



TALENT MOBILITY IN
CHINA

2016

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CHINA**

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TALENT MOBILITY IN CHINA

Worldwide ERC's 2013 *Talent Mobility in China* survey found respondent companies eager to take advantage of China's phenomenal economic growth despite high assignment costs and cost-control concerns. Only three years later, China has entered a period of economic slowdown. In a 2015 report titled "What China's 'New Normal' Means for Multinational Companies," Heidrick and Struggles state:

"After nearly two decades of double-digit growth, it is clear that China's economic boom is beginning to slow—a state of affairs that Chinese President Xi Jinping has dubbed China's 'new normal.' The Chinese government has set a more modest target of 7 percent annual GDP growth, and the country now enters a phase of restructuring, consolidation, and an economy driven more by innovation than input and investment. The government's goal is to strike a better balance among economic, social, and environmental objectives."

With these changes in China's economic outlook in mind, we paid close attention to several questions related to moving expats into China, Chinese nationals out of China, and Chinese nationals domestically within China:

1. How is the slowing of China's economic growth impacting workforce mobility?
2. How much pressure to control costs are talent mobility managers facing? What strategies for cost control are they employing in China?
3. What are companies' biggest concerns and challenges to assignments into China?
4. How are companies managing assignments into China? What management structures and practices have been implemented and to what degree?
5. What is on the horizon for China's talent mobility? What evolving policy and business trends will have an impact on mobility?

Worldwide ERC® partnered with survey sponsor SIRVA Worldwide for this *Talent Mobility in China* Survey, conducted in January 2016. One hundred and sixty-three companies representing 24 industries responded.

Mobility Volume Remains Stable; Companies See that Trend Continuing

A majority of surveyed companies report that moves into China, localizations of expatriate employees, and moves of Chinese nationals outside of China generally remained stable or increased in 2015 and that these trends are expected to continue in 2016 (See Figures 1A, 1B, 3 and 12.).

These findings echo the Heidrick and Struggles' survey results that "most [multinational companies (MNCs)] remain optimistic and expect to see good profitability from their China operations — but they also anticipate the rate of business growth will continue to slow."

The 2016 *China Business Report* by the American Chamber of Commerce in Shanghai also came to a similar conclusion, finding that:

"Most companies (81 percent) plan to increase their investment in 2016, but with greater caution across all industries. The number of companies in 2015 with investment increases in the 1 to 15 percent range expanded to 56 percent from last year's 39 percent. Looking ahead, 61 percent expect investment increases in this smaller range and 19 percent expect to decrease their investment, compared to 16 percent in 2015 and 4 percent in 2014."

Both these reports predict that multinationals will continue to invest in China but more cautiously. Since they were published, the uncertainty about the China economy has intensified and reinforces this cautious attitude.

Cost-control Goals Result in Focus on Long-term Assignments and Developing Local Talent

Long-term Assignments

When asked to indicate how much pressure there is from management to reduce costs on a scale of one to five with one being "No Pressure" and five being "Significant Pressure," a clear majority of respondents rated the pressure they are experiencing to reduce costs at a three or above for long-term and short-term assignments, as well as for permanent moves (See Figure 5.).

For all three mobility types, respondents said that they felt the most pressure to control costs for long-term assignments, with 66 percent scoring the pressure they receive at a four or above. Three of the top six China mobility cost-control techniques on which respondents most often rely directly reference changes in long-term assignments (See Figure 6.). In fact, the approach that was cited most often by companies as being relied on to a high extent to control costs was "reducing the number of traditional long-term assignments."

Developing Local Talent

Worldwide ERC's 2013 *Talent Mobility in China* survey found evidence of a focus on local talent. About two-thirds of respondents answered that they had "moved employees domestically within China during the past two years." At that time, we reported:

"With the loosening of the hukou system, companies that identify rising stars among their local worker population have the opportunity to begin creating career development plans that will help create more loyalty among their employees. Mobility is a key strategy for creating new opportunities for such rising stars."

In our 2016 study, we find this trend toward developing local talent continuing—and being used in companies' cost-control strategies. As noted above, the number one cost-control approach for China mobility was reported as reducing long-term assignments; the number two was "increased focus on training local staff" (See Figure 6.).



“Currently, our Asian leadership is composed of a quite high percentage of local leaders. Our mobility program is really adding value to make this happen by facilitating these candidates’ relocations domestically and internationally. Our assignments are typically long-term for international assignments as these candidates need to be in the host location for years to develop network and new capabilities. For domestic relocation, it varies from 6 months to 3 years based on their career plan. I think that balancing program flexibility and consistency is key to the relocation programs.”

—MOBILITY MANAGER IN CHINA WITH
WESTERN MULTINATIONAL COMPANY

Environmental Concerns and Family Resistance are Top Mobility Challenges

Environment

Environmental concerns are the most frequently cited significant challenge to moving employees into China for long- and short-term assignments and permanent moves (See Figure 11.).

According to Eleanor Albert and Beina Xu, the authors of the Council of Foreign Relations 2016 report, *China’s Environmental Crisis*, China’s environmental problems have a deleterious effect on economic opportunity, “costing the country roughly 3 to 10 percent of its gross national income” and “caus[ing] significant health complications among its population.”

Indeed, the American Chamber of Commerce in Shanghai survey respondents identified “more stringent environmental protection requirements” as a top macro-trend affecting China’s business over the next five years.

The impact of environmental issues on business opportunities identified in the Council on Foreign Trade, American Chamber and Worldwide ERC® reports is not lost on the Chinese government. In March of 2015, Chinese premier Li Keqiang renewed pledges to tackle the country’s chronic pollution and Reuters reported in February 2016 that the government is building ventilation corridors in Beijing and closing 2,500 small polluting firms in an effort to make headway against the problem.

Family Resistance

“Family resistance to moving” ranked as the most frequently cited significant challenge to moving Chinese nationals within China. Nearly half cited it as a significant challenge to long-term assignments. Fifty-four percent indicated it is a significant challenge to permanent moves (See Figure 19.). A myriad of factors can impact a family’s resistance to moving, including spouse-career disruption, children’s education, elder care concerns and separation from extended family.

Few Companies Have Formal Domestic Mobility Policies

Companies wishing to ensure that domestic employee mobility is cost-effective and equitable should develop formal mobility assistance policies. A majority of respondents to our survey reported that they do not have formal policies for domestic mobility in China. Sixty-three percent of respondents indicated that they do not currently have a formal policy for long-term assignments and 60 percent have no policy for short-term assignments. Sixty-six percent have no policy for permanent moves (See Figure 16.). These results mirror our 2013 *Talent Mobility in China* survey finding that, for China domestic moves, “less than half of firms reporting [had] formal policies in place for various types of moves, from commuter to long-term assignment.”

The Movement of Chinese Nationals out of China

While our survey data indicates that the number of out-bound moves of Chinese nationals in 2015 has remained about the same (See Figure 12.), there is reason to believe increases in the movement of Chinese nationals out of China are looming. The Heidrick and Struggles report notes, “Many [companies] are going global partly through government-supported campaigns such as ‘One Belt, One

Road,' a massive effort to expand linkages from China across Asia to Europe." According to a 2016 *Economist China's Foreign Policy* article "Well Wishing," President Xi Jinping recently toured the Middle East, as a show of this commitment to the "new Silk Road" and "Chinese companies are already building expressways and harbours there."

As China focuses on becoming a more global force and Chinese companies expand worldwide, this will mean more talent mobility for Chinese nationals. Likewise, as multinational companies operating in China increasingly focus on developing local staff, their use of mobility for training and global leadership opportunities will increase.

When we asked survey respondents to which one region they sent "the greatest number" of Chinese nationals to in 2015, Asia, North America and Europe received the highest rankings (See Figure 13.). This is not surprising, as the majority of responding companies are headquartered in these regions.

This movement of Chinese nationals outward may have widespread ramifications. For example, the same 2016 *Economist* article reports that the "growing number of Chinese citizens in the Middle East" likely will cause change in China's traditionally "non-interventionist approach" in the region. In November 2015, a Chinese national was executed by the Islamic State. Following this, China "vowed to strengthen protection of its citizens abroad."

Another important consideration as Chinese companies expand is cross-cultural training and helping multinational teams work effectively together. As *The New York Times* reported in a December 2015 article titled, "A Chinese Company in India, Stumbling Over a Culture:"

"Chinese companies have embarked on ambitious overseas expansion efforts, snapping up land in dozens of countries to build factories, industrial parks, power plants and other operations. While the investments provide critical support for many economies, Chinese businesses are struggling to navigate complex cultural, political and competitive dynamics."

Mobility and the Talent Management Connection

As businesses expand globally and employees are increasingly eager to work internationally, the importance of talent mobility continues to grow. The traditional long-term assignment, however, is a costly approach to fulfilling today's business and employee needs.

As seen in this survey, the mobility cost-reduction approach most frequently relied on by companies to a high extent is reducing long-term assignments into China. This appears to shift the focus to developing local talent (the second most frequently cited highly relied upon cost-reduction technique) (See Figure 6.). Developing local talent often necessitates creating mobility opportunities for training and global leadership development. Mobility continues in different forms and for different employees.

We are seeing more focus on the integration of talent mobility into talent management initiatives in recognition that mobility is an important tool in employee development, engagement and retention strategies. Today, companies are at different points along this integration journey. Our survey found that 30 percent of respondents have significantly integrated their China mobility into their talent management strategy, 37 percent have done so to a moderate extent and 33 percent to a small or no extent (See Figure 10.).

Moreover, organizations are becoming increasingly sophisticated in how they tailor their programs to meet the objectives of the assignment. It is interesting to note that more companies report relying on "developing flexible/tiered assistance" and "varying assistance based on the purpose of the assignment" to control costs than reducing the benefits in local-plus packages or traditional long-term assignments (See Figure 6.). The focus is on new policy structures that are more individualized and meet business needs than on simply cutting benefits from existing policies.

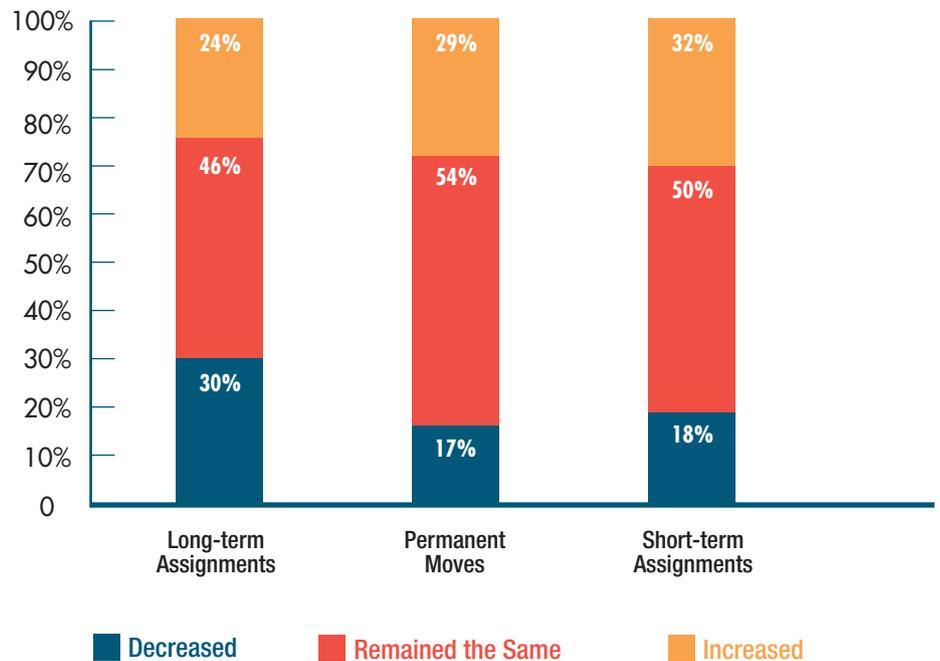
We expect this journey of integrating talent mobility and management to continue as the traditional expatriate assignment has given way to a different mobility in China — and the world. ■

WORLDWIDE ERC[®]
THE WORKFORCE MOBILITY ASSOCIATION

A majority of surveyed companies report that moves into China generally remained stable or increased in 2015. This trend is expected to continue in 2016.

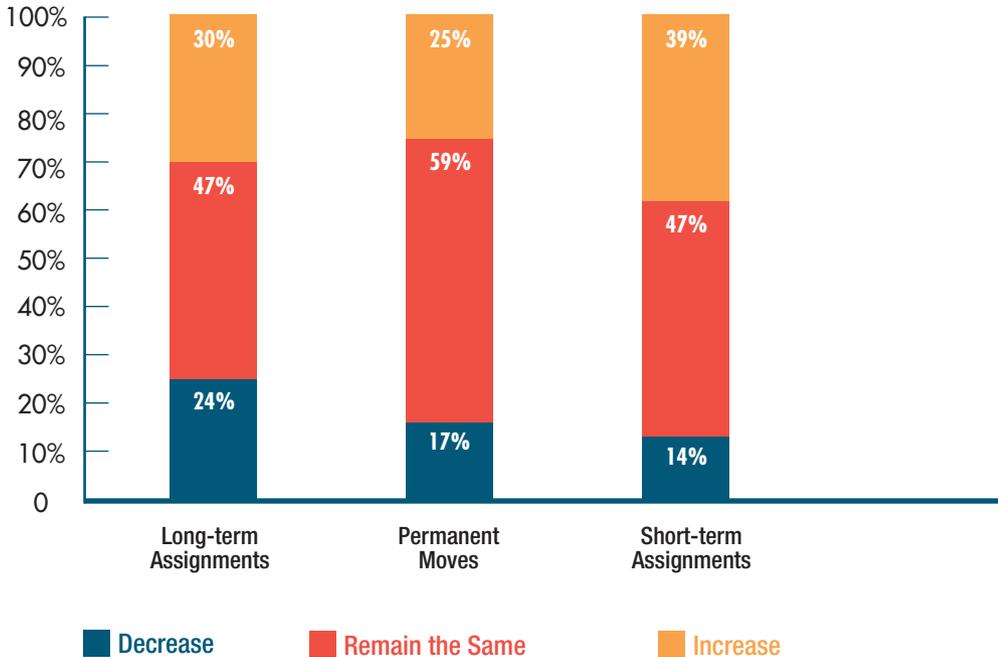
FIGURE 1: MOBILITY TRENDS

FIGURE 1A: Compared to 2014, your company's 2015 moves into China have:



Participants rated the change in their volume based on a five-point range that included "Significantly increased," "Somewhat increased," "Remained the same," "Somewhat decreased" and "Significantly decreased."

FIGURE 1B: Compared to 2015, do you think your company's moves into China in 2016 will:



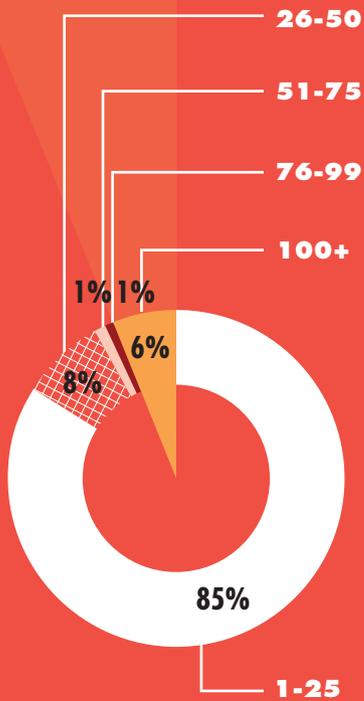
Percentages do not total 100% due to rounding.
Participants rated the change in their volume based on a five-point range that included "Significantly increased," "Somewhat increased," "Remained the same," "Somewhat decreased" and "Significantly decreased."

A majority of surveyed companies report moving between 1 and 25 employees into China in 2015.

FIGURE 2: APPROXIMATELY HOW MANY EXPATS IN TOTAL DID YOUR COMPANY MOVE INTO CHINA IN 2015?

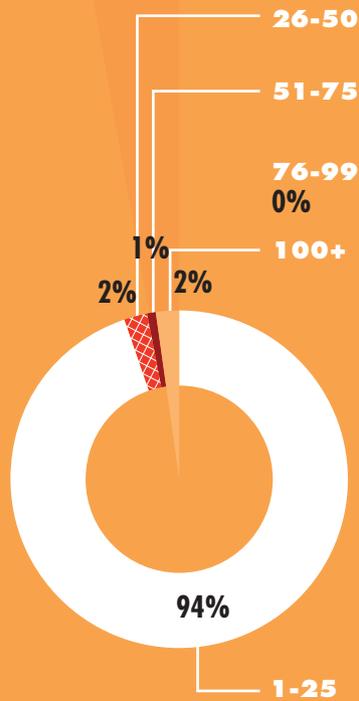
Long-term Assignments

Percent of companies



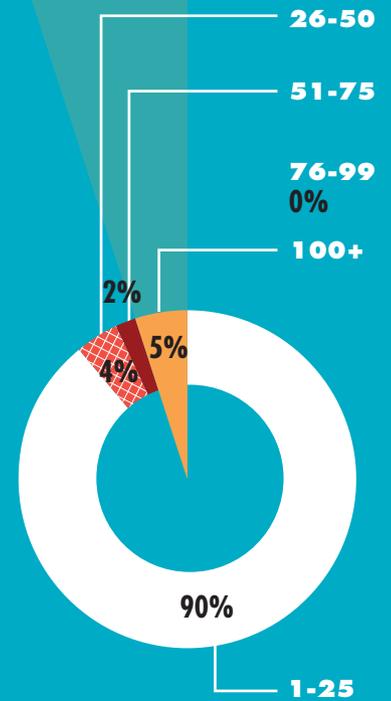
Permanent Moves

Percent of companies



Short-term Assignments

Percent of companies

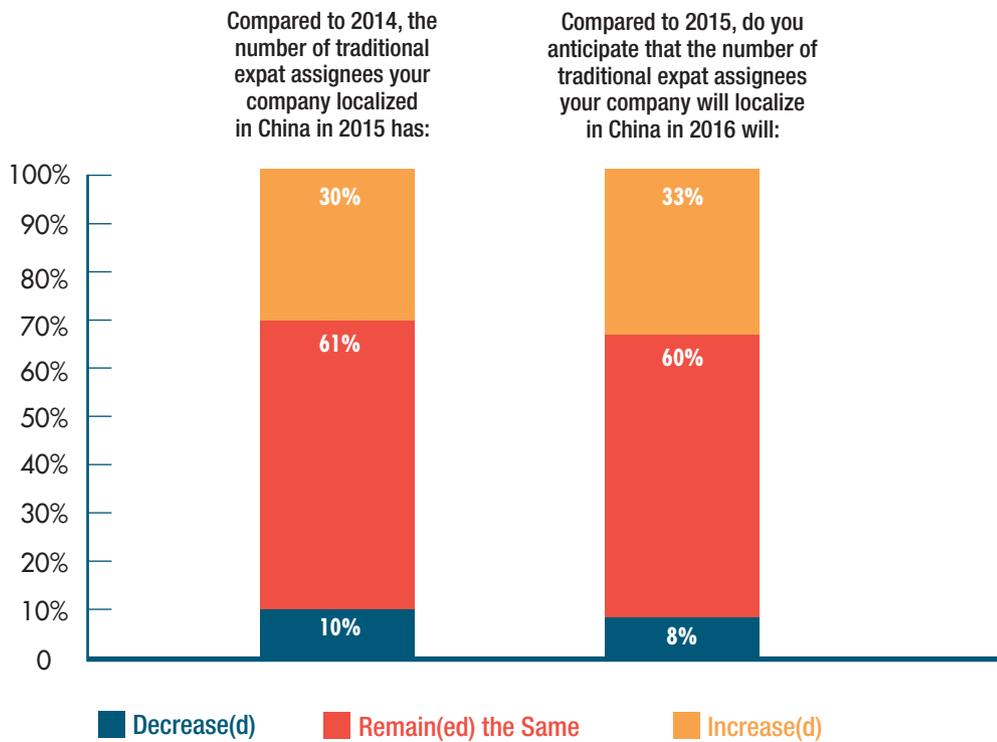


Percentages do not total 100% due to rounding.

A majority of surveyed companies report that localizations of expatriate employees increased or remained the same in 2015. This trend is expected to continue in 2016.

FIGURE 3: LOCALIZATION TRENDS

Percent of companies



Percentages do not total 100% due to rounding.

Participants rated the change in their localizations based on a five-point range that included “Significantly increased,” “Somewhat increased,” “Remained the same,” “Somewhat decreased” and “Significantly decreased.”

TOP REASONS FOR LONG-TERM EXPATRIATE ASSIGNMENTS AND PERMANENT MOVES INTO CHINA:

- Business needs
- Knowledge transfer
- To fill a skill gap



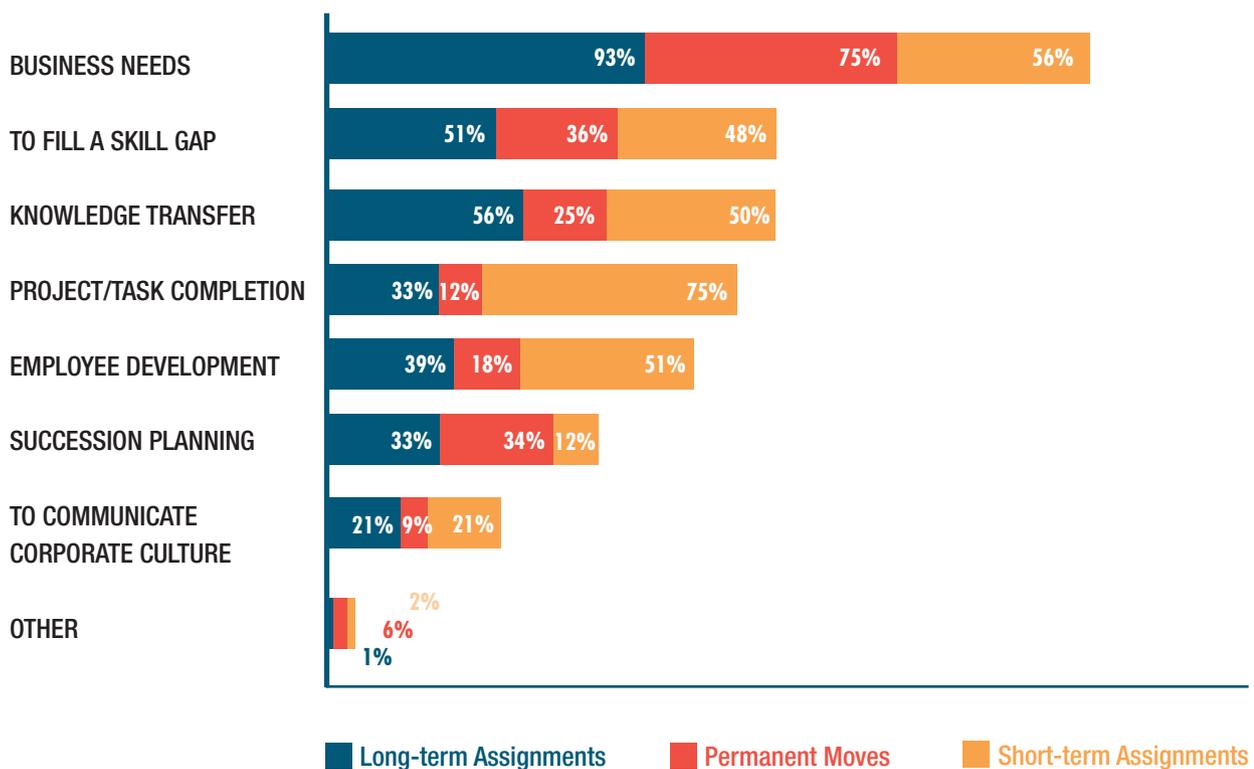
TOP REASONS FOR SHORT-TERM EXPATRIATE ASSIGNMENTS INTO CHINA:

- Project/task completion
- Business needs
- Employee development



FIGURE 4: WHAT ARE YOUR COMPANY'S MAIN REASONS FOR MOVING EMPLOYEES INTO CHINA?

Percent of companies



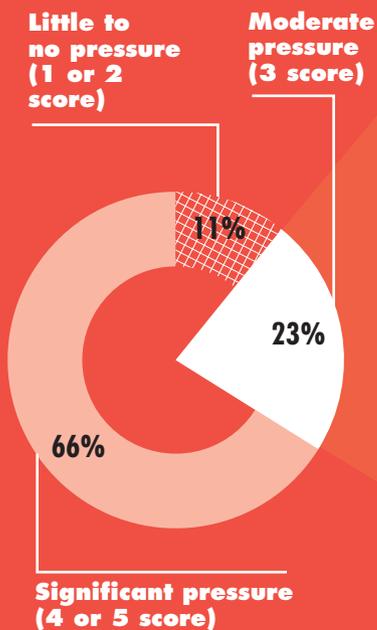
Percentages do not total 100% due to multiple responses.

Sixty-six percent of respondents face significant pressure to reduce the cost of long-term assignments into China.

FIGURE 5: FOR EACH OF THE FOLLOWING TYPES OF MOBILITY INTO CHINA, INDICATE HOW MUCH PRESSURE THERE IS FROM MANAGEMENT TO REDUCE COSTS.

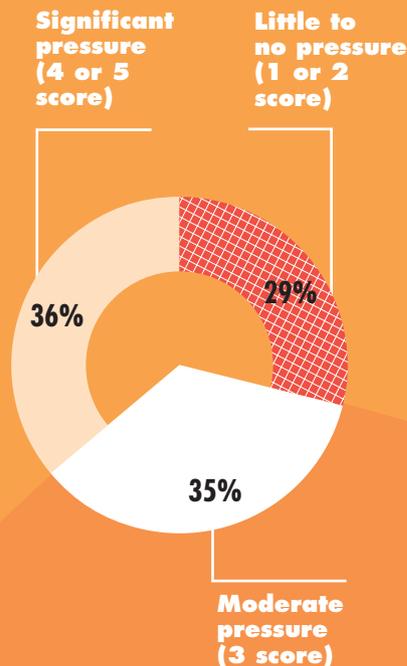
Long-term Assignments

Percent of companies



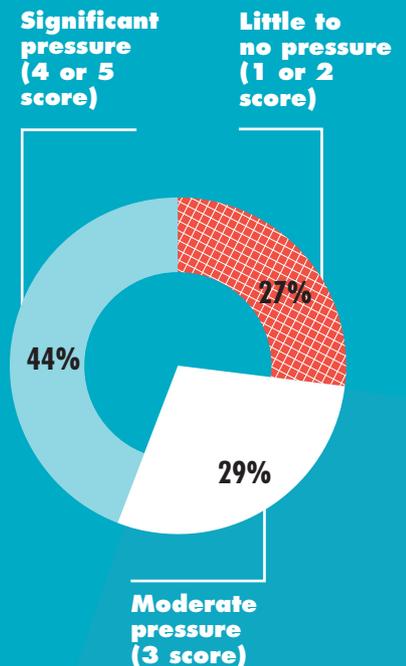
Permanent Moves

Percent of companies



Short-term Assignments

Percent of companies



Participants rated the pressure to reduce costs on a five-point scale with 1 indicating “No pressure” and 5 indicating “Significant pressure.”

TOP 6 APPROACHES TO REDUCING MOBILITY COSTS

- 1** Reducing the number of traditional long-term assignments
- 2** Increasing the focus on training local talent
- 3** Developing more tiered or flexible assistance policies
- 4** Using short-term assignments instead of long-term assignments
- 5** Varying assistance based on the purpose of the assignment
- 6** Using permanent moves instead of traditional long-term assignments

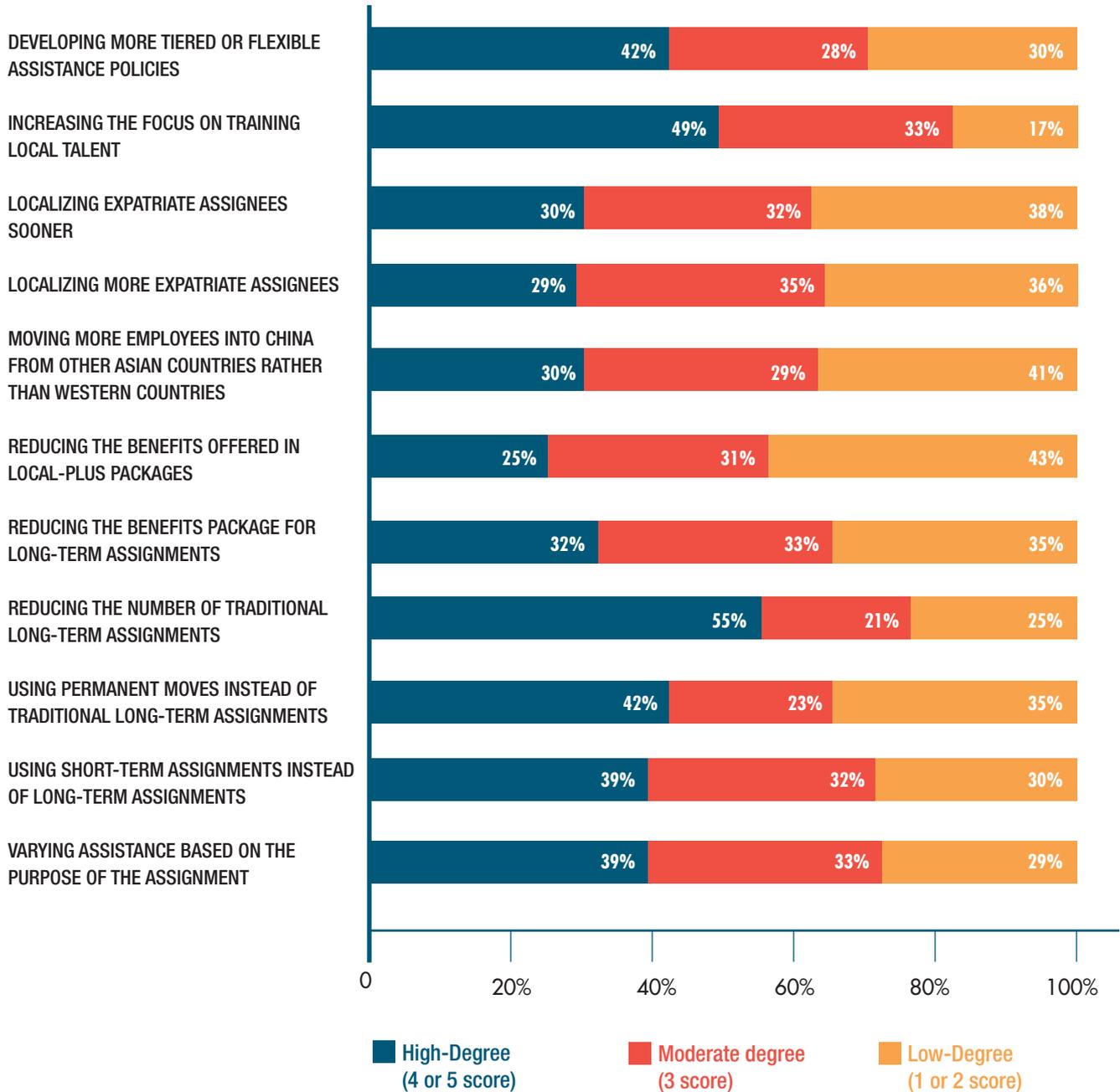
Based on weighted averages.

Developing local talent often necessitates creating mobility opportunities for training and global leadership development. Expat assignments may decrease, but mobility continues in different forms for different employees.

Guangzhou Guangdong China

FIGURE 6: TO WHAT DEGREE DOES YOUR COMPANY RELY ON THESE APPROACHES TO REDUCE THE COST OF MOBILITY INTO CHINA?

Percent of companies



Percentages do not total 100% due to rounding.

Participants rated their company's reliance on these cost control approaches on a five-point scale with 1 indicating "Low degree" and 5 indicating "High degree."

Nearly half of all assignments into China are managed by shared responsibility of the corporate headquarters and regional or local offices.

FIGURE 7: PLEASE INDICATE THE CURRENT STRUCTURE FOR MANAGING ASSIGNMENTS INTO CHINA.

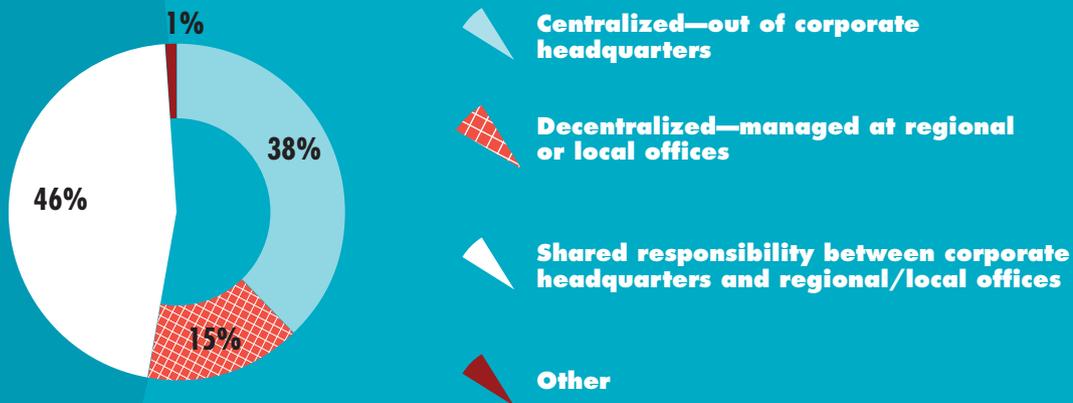
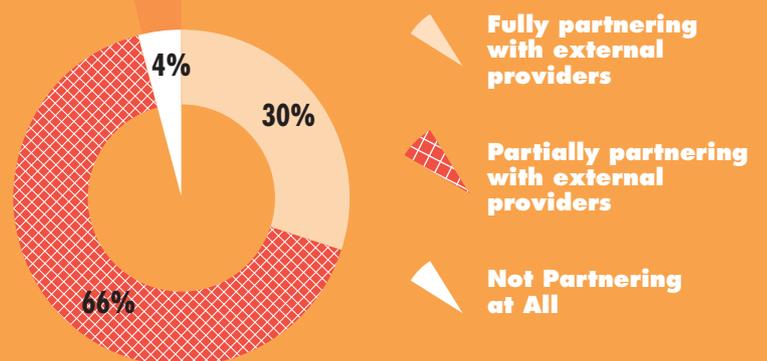


FIGURE 8: HOW ARE ASSIGNMENTS INTO CHINA CURRENTLY BEING ADMINISTERED?

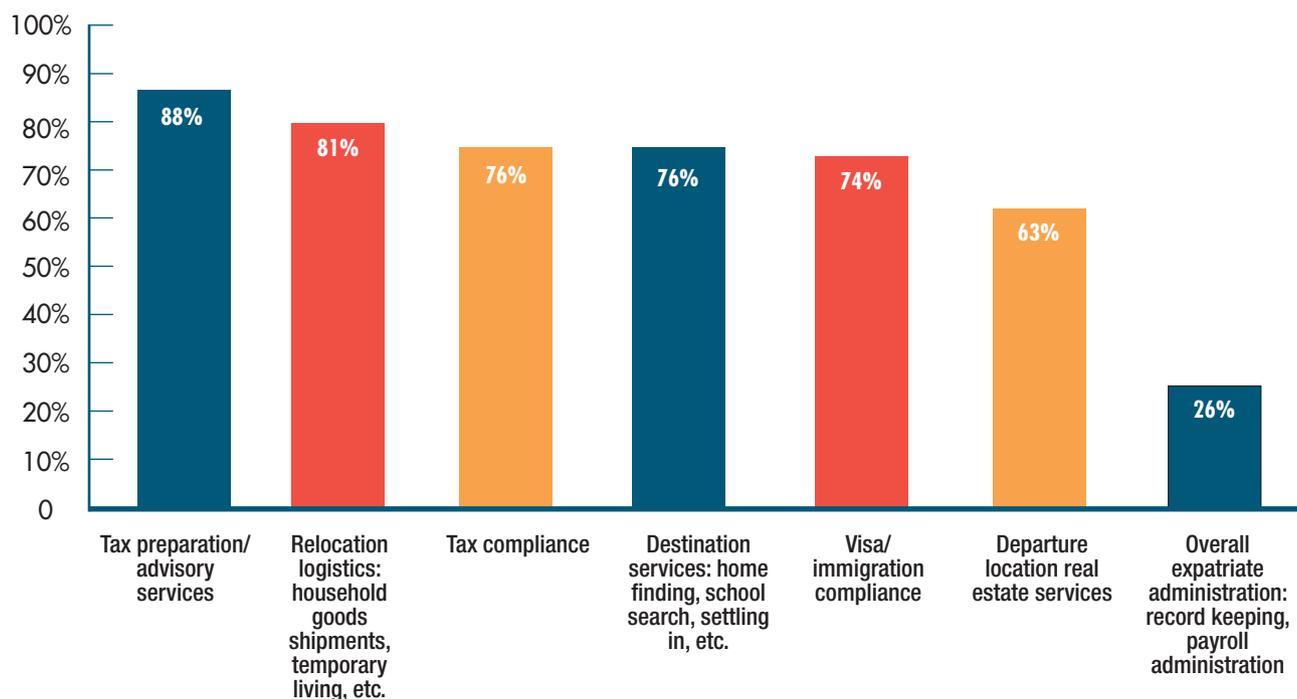
Ninety-six percent of companies fully or partially partner with an outside partner in the administration of assignments into China.



Tax preparation/advisory services and relocation logistics are most often fully outsourced.

FIGURE 9: WHAT TYPES OF MOBILITY SERVICES ARE FULLY OUTSOURCED?

Percent of companies



Percentages do not total 100% due to multiple responses.



2.9

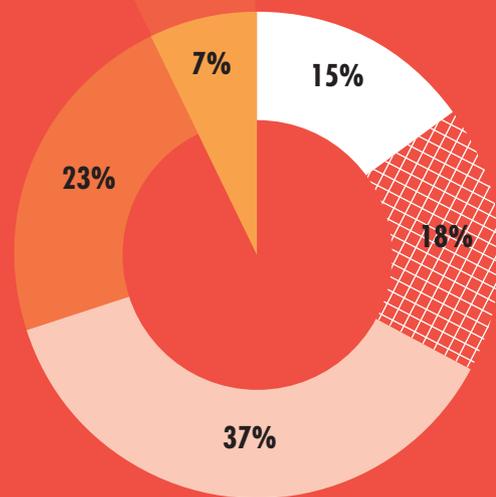
THE GRADE RESPONDENTS GAVE THEIR COMPANIES' USE OF TALENT MOBILITY IN THEIR TALENT MANAGEMENT STRATEGIES IN CHINA.

Based on weighted averages.



FIGURE 10: TO WHAT EXTENT IS YOUR COMPANY USING TALENT MOBILITY IN ITS TALENT MANAGEMENT STRATEGIES (EMPLOYEE RECRUITMENT, DEVELOPMENT, ENGAGEMENT, RETENTION) IN CHINA?

Percent of companies



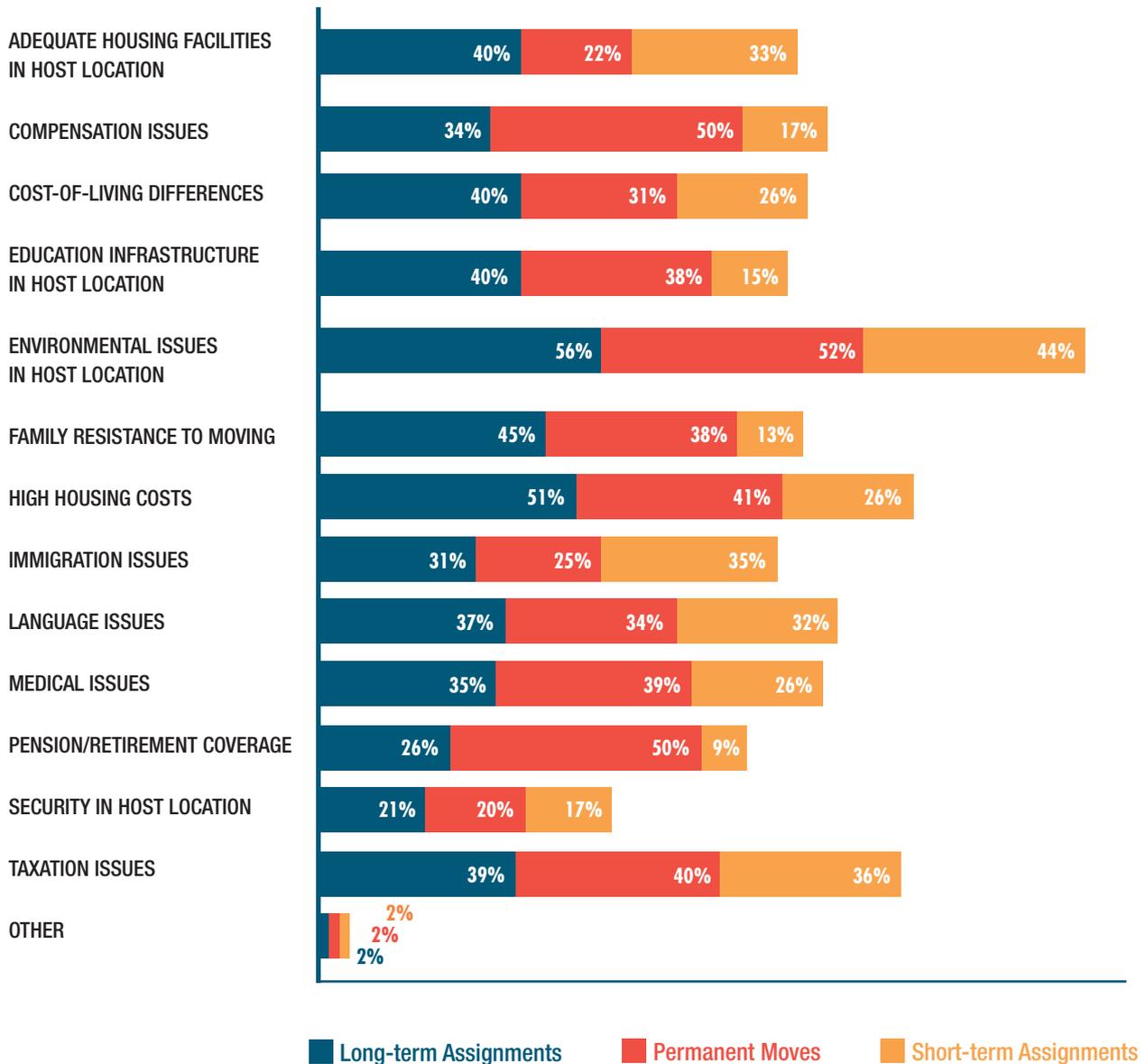
-  **Not at all (1 score)**
-  **To a small extent (2 score)**
-  **To a moderate extent (3 score)**
-  **To a significant extent (4 score)**
-  **To a great extent (5 score)**

Participants rated their company's use of talent mobility in its talent management strategies on these cost control approaches on a five-point scale with 1 indicating "Not at all" and 5 indicating "To a great extent."

ENVIRONMENTAL CONCERNS are the top significant challenge to moving employees into China.

FIGURE 11: FOR EACH TYPE OF MOBILITY, INDICATE THE MOST SIGNIFICANT CHALLENGES FACED BY EMPLOYERS MOVING EXPATRIATES INTO CHINA.

Percent of companies



Percentages do not total 100% due to multiple responses.

Top Five Significant Challenges to Long-term Assignments, Permanent Moves and Short-term Assignments

	LONG-TERM ASSIGNMENTS	PERMANENT MOVES	SHORT-TERM ASSIGNMENTS
1	Environmental issues in host location	Environmental issues in host location	Environmental issues in host location
2	High housing costs	—TIED— Compensation issues Pension/retirement coverage	Taxation issues
3	Family resistance to moving	High housing costs	Immigration issues
4	—TIED— Adequate housing facilities in host location Cost-of-living differences Education infrastructure in host location	Taxation issues	Adequate housing facilities in host location
5	Taxation issues	Medical issues	Language issues

“Environmental deprecations pose a serious threat to China’s economic growth, costing the country roughly 3 to 10 percent of its gross national income, according to various estimates. China’s Ministry of Environmental Protection calculates the cost of pollution at around 1.5 trillion RMB (\$227 billion) or roughly 3.5 percent of GDP, according to 2010 figures.”

—THE COUNCIL ON FOREIGN RELATIONS

“We are more focused on taking advantage of a “good air day,” i.e., telling the kids to go outside and play and exercising outdoors, because staying inside when the air is bad is a fact of life. All international schools have restrictions if the Air Quality Index reaches a certain level...It’s signaled by two bells instead of one. The kids all know to listen for those two bells.”

—TERRI SCHWARTZBECK, 41, BEIJING
AS QUOTED IN *THE NEW YORK TIMES*



Compared to the *2013 Worldwide ERC® China Mobility Survey*, Shanghai, Beijing, Guanzhou, Shenzen, Chengdu and Nanjing all continue to be top destinations. Fuzhou fell out of the top 10 from third place with 22 percent in 2013 to 15th place with only 1 percent reporting movement there. Dalian rose into the top five in 2016.

Top Five Expat Destinations in 2013 and 2016

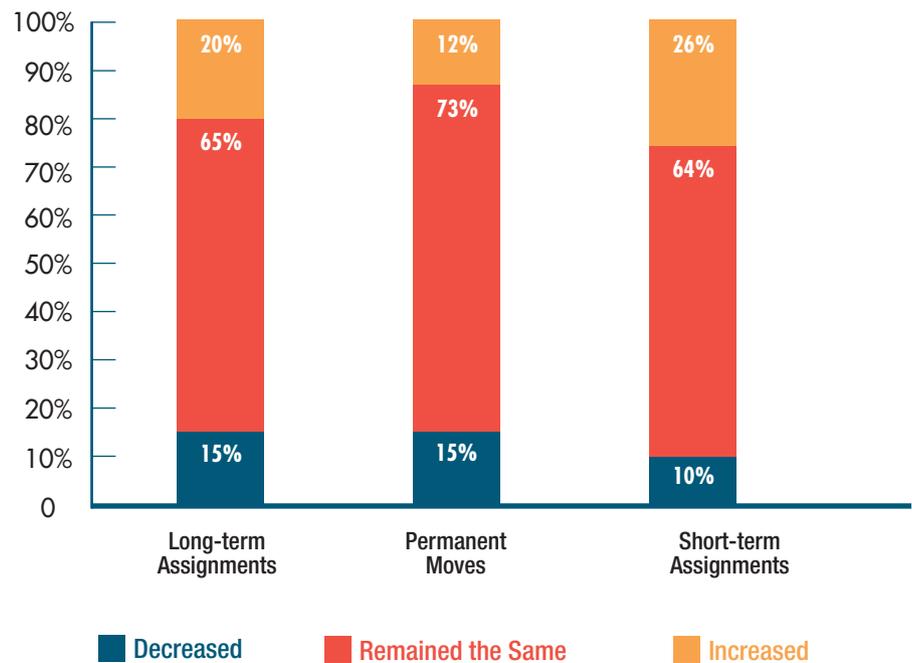
2013 RANK	CITY	PERCENTAGE	2016 RANK	CITY	PERCENTAGE
1	Shanghai	82%	1	Shanghai	87%
2	Beijing	58%	2	Beijing	57%
3	—TIED— Guangzhou Fuzhou	22% 22%	3	—TIED— Guangzhou Shenzhen	20% 20%
4	Shenzhen	19%	4	Chengdu	13%
5	—TIED— Chengdu Nanjing	13% 13%	5	—TIED— Dalian Nanjing	11% 11%

ASSIGNMENT OF CHINESE NATIONALS OUTSIDE OF CHINA

A majority of companies generally reported that moves of Chinese nationals outside of China remained the same or increased in 2015.

FIGURE 12: COMPARED TO 2014, YOUR COMPANY'S MOVES OF CHINESE NATIONALS OUTSIDE OF CHINA IN 2015 HAVE:

Percent of companies



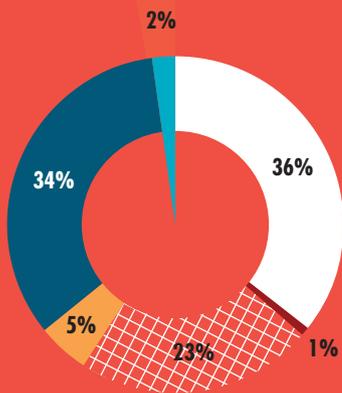
Participants rated the change in their volume based on a five-point range that included "Significantly increased," "Somewhat increased," "Remained the same," "Somewhat decreased" and "Significantly decreased."

Asia, North America and Europe are the top destinations for assignment of Chinese Nationals.

FIGURE 13: TO WHICH ONE OF THE FOLLOWING LOCATIONS DID YOUR COMPANY SEND THE GREATEST NUMBER OF CHINESE NATIONALS IN 2015?

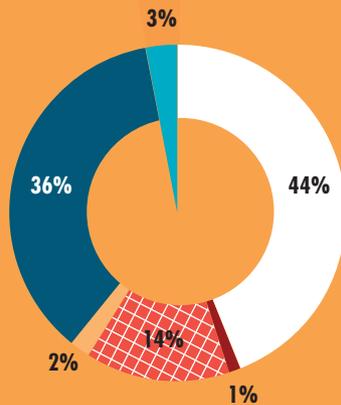
Long-term Assignments

Percent of companies



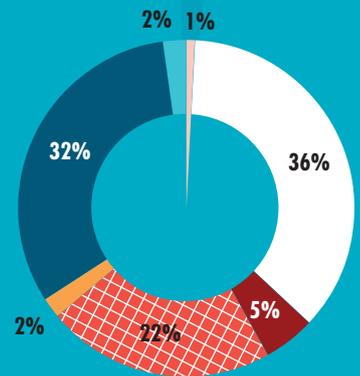
Permanent Moves

Percent of companies



Short-term Assignments

Percent of companies



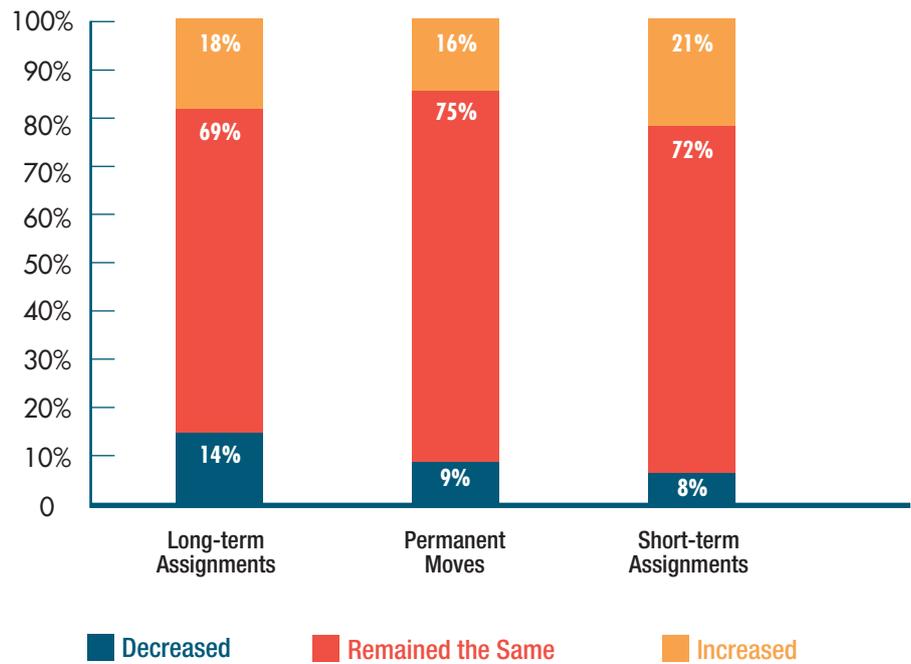
Percentages do not total 100% due to rounding.

MOVES DOMESTICALLY WITHIN MAINLAND CHINA

A majority of surveyed companies report moves of Chinese nationals into second and third tier Chinese cities have remained the same or increased in 2015 compared to 2014. This trend is expected to continue in 2016.

FIGURE 14: MOBILITY INTO SECOND AND THIRD TIER CHINESE CITIES

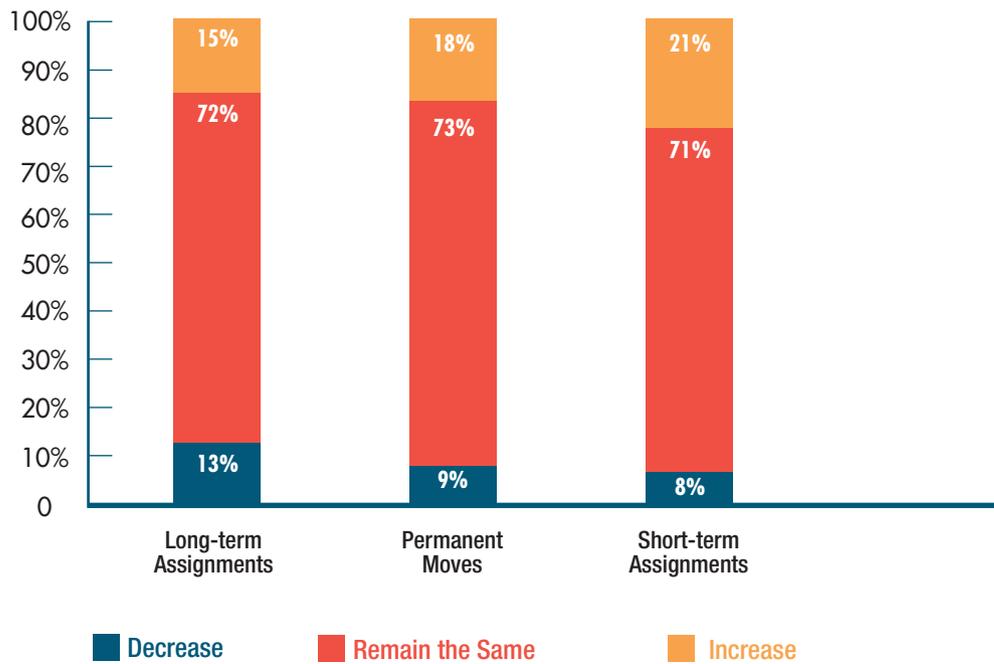
Figure 14A: Compared to 2014, your company's 2015 moves of Chinese nationals into second and third tier Chinese cities have:



Percentages do not total 100% due to rounding.

Participants rated the change in their volume based on a five-point range that included "Significantly increased," "Somewhat increased," "Remained the same," "Somewhat decreased," and "Significantly decreased."

Figure 14B: Compared to 2015, do you anticipate that your company's moves of Chinese nationals into second and third tier Chinese cities in 2016 will:



Participants rated the change in their volume based on a five-point range that included "Significantly increased," "Somewhat increased," "Remained the same," "Somewhat decreased," and "Significantly decreased."

FAMILY RESISTANCE to moving is the top significant challenge to moving Chinese nationals within China.

TOP 3 SIGNIFICANT CHALLENGES TO
LONG-TERM DOMESTIC
ASSIGNMENTS:

1. Family resistance to moving
2. Environmental Issues in host location
3. Cost-of-living differences



TOP 3 SIGNIFICANT CHALLENGES TO
DOMESTIC PERMANENT
MOVES:

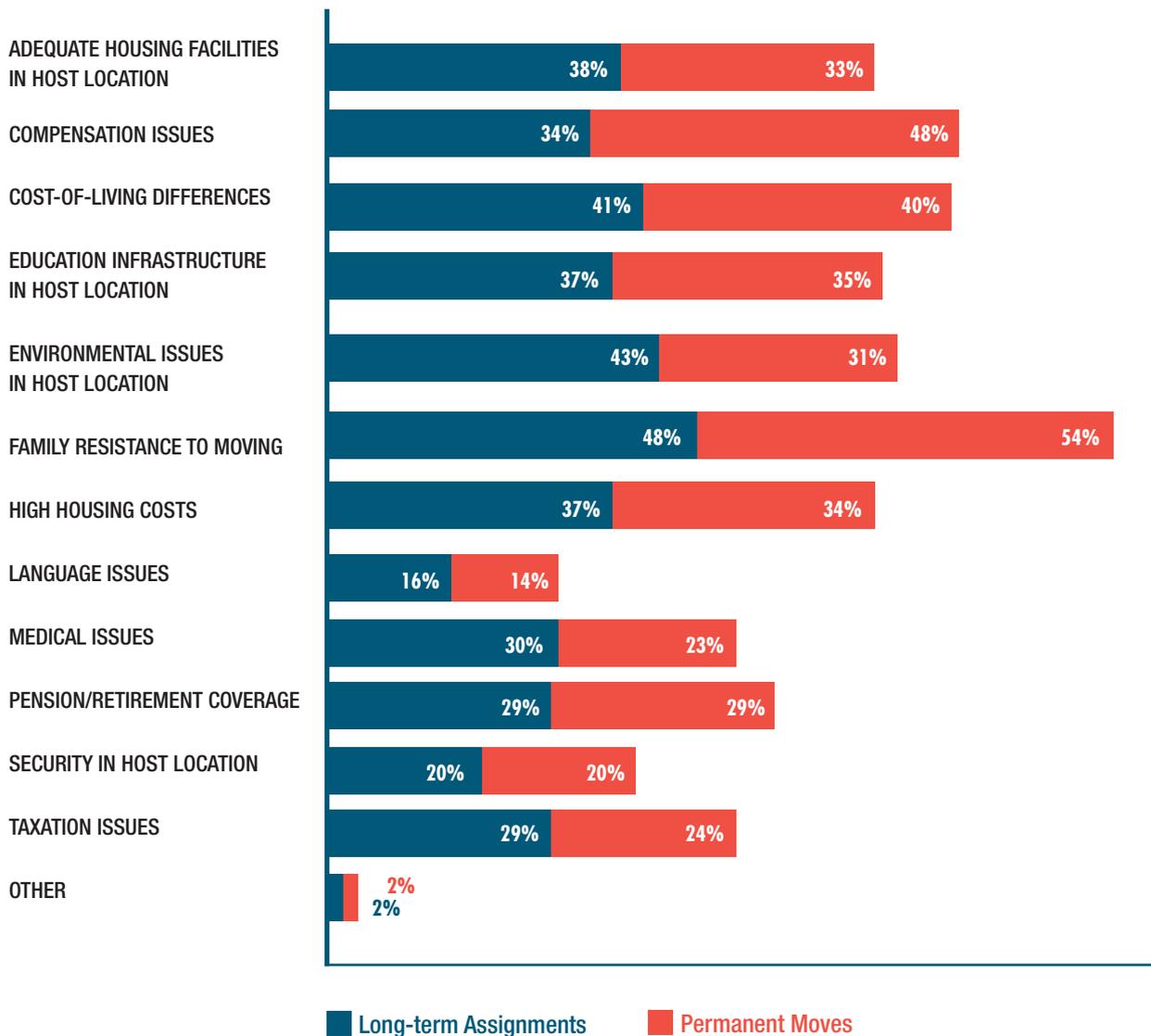
1. Family Resistance to moving
2. Compensation Issues
3. Cost-of-living differences



ENVIRONMENTAL ISSUES RANK SECOND as a significant challenge to long-term domestic assignments.

FIGURE 15: FOR EACH TYPE OF MOBILITY, INDICATE THE MOST SIGNIFICANT CHALLENGES FACED BY YOUR COMPANY WHEN MOVING CHINESE NATIONALS WITHIN CHINA.

Percent of companies

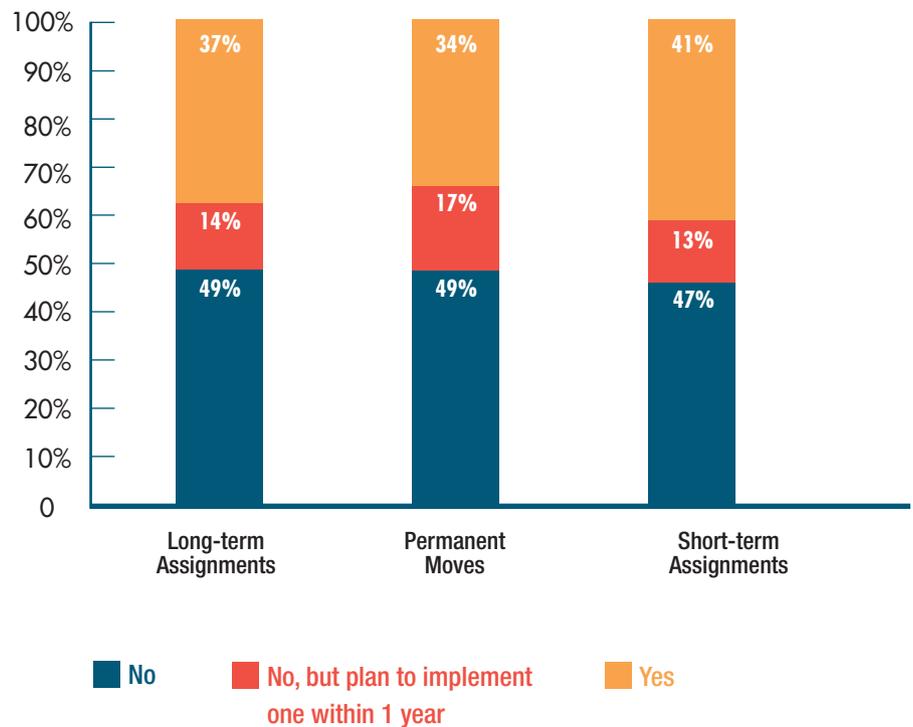


Percentages do not total 100% due to multiple responses.

In Worldwide ERC®'s 2013 Talent Mobility in China report, less than half of firms had formal policies in place for various types of moves.

FIGURE 16: DO YOU HAVE FORMAL POLICIES DEVELOPED FOR DOMESTIC MOBILITY WITHIN CHINA?

Percent of companies



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(Some participants chose to remain anonymous.)

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ADP	Cisco Systems, Inc.
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AkzoNobel Global	CNH Industrial
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Amaris	Covestro
Amkor Technology	Cummins, Inc.
Analog Devices, Inc.	DaVita Healthcare Partners, Inc.
Aramco	Dell, Inc.
Avanade, Inc.	Deloitte
Avery Dennison Corporation	Delphi Automotive, LLP
BAE Systems	Discover Financial Services
Bank of America	The DOW Chemical Company
Bechtel Corporation	Dulwich College
Bekaert Corporation	Eaton Corporation
bioMerieux Vitek, Inc.	EMC Corporation
BNP Paribas	Emerson
Boehringer Ingelheim Pharmaceuticals, Inc.	Emigra
Boeing	Encore Capital Group
Bombardier, Inc.	Ericsson, Inc.
BorgWarner, Inc.	ERM Hong Kong Limited
Bradesco S.A.	EY
Broadcom Corporation	Fiat Chrysler Automobiles
CareFusion	Fonterra Co-operative Group Limited
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- Know when and how an organization's business and talent strategies can be accomplished through talent mobility
- Build a compelling case to demonstrate how talent mobility supports business strategy.

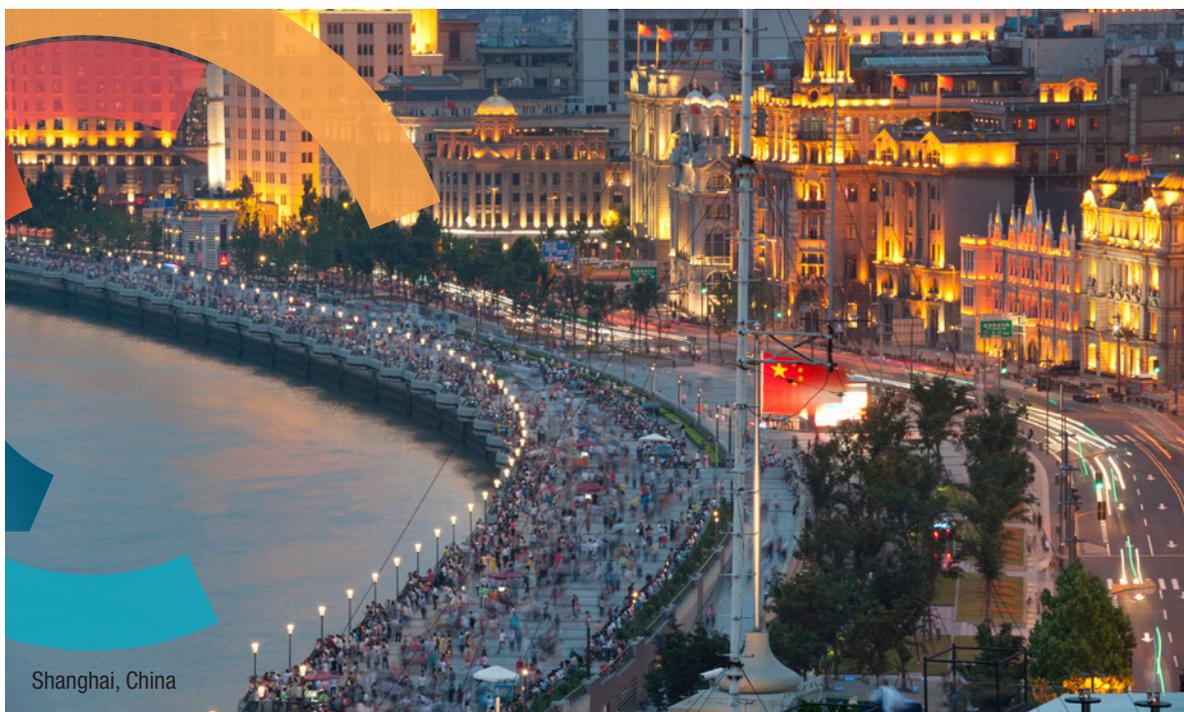
Learn through illustrative examples that show how leading companies have achieved success by integrating their talent mobility practices into their talent management planning.

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Gulfstream Aerospace Corporation	Mediacom
Hasbro, Inc.	Merck
Hess Corporation	Metro Movers
Hewlett Packard Enterprise	Micron Technology, Inc.
Hisense Group	Monetary Authority of Singapore
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Honeywell International, Inc.	NetApp, Inc.
HSBC Bank, PLC	NIKE, Inc.
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Inditex	Oceaneering International, Inc.
Infosys Limited	ON Semiconductor
ING Group	ORIX Asia Limited
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Saudi Basic Industries Corporation - SABIC
SC Johnson - A Family Company
Schaeffler Holding Co. Limited
Schneider Electric
SCIEX
Secret
Seyfarth Shaw, LLP
Siemens Corporation - Global Shared Services
Software AG
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Starbucks Coffee Company
State Street
Stryker
Sunway Group
Swire Hotels
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