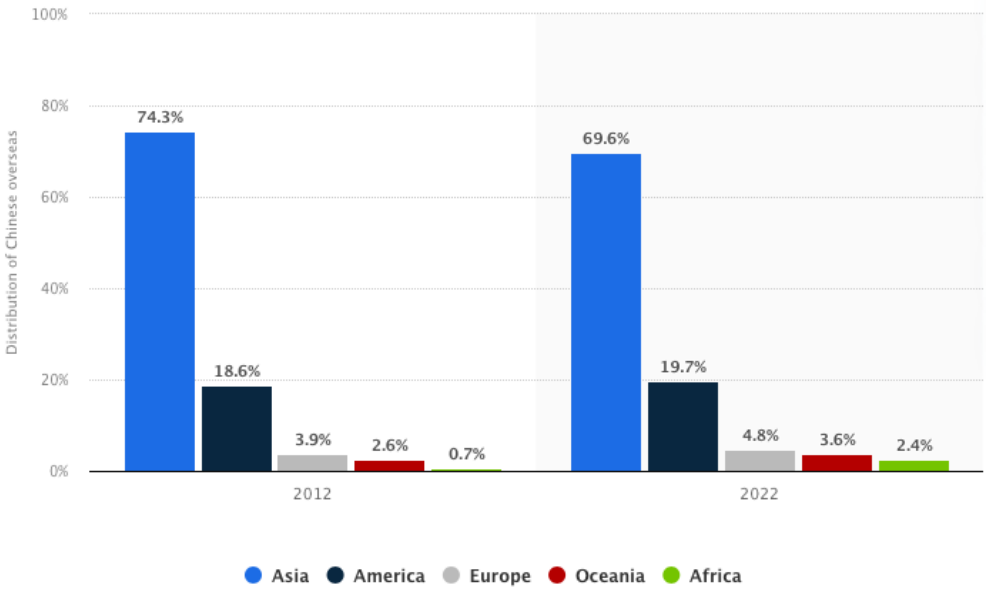
the Chinese population is expected in Africa, attributed to the enhanced economic and political relationships between China and various African nations. Numerous migrants have embarked on new diasporic paths, such as those relocating from China to Europe, Africa, or the United States (Miles, 2020).

In response to the outbreak of COVID-19, China promptly implemented a complete closure of all entry and exit points to combat the pandemic and prevent further spread, both domestically and internationally. The imposition of air traffic restrictions and the potential risk of returnees introducing new COVID-19 cases into the country posed significant challenges. In addition to international assistance from various countries, the Chinese diaspora played a crucial role by providing aid, including the shipment of emergency medical supplies. This support is consistent with the historical tendency of the Chinese diaspora to assist their homeland during times of crisis (Leung, 2022). However, with this, many students and qualified workers managed to return to China, with many adopting a remote form of work to work globally without residing in another country, helping *brain gain* and increasing digital exchange.



Graphic 1: Countries with the most significant number of overseas Chinese in 2022, source: (Statista, 2023)

Following Graphic 1 data, in 2022, the largest concentration of the Chinese overseas population was gathered in Indonesia, Thailand, and Malaysia, three countries from Southeast Asia, a trendy region for Chinese migrants that dates back to the dynasties, contrasting with the United States, a more recent area of preference. Over the last decades, English-speaking developed countries have been popular destinations for Chinese emigrants. Overseas Chinese are considered strong supporters of the overall strength of Chinese culture and international influence. Among other popular immigration destinations for Chinese riches are Canada, Australia, Europe, and Singapore.



Graphic 2: Overseas Chinese population divided by continent, compared between 2012 to 2022, source: (Statista, 2024)

According to Statista, in 2022, almost 70 percent of people of Chinese birth or descent living overseas lived in other Asian countries, even though in 2022, the percentage slightly decreased. As mentioned in the topics above, the Chinese migrations were mainly to Southeast Asia, such as Indonesia, Thailand, and Malaysia (graphic 1). This occurs because, throughout time, Chinese migrants established communities across those countries and, later on, America or Europe, either running from the conditions at home or to get a better life elsewhere. The diaspora slightly changed regarding the African continent, with a slight but notable increase in Oceania, and Europe. However, the leading choice continues to be the southeast of Asia, despite the decrease when comparing 2012 to 2022.

1.3 Chinese Waves of Migration to Portugal

According to Yijing (2015), the arrival of Chinese immigrants in Portugal dates back several years. Portugal can be regarded as a pivotal point in transmitting Eastern culture to the Western world. In terms of chronology, there are a few relevant moments in time about these migration flows.

Gaspar (2017) believes that, in recent decades, the economic and administrative prospects presented by the Schengen Area have drawn the interest of Chinese immigrants, who view it as a strategically significant geopolitical region for establishing a presence in Europe and the global arena.

1.3.1 The late 1920s to the 70's

The initial point to consider relates to the timeframe from the 1920s to the 1970s, which aligns with the occurrences of the Second World War. According to Yijing (2015), the arrival of Chinese migrants occurred relatively late. Before the Second World War, European Chinese immigrants mainly worked as temporary contract laborers, particularly in port cities such as Amsterdam, Barcelona, and Porto. However, those who settled in Portugal began establishing small enterprises, including various warehouses. Their descendants subsequently took over these businesses, which ultimately led to the creation of the first Chinese restaurants in Portugal.

The initial influx of Chinese immigrants to Portugal can be traced to the 1920s, when they established a street trading presence in cities such as Lisbon, Martin Muniz, Porto, and Setúbal. According to Ning (2012), early Chinese merchants offered silk ties displayed on a suspended wooden rod, advertising their products with the phrase: Bonito e Barato! Their numbers were limited and gained greater visibility only in the 1970s. In the aftermath of decolonization in 1974 and 1975, many Chinese immigrants arrived in Portugal, primarily from Timor, Angola, and especially Mozambique.

1.3.2 The 70's to the 80's

From the 1970s to the 1980s, migrants from China, particularly from the Zhejiang province, migrated to Portugal. However, their integration and adaptation into

the local community could have been more effective. They faced challenges due to their limited proficiency in Portuguese, often gravitating towards ethnic-specific economic endeavors instead of fully participating in Portugal's broader labor market and national economy. Additionally, the cultural and religious beliefs of these Chinese migrants presented obstacles to their assimilation into the predominantly Catholic society (Yijing, 2015). Following the decolonization period of 1974 and 1975, Portugal experienced a notable influx of Chinese immigrants, predominantly from Timor, Angola, and Mozambique. (Ning, 2012).

The Reform and Opening Up policy in China during the last century led to establishing diplomatic relations with Portugal in 1979, subsequently facilitating migration. Many Chinese individuals opted to emigrate to Portugal in pursuit of improved living conditions and a higher quality of life.

This trend of migration spanned from the 1970s to the 1990s, during which the Chinese population in Portugal expanded considerably. This influx of immigrants originated by the 1985 policy changes with the aim to liberalize emigration and reduce restrictions. This resulted in a notable rise in Chinese citizens departing from China. Yijing (2015) agrees that, before this period, China had enforced strict regulations and oversight regarding migration activities.

Before 1982, the Chinese population in Portugal was fewer than a thousand, indicating a tiny community. Diplomatic relations between China and Portugal were only established in 1979 (Fengyang, 2016). Before this development, there were no Portuguese embassies or consulates in China, which meant that individuals holding passports from the People's Republic of China could not secure entry visas to Portugal.

Those Chinese nationals who traveled to Portugal around 1976 faced a complicated process to obtain such visas. Initially, they had to gain permission to travel to Hong Kong, Macau, and Taiwan, where they could acquire visas from the Portuguese authorities, as Fengyang (2016) also defends. Subsequently, they flew to Portugal, where they underwent a thorough examination by the Immigration and Borders Service to obtain residency.

Chinese immigration to Portugal, while reflecting similar migratory trends observed in other Southern European nations, presents a distinctive scenario (Gaspar, 2017). In Portugal, two distinct waves of Chinese immigration can be identified, influenced by particular historical, political, and economic factors. The first is rooted in historical connections between Portugal and its former colonies, specifically Mozambique and Macau, which came to facilitate the migration of specific Chinese individuals from these regions from 1975 to the 1990s.

1.3.3 The 80's to the 21st Century

The strength of this migratory wave leading up to the 1990s, as noted by Fu (2020), can be linked to the transformations occurring in Hong Kong and Macau. Furthermore, the persistence of earlier migration patterns also played a significant role in the overall rise of Chinese immigrants in Portugal.

In the 80s, a significant wave of migration occurred, which can be associated with the Chinese government's Reform and Opening-up policy initiated in 1978. This influx of immigrants primarily originated from China, also from Zhejiang Province. In contrast to those who emigrated from Portugal's former colonies, these individuals do not speak Portuguese and form a relatively insular community, primarily engaged in the catering industry, the clothing trade, and the importation and sale of Chinese goods. The ideas of Ning (2012) regarding these Chinese migrants relate to them being more prominent and representative in terms of their numbers, geographical spread, or even economic significance.

Nevertheless, those who already have established businesses tend to contact their relatives or acquaintances in China to encourage them to come to Portugal for work purposes, guarantying some help when newcomers arrive; a factor that, for Ning (2012), can positively influence the migration flows once it helps increase Chinese immigration.

Between 1982 and 1984, there was a notable increase in Chinese immigrants arriving in Portugal, primarily from Shanghai and Zhejiang. Many of these individuals had relatives residing in various European nations (Fengyang, 2016). This influx of migrants resulted in thousands of Chinese individuals settling in Portugal, a significant portion of whom swiftly acquired residence permits.

Between 1992 and 1996, they also experienced an increase in the presence of the Chinese community in Portugal. Fengyang (2016) explains the event with the fact that the Portuguese government amended the Immigration Law, regularizing the status of numerous undocumented immigrants; all undocumented immigrants could apply for permanent residency in Portugal if they demonstrated a clean criminal record. Due to this flexible legislation, many Chinese individuals who lacked legal status in other European countries opted for Portugal. During this time, thousands of immigrants, entered the country, positively impacting the Portuguese economy. This led to a growth in residency requests and a will to remain in Portugal because of the opportunities to establish their businesses.

The increase in the population of Chinese immigrants in Portugal is significant, as highlighted by Li (2018), with official statistics from the Serviço de Estrangeiros e Fronteiras[5] (SEF) indicating that the number of Chinese immigrants climbed to 2,202 individuals in 1995. Fu (2020) describes the large inflow of immigrants to the transformations occurring in both Hong Kong and Macau, originating from the transfer of sovereignty from England and Portugal to Chinese governance. During this timeframe, Chinese immigrants also migrated to Portugal from Mozambique following decolonization.

As discussed in section 1.1.2, two waves of migration can be identified, according to Gaspar (2017). This is where the second wave emerges; in the 2000s, the recent migrations are now being characterized by economic immigration and, more recently, by the mobility of Chinese students, primarily from exchange programs or even for university degrees, and business immigrants, with the example of the Golden Visa.

1.3.4 After the Golden Visa: from 2012 until today

Since establishing the Golden Visa program in 2012, Portugal has experienced a significant increase in Chinese migrants, particularly investors. This rise in migration has contributed to the expansion of the Chinese community in the country, thereby generating a greater demand for labor within this demographic (Fu, 2020). Nevertheless, challenges such as language barriers and cultural differences often lead Chinese

[5] SEF was terminated in 2023, with AIMA (Agência para a Integração Migrações e Asilo) taking responsabilities for some of SEF's competences;

employers to prefer hiring Chinese workers, which in turn encourages more individuals from China to migrate to Portugal in pursuit of employment opportunities.

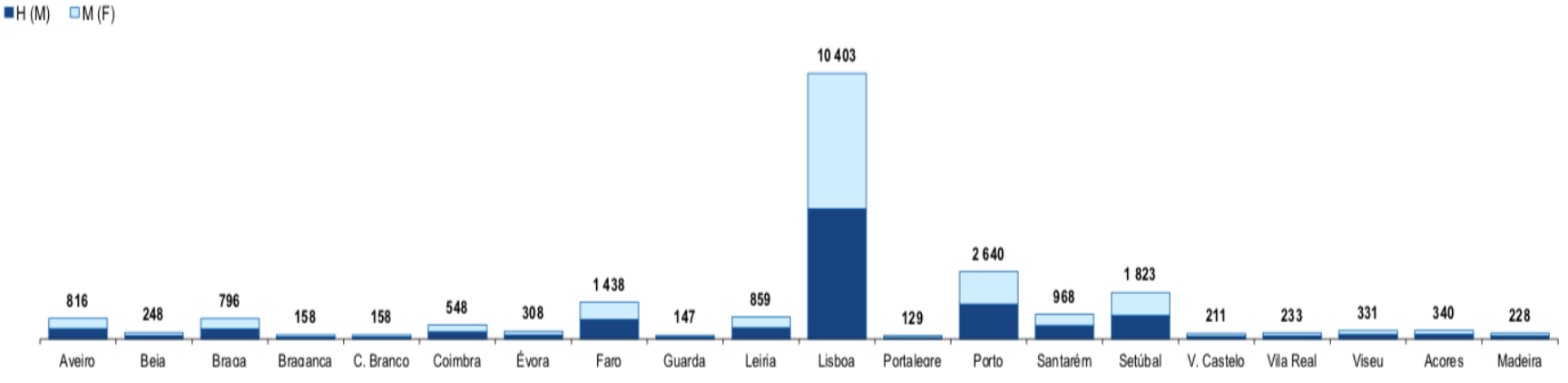
Not all individuals arrived in Portugal to establish a long-term residence. In certain instances, Portugal served as a transit point for reaching other European locations, as it is among the European Union countries offering relatively low costs and a more accessible process for obtaining a residence permit (Fengyang, 2016). The author also mentions that Chinese individuals who have resided in Portugal for an extended period have achieved a higher level of integration within Portuguese society, often through intermarriage or attending Portuguese educational institutions. In contrast, more recent arrivals remain primarily isolated, prioritizing connections with fellow nationals. Many newcomers do not speak Portuguese and rarely interact with other immigrant groups.

The consequences of the wealth exodus from China are viewed mainly as unfavorable from the point of view of the Chinese State. To name a few, capital outflow is perceived to lead to a capital drain and i the robust growth of the Chinese economy, while the Chinese political left also perceives investment migration as an escape route for corrupt officials and businessmen facing prosecution. Investment migration is used to preserve wealth, and investment in the future for their children's education can also directly or indirectly contribute to the reproduction of inequality.

In response to the economic and financial crisis of 2011, which impacted numerous Southern European nations, Portugal introduced the Golden Visa to encourage foreign investment and improve the economic situation. This visa enables investors from abroad to seek a residence permit to initiate an investment activity (Li, 2018).

According to data from SEF (2016), about 68,8% of this population resides in the three principal cities: Lisbon, Faro and Setubal collectively accounting for 272,774 individuals. Moving to 2023, the Chinese community predominantly resides in urban regions; however, some individuals are situated in various other areas of the country (Gaspar, 2018), as represented in Graphic 3, which illustrates the distribution of these immigrants by district, including the islands of the Azores and Madeira. In 2023, Chinese immigrants remained mainly in metropolitan areas such as Lisbon and Porto. Still, Setubal, Faro, Leiria, and Aveiro appear to be the places of choice, with Setubal being third with 1823 Chinese residents. Faro with 1438, Leiria with 859 and Aveiro with 816.

Although Chinese residents are gathering all across Portugal, these regions are the ones that collect the most significant numbers of the Chinese population.



	Aveiro	Beja	Braga	Bragança	C. Branco	Coimbra	Évora	Faro	Guarda	Leiria	Lisboa	Portalegre	Porto	Santarém	Setúbal	V. Castelo	Vila Real	Viseu	Açores	Madeira
(M)	405	129	395	85	81	281	159	766	84	430	5 103	61	1 356	531	925	103	126	170	188	117
(F)	411	119	401	73	77	267	149	672	63	429	5 300	68	1 284	437	898	108	107	161	152	111
(M/F)	**816**	**248**	**796**	**158**	**158**	**548**	**308**	**1 438**	**147**	**859**	**10 403**	**129**	**2 640**	**968**	**1 823**	**211**	**233**	**331**	**340**	**228**

Graphic 3: Distribution of Chinese Population across Portugal in 2021, by Continental Districts, Azores and Madeira and by gender, source: (Office for Strategy and Studies, 2023)

CHAPTER II – IMPACT OF THE CHINESE GOLDEN VISA INVESTMENTS IN PORTUGAL

2. Impact of the Chinese Golden Visa Investments in Portugal

2.1 Portugal Migration Policies

Foreign individuals seeking entry into Portuguese territory are required to comply with certain legal stipulations. According to Ministry of Foreign Affairs (n.d), it is crucial for individuals to hold a travel document that is valid for at least three months beyond their planned duration of stay. In cases where entry is facilitated by a visa, it is necessary to have a valid visa that corresponds to the intended purpose of the visit. The application for this visa must be submitted solely at a Portuguese diplomatic mission or consular post situated outside the country. Additionally, applicants must provide evidence of sufficient financial means to support themselves during their time in Portugal.

Residency, temporary stay, and Work-seeker visas are granted solely to third-country nationals who fulfill certain requirements, which include not having been expelled from their home country and not being barred from re-entering their national territory. To qualify for these visas, applicants must not appear on the non-admission list in the Schengen Information System maintained by any of the Contracting Parties, nor should they be listed in the Portuguese Immigration and Borders Service[6] (SEF) Integrated Information System.

Furthermore, candidates are required to prove that they possess adequate financial resources, as assessed by relevant internal administrative and social solidarity authorities. In addition to holding a valid travel document, securing travel insurance is a prerequisite for visa approval. The application procedure necessitates the submission of the required documentation to the consular office in their country of origin, where their eligibility will be evaluated against the specified criteria.

Foreign individuals entering Portugal via an uncontrolled border must notify the SEF, now AIMA[7], within three working days of their arrival. This requirement, however, is exempt for specific groups of non-Portuguese citizens, including those who are residents or have received permission to remain in the country for more than six months,

[6] According to the Portuguese Government, SEF was inactivated in October of 2023, so AIMA is responsible for matters such as the request for the residency permits.
[7] Agency for Integration, Migration, and Asylum

individuals benefiting from the Community regime or equivalent arrangements, and those staying in hotels or comparable accommodations.

Sumi and Alam (2023) noted that Portugal distinguishes itself from numerous other European countries by adopting immigrant-friendly policies that contrast with the dominant restrictive immigration practices in the area. The country has established inclusive and coherent policies designed to facilitate the integration of immigrants, following legal regulation such as article 1 of Law nº 23/2007:

"This law defines the conditions and procedures for the entry, stay, exit and removal of foreign citizens from Portuguese territory, as well as the status of long-term resident." In Diário da República nº127/2007, I Serie de 2007-07-04, pages 4290 – 4330.

The involvement of immigrant associations and recognition on an international scale have played a significant role in improving the effectiveness of these policies.

The official website of the República de Portugal has released a Regulatory Decree in the Official Gazette of 2017. This decree aims to enhance the efficiency of administrative processes and to provide greater flexibility in the application procedures for visas and residence permits. It establishes a streamlined system tailored for students pursuing vocational education courses in Portugal, as well as for immigrants who are either entrepreneurs or possess advanced skills.

The objective is to foster the creation of innovative business models within the realms of entrepreneurship, technology, and innovation, aimed at tackling the challenges encountered by enterprises in these fields. Furthermore, the decree streamlines the regulations concerning seasonal workers by establishing a new framework for employees transferred from other member states. This legislative modification facilitates a more efficient and uncomplicated procedure for issuing residence permits to those seeking to engage in higher education in Portugal.

> *"We feel we must regulate immigration to offer people dignity. Portugal cannot and won't have its doors shut to welcome those who are looking for opportunities, who have know-how, willingness, often they have what we are lacking. Portugal will not shut its doors to those who want that opportunity. It would never do so due to humanism, yet also for pragmatism, fulfilling our national interest",*

Prime Minister Luís Montenegro speech related to the plan for immigration at the Action Plan for Migration presentation, at Cascais, 3rd of June of 2024 (República Portuguesa, 2024)

2.1.1 National Visas

According to the information from the diplomatic portal of Ministry of Foreign Affairs related to the different types of visas, it can be identified 3 different types, the Temporary Stay Visa, the Residence Permit visa and the Job Seeker Visa. Long-stay visas, governed by existing national laws, may be issued for either a temporary visit or to secure a residence permit, contingent upon the duration of the stay. These visas permit the holder to reside in Portugal for specific purposes, such as education, internships, employment, or medical care, among others. Additionally, a new category of visa has been introduced, enabling foreign nationals to enter Portugal for the purpose of job searching.

Temporary Stay Visa

The temporary stay visa is designed to facilitate entry into Portugal for durations of less than one year. This visa is valid for the entire length of the stay and permits multiple entries into the country. It encompasses various categories:

- **Work and research visas**, for seasonal employment for periods exceeding 90 days, self-employment, and highly skilled activities such as research and teaching for up to one year. Additionally, it accommodates remote work for digital nomads, amateur sports activities, and the transfer of employees between companies within the World Trade Organization (WTO).
- **Temporary study** visas are applicable for secondary and higher education programs (bachelor's, master's, doctoral, and post-doctoral), as well as for mobility or exchange programs lasting more than three months.
- **Professional training, internships, and volunteer work** are intended for the transfer of employees from WTO countries for periods exceeding one year. Unpaid internships and volunteer activities necessitate a visa for stays longer than three months, as do participation in study or exchange programs. Professional training may also fall under the provisions of this visa.

- **Health visas** are designated for individuals seeking medical care or for those accompanying family members who are receiving treatment.
- Portugal offers **Youth Mobility** visas that permit temporary stays longer than three months for the purpose of work exchange vacations.
- Furthermore, individuals who possess **financial independence**, such as retirees and those dependent on their income, may be eligible for a visa that permits stays exceeding three months, provided there are compelling justifications.
- A visa is also available for **religious** purposes, designed for individuals involved in religious training with a congregation or those enrolled in a study program at an accredited educational institution, allowing for stays that exceed three months.
- A **family visa** is ultimately issued to those who are accompanying a family member on a temporary stay visa.

Residency Permit Visa

The residency permit visa allows for two entries and is valid for a duration of four months. Within this period, the holder is required to submit an application for a residence autorization to the Institute of Registries and Notary (IRN)[8].

- The **Work visa** in Portugal is designed for non-nationals who wish to engage in employment within the country. This visa encompasses various categories, including subordinate employment for individuals holding contracts with Portuguese firms, independent work for freelancers and entrepreneurs through the Startup Visa, remote work for Digital Nomads employed by companies based outside of Portugal, and highly specialized roles for educators, researchers, and other qualified professionals.
- The **study and research visa** are intended for individuals who aim to engage in research, academic study, exchange programs, internships, or volunteer work for a duration over a year. This visa is applicable to secondary school students, as well as those pursuing bachelor's, master's, doctoral, and post-doctoral degrees, in addition to participants in mobility and exchange initiatives.

[8] After the shutdown of SEF in 2023, the IRN became responsible for the administrative part regarding the request for residency permit visas, while AIMA is responsible for issues connected to migration and asylum. In any case, people can go to these two institutions depending on their particular condition.

- **Professional training** encompasses research initiatives, academic study, the exchange of secondary school students, unpaid internships, and volunteer work.
- The **family visa** is designed to facilitate the reunification of family members with legal residents in Portugal, as previously sanctioned by SEF. The residence visa for family accompaniment is applicable to family members who are traveling alongside the holder of the residence visa from their country of origin.
- **Residence settlement visa** is designed for individuals who are financially supported by income, retirees, or those participating in religious training within a community.

Work-seeker Visa

The work-seeker visa permits the holder to enter Portugal and remain in the country while actively searching for employment. It allows the individual to work under a contract until either the visa expires or a residence permit is granted. This visa is valid for 120 days, with the option to extend it for an additional 60 days, and it permits only a single entry. Upon obtaining the visa, it is mandatory to schedule an appointment with the relevant authorities (AIMA or IRN) within this timeframe to apply for a residence permit, provided that an employment contract has been secured.

Applicants must fulfill specific criteria, which include demonstrating sufficient financial resources to support themselves during their job search, as well as funds for their potential return. Additionally, having health insurance and maintaining up-to-date communication regarding their job search status with AIMA/IRN are essential requirements for the issuance of the visa.

2.1.2 Schengen Visas

A Schengen visa is a permit granted by a Member State that allows for an airport layover or a brief visit within the territory of one or more Member States, enabling the holder to present themselves at the external border.

A short-stay visa does not assure the holder of the right to enter the Schengen area; instead, it allows the individual to arrive at a border post and formally seek permission to enter the country. This type of visa does not immediately grant entry rights

to the Schengen area but merely permits the holder to approach a border post and request entry into the country.

At the border, you may be required to provide documentation regarding the terms of your stay. This includes proof of adequate financial resources to support your stay and return trip, details about your accommodation, and valid travel medical insurance. Schengen visas are designed for short-term visits lasting up to 90 days within any 180-day timeframe and can be issued for purposes such as tourism, family visits, business, seasonal employment, or transit. These visas facilitate transit through the Schengen area and permit brief stays. They can be valid for a maximum of 90 days within a 180-day period and may allow for single or multiple entries, categorized into three types according to the European Union:

1. Single-entry visa- allows the individual to enter the Schengen area just one time;
2. Multiple-entry visa- allows the individual to enter several times into Schengen space, as long as the visa is valid;
3. Airport transit visa- These are granted to allow transit through the international area of an airport, allowing the holder to take a connecting flight out of the Schengen area, without entering the Schengen area.

2.2 What is the Golden Visa Program?

The following topic aims to explore the creation process of the Golden Visa programme by the Portuguese Government; followed by the requests and offerings of possessing this type of visa.

2.2.1 Portuguese Residence Permit for Investors: Golden Visa

The effects of the 2008's global crisis

In order to better understand how the Golden Visa program works, it becomes imperative to first explain the context behind its creation. The 2008 financial crisis originated in the United States, quickly began to spread globally. The aftershock in Europe came in the form of successive waves of crises, interconnected to US real estate loans and the accumulation of public and private debt.

According to Banco de Portugal[9], countries with more fragile economies encountered a financing market far from having sustainable prices, therefore compelled to seek financing through assistance programs. Economies such as Greece, Portugal, Spain, Ireland and Cyprus felt hard the effects of the crisis on national economy.

In the perspective of Delgado (2014), the crisis had a profound impact on the fiscal frameworks of eurozone nations, leading to notable alterations in their national financial conditions. This was primarily attributed to a decline in public revenues stemming from the economic downturn, coupled with an escalation in social expenditures due to increasing unemployment rates.

Furthermore, initiatives aimed at economic stimulation, along with the allocation of funds to financial institutions and expensive recovery strategies, exacerbated the fiscal challenges. These elements contributed to a swift deterioration of public finances in several countries (Delgado, 2014), culminating in the "Sovereign Debt Crisis," which particularly affected Portugal, Ireland, Italy, Greece, and Spain (referred to as the PIIGS).

Like many, Portugal was one of the fragile European economies affected; in 2008, according to a news published by Observador[10], the fall of international commerce stagnated the imports and exports of Portugal, with a fall of 10% in 2009; the prominent factor was the decrease on investment, the main cause of the elaboration of the Golden Visa programme. The elevated levels of public debt inhibit the nation's ability to secure financing from international markets, as Rodrigues, Diz, and Dos-Santos (2017) refer to in their research. The ultimate solution was to seek economic and financial assistance from “Troika”[11] in 2011. The assistance program mandated stringent austerity measures, which had significant socio-economic repercussions, leading to increased unemployment and poverty while simultaneously fostering conditions of resilience and social vulnerability.

[9] The Governor Carlos Silva Costa speaks about the origins, spread, response and challenges of the 2007 crisis, when visiting Bank Al-Maghrib, 2018;
[10] The article, Crisis and punishment. The long stagnation of Portugal's economy, analyses the Portuguese economy by discussing ups and downs, since the XX century.
[11] Group formed by the European Commission, European Central Bank and the Internacional Monetary Fund;

´The creation of the Golden Visa- ARI/RPI[12]

The *Golden Visas* in Portugal serve as an expedited pathway for foreign investors from non-EU nations to acquire a permanent residence permit, according to Yijing (2015). Once the country was facing economic and financial problems, rigorous measures played a significant role in addressing these issues by curtailing public expenditure and encouraging the liberalization and privatization of goods and services to enhance competitiveness. Amidst the budget reductions, the attraction of foreign investment became a priority for Portugal.

To Gaspar (2019), the introduction of the Portuguese Residence for Investors (PRI) must be viewed within the framework of the recent financial crisis in a way to help improve the national economy; the PRI is inspired by a similar program implemented in other countries, such as Canada, to attract capital into the country. Legally, the ARI is established by Law no. 23/2007, of July 4, as amended by Law no. 29/2012, of August 9, which came into force on October 8, 2012, establishing a new legal regime for residence permits for investment activities in Portugal (Mendes, 2015);

The program has the objective of drawing investors who are keen on investing in Portugal and the European Economic Area (EEA), enabling the holder to travel to the Schengen area and potentially acquire Portuguese nationality by filling in specific criteria, as indicated by Mendes (2015). Starting on the 8th of October, 2012, the program was launched, and individuals from third countries that do not belong to the EU or the Schengen Agreement could now apply for a residence permit in Portugal. This application can be made without the need to obtain a residence visa, specifically to carry out investment activities in the country. In order to better understand, the PRI differs from the other residency permits by requesting a mandatory financial investment from the holder, according to the Portugal Residential (APR, n.d).

[12] ARI, in portuguese stands for Autorização de Residência para Atividade de Investimento;

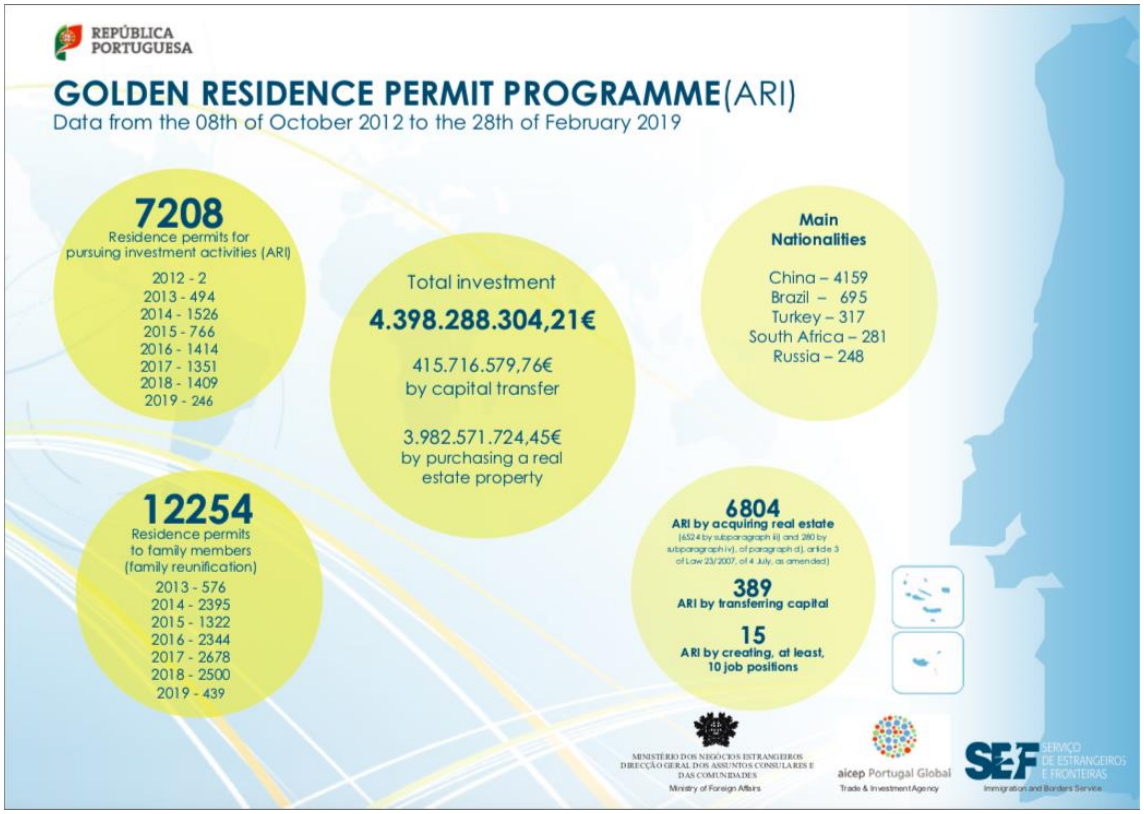


Figure 1: Golden Visa Programme, from 2012-2019, source: (SEF, 2019)

According to data retrieved from SEF, the leading nationality that requested this type of visa was indeed Chinese. Figure 1 shows us that from the period between October 2012 and February 2019, there was a total of 4159 granted Golden Visas to Chinese investors, followed by Brazilians, with 695 granted Golden Visas, and Türkiye, in third place with 317 Golden Visas. In terms of percentage, the golden visa program attracts 55% of China, Brazil with 10%, and Türkiye with 5% (Surak & Tsuzuki, 2021). It is important to refer to this aspect once the present research focuses on the presence of the Chinese Golden Visa in Portugal; most importantly, its impact on the Portuguese economy after the creation of the programme emerges as a way to captivate foreign investments. Therefore, figure 1 indicates that the ARI program has effectively drawn foreign investors, particularly from China, with an emphasis on real estate ventures. Furthermore, the program has positively impacted numerous family members, leading to a substantial rise in the issuance of residence permits.

2.2.2 Benefits of having a Golden Visa: necessary conditions of aquiring an ARI

According to the Ministry of Foreign Affairs (n.d)[13] official portal, the ARI program enables foreign investors to secure a residence permit in Portugal through specific investment options for a minimum duration of five years. Those who participate in this program can enter Portugal without requiring a residence visa and reside and work in the country for at least seven days during the initial year and fourteen days in subsequent years.

Additionally, they have the privilege to travel visa-free within the Schengen zone; the selection of a country for relocation or study is not solely determined by the characteristics of its educational or immigration programs; various other elements can also play a significant role, like mobility, which often drives them to prefer countries that are members of the Schengen Area (Pitrová and Bindačová, 2024), as well as the pursue for family reunification, the appliance for permanent residency, and ultimately seek Portuguese citizenship.

There are a few conditions on who can request the PRI, being non-EU nationals who can do so either individually or via a company established in Portugal or another EU member state with a permanent presence in Portugal. To meet the quantitative criteria, investors who engage in one of the legally sanctioned investment options may submit an application for a PRI:

- The creation of at least ten jobs;
- Acquiring real state worth 500,000 euros or more;
- The purchase of real estate that has been fully constructed for a minimum of 30 years or situated within urban renewal zones, along with the execution of rehabilitation projects valued at 350,000 euros or higher.
- The allocation of capital amounting to 500,000 euros or greater, directed towards research initiatives conducted by either public or private scientific research organizations, which are incorporated within the national scientific and technological framework.

[13] The conditions and requirements necessary for the acquiring an PRI, are all presented in the official website of the Ministry of Foreign Affairs;

- The allocation of capital amounting to 250,000 euros or superior is required to be directed towards artistic production, the restoration, or the preservation of the national cultural heritage. This investment should be facilitated through public administration services, public institutions, foundations, and cultural organizations;
- A capital transfer amounting to 500,000 euros or greater is required to be allocated towards the purchase of units in investment or venture capital funds that are established in accordance with Portuguese legislation. These funds must have a minimum duration of five years and must invest at least 60% of their capital in companies located in Portugal.
- A capital investment of 500,000 euros or greater is required to either establish a new company in Portugal, which must generate a minimum of five permanent positions or to augment the capital of an existing enterprise in Portugal, thereby ensuring the creation or preservation of at least five permanent jobs for a duration of no less than three years.

Initially, many Chinese immigrants opened restaurants or shops to make a living, but newer arrivals are focused on investing and improving their quality of life. Good social conditions, along with political and economic stability, are strong incentives for their investments. As a stable and safe society, Portugal's "Golden Visa" program was very popular among Chinese investors (Fengyang, 2016).

The increasing trend of Golden Visa acquisitions among Chinese citizens highlights a significant aspect of the rising influence of Chinese investment in Portugal. From 2011 to 2015, such investments constituted 3.3 percent of the country's GDP, marking the highest percentage within the European Union (Gaspar, 2019).

The benefits of the regulatory framework in Portugal are widely recognized, positioning the country as a prime destination for foreign investors, as Mesquita (2014) believes it. Three main aspects lead to the success of the *Golden Visas* among Chinese investors in Portugal (Fengyang, 2016):

1. Geographical, due to Portugal’s good location and good views, since it is in the south of Europe and presents good Mediterranean weather;

2. The safety offered by the Golden Visa Programme by investing in real estate is considered a secure venture. Property owners who choose to lease their assets can create a steady stream of income, which is particularly appealing to investors from China;
3. Global real state planning with the key benefit is the ease of transferring assets from Portugal to anywhere in the world.

2.3 Economic Implications of Chinese Investments for Portuguese Economy

2.3.1 Impact of the Investments on National Economy

Dos Santos and Strohmaier (2024) suggest that the introduction of Portugal's Golden Visa program has significantly influenced the real estate market. Portugal, located in Southern Europe and facing sovereign debt challenges, has attracted considerable Chinese investment, particularly following the implementation of Golden Visas in 2012 during the aftermath of the 2011 economic crisis. The primary motivations behind China's investment in Portugal are economic in nature, focusing on gaining access to new markets and facilitating the global expansion of Chinese enterprises. This investment opportunity arose after Portugal obtained international financial assistance, which necessitated the privatization of assets worth 5.5 billion euros. (Ramos, 2021).

Ramos (2021) indicates that Chinese investment not only met but surpassed the necessary privatization value, resulting in a favorable perception of China, especially among many political figures. Nevertheless, the stipulations of the Golden Visa program have evolved in response to shifting trends in Portugal's real estate sector. As of January 2022, investments in residential properties have been restricted in major urban centers and coastal regions, now being allowed solely in areas with low population density (APR, n.d), with Chinese investors hurried to acquire properties in Lisbon in order to meet the impending year-end deadline associated with Portugal's Golden Visa program (Schacherer, 2022).

Chinese developers in Portugal have significantly contributed to the landscape of Chinese real estate investment within the country. Through property acquisitions, Chinese investors not only secure a Golden Visa but also benefit from a guaranteed rental yield of up to 10% provided by the developer, who typically allows one or two weeks of

personal use for the buyer. Furthermore, Chinese property purchasers are increasingly concentrating their attention on Portugal and Singapore, seeking locations that present minimal geographical risk (Schacherer, 2022).

Foreign real estate investment is frequently conducted without the use of mortgages, a factor that proved particularly advantageous for Portugal, especially in light of the significant adverse effects of the financial crisis on the country's real estate market and the subsequent restrictions on credit availability (van der Bareen and Li, 2018). In this scenario, the Golden Visa program played a crucial role in stabilizing the real estate sector. Additionally, investors often focus on acquiring renovated or newly constructed properties, which generally yield more favorable outcomes compared to the purchase of older, pre-existing buildings. Foreign investment has contributed to an increase in property values in specific regions, with the historical center of Lisbon being a notable example.

In many instances, the investment in real estate by Chinese nationals in Portugal is perceived as a strategic approach to securing a residence permit. This enables them to either protect their capital in a stable market or engage in property rental for consistent annual income. The acquisition of housing is frequently aimed at facilitating potential future migration rather than immediate relocation (Gaspar and Haro, 2019). Nevertheless, if one considers a hypothetical situation in which all ARI permits issued from 2013 to 2022 were exclusively for property acquisitions in the metropolitan areas of Lisbon and Porto, the overall effect would represent merely 1.77% of total sales in those locals (APR, n.d).

Figure 2: Residence Permit for Investment granted from October 2012 to September 2023, source: (SEF, 2023)

The analysis depicted in figure 2 examines Portugal's Golden Visa program from October 2012 to September 2023, emphasizing notable patterns in Chinese investment. Out of a total of 12,718 residence permits issued, 5,407 were granted to Chinese nationals, positioning them as the largest group of investors within the Golden Visa framework, significantly outpacing other nationalities such as Brazil, which received 1,256 permits, and the USA, with 781 permits.

A considerable majority of the ARI permits, amounting to 11,383, were designated for real estate purchases. This trend suggests that Chinese investors view the Portuguese real estate market as a stable and attractive investment opportunity.

Furthermore, the program also enabled the reunification of 20,424 family members, indicating that Chinese investors are not only pursuing individual investment opportunities but are also committed to relocating their families to Portugal, which reflects a deep commitment to their new home. Chinese investors constitute the largest demographic within Portugal's Golden Visa program, marked by a strong inclination towards real estate investment and family migration, thereby taking full advantage of the favorable conditions offered by the program.

The programme has brought several economic benefits, including an increase in foreign investment and job creation in areas like real estate and tourism; but the search for property buying as a way to obtain the residence permit can bring a few complications such as affecting housing prices and affordability for local residents, as the costs increase, those with less purchase power will have more difficulties.

Portugal has emerged as a prominent hub for substantial Chinese investment activities, with the volume and magnitude of these investments since 2011 elucidating why it stands out as the European nation most significantly influenced by Chinese capital relative to the scale of its economy (Villalobos, 2017). Prior to securing their visas, investors already play a role in increasing the Portuguese economy by engaging with local services, including transportation, dining, and insurance (Man and Santos, 2022).

The influx of foreign capital from Chinese investors presents a variety of benefits that extend beyond the national economy to local economies as well. The Portuguese Association of Real Estate Developers and Investors (APR) highlights those local economies gain advantages through the construction or renovation of properties, which subsequently enhances tourism opportunities and generates employment. Furthermore, this wave of investment aids in attracting new residents and fosters the growth of related services, including tourism, maintenance, dining, and retail sectors (APR, n.d).

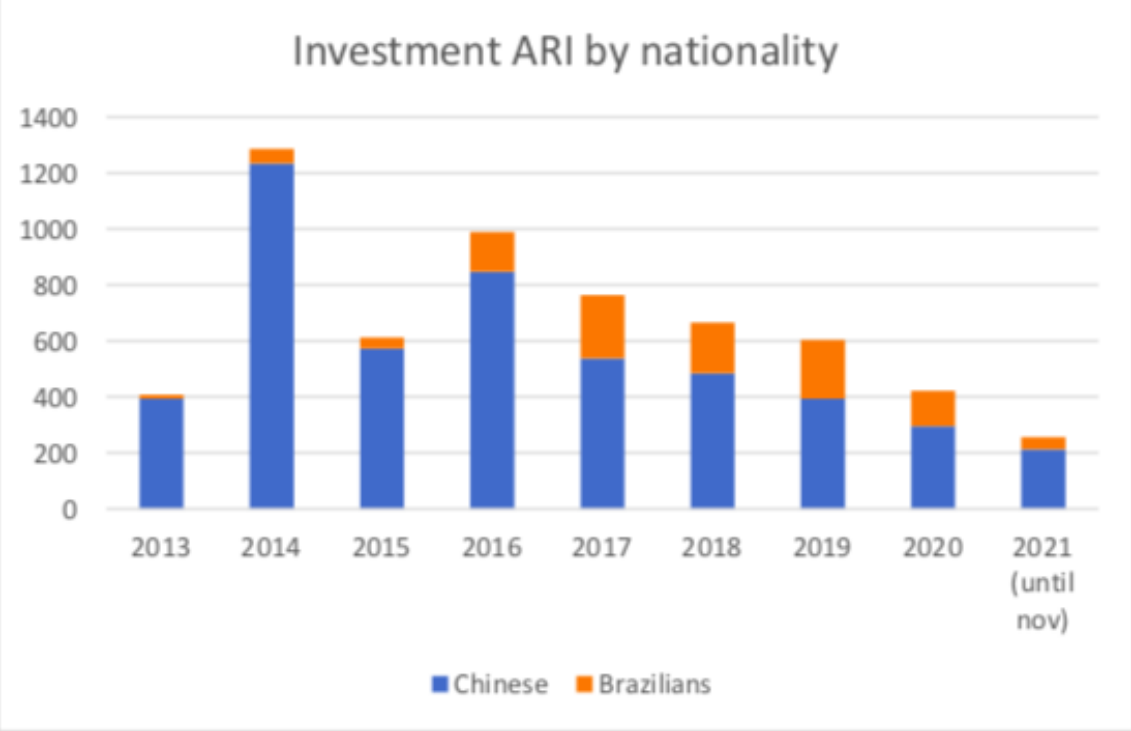
The investment initiative has received a favorable reception within the real estate industry. It encompasses a particular component designed to support rehabilitation efforts, which fulfill two primary objectives. Indirectly, these efforts are intended to create job opportunities in the construction and renovation fields. Directly, they facilitate the restoration and improvement of properties, consequently enhancing their value and utility (Man and Santos, 2022).

The investment initiative was launched at a time when the real estate market was undergoing a considerable downturn. Consequently, foreign capital influx into the real estate sector was highly encouraged (van der Bareen and Li, 2018). The contribution of Chinese investments to the global growth of Portuguese enterprises has cultivated a favorable view of these investments among numerous businesses and the broader community.

According to Zeneli (2019), Portugal has positioned itself as one of the foremost recipients of Chinese foreign direct investment (FDI) in Europe, with investments approaching USD 10 billion on a per capita basis. In the aftermath of the 2010 financial crisis, China initiated investments across a wide range of strategic sectors, encompassing electricity, transportation, oil, financial services, insurance, healthcare, and real estate.

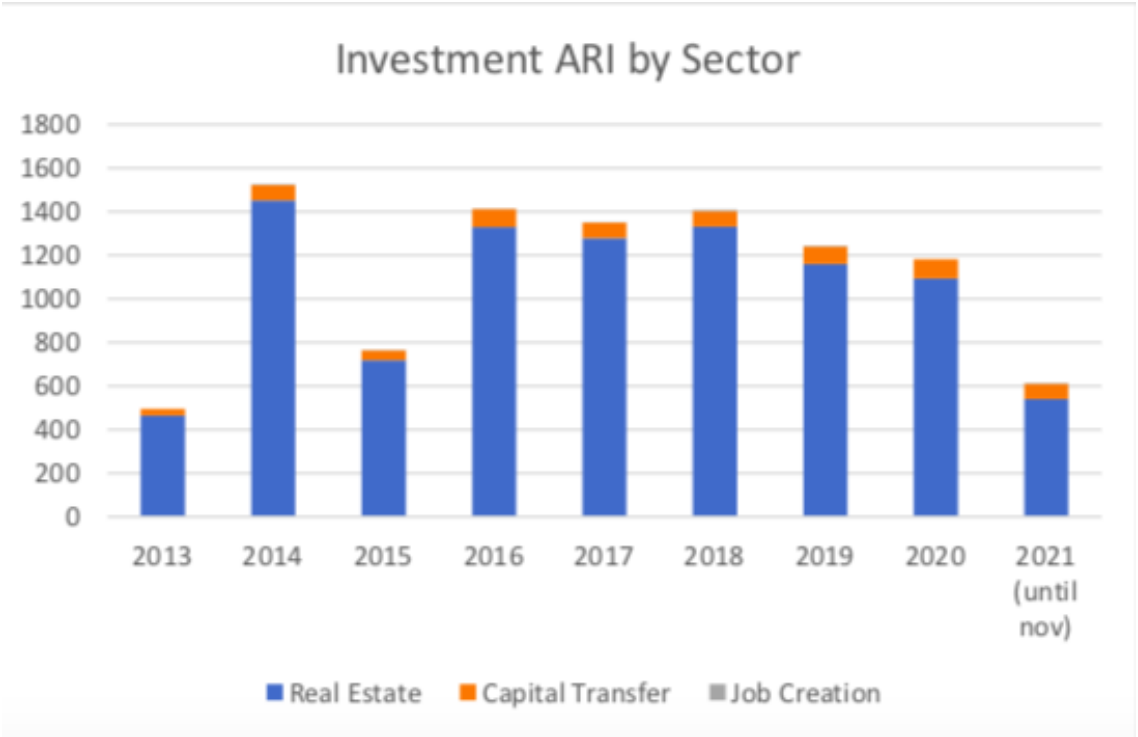
The phenomenon of Golden Visa acquisitions by Chinese citizens underscores the growing importance of Chinese investments in Portugal. The Chinese capital has been predominantly allocated across a range of industries, including banking (notably BCP, ICBC, and Bank of China), energy (such as EDP and CTIEC), healthcare (Luz Saúde), sports (Start), insurance (Fidelidade), as well as real estate and tourism. Such investments are vital for infusing capital into the Portuguese economy (Gaspar, 2019).

This initiative possesses the capacity to draw international talent and foster economic growth; however, the primary challenge is to maintain a careful equilibrium between leveraging economic advantages and mitigating potential risks (dos Santos and Strohmaier, 2024), explained in topic 2.3.2. Reliance on foreign investment cannot always be a preference, once it creates a vulnerability to economy when faced by global market fluctuations.



Graphic 4: Comparison between Chinese and Brazilian ARI investments, source: (Schacherer,2022)

The graph illustrating ARI distribution by nationality indicates that the blue bars correspond to Chinese investors, whereas the orange bars denote Brazilian investors. In 2014, Chinese nationals reached a peak in their investments, with more than 1,400 ARIs awarded. Following this peak, a pronounced and ongoing decline in investments was noted in the years that followed. In contrast, Brazilian investments, although consistently lower than those from China, maintained a steady level from 2014 onward. By November 2021, both Chinese and Brazilian investments had markedly diminished, presenting relatively low figures in comparison to earlier years.



Graphic 5: Sectors invested by the ARI programme, source: (Schacherer, 2022)

Real Estate (blue), Capital Transfer (orange), and Job Creation (gray) illustrate distinct trends in investment sectors. Historically, Real Estate has maintained its status as the leading sector, experiencing a notable surge in 2014. In contrast, Capital Transfer and Job Creation account for relatively minor segments, with Capital Transfer exhibiting only sporadic activity in certain years. Mirroring the trends observed in the nationality chart, total investments experienced a marked decline by 2021. Since reaching its peak in 2014, there has been a general downturn in ARIs across both nationality and sector categories. The real estate sector, which is predominantly influenced by Chinese investors, continues to be the most significant. Nevertheless, both sectors and nationalities have demonstrated a consistent downward trajectory over time, which may indicate underlying economic or policy changes.

The Golden Visa program has notably influenced Portugal's financial landscape, especially within the real estate market. The surge in property purchases has resulted in a considerable increase in tax income for the Portuguese government. Mendes (2015) emphasizes that investors looking to acquire property in Portugal must consider the various costs linked to both acquisition and ownership. These costs encompass taxes such

as the Municipal Tax on Property Transfers (IMT), Stamp Duty (IS), and the Municipal Property Tax (IMI).

The surge in property prices, primarily driven by interest from Chinese investors, has been particularly pronounced in the urban centers of Lisbon and Porto. This escalation has not only invigorated economic activity within the construction industry but has also posed challenges regarding housing affordability for residents. Additionally, as noted earlier, a considerable number of investors have opted to transform their newly acquired properties into vacation homes or short-term rental units, leading to increased engagement in the tourism and service sectors. This trend has played a crucial role in job creation and the revitalization of the local economy. Understanding these factors is vital for assessing the implications of the Golden Visa program, which has yielded substantial economic and fiscal advantages, thereby serving as a significant revenue source for the government.

2.3.2 Possible Risks

Risks of Money Laundering

The necessity for capital laundering may elucidate the prominence of real estate investment under the Golden Visa program in comparison to alternative ARI options. According to Coroado (2017), the National Risk Assessment, carried out by the Ministry of Finance, reveals that Portugal possesses features that are appealing to transnational criminal entities, such as investment incentive schemes and economic weaknesses that enable the entrance of illicit funds.

The real estate sector is classified as a high-risk area for money laundering and terrorist financing, primarily due to the substantial amounts of money involved and the relative simplicity of executing transactions, which may include the utilization of companies registered in jurisdictions with low cooperation and in the case of Portugal, after the crisis, buying real state was relatively easy and cheap (Coroado, 2017). Furthermore, real estate agents, who are obligated to report suspicious activities, frequently fail to meet these compliance requirements. The Portuguese Security and Intelligence Service (SIS) has issued warnings regarding the global expansion of organized crime and its potential exploitation of Portugal’s financial system for laundering purposes.

The European Parliament condemned this practice as state-facilitated corruption, with the Council of Europe highlighting its possible role in financing terrorism. Pitrová and Bindačová (2024) mentioned that Transparency International has alerted to the possibility of RBI programs being exploited by oligarchs to launder illegal gains and avoid sanctions. The lack of transparency in RBI programs can create an environment conducive to corruption among the national authorities responsible for assessing applicants. This ambiguity may also render policymakers vulnerable to influence from private entities promoting these initiatives. Additionally, as Pitrová and Bindačová (2024) agree, RBI programs serve as a vehicle for investors to expand their wealth internationally, with dos Santos and Strohmaier (2024) stating that the ownership of real estate through offshore entities not only enables tax evasion but also facilitates money laundering, thereby exacerbating the overvaluation of the housing market.

The recent decline in Chinese investment can be linked to capital flow restrictions imposed by the Chinese government, which stem from apprehensions regarding money laundering and the depreciation of the currency (Ramos, 2021). In reaction to these challenges, the European Union implemented, in 2019, a mechanism for investment screening aimed at safeguarding Member States from exploitative investments, particularly in the context of the COVID-19 pandemic.

Risks of Organized Crime and Terrorism

Portugal, while not classified as a high-risk nation for terrorist activities, may still serve as a potential entry point or logistical center for terrorist organizations seeking to finance operations in regions with heightened risks. The difficulty in tracing the origins of funds and identifying their true owners, particularly when investments are facilitated through corporate entities, raises concerns that individuals engaged in terrorist endeavors might acquire these visas, as mentioned by Coroado (2017). Furthermore, there is a possibility that funds earmarked for criminal or terrorist activities could be funneled into European territories, thereby facilitating easier access.

For example, a significant number of visas have been granted to entrepreneurs from areas characterized by low levels of cooperation and substantial illicit financial transactions, including countries such as China, Russia, and Lebanon (Coroado, 2017). Additionally, Bulgaria, Greece, Hungary, Latvia, Lithuania, and Portugal have been

identified as EU Member States that have conferred residency rights to a considerable number of affluent individuals from Africa, China, and Russia in exchange for investment in recent years (Watson, n.d)[14].

Risks of Corruption among Politicians, Public Officials, and Intermediaries

The golden visa process encompasses a range of intermediaries, including law firms, immigration agencies, real estate firms, and financial institutions. The participation of these consultants and intermediaries heightens the risk of third parties offering inappropriate advantages or soliciting payments for favors, primarily due to the inherent information asymmetries present in these interactions. Additionally, the existence of service provision contracts complicates oversight, thereby amplifying the potential for corruption and money laundering, as it obscures the tracing of funds' origins, uses, and destinations (Coroado, 2017).

In a 2020[15] press release, the European Parliament (2020) addressed the issue of selling EU citizenship through the Golden Visa program, highlighting that the provision of EU citizenship to third-country nationals without adequate scrutiny and transparency can have detrimental effects on other member states, eroding mutual trust and undermining shared values. An example of this, is a recent scandal in Cyprus, where high-ranking officials, including the Speaker of the national parliament, were covertly recorded offering assistance to a fictitious Chinese executive with a criminal background in obtaining a Cypriot passport via the national "citizenship by investment" scheme.

Coroado (2017) argues that the legislative changes made in Portugal in 2015 increase these risks by permitting investments in public foundations, private foundations with public utility status, inter-municipal entities, municipal associations, and public cultural associations. Serving as a way to camouflage any possible illegal political financing, personal enrichment, or influence peddling, aimed at steering investments toward specific municipalities or institutions.

[14] From the International Bar Association official website;
[15]The European Parliament demanded an end to selling EU Citizenship as this last cannot be traded as a simple commodity;

Risks of Facilitated Citizenship Sales

Golden visas provide an expedited route to potential citizenship, as the criteria for securing a residence visa are considerably less rigorous compared to those for conventional visas granted to foreign nationals (Coroado, 2017). According to Portuguese legislation, applicants are only obligated to reside in the country for a minimum of seven consecutive days or 14 non-consecutive days annually. Following a period of six years of maintaining this residency, they become eligible to seek nationality.

It is essential that all individuals, irrespective of their financial status, have equal rights and opportunities. However, the golden visa system may compromise this principle by promoting a discriminatory framework that establishes a hierarchy among immigrants. It favors those with substantial financial means, thereby creating a stratified system in which wealthier individuals receive preferential treatment over those who may demonstrate a stronger commitment to social integration and contributing to the nation's welfare. The European Commission (2020) asserts that the provision of EU citizenship in exchange for predetermined payments or investments, devoid of any authentic connection to the relevant Member States, undermines the fundamental nature of EU citizenship. Coroado (2017) concurs, suggesting that citizenship can be acquired through financial means rather than through active engagement and contributions to the community. This situation poses a threat to the core values of equality and inclusivity, which are vital to the functioning of democratic societies.

Fiscal Risks

Individuals pursuing golden visas may find the NHR tax regime advantageous upon achieving tax residency in Portugal. This regime provides significant tax benefits, such as exemptions on retirement pensions and a fixed personal income tax (IRS) rate of 20% applicable to foreign income (Coroado,2017). This encompasses earnings from employment, self-employment in high-value sectors, as well as income derived from real estate, capital, and capital gains. Consequently, affluent foreign nationals can markedly diminish their tax liabilities in their countries of origin.

This scenario engenders a perception of tax inequity among Portuguese citizens and individuals from the same nations as the beneficiaries, who are subject to higher tax rates. Furthermore, it raises issues of social equity, as access to these tax advantages is

predominantly restricted to those possessing substantial wealth, as pointed by Coroado (2017). The growing awareness of such tax inequalities among national citizens and other immigrants, who do not meet the criteria for the NHR regime, has led to the end of similar programs in other nations, including Canada's investor visa scheme.

Real Estate Speculation

Investors primarily gravitate towards the real estate sector when seeking golden visa opportunities. Nevertheless, this inclination does not consistently yield the desired results. In their efforts to meet the necessary investment criteria, investors might unintentionally overpay for properties, exceeding their market value. The heightened demand for real estate can result in adverse effects, such as escalating property prices and the potential for housing crises. Additionally, investing in businesses can pose its own set of challenges. (Pitrová and Bindačová, 2024).

Concentration of Wealth

Foreign investors frequently have access to information that is not equally available to local market participants, enabling them to acquire properties at moments when more knowledgeable locals are inclined to sell. According to dos Santos and Strohmaier (2024), this situation can result in price inconsistencies, even among investors operating concurrently, due to differences in search expenses and negotiating leverage. The influx of foreign investment can profoundly influence real estate valuations and overall social welfare, leading to apprehensions regarding the durable effects on the local housing market.

2.3.3 Political and Social Issues Surrounding the Visas

Survey data from dos Santos and Strohmaier (2024) indicates that a considerable segment of the Portuguese population supports the end of the program, notwithstanding its possible economic benefits. This viewpoint is particularly pronounced among the elderly and well-educated individuals residing in Lisbon, who express apprehensions regarding housing affordability and its societal repercussions. While the situation

surrounding ARI is influenced by market dynamics, its most significant implications extend beyond economic factors to encompass social, political, and ethical dimensions. On one hand, ARI opens the possibility of inequal access to citizenship and so it may rise identification questions within the Portuguese society (Amante and Rodrigues, 2020).

Golden visas represent more than a simple economic strategy aimed at attracting investment; they carry significant political implications. In this regard, investigations into corruption reveal not only an issue within the State's framework but also indicate our current unpreparedness to manage operations of this magnitude, as Villalobos (2014) says. These considerable investments reflect the political significance that China attributes to Portugal, thereby drawing the interest of medium-sized investors. As Villalobos (2014) defends, these investors aim not only to take advantage of the opportunities presented by the economic downturn but also view the influence of large Chinese state-owned enterprises as a strategy to reduce political risks and provide a safe space for their investments.

Public and political perspectives on Chinese investments through the golden visa program are divided. On one hand, policymakers and business executives voice apprehensions about the growing influence of Chinese state-owned enterprises in critical areas of the Portuguese economy, regarding unfair competition, economic reliance, and potential threats to national security as essential sectors fall under foreign ownership (Gaspar and Haro, 2019). On the other hand, regarding Chinese investment as an essential influx of capital, offered crucial financial assistance, aiding in economic recovery and contributing to Portugal's development during a crisis during a time when Portugal was in economic distress.

The discourse surrounding golden visas in Portugal is closely linked to wider social and political issues. There is a persistent dialogue regarding the advantages afforded to affluent investors from non-EU nations, who, via the golden visa initiative, acquire the right to reside within the EU while circumventing more stringent immigration laws. To Pitrová and Bindačová (2024) it is a situation stands in stark contrast to the more demanding criteria imposed on the majority of third-country nationals aspiring to settle in Portugal, fostering perceptions of inequality and discrimination. Where emphasizes economic wealth over human value, favoring the wealthy over other immigrant groups. Still with Pitrová and Bindačová (2024), the results are wealthy individuals receiving

preferential treatment compared to those with limited financial resources. The authors highlight that a significant concern associated with the golden visa program is the opacity surrounding the allocation process, which has led to apprehensions regarding corruption and a decline in public confidence in governmental institutions.

Instances of scandals and irregularities in the issuance of residency or citizenship through investment intensifies public doubt, with the program conflating financial resources with political influence. It seems that, the golden visa programme was in a way, favorable to Portuguese economy, but the cultural integration of these immigrants can be affected by the perception of these as investors and not as active members of the community. By integrating isolated social communities, the investors have all the services and commerce to their liking, which can reflect in a more difficult integration process with the other local communities.

It is important to refer as well the difference in resources processed by the Golden Visa holders with local population, in a way that having more purchasing power to invest, more opportunities will be given to them out of the population's reach; this results in an exclusion of the locals to these resources and opportunities, leading to a bigger disparity between locals and investors.

2.3.4 2023: the end of the Golden Visas?

As previously mention, the golden visa programme was created in a context where Portugal was facing a very bad economic situation after the 2008 global crisis. The country was faced with the decision to privatize in order to fulfill the amount necessary to escape the debt, with the help and presence of Troika on national soil. The solution of creating a programme with the aim of attracting foreign investment was a successful one, once thousands where invested, especially among Chinese investors. Chinese Golden Visa holders were attracted to Portugal due to several conditions, already explain above, being the main one the security and opportunities given by the programme.

Although in a primary scenario the investments turned into a success, mainly in real state, with the years passing by, the affordability of housing prices increased; areas such as Lisbon and Porto where the principal areas of investment. According to dos Santos and Strohmaier (2024), the programme increased housing prices, and overseas real

estate investors, with more investment power, tend to have higher opportunities to buy houses for more expensive prices rather than locals. Gaspar and Haro (2019) also comment about the unbalance between the relation with the government and the citizens, prioritizing the economic value each individual brings to the country. The discontentment with the programme rises even more with this, leaving the citizens with doubts about either or not to trust on measures such as the importance given to foreign Chinese investments.

As a way to reverse the expensive housing prices and avoid speculation by potential foreign investments- Chinese investments being included- in the real estate sector, the Portuguese Parliament approved in 2020, a set of measures to relieve the pressure on Lisbon and Porto real estate markets, by restricting golden visas emissions. The increase in the cost of participation in the program may also affect the number of investors willing to participate (Sumi and Alam, 2023), once from January 1, 2022, the cost of participation in the Portuguese investment program of obtaining a residence permit will double, generating less investors, since they don't want to participate under new conditions.

The *Mais Habitação* programme, according to the information retrieved from the official website of the Portuguese Government[16], is an ambitious initiative aimed at enhancing access to affordable housing. These measures include improved security in leasing agreements and an extensive array of tax incentives. Innovative mechanisms to increase the availability of housing in the market, alongside the establishment of new credit lines dedicated to construction and rehabilitation efforts.

According to Idealista[17] (2024), the entrance of the Mais Habitação programme, the Law No. 56/2023 is published on October 6, 2023, saying that new Golden Visa requisitions are no longer accepted for real estate investments. But the possibility of renewing PRI remains unaffected, as long as these permits were issued in accordance with the relevant legal framework prior to the enactment of this law (Diário da República[18]).

[16] The website presents all the information of the *Mais Habitação* programme in detail;
[17] The website published about foreigners seeking less housing since the end of the golden visas;
[18] Diário da República nº 194/2023, Series I of 2023-10-06, pages 2-50;

Rua and Demony (2024) believe that acquiring property in Portugal may no longer serves as a pathway to a golden visa that grants residency rights. However, investors that seek residency can still invest in funds. The Portuguese government has implemented stricter regulations following the announcement of discontinuation in February 2023 of the program. The golden visas ending in the area of property acquirements doesn´t mean that foreign investors may not acquire a residence permit through their investments. Another option is investing in funds, now anticipated to become the primary method for securing residency. Some of these include contributions to cultural or research initiatives.

Although the programme came to an end, it is possible to observe some negative effects. The APR (n.d) estimates that the announcement of these measures is damaging the credibility of the country. The lack of stability and credibility will deter many investors from our country, leading them to relocate their investments to other nations that offer predictability and a stable legal framework.

If the housing crisis cannot be resolved by the Mais Habitação programme for much longer it can damage the image of the Portuguese government, regarding the idea of ending a programme that was contributing to the country's foreign investment, in an attempt to control housing prices.

CHAPTER III – CULTURAL INTEGRATION OF CHINESE IMMIGRANTS INTO PORTUGUESE SOCIETY

3. Cultural Integration of Chinese Immigrants into Portuguese Society

3.1 The Importance of Portugal and China relationship

Silva[19] (2018) believes that its necessary a comprehensive understanding of Portugal regarding its global orientation and its capacity to connect with significant regions worldwide. Portugal not only maintains strong ties with the entirety of Africa but also serves as a crucial ally to Latin America, alongside other prominent areas such as India, Southeast Asia, Japan, and the Republic of Korea. Furthermore, the relationship with China has been a consistent element in Portugal's contemporary history. In numerous respects, Portugal can be regarded as one of the earliest and most insightful European nations in its engagement with China.

The historical connection between Portugal and China is profound and has endured over time, bolstered by political, economic, and cultural affiliations, with Macau serving as a pivotal element in this dynamic, as noted by Fang (2023). The engagement between the two nations is characterized by significant and varied migratory movements. While the living conditions for Chinese immigrants in Portugal have seen improvements, they continue to face substantial obstacles, including challenges related to social integration, language proficiency, and access to employment opportunities. These issues adversely affect the immigrants' sense of cultural identity and their economic prospects.

Chinese immigrants significantly contribute to the cultural and social vibrancy of Portuguese communities. According to Dingyan (2018), there has been a notable increase in the establishment of associations by Chinese immigrants, accompanied by the publication of magazines and newspapers in Mandarin. Noteworthy examples in Portugal include the Mandarin magazine "A Visão da China," as well as the newspapers "Pu Hua" and "Pu Xin," in addition to the media organization Iberia Universal.

In an interconnected world, the importance of intercultural communication has escalated, influenced by technological progress and the deepening of globalization. A foundation of respect and appreciation for diverse cultures is essential for effective intercultural dialogue (Sinong, 2023). Within the framework of Sino-Portuguese relations, there has been a notable rise in intercultural exchanges, particularly in the

[19] Augusto Santos Silva, former Ministry of Portugal Foreign affairs from 2015-2019 and 2019-2022; The document regarding Portugal and China Relations was published in the official website of the Portuguese Government;

realms of politics, economics, and culture. Following the establishment of diplomatic ties, both Portugal and China have actively fostered cultural, scientific, and educational collaborations.

The establishment of agreements, including the Cultural Exchange and the Three-Year Implementation Plan, along with the 2005 Agreement on the Mutual Recognition of Degrees and Diplomas in Higher Education, significantly enhanced the relationship between the two nations, as seen in Portal Diplomático[20]. In 2016, an additional agreement was made to establish Mutual Cultural Centers, which further advanced cultural exchange. Macau remains a crucial link between China and Portugal, acting as a conduit for the exchange of knowledge and cultural practices.

According to Sinong (2023), Macau serves a dual purpose by enhancing local cultural exchanges while simultaneously fostering cultural interactions between mainland China and Portuguese-speaking nations. This positions Macau as a significant platform for humanistic exchanges, thereby aiding in the establishment of a robust "Sino-Portuguese Platform.". Silva (2018), regarding the relation between Portugal and China, said that the transition of sovereignty regarding Macau exemplified a process characterized by effective coordination and a foundation of mutual trust.

Portugal holds significant historical and cultural importance, and it also serves as a strategic ally of China within the framework of the "One Belt, One Road" initiative, owing to its location at the origin of the ancient maritime silk route. The partnership between these two nations in this endeavor presents opportunities for substantial advancements, particularly in sectors such as infrastructure, commerce, and technological progress. Both nations are dedicated to fostering reciprocal advantages and constructing a global community oriented towards a common future. Fernandes et al (2022) see China's investment in the Portuguese economy as a significant international interest. Given Portugal's status as a small and open economy, the economic and political ties with China are of considerable importance

The growing closeness between the Chinese and Portuguese communities has created both opportunities and challenges. The phenomenon of multiculturalism in Portugal is on the rise (Yijing, 2015), making it essential to examine the experiences of

[20] The website belongs to the Portuguese Foreign Affairs Office and contains the information regarding the relationship between the two countries;

Chinese immigrants from both social and linguistic-cultural viewpoints. Celebrations such as the Chinese New Year and the Lantern Festival, which are becoming more prevalent in Portuguese urban areas, not only foster intercultural dialogue but also act as instruments of public diplomacy. These events enhance interpersonal connections and facilitate a deeper appreciation of Chinese culture among the Portuguese population.

The successful integration of Chinese immigrants has been significantly supported by educational programs implemented at both local and European levels. Courses in the Portuguese language, along with various community initiatives, have been crucial in addressing language barriers. These efforts have not only aided immigrants in their adaptation process but have also fostered greater mutual understanding between the two cultures.

The trajectory of Sino-Portuguese relations is poised for further development, with the emergence of new branches for collaboration, including renewable energy, artificial intelligence, and digital trade. As these partnerships deepen, the bilateral relationship between the two nations could serve as a paradigm of intercontinental cooperation in the 21st century.

In the context of the Covid-19 pandemic, in the early 2020's, provision of medical aid from China arrived to Portugal. Portugal's heightened sense of vulnerability stemmed from its reliance on global supply chains, prompting a desire to reduce dependency on imports from a singular nation, specifically China. The authors Fernandes et al (2022) comment about a marked increase in Portugal's openness to engage in discussions about its relationship with China, especially in light of the escalating rivalry between China and the United States.

The former ministry of Portuguese foreign affairs also reinforces that the relation established with China was never placed in opposition to European alignment. On the contrary. As Silva (2018) says, Portugal uses this relation as a way to influence the EU in what seems to be an essential condition of its foreign policy, by understanding the multipolar reality and maintaining with other global actors a relationship with a firm defense of its values and interests.

China seeks to cultivate a robust partnership with Portugal due to its status as a mature democracy that is deeply invested in European integration. Portugal serves as an Atlantic ally that perceives its national security and geostrategic significance exclusively

within this context (Silva, 2018). In addition, Portugal is a long-established sovereign state that exercises independent thought and acts effectively as a conduit between Europe and other regions.

In October of 2024[21], the Portuguese Embassy in China published a news article about Chinese authorities declaring Portugal as one of the visa exemption program, allowing Portuguese citizens for short stays related to tourism, business, family visits, or transit for up until 15 days. This applies to citizens with regular passports, starting off on October 15th of 2024 through December 31st of 2025. The exemption will be limited to those categories mention above. It is clear that China and Portugal keep fortifying their ties, and the inclusion of Portugal in the exemption of entry visas is a clear signal that China has high regards for our country.

3.2 Chinese Festivities and Festivals Similarities as a way of Promoting a better Cross-Cultural Understanding

The development of cultural celebrations by the Chinese Community living in Portugal, represents an important factor in demonstrating a little piece of their culture. With the most significant example being the festivities related to the Chinese New Year, also called Spring Festival; the Lantern Festival and the Qingmin (or Tomb Sweeping).

These traditional festivities reflect the socio-cultural life of both Portugal and China. When analyzed, it is clear that, Chinese festivities tend to be much more similar to our own festivities, contrary to what many think. Of course, Chinese festivities have also their own particularities and differences, but the main point is the role that these festivities have in shaping or defining the cultural identity of a country.

Like Jiaqi (2021) mentions, from a cultural perspective, China's traditional festivals showcase a rich historical background, these festivals encompass various forms of celebration and are deeply rooted in ancestral traditions that have been passed down through generations. Chinese traditional festivals emphasize the significance of food,

[21] The Portuguese Embassy in China announced the measure of exemption of visas;

with its wisdom accumulated over thousands of years as a testament to endure their heritage.

3.2.1 Chinese New Year

The most significant example is the Chinese New Year, also called Spring Festival, that for Rocha-Trindade (2020) it is regularly celebrated in different ways all over Portugal, and the rest of the world.

To gain a comprehensive understanding of these Chinese celebrations, it is imperative to examine both their similarities and differences. Chinese New Year and the Portuguese celebration of Christmas hold immense significance for both China and Portugal, serving as occasions for families to reunite. A shared tradition between the two countries is the grand feast held on the eve of the festival. Chinese New Year exudes a vibrant festive ambiance, as the Chinese community eagerly anticipates its arrival throughout the year. According to Jiaqi (2021), the joyous atmosphere and the beckoning of family compel most individuals to return to their homeland, despite professional obligations and geographical distances; it’s a festivity that gathers all, no matter the distance, relatives tend to return to China to celebrate alongside their families. However, the rituals associated with Chinese New Year possess distinct cultural characteristics, such as the veneration of the kitchen deity and the display of spring pictures and verses. In contrast, Christmas holds a religious nature and its rituals are intertwined with Western religious culture.

Chinese New Year as the particularity of being a long duration festivity; according to Yeromiyan (2024), Chinese New Year marks the beginning of the lunar year as determined by the traditional Chinese lunisolar calendar, concluding 14 days later with the Lantern Festival. This celebration spans a period of 15 days and encompasses a diverse array of festivities that vary by region, reflecting local traditions and customs. Nevertheless, there are several shared customs that are observed universally across different areas.

The author also mentions that Chinese New Year marks the transition to a new zodiac sign, with each year corresponding to a particular zodiac animal. These zodiac signs hold significant importance within Chinese culture. It is believed that one's fortune

in some areas such as finances, health, and relationships can be influenced by their zodiac sign for that year. 2025 will be the year of the Snake.

According to Jiaqi (2021), the grand New Year's dinner holds significant importance in the familial context of Chinese culture. This event serves as a vital gathering for the entire family, featuring a lavish spread that represents a life filled with prosperity and joy. In addition to various meats, fish is an essential component of the meal, as its pronunciation closely resembles the Chinese character for abundance, thereby symbolizing wealth and material prosperity. Another common practice is fixing cut-out paper decorations and New Year motifs to windows. In Chinese culture, red paper cutouts are thought to symbolize joy and good fortune, as it can be seen in figure 3 (Jiaqi, 2021).

Figure 3: An example of paper cutout with the word Fú (good fortune), source: (Getty Images, n.d)

The observance of the Chinese New Year is also prominent in Portugal. As noted by Lopes (2024), the Museum of the Orient hosted a celebration to mark the onset of the Chinese New Year, highlighting the customary practices associated with this occasion. In Lisbon, the celebrations occurred on Friday, February 9, the day preceding the inaugural day of the Lunar New Year, which commences on February 10. Throughout the city, numerous red lanterns were displayed to herald the arrival of the Chinese New Year in Lisbon.

Not only Lisbon celebrated this tradition, Porto was also stage for hundreds of Chinese residents from the northern part of the city celebrating; the event counted with some notable attendees, including Porto's Mayor Rui Moreira, the Ambassador of the People's Republic of China in Portugal, Zhao Bentang, and YPing Chow, who coordinated the city's celebrations. According to Jornal de Notícias (2024), celebrations

featured a variety of initiatives from the collaboration between the Embassy of the People's Republic of China in Portugal, organizations representing the Chinese Community in Portugal, and the Municipality of Porto, alongside the Dragon Dance, which represents the awakening of this legendary creature in the Chinese calendar.

When comparing Chinese New Year to Portuguese Christmas Celebrations, the main differences remain in the dates, with Chinese New Year celebrated from the 29th of January (2025) until the 16th of February. In contrast, Christmas is celebrated from December 24 to January 6 according to the Gregorian calendar. Jiaqi (2021) also mentions another difference, where Chinese New Year boasts a rich history, originated by the practice of ancestor veneration. it began as a means to honor deities and ancestors in hopes of securing a bountiful harvest. In Portugal, Christmas is celebrated to honor the birth of Jesus, rooted in a Catholic tradition. A significant portion of the Portuguese population holds a belief in God and practices the Catholic faith, which influences numerous aspects of daily life.

The worldview, values, thought processes, and customs of the Portuguese people are deeply shaped by Catholicism where Chinese are more pluralists, embracing Taoism, Budism and others.

3.2.2 The Lantern Festival

The fifteenth day of the first lunar month is referred to as the Lantern Festival. In the traditional calendar, this day is called Yuanshao, a term that has evolved to denote the small round dumplings made from rice flour that are typically consumed during this celebration. The Lantern Festival marks the conclusion of the New Year festivities, according to Columbia University (n.d). These festivities mark the conclusion of family gatherings and the resumption of daily routines centered around education and employment.

For Jiaqi (2021), the rituals during the Lantern Festival are rooted in history and are tied to the concept of light. They encompass the hanging and appreciation of colorful lanterns, the solving of riddles, and the consumption of Tangyuan. On the other hand, New Year's rituals in Portugal are more contemporary in nature, featuring concerts and the consumption of alcohol, without any specific traditional food associated with the occasion.

The Lantern Festival has been observed to have varying levels of celebration throughout the years. Central to the festivities is the appreciation and engagement with magnificent displays of Chinese lanterns. Fireworks are a prominent feature of the Lantern Festival, and it is customary to witness and hear fireworks almost daily from the commencement of the Chinese New Year until the Lantern Festival, which signifies the formal conclusion of the Spring Festival holiday. (Meredith, 2022)

Originally, lanterns were said to have been used on this night to help see the gods by torchlight. Each family would construct an elaborate paper lantern for this purpose. In many parts of China, there is great emphasis on the craftsmanship used in making exquisite lanterns in various shapes and styles, often shown at public exhibitions (Columbia University, n d). Throughout China, multiple fairs are held in parks, squares, streets, and avenues embellished with vibrant lanterns. The traditional lanterns, typically constructed from bamboo and wrapped in paper or silk, feature a candle at their core. They are often large and artistically painted to resemble ancient Chinese architectural styles (Jiaqi, 2021). In contemporary times, lanterns of diverse shapes and materials, including glass and plastic, equipped with electric lighting, have become increasingly prevalent.

The Lantern Festival is another occasion for inviting guests and holding feasts, though on a smaller scale than the New Year's Eve celebrations. Children can be seen parading around outside carrying colorful paper lanterns. A common festival pastime is guessing answers to riddles written on slips of paper and attached to a lantern, as can be observed in Figure 4 (Columbia University, n.d).

Figure 4: Lantern Festival celebration in Yantai, China, source: (Paredes, 2022)

3.2.3 The Qingmin (Tomb Sweeping)

The Qingmin, or the Tomb Sweeping, is seen as a way to show respect to one's ancestors. Tending to the tombs of one's ancestors is an essential part of the Qingming holiday. Still, since burial practices in the Chinese countryside are very different from those in the cities, cleaning the ancestors' tombs is different depending on where one lives. It is known that Chinese individuals tend to have a deep respect for elders, more in a hierarchical way, so when this festival comes, it is imperative to visit and pay respects to their deceased ancestors.

The commemorative events of Qingmin in China are similar to those of All Saints' Day or the Faithful Dead in Portugal. They serve the common purpose of paying tribute to the deceased. During these occasions, Chinese individuals express their sentiments of longing, respect, and affection towards their departed loved ones. In China, it is an opportunity for people to venture outside their homes, revel in the beauty of early spring, and engage in various outdoor pursuits (Jiaqi, 2021). Conversely, on All Saints' Day and the Day of the Faithful Departed, the Portuguese attend mass and actively participate in religious processions. With this, the significance of family becomes evident and represents a significant highlight within both cultures. Individuals in China take the

opportunity to venture outdoors, appreciating the beauty of early spring and participating in various outdoor activities.

The significance of these festivals reveals the centrality of family in both cultures. Honoring ancestors can reinforce familial hierarchy, as Figure 5 demonstrates, highlighting the importance of prosperity and fostering family cohesion. Additionally, in Chinese society, family structure is highly valued. The festivals commemorating the deceased have been transmitted through generations.

In contrast, the Portuguese are shaped by the principles of freedom and equality promoted by liberalism and humanism. For them, every individual shares a spiritual bond with God and is equal in His eyes, despite social status or wealth. Likewise, within families, members are regarded as equals, with less hierarchy (Jiaqi,2021).

Figure 5: A child bowing to a tomb to pay his respects on Qingmin Festival, China, source: (Getty Images, n.d)

3.3 The Influence of Language Learning and Education

Diplomatic relations between Portugal and China are notably enhanced through celebrating Chinese festivals within Portugal. These events serve as a testament to the

strengthening ties between the two nations, as they facilitate cultural exchange. Furthermore, linguistics is crucial for fostering a deeper cultural interaction, enabling Chinese immigrants to integrate more seamlessly into Portuguese society. This integration, in turn, promotes a more positive perception and interaction between the Chinese community and the broader Portuguese populace. This topic aims to explore how language can impact the integration process of Chinese immigrants living in Portugal.

3.3.1 The Importance of Portuguese Learning as an essential Cultural Integration process

According to Dingyan (2018), the advancement of cultural exchange has resulted in an increasing number of individuals residing within diverse cultural contexts. This amalgamation of populations from various cultural backgrounds fosters an environment where cultures intermingle, rendering it impossible for any culture to remain untouched by others. Consequently, incorporating elements from different cultures inherently influences the forming of a distinct cultural identity.

The Chinese exhibit a deep appreciation for foreign languages, which is why the Chinese government actively promotes the instruction and acquisition of these languages. This is often achieved through the establishment of courses and educational programs, or even sending their students to learn abroad (Shieh, 2018).

Education serves multiple functions, including the selection, transmission, preservation, reform, and creation of culture. Furthermore, it plays a significant role in integrating diverse cultures that may conflict or contradict one another. The intricate relationship between education and culture profoundly influences all dimensions of the educational process (Dingyan, 2018).

The capacity to use the local language is often considered a crucial factor for social integration for immigrants. In the words of Li (2012), a significant number of second-generation individuals have undergone language training facilitated by various institutions that offer such opportunities.

The intense competition in the job market, coupled with a substantial population, underscores the significance of career selection. The established connections between Portugal and China, particularly in commercial contexts, as well as relationships

with Brazil and Portuguese-speaking nations in Africa, contribute to the growing importance of the Portuguese language. (Shieh, 2018). Fang (2023) demonstrated that certain immigrants, while maintaining a solid connection to the traditional culture of their homeland, also adopt the educational practices and cultural norms of their host country to enhance their employment prospects.

Many Chinese parents exhibit confidence in the school environment but express concerns regarding the quality of education. This discrepancy arises from the differing perspectives on compulsory education between Portugal and China (Li, 2012). In Portugal, as in many Western nations, the primary and secondary education systems aim to foster children's interests in various activities, including sports and the arts. Conversely, from the onset of formal education in China, there has been a pronounced emphasis on cognitive development, particularly in mathematics and English.

By having different educational ideologies, the challenges of school integration may increase. Coupled with issues such as late entry into the educational system, discrepancies in expectations, and unsuitable educational approaches, a significant number of second-generation students have withdrawn from school, which in turn has diminished their parents' expectations (Li, 2012)

Fang (2023) argues that Chinese immigrants in Portugal exist within a highly isolated environment, therefore establishing their communities and a restricted system of mobility. This complicates local authorities' efforts to comprehend their circumstances, making it difficult to study the levels of integration Chinese individuals have in Portuguese society.

Despite being raised in Portugal, many have a strong cultural connection to China. They have largely been nurtured within a limited Chinese business network, especially those with small businesses (Zhejiang immigrants, for example). They rely on Chinese communities for social engagement and experience minimal interaction with the broader local society (Fang, 2023).

The presence of diverse groups within the Chinese community in Portugal exemplifies the longstanding historical and cultural ties between Portugal and China. This connection is particularly observable in the initial wave of Chinese immigrants, including the Macanese and Mozambican returnees, whose successful integration into Portuguese society can be attributed mainly to their command of the Portuguese language and their

understanding of Portuguese cultural norms. Among these, economic migrants have become the Chinese community's most significant segment, as Gaspar (2017) notes.

With the shift in migration profiles, many Chinese students are considering pursuing their education abroad. The pursuit of academic degrees is no longer the exclusive focus; instead, various short-term study and research opportunities have gained prominence as vital means of gaining international experience for Tang (2011), including exchange students, individuals traveling to foreign countries to enhance their language skills, as well as visiting professors and researchers. Furthermore, the range of potential destination countries has expanded dramatically, evolving from a limited selection of developed nations to over one hundred options.

Pinto, Fernandes, and Xinyan's (2023) assertion that mastering the host country's language can reduce potential conflicts and improve entrepreneurial outcomes underscores the importance of setting realistic expectations for the success of a transnational entrepreneurial endeavor. This insight applies to both Chinese families and newcomers.

In broad terms, acquiring proficiency in the host country's language is generally associated with improving the socio-economic status of immigrants and more significant opportunities in the labor market. Language plays a vital role in shaping the identity and culture of its speakers, and achieving a competent level of proficiency in the host nation's language is essential for effective integration. It is necessary to provide immigrants with avenues for language learning in both structured and unstructured environments.

3.3.1.1 European Programs

The European Parliament[22] has articulated that the language policy of the European Union is founded on the principles of honoring linguistic diversity across all Member States and fostering intercultural dialogue within the EU. To actualize the concept of mutual respect, the EU advocates for the instruction and acquisition of foreign languages and the mobility of its citizens through specialized educational and vocational

[22] The institution mentions in their Language Policy that, as a way to promote mobility and intercultural understanding, the EU designated Language Learning as a priority;

training programs. Proficiency in foreign languages is considered a fundamental skill essential for all EU citizens, enhancing their academic prospects and employment opportunities.

Not only did the European Parliament (n.d) comment on the language aspect, but the European Commission also enhanced the recognition of Europe's cultural heritage through educational initiatives and sought to optimize the influence of the Erasmus+ program in this domain.

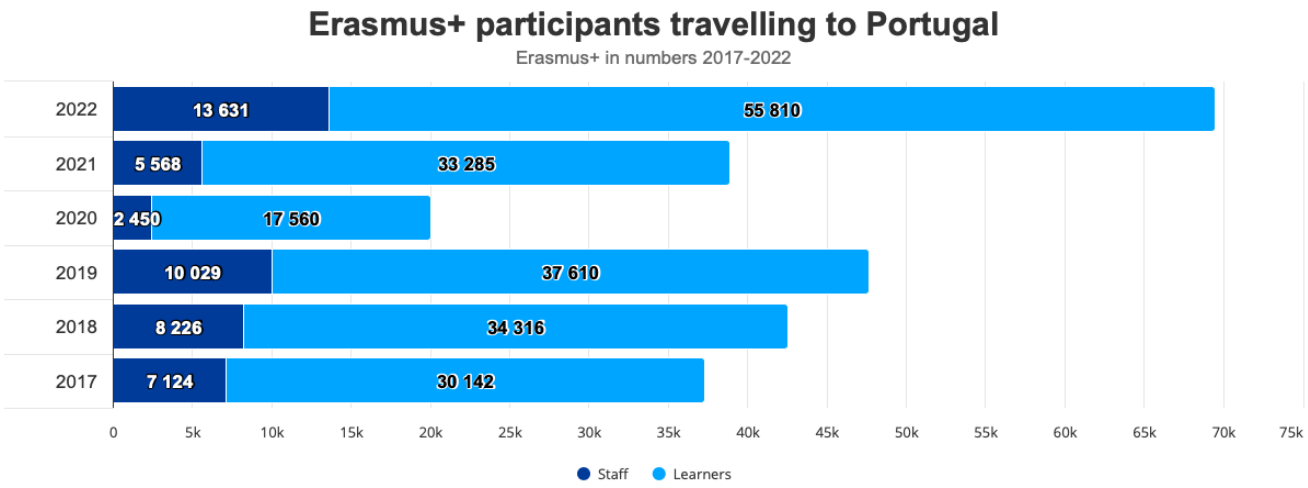
The Erasmus+ program is a European Union initiative that promotes education, training, youth engagement, and sports across Europe (European Comission, n.d). The initiative, which will run from 2021 to 2027, prioritizes social inclusion, ecological and digital transformations, and the enhancement of youth engagement in democratic processes. It underpins vital priorities and initiatives, including establishing the European Education Area, implementing the Digital Education Action Plan, and advancing the Skills Agenda for Europe.

Program 29 aims to achieve three primary "Key Actions": facilitating individuals' learning mobility, fostering collaboration among organizations and institutions, and providing support for policy development and cooperative efforts. For example, the "Jean Monnet" initiatives also facilitate education, research, and discussions regarding issues related to European integration, including the future challenges and opportunities facing the European Union.

In Portugal, the Erasmus+ enhances the backing for initiatives promoting collaboration and sharing practices, enabling key stakeholders to effectively utilize emerging technologies, cultivate innovative pedagogical, training, and learning strategies, advocate for non-formal education, and create shared tools and activities.

In collaborative projects and policy formulation endeavors, organizations acquire valuable experience in international partnerships, bolster their capabilities, generate innovative solutions, share best practices, and establish networks.

Through these initiatives, Erasmus+ significantly reinforces resilience and facilitates recovery and innovation within education, training, youth, and sports.



Graphic 6: Number of Erasmus+ participants from 2017-2022, source: (European Comission, n.d)

Graphic 6 illustrates the trends in Erasmus+ participants traveling to Portugal from 2017 to 2022, differentiating between staff (represented in dark blue) and students (depicted in light blue).

A notable decline in the number of Erasmus+ participants, encompassing both staff and students, occurred in 2020, with a particularly sharp decrease among staff members, whose numbers fell from 10,029 in 2019 to 2,450 in 2020. This decline can be attributed to the disruptions brought about by the pandemic. In 2021, participation increased, particularly among students, who numbered 33,285 in 2022 witnessed a significant surge in overall participants, especially among students, who reached 55,810. The number of staff participants also increased to 13,631, indicating a considerable recovery from the impacts of the pandemic.

Erasmus+ plays a vital role in fostering cultural integration and enhancing mutual understanding between Portugal and other nations (European Commission, n.d). The rising mobility of students and staff facilitates cultural exchanges and academic partnerships. Chinese students and teachers living overseas or in European countries can also come to Portugal through the Erasmus+ program to study or work.

Erasmus Mais (n.d) indicates that the objectives established for mobility projects funded by external policy resources, applicable across EU Member States and associated

countries within the Program, stipulate that, in the Asian continent, a maximum of 15% of the budget should be allocated to mobility initiatives involving China.

3.3.1.2 Portuguese Programs

Tang (2011) identifies various categories of Chinese students enrolled in Portuguese universities and institutions based on their academic qualifications. These categories include undergraduates, master's and doctoral students, postdoctoral researchers, visiting scholars, and Chinese staff at Portuguese academic institutions. The undergraduate category encompasses those pursuing bachelor's degrees at Portuguese universities and students participating in exchange programs aimed at studying the Portuguese language for one or two years without obtaining a degree. Notably, these exchange students represent a significant portion of Portugal's undergraduate Chinese student population.

China aims to enhance the capacity of its higher education institutions and views Portuguese-speaking countries as essential allies in obtaining the requisite knowledge and skills to achieve this goal.

Exchange programs at Portuguese universities predominantly involve undergraduate students who, typically in their third or fourth year, travel to a partner university in Portugal for six months to a year. Upon their return, these students have their academic credits earned in Portugal officially recognized. This arrangement is similar to Portuguese students who engage in exchange programs with various universities in China. Yijing (2015) defends the fact that many Chinese master's and doctoral students reside in Portugal, especially in cities such as Lisbon, Aveiro, Coimbra, Porto, and Braga. In Portugal, there are numerous institutions dedicated to teaching the Chinese language. These establishments have established a presence in the country's northern, central, and southern regions, thereby promoting both the language and culture of China.

The Camões Institute's official website[23] highlights its crucial contribution to promoting Portuguese language education internationally. The Portuguese Language

[23] Within its several missions, Camões Institute aims at the teaching and promotion of the Portuguese language and culture abroad;

Center, situated in Macau, Beijing, and Shanghai, engages in a range of activities aimed at enhancing teacher training, developing educational resources, and overseeing international certification examinations for Portuguese as a foreign language (Camões Institute, n.d). The center undertakes various initiatives to foster the spread of the Portuguese language and culture. Numerous trainings and scientific-pedagogical development activities for educators are also conducted outside the center.

The University of Porto is a key founding member of the collaborative initiative formed among higher education institutions in the Jiangsu province of China, the administrative region of Macau, and countries where Portuguese is spoken. Established in 2015, the memorandum of understanding seeks to enhance cooperative relationships between Portuguese-speaking institutions and Chinese universities across various fields, including Humanities, Engineering, Technology, Management, and Sports (Santos, 2015). However, in 2024, the relationship between the University of Porto and the University of Macau was further solidified through a visit by António de Sousa Pereira, the Rector of the University of Porto, to Macau. According to Reis (2024), the visit showed the significance of the University of Macau as a critical partner for the University of Porto. During this engagement, aspirations for collaboration in the realms of technology and innovation and the sharing of scientific and educational resources were reinforced.

The Confucius Institute at the University of Porto (ICUP) results from a partnership between the University of Porto and the Guangdong University of Foreign Studies, a university specialized in teaching foreign languages (including Portuguese) and explicitly dedicated to training diplomats and international businesspeople.

The University of Coimbra and Beijing Foreign Studies University, one of China's oldest and most esteemed institutions for foreign studies, have formalized an agreement to establish the Center for Chinese and Portuguese-Speaking Countries Studies. This initiative is designed to foster collaborative projects in the Humanities and Law, marking a significant advancement in the relationship between the University of Coimbra and the People's Republic of China (Fernandes & Santos, 2019).

ULisboa recently welcomed a delegation from China, comprising esteemed dignitaries, professors, researchers, and doctoral candidates, to renew the existing

protocol with Shanghai University. The primary objective of this meeting was to enhance academic collaboration, as ULisboa provides undergraduate and master's degree programs in Electronic and Computer Engineering, Civil Engineering, and Environmental Engineering at the Shanghai University campus. This partnership facilitates the exchange of students and the sharing of academic and scientific pursuits, thereby promoting scientific progress in mutually relevant fields. (Tavares, 2023)

As it can be seen, several universities across Portugal maintain partnerships with Chinese universities, showing that Portugal-China relations are based not only on economic investments but also on educational programs, allowing Chinese immigrants and their families to learn Portuguese or take a degree. Language learning is, therefore, a very important factor of integration.

CHAPTER IV – CONCLUSION

Upon the elaboration of the present dissertation, the aim to explored the cultural and economic integration of Chinese immigrants in Portugal was well succeeded, focusing on the intersection of diplomatic relations, cultural festivities, education, and the Golden Visa program. The conducted research provided a comprehensive view of how the Chinese community has navigated the process of integration in a country with historical ties to China.

The assimilation of Chinese immigrants into Portuguese society represents a multifaceted process characterized by an intersection of economic contributions, cultural interactions, and educational opportunities. The conducted research revealed that the Golden Visa program, cultural festivities, and educational initiatives play a crucial role in promoting the integration of Chinese immigrants. Nonetheless, this integration is a very complex factor and encounters various obstacles. Furthermore, there remains a notable deficiency in comprehensive data and detailed studies regarding the extent of integration experienced by the Chinese community in Portugal.

Investment initiatives, such as the Golden Visa, have significantly impacted Portugal's economy, particularly in the realm of real estate. While these programs successfully attract foreign capital and generate business opportunities, they do not guarantee effective social integration. A notable trend among Chinese investors who gain residency through this scheme is their tendency to remain within their own communities, prioritizing the financial returns of their properties over engaging with the broader society. This phenomenon raises questions of the true efficacy of such programs in fostering social cohesion and establishing enduring connections between immigrants and the local population. Additionally, there are potential drawbacks, including speculative practices in the real estate market and the marginalization of local residents, which may lead to increased social tensions.

Cultural celebrations are significant in fostering community cohesion. Events such as the Chinese New Year and the Lantern Festival not only celebrate the profound cultural legacy of China but also act as bridges connecting immigrants with Portuguese society. These occasions facilitate mutual understanding and mitigate the perception of "otherness" that is frequently linked to immigrant populations. It is crucial, however, that these celebrations are recognized not merely as cultural exhibitions, but as authentic

avenues for cultural exchange and dialogue, which encourage a more profound and enduring integration.

Education stands out as a central element for achieving long-term integration. Proficiency in the Portuguese language is especially vital for Chinese immigrants, as it facilitates not only their economic participation but also the establishment of meaningful and deeper social connections. The initiatives aimed at fostering collaborative learning and cultural exchange between Portugal and China have the potential to cultivate new immigrants who are confident in their engagement with Portuguese society. Nevertheless, the primary challenge remains in addressing linguistic and cultural obstacles through the provision of sufficient resources and inclusive policies that go beyond simple employment integration.

The present dissertation examined the significance of perceiving integration as a multifaceted process that goes beyond the economic advantages offered by Golden Visa. While these initiatives play a crucial role in fostering economic growth, they alone do not guarantee social cohesion. While the Golden Visa program has economically benefited Portugal, it does not ensure social integration, as many Chinese investors remain within their own communities. Cultural events, foster mutual understanding and serve as platforms for dialogue. Education, particularly proficiency in Portuguese, is vital for deeper social connections and economic participation. One without the other will not guarantee the full integration of these migrants, so in order to achieve genuine integration it is needed a balanced approach that combines economic initiatives with inclusive cultural and educational policies. Genuine integration emerges from a harmonious balance between the creation of economic opportunities and the promotion of cultural and educational initiatives that facilitate substantial interactions among varied communities.

Future investigations may explore the ways in which various immigrant communities in Portugal navigate with similar issues related to cultural and economic integration, drawing comparisons with the experiences of the Chinese community. Additionally, it would be valuable to examine the long-term implications of the Gold Visa, particularly in rural regions where emerging policies are influencing investment patterns. Another significant area of study could focus on the second generation of Chinese immigrants and the processes through which these individuals are shaping their cultural identities, balancing elements of Chinese heritage with Portuguese cultural influences.

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