WORLDWIDE ERC®

Talent Mobility in CHINA

2017

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Talent Mobility in CHINA

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Talent Mobility in CHINA

Economists have been reporting for the past several years that China's economy is slowing. Recent reports put China's 2016 GDP growth at 6.7%. Although this is better than many economists' predictions, it is a sharp reduction from the double-digit growth in GDP seen in the previous two decades. Estimations of the China economy based only on the GDP, however, fail to recognize how complicated this slow growth really is. In October, *The Economist* reported that property sales and corporate earnings are still strong and; "prices of goods started rising after a four-year period of deflation." Yet, the *Financial Times* recently reported that "[c]onsolidated net losses reported by companies listed in Shanghai and Shenzhen for the first half of 2016 total 62.6 billion RMB (US$9.38 billion)...an increase of 23.5% year over year."

The complicated nature of the Chinese economy serves as the backdrop for our survey of companies about their talent mobility into and within China. It seems that the complex economic picture, combined with uncertainty about China's economic policies, treatment of non-Chinese companies, and leadership transition as well as a dynamic global political atmosphere, all combine to make many multinational companies less confident about their prospects in China.

This is the finding of two separate and independent annual surveys from the U.S.-China Business Council and The American Chamber of Commerce in China (AMCHAM).

The U.S.-China Business Council's *2016 China Business Environment Survey* found companies increasingly ambivalent about their Chinese investments. According to the survey, almost three-quarters of responding companies have an optimistic or somewhat optimistic five-year outlook—the lowest total over the past decade. About a quarter reported that their revenue from China decreased in 2015, although 90% reported that their operations in China remained profitable. The report notes that, "Companies are responding by doing what would be expected – cutting costs, slowing investment, controlling hiring...but not pulling out."

Similarly, the American Chamber of Commerce in China's *2017 China Business Climate Survey Report* found companies are not prioritizing investment in China as much as they did in years past, although they continue to view China as an important market.

Companies' conservative approaches to operating in China seem to stem from a lack of clarity regarding China's economic future. This lack of clarity is apparent in three key areas:

1. The current state of China's economy

2. The evolution of China's prevailing macro-economic philosophies and upcoming decisions regarding leadership at a top economic government agency

3. The future of international trade and trade agreements, particularly with the United States

The Current State of the Chinese Economy

Mark Magnier for *The Wall Street Journal* reported that last year's growth in China was helped by monetary easing and a strong property market and that policy changes may lead to slower growth next year. According to Douglas Bulloch, a contributor to *Forbes*, growth in 2016 remained stable in part because China has been "building vast amounts of infrastructure and productive capacity in its state-owned enterprises." This kind of governmental support and rapid debt accumulation allows companies to remain in business that otherwise would be forced to close their doors.

The International Monetary Fund has issued a report entitled "Resolving China's Corporate Debt Problem." They argue against a "purist market approach" to debt reduction in this instance because both the creditors and the debtors are state-owned. Rather, IMF recommends that the government appoint financial regulators, assess which companies are the best positioned to succeed in the long-term and establish greater transparency in the banking system.

Policy change is likely to be slowed by the fact that China's top leadership structure is in transition. Magnier writes:

> *"...the [Chinese] leadership will only let growth moderate slightly, trying to keep the economy stable ahead of a reshuffling of the top echelon of the Communist Party later this year. China's leadership will tolerate a slower rate of growth this year—likely around 6.5%—to fend off asset bubbles and other financial risks that have become a leading priority, according a senior government adviser."*

The European Commission's *European Economic Forecast,* Winter 2017, echoes this finding, stating:

> *"China's current policy mix appears to be one of 'buying time' for necessary structural reforms by sustaining short-term growth through demand management measures and attempting to stabilize expectations in financial and foreign exchange markets."*

China's Evolving Economic Philosophy

Changes in China's economic policies and regulations may need to begin at the top, with a fundamental shift in China's economic philosophy. At the time of this reporting, there is still little understanding of what China's path forward will be. Kenneth Rapoza, a contributor to *Forbes* reports that while attending the recent World Economic Forum in Davos, President Xi Jinping "tout[ed] the wonders of open markets." But, many see a divide between this economically liberal rhetoric and the actual practices and economic beliefs that are borne out in policy and regulatory decisions in China.

The debate over the future of the Chinese economy is seen in both academia and in government administration. Recently, economic professors, Justin Lin and Zhang Weiying of Peking University have begun to intensify their ongoing philosophical debates over whether public spending is an answer to China's economic issues.

Central to China's economic path forward is the selection of a new Director for the National Development and Reform Commission. The NDRC is an important state agency concerned with macro-economic analysis, strategy and implementation. Some of the NDRC's primary responsibilities are the study and development of strategies for national economic and social development, restructuring of the economic system and establishment of relevant laws and regulations.

Liu He, a deputy director at NDRC and a top economic adviser to President Xi Jinping is currently under consideration to succeed the current chairman, Xu Shaoshi. According to Chris Buckley and Keith Bradsher reporting for *The New York Times,* Liu supports "trimming…state-owned industry and curtail[ing] China's ever-rising debt." These views are somewhat at odds with the current NDRC's more "conservative agenda to restore party control and protect state companies," but, Liu's views appear to be gaining momentum in some government circles. Lingling Wei of *The Wall Street Journal* reports that at a recent conference for the China 50 Forum, Yang Kaisheng, an adviser at the China Banking Regulatory Commission, acknowledged the high debt levels and stated that "the central government has made cutting debt a top economic priority."

The Future of International Trade and Trade Agreements

Complicating China's economic future still more is the election of President Donald Trump in the United States. Thomas Friedman, in a recent op-ed for *The New York Times*, expressed concern that President Trump's protectionist rhetoric could make China's leadership wary of changing economic policies and raise the specter of a trade war. Friedman wrote that while he generally supports Trump's instincts on the "need to strike a better long-term trading arrangement with China," he worries about the productiveness of Trump's "pugnacious tactics," believing that they could result in a trade war, with individual countries imposing their own sets of tariffs and trade restrictions in response to such measures by the United States.

Trump's January pullout of the Trans-Pacific Partnership will require countries to negotiate their own bilateral agreements with China. Uncertainty about how these agreements may impact future business in China may also be contributing to companies' hesitancy regarding investment and growth in the region. While attending the World Economic Forum, Bill George of *Fortune* spoke with CEOs from American, European and Asian companies and reported that "all of them are scrambling to adapt to these sudden changes in the global order." He continued,

> *"Many of them have invested billions in building up their businesses in China. Now, they fear their plans are in jeopardy. Major global manufacturers from…automotive, pharmaceutical, chemical, medical technology, and consumer products [industries] worry that Trump's new policies could disrupt their global manufacturing plans, which have been carefully constructed to optimize the efficiency of their supply chains based on free trade policies."*

Yet, there are reasons to be optimistic about the future of U.S. and Chinese trade relations. A recent article by Rapoza argues that Chinese business leaders may see Trump's language to be more good business strategy than political philosophy. Both AmCham and U.S.-China Business Council believe that many of their reporting organizations' top concerns can be wholly or partially resolved with the development of positive bilateral relations.

Impact on Workforce Mobility

Worldwide ERC® partnered with survey sponsor SIRVA Worldwide for this *Talent Mobility in China* survey, conducted between November and December 2016. One hundred and sixteen companies representing 31 industries responded. We developed this survey interested in the current state of workforce mobility in this economic and political environment. Specifically, we focused on four key areas:

1. What are the current mobility trends into, out of, and within China?

2. Are we seeing any evolution in how companies address employee development? How are they focusing on developing local talent?

3. Last year, environmental concerns were a top-ranked challenge to sending expatriate assignees into China. How do they rank this year?

4. Most responding companies indicated that they have no formal mobility assistance policies for domestic moves within China. What factors are discouraging implementation?

Mobility Volumes and Localization Trends

This year's survey participants report that mobility into China remained relatively stable in 2016, although 29% indicated that their long-term assignments had decreased. Most companies predict that their volumes will remain about the same in 2017 (See Figures 1A and 1B). Participants also predicted that the number of expatriate assignees they localize will remain about the same. Companies generally reported stability in other areas as well, including mobility of Chinese nationals out of China (See Figure 3) and domestic mobility within the country (See Figure 12). These findings may reflect companies' uncertainty about their economic prospects in China.

A mobility manager for a chemicals company told us that she sees a potential decrease of long-term assignments. This company is currently working on strategies to categorize long-term assignments as strategic and developmental. The company also seeks to optimize permanent moves and local-plus policies to save costs.

Reasons for Short-term Assignments into China

Project/task completion, business needs and employee development continue to rank as the top three reasons for short-term assignments into China (See Figure 4).

More than one-third of responding companies predicted an increase in short-term assignments in 2017 (See Figures 1A and 1B).

A mobility manager in China with a western multinational company shared that her company is experiencing increased mobility into China, particularly short-term assignments, as the result of multiple expansion projects.

Employee development is one of the top reasons for long-term and short-term assignments into China (See Figure 4). The emphasis on employee development may be related to a growing trend of linking talent management and talent mobility. As Sylvia Vorhauser-Smith, a contributor to *Forbes*,writes:

> *"[E]mployees with international experience become an even greater asset to their organization. International assignments can help increase cultural literacy, facilitate the mastery of foreign languages, expand the professional network and broaden perspectives.*

Interestingly, companies continue to grade their talent mobility and management integration relatively poorly. This year and last, survey participants graded their companies' integration at an average score of 2.9 on a 5-point scale (See Figure 10). Companies may be choosing to leverage mobility in their talent management programs selectively. For example, they may use mobility well in employee development but not in other aspects of talent management, such as career-path planning.

According to another mobility manager, the talent management in her company is focused on local staff development and does not currently link its talent and mobility teams. The company has no assessment tools for mobility or talent management teams to use for assignment selection and tracking.

Controlling Costs

Responding companies also reported concerns regarding controlling costs (See Figure 5), particularly for long-term assignments and permanent moves. This year, developing local talent topped our list of cost-control approaches. This may be a manifestation of a larger and broader business trend in Asia of investing in its local talent development.

According to Rosemary Goater and Charles Moore of the *China Business Review*, Asian business leaders worry that their current talent pool lacks a breadth and depth of experience needed to quickly adapt in a constantly changing business environment. They speculate that this is due to a number of factors including a retiring leadership structure that is "not being replaced by new entrants to the workforce."

One mobility manager in China argues that improving the breadth and depth of the talent pool depends on a company having in place internal job opportunities that hone and develop needed skill sets and a robust talent development system. If the business does not have these opportunities, policies and procedures in place, it is very hard to develop the required skills to improve the talent pool.

One mobility manager reported that talent shortage concerns may be a result of how effectively companies are developing employees based on business needs. This company's talent team has frequent conversations with business heads in order to understand business trends and future talent pool needs. This collaboration allows the talent team to prepare for the next few years.

Environment Continues as Top Concern

Environmental concerns continue to be the top reported challenge to moving long-term and permanent assignees into China (See Figure 11). As Edward Wong reported last year in *The New York Times*, China is showing continuing signs of wanting to address the issues. Coal consumption in China is decreasing, leading to a reduction in greenhouse gas emissions. Additionally, in January, Wong reported that "China has indicated that it wants to take on a leadership role to promote the Paris Agreement" on climate change, and the Chinese National Energy Administration plans to spend $360 billion on "renewable energy sources and create more than 13 million jobs in that sector."

Successful Mobility and Talent Management

"Successful integration requires a good balance between business needs and personal inspiration. The challenge is that both change quite often. Mobility and Talent Management need to keep track and adjust their plans whenever necessary."

—MOBILITY MANAGER IN CHINA WITH WESTERN MULTINATIONAL COMPANY

Policies for Domestic Mobility Still Relatively Rare

When asked if they have formal assistance policies for domestic mobility in China, more than half of respondents stated that they do not currently have such a policy. Approximately 70% of respondents indicated that they do not currently have a formal policy for domestic mobility within China for long-term assignments, permanent moves and short-term assignments (70%, 73% and 67%, respectively) (See Figure 16).

One mobility manager told us that her company does have occasional problems with relocation support for domestic move; however, because of the relatively low frequency of such moves. Her company handles them on a case-by-case basis rather than creating a new policy.

Conclusion

We anticipate mobility activity will remain relatively stable as China continues to see modest growth in the coming year as the economy stabilizes, new political leadership is chosen, trade negotiations stabilize and China continues its growing leadership in environmental reform.

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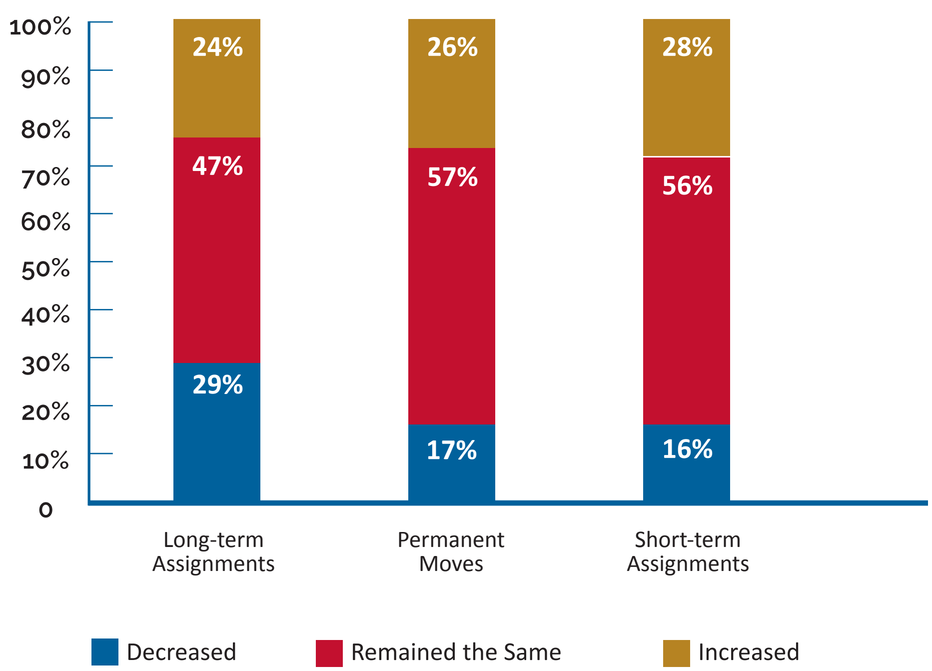
ASSIGNMENTS INTO MAINLAND CHINA

FIGURE 1: MOBILITY TRENDS

FIGURE 1A: Compared to 2015, your company's 2016 moves into China have:

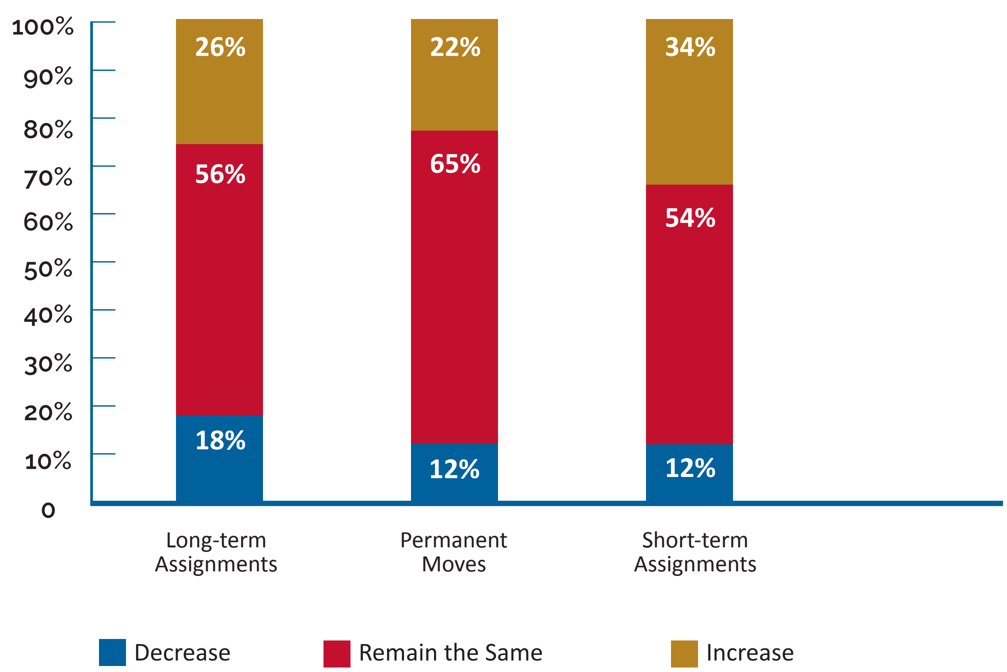


Percentages may not total 100% due to rounding.

Participants rated the change in their moves based on a 5-point scale that included "Significantly increased," "Somewhat increased," "Remained the same," "Somewhat decreased," and "Significantly decreased."

The majority of companies generally report their recent and anticipated mobility remaining about the same. Short-term assignments appear to be the type of mobility most likely to increase.

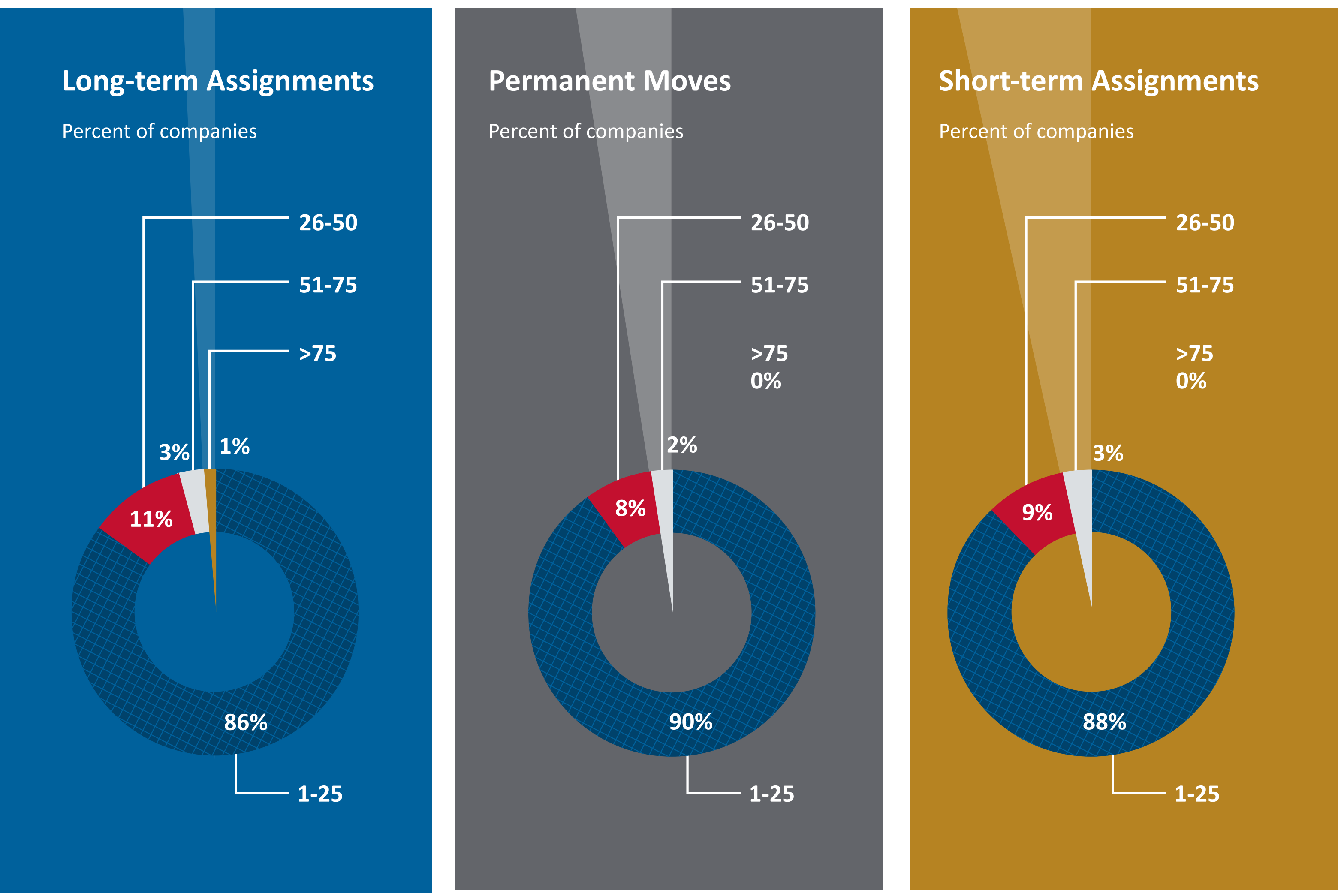
FIGURE 1B: Compared to 2016, do you anticipate your company's moves into China in 2017 will:



Percentages may not total 100% due to rounding.

Participants rated the change in their moves based on a 5-point scale that included “Significantly increase,” “Somewhat increase,” “Remain the same,” “Somewhat decrease,” and “Significantly decrease.”

FIGURE 2: APPROXIMATELY HOW MANY EXPATS IN TOTAL DID YOUR COMPANY MOVE INTO CHINA IN 2016?

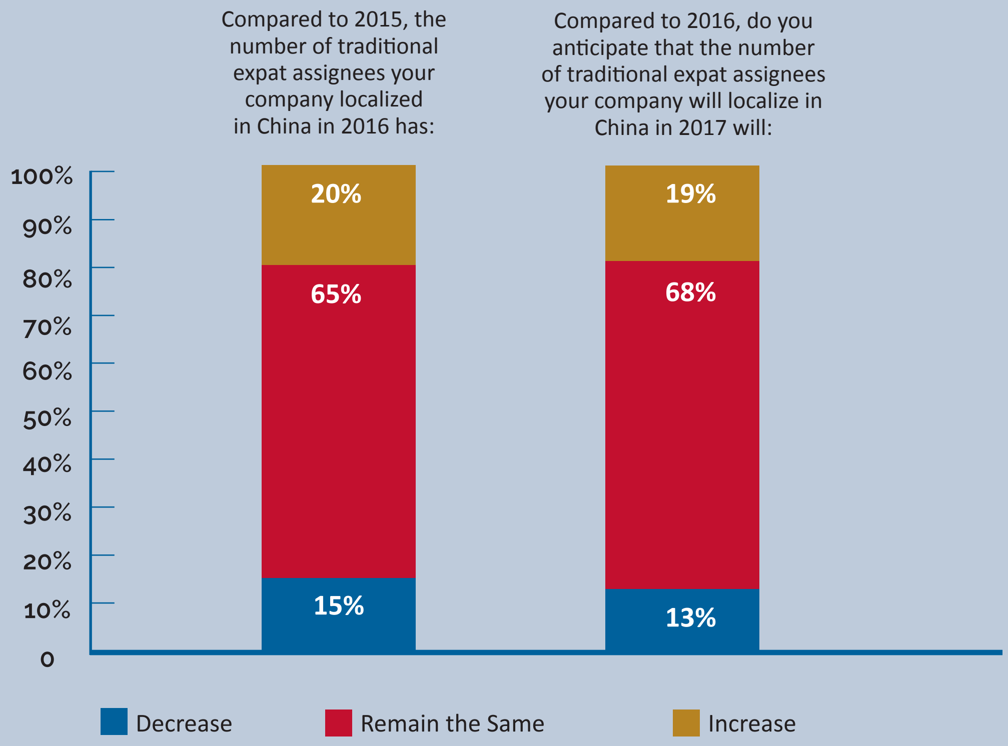


Percentages may not total 100% due to rounding.

Most companies report little change in the number of traditional expat assignees they localized in 2016 and most anticipate similar numbers for 2017.

FIGURE 3: LOCALIZATION TRENDS

Percent of companies



Participants rated the change in their localizations based on a 5-point scale that included "Significantly increase(d)," "Somewhat increase(d)," "Remain(ed) the same," "Somewhat decrease(d)," and "Significantly decrease(d)."

Top Reasons for LONG-TERM EXPAT Assignments 2016 and 2017

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

Top Reasons for PERMANENT MOVES 2016 and 2017

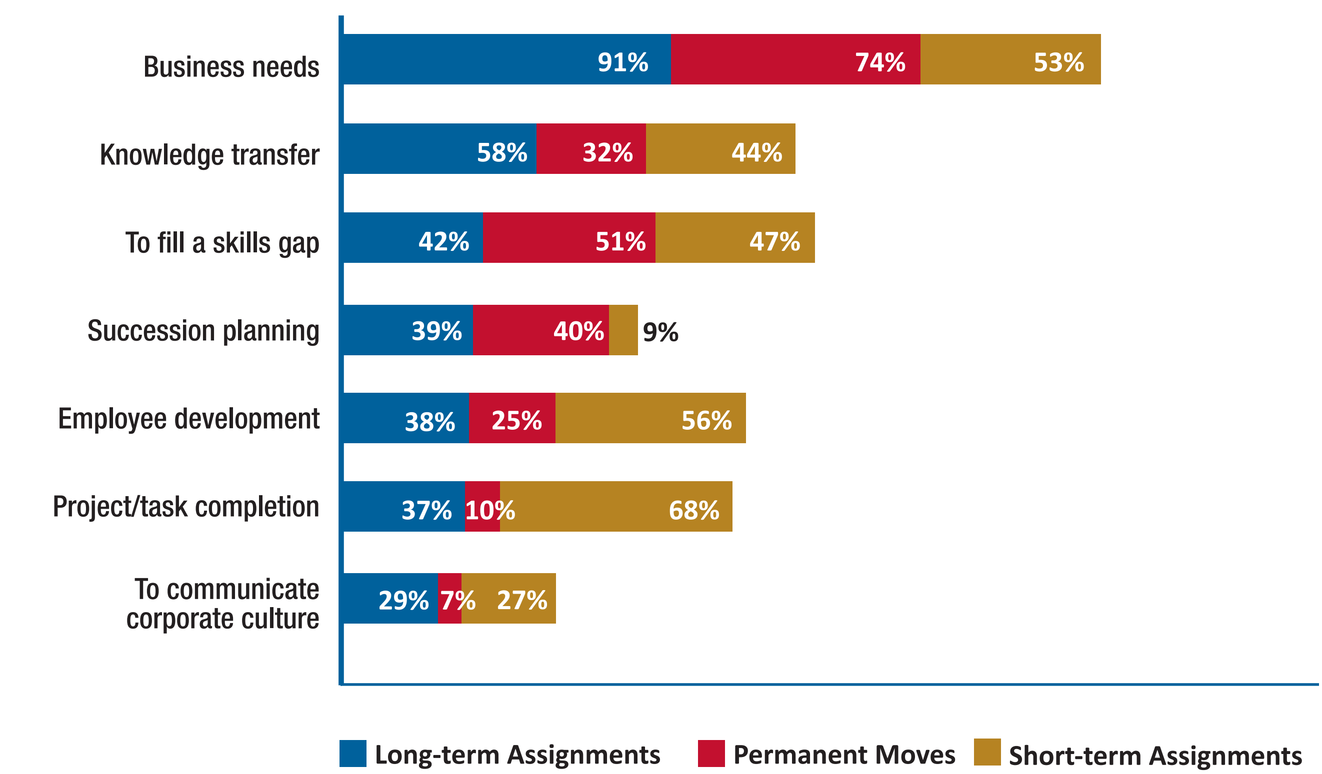
- Business needs
- To fill a skills gap
- Succession planning

Top Reasons for SHORT-TERM EXPAT Assignments 2016 and 2017

- Project/task completion
- Employee development
- Business needs

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

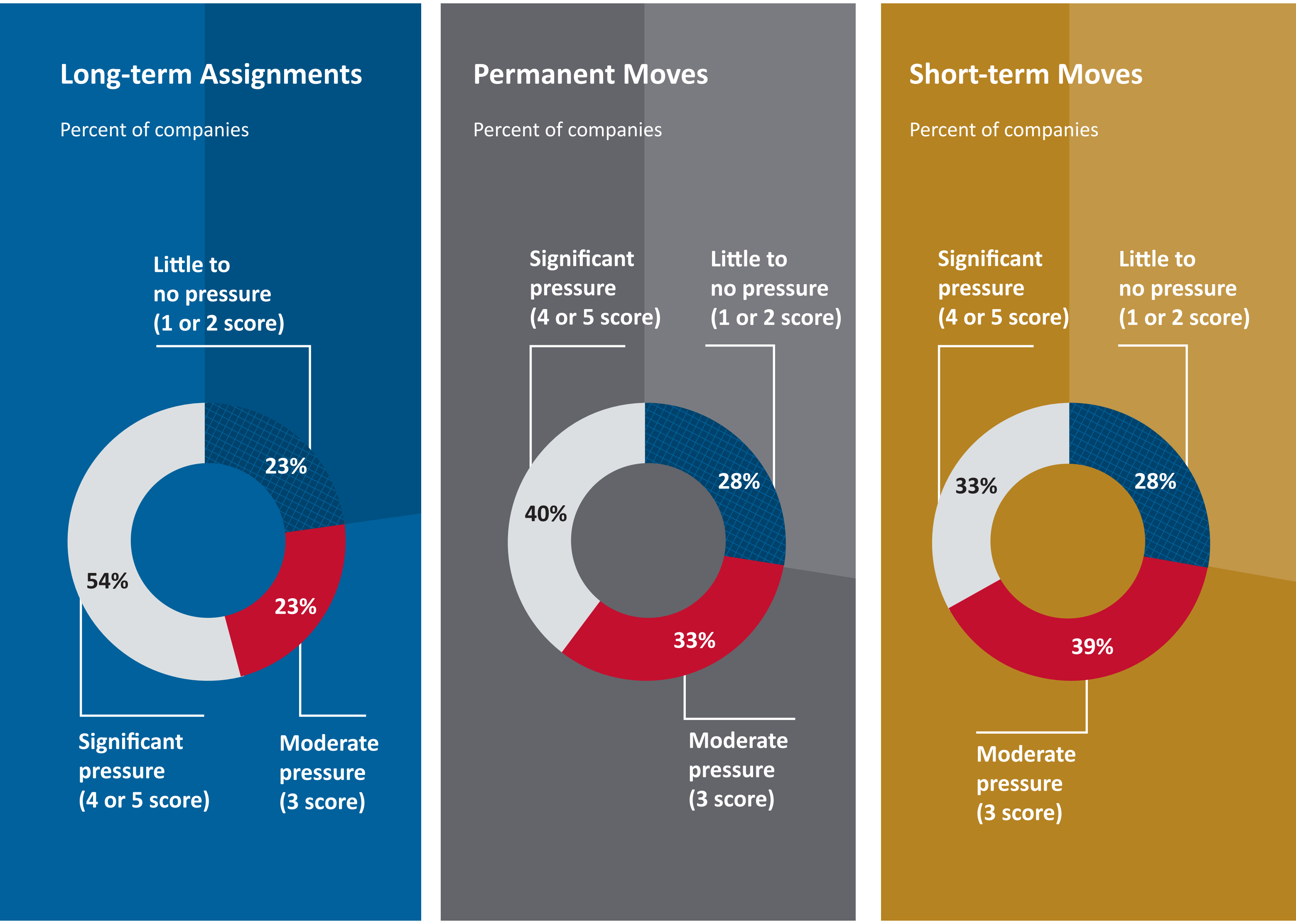
Percent of companies



Percentages do not total 100% due to multiple responses.

Fewer respondents noted that they face significant pressure to reduce the costs of long-term assignments in the 2017 study (54%) than did in the 2016 study (66%). The number reporting significant cost pressure on permanent moves rose from 36% in 2016 to 40% this year while the number reporting significant pressure on the cost of short-term assignments moved from 44% in the 2016 study to 33% this year.

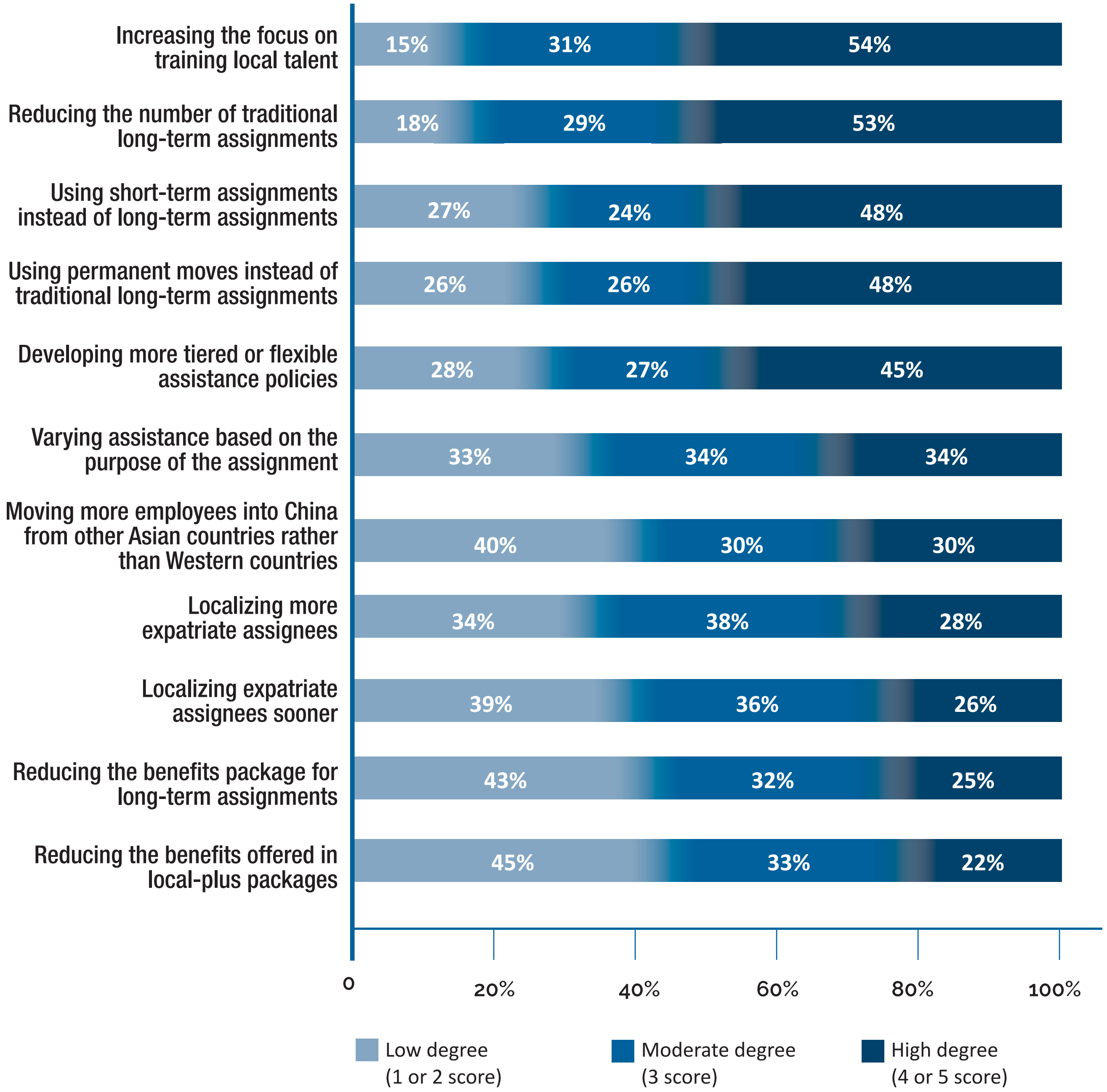
FIGURE 5: FOR EACH OF THE FOLLOWING TYPES OF MOBILITY INTO CHINA, INDICATE HOW MUCH PRESSURE THERE IS FROM MANAGEMENT TO REDUCE COSTS.



Percentages may not total 100% due to rounding.
Participants rated the pressure to reduce costs on a 5-point scale with 1 indicating “No pressure” and 5 indicating “Significant pressure.”

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

Percent of companies



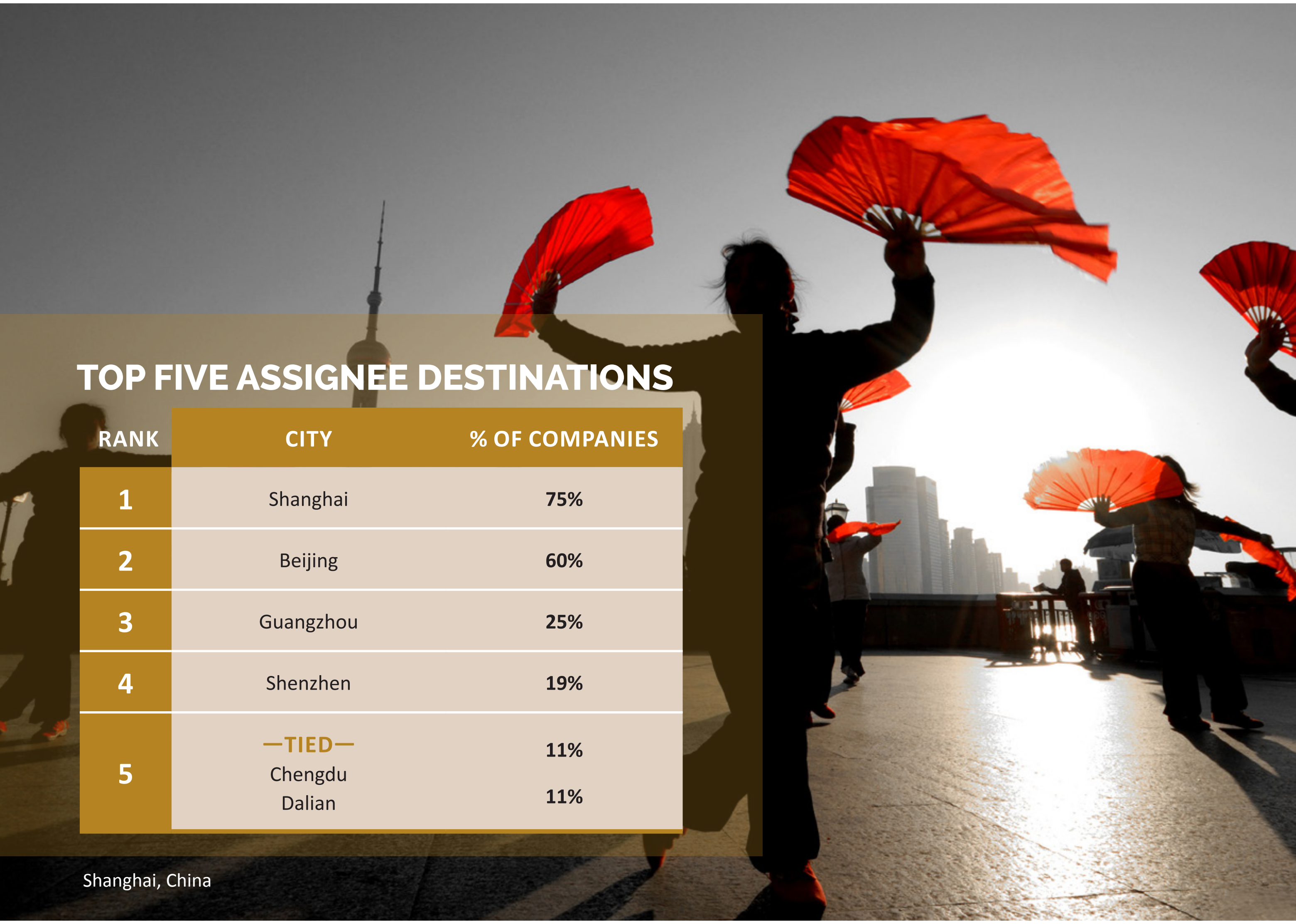
Percentages may not total 100% due to rounding.

Participants rated their companies' reliance on these cost-control approaches on a 5-point scale with 1 indicating "low degree" and 5 indicating "high degree."

TOP 5 APPROACHES TO
REDUCING MOBILITY COSTS

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

Based on weighted averages.



TOP FIVE ASSIGNEE DESTINATIONS

RANK	CITY	% OF COMPANIES
1	Shanghai	75%
2	Beijing	60%
3	Guangzhou	25%
4	Shenzhen	19%
5	—TIED— Chengdu	11%
5	Dalian	11%

Shanghai, China

85% of companies involve corporate headquarters in the management of their China assignments.

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

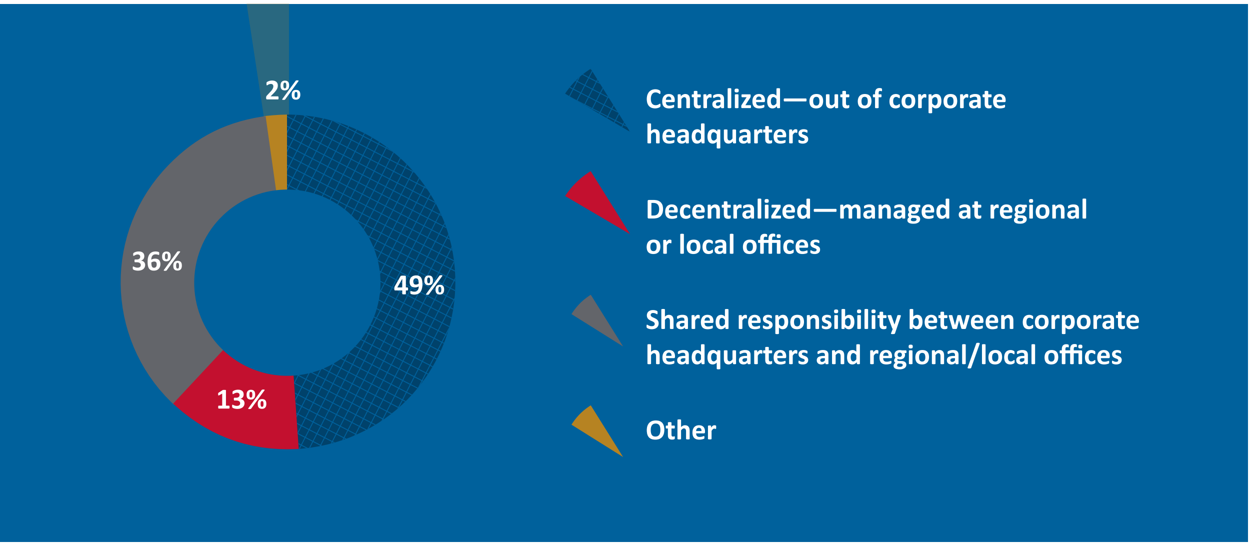
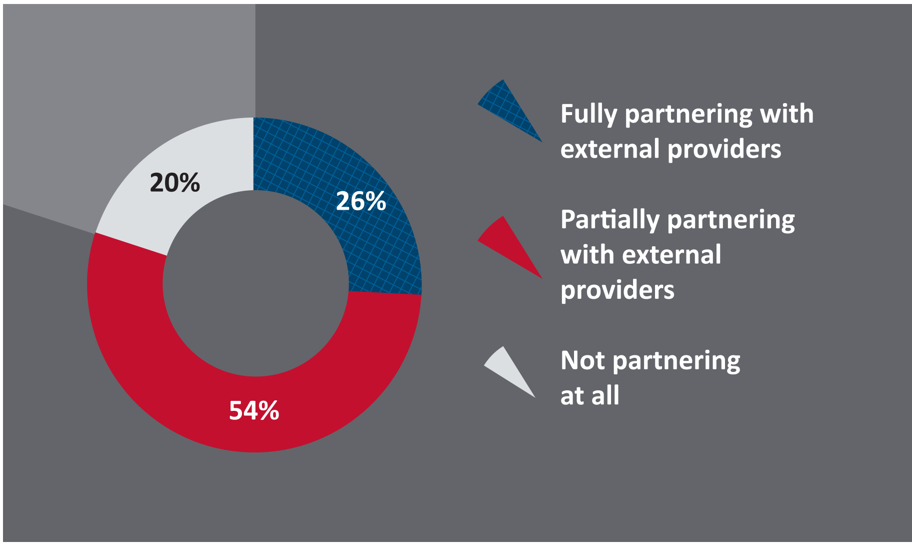
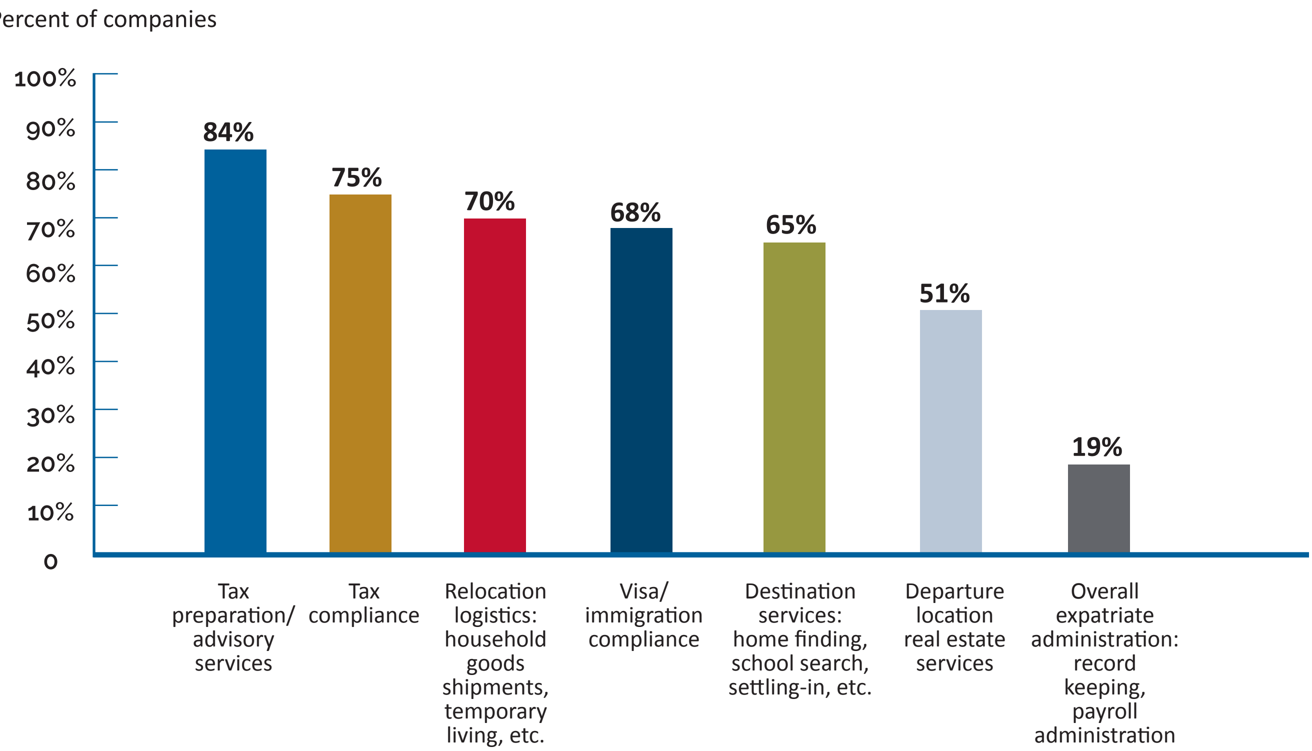


FIGURE 8: HOW ARE ASSIGNMENTS INTO CHINA CURRENTLY BEING ADMINISTERED?

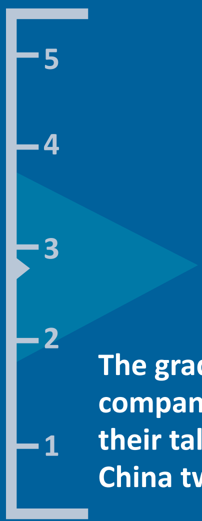


It is not surprising, given companies' focus on compliance, that tax preparation/advisory services and tax compliance are the two most frequently outsourced services.

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



Percentages do not total 100% due to multiple responses.



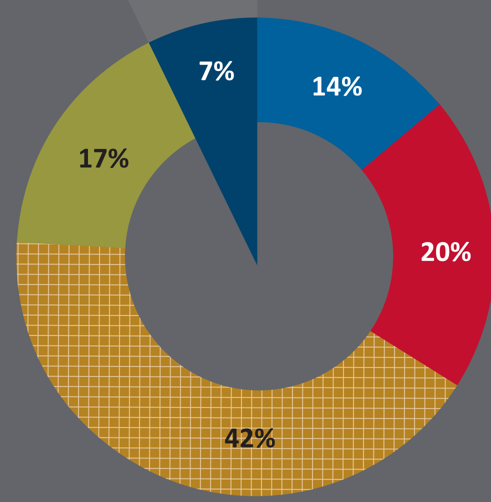
2.9

The grade respondents gave their companies' use of talent mobility in their talent management strategies in China two years in a row.

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)

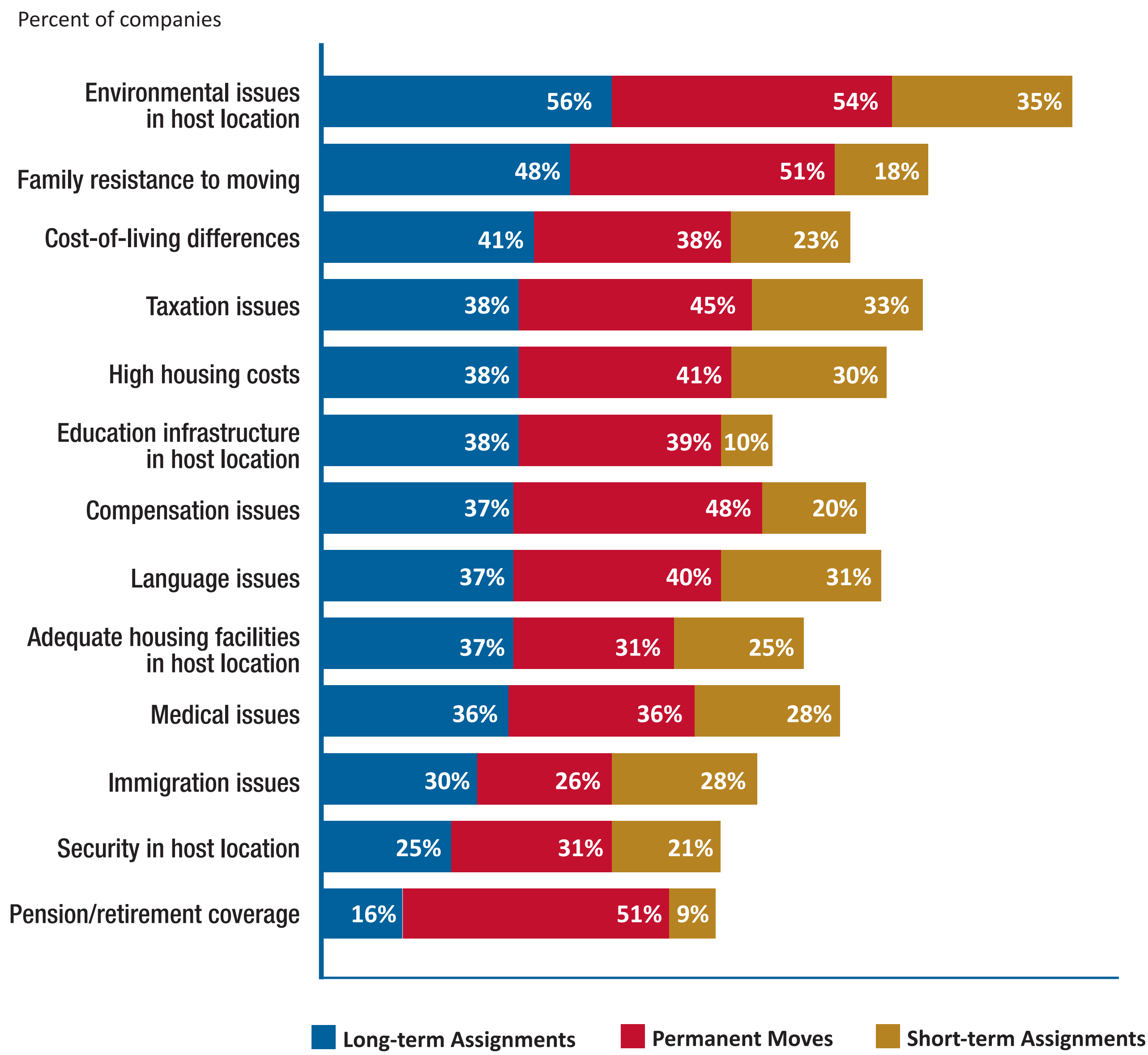
To a significant extent (4 score)

To a great extent (5 score)

Participants rated their company's use of talent mobility in its talent management strategies on a 5-point scale with 1 indicating "not at all" and 5 indicating "to a great extent."

Similar to the 2016 report, environmental issues in host location still top the list of challenges to moving expatriates into China.

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

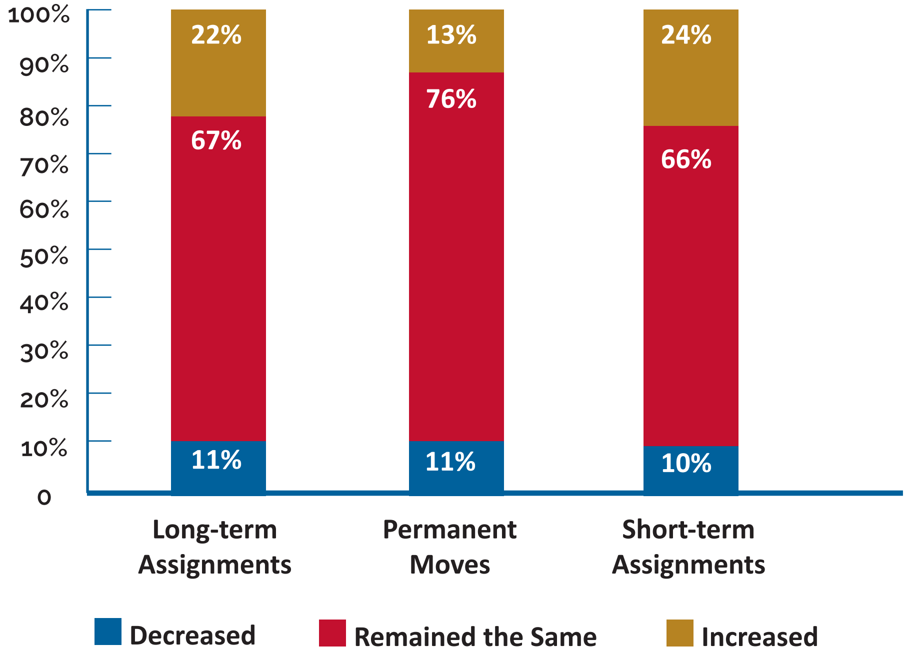


Percentages do not total 100% due to multiple responses.

ASSIGNMENT OF CHINESE NATIONALS OUTSIDE OF CHINA

FIGURE 12: COMPARED TO 2015, YOUR COMPANY'S MOVES OF CHINESE NATIONALS OUTSIDE OF CHINA IN 2016 HAVE:

Percent of companies



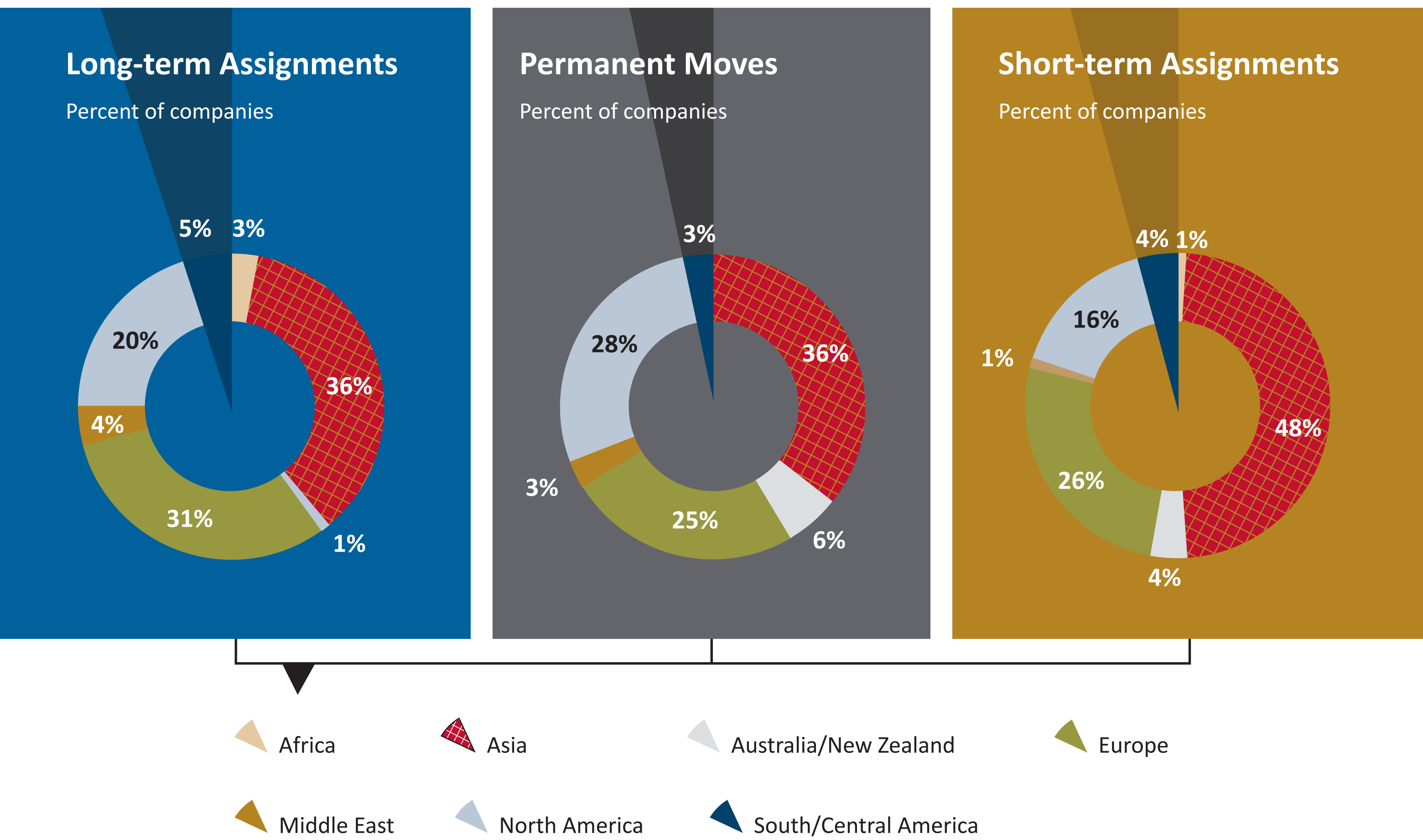
Participants rated the change in their volume based on a 5-point scale that included "Significantly increased," "Somewhat increased," "Remained the same," "Somewhat decreased" and "Significantly decreased."

TOP 3 REGIONS

RECEIVING CHINESE NATIONALS

ASIA | EUROPE | NORTH AMERICA

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

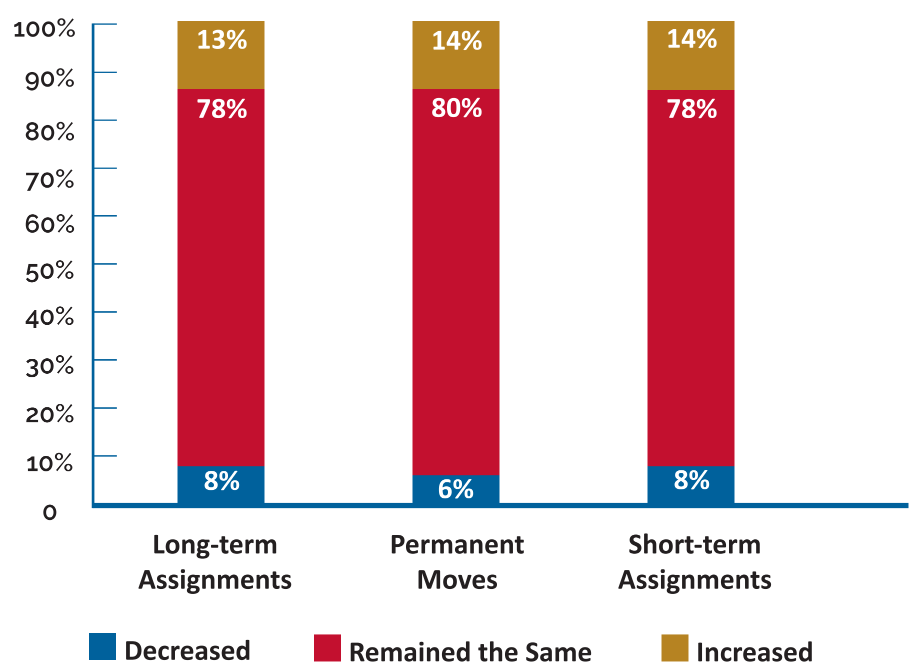


Percentages may not total 100% due to rounding.

MOVES DOMESTICALLY WITHIN MAINLAND CHINA

FIGURE 14: MOBILITY INTO SECOND- AND THIRD-TIER CHINESE CITIES

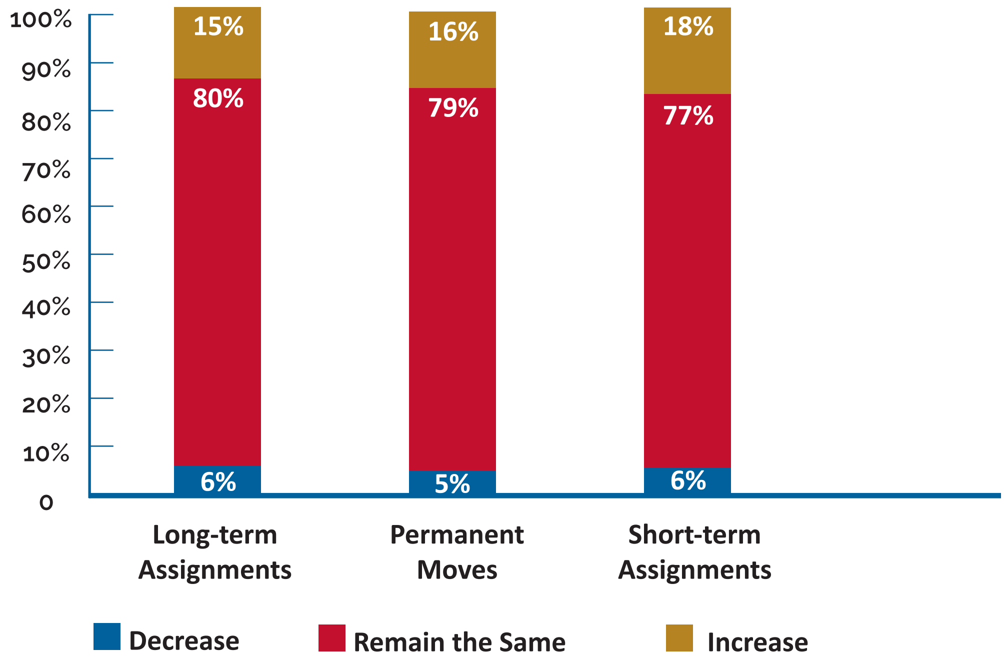
Figure 14A: Compared to 2015, your company's 2016 moves of Chinese Nationals into second- and third-tier Chinese cities have:



Percentages may not total 100% due to rounding.

Participants rated the change in their volume based on a 5-point scale that included "Significantly increased," "Somewhat increased," "Remained the same," "Somewhat decreased," and "Significantly decreased."

Figure 14B: Compared to 2016, do you anticipate that your company's moves of Chinese Nationals into second- and third-tier Chinese cities in 2017 will:



Percentages may not total 100% due to rounding.

Participants rated the change in their volume based on a 5-point scale that included "Significantly increase," "Somewhat increase," "Remain the same," "Somewhat decrease," and "Significantly decrease."

TOP 3 CHALLENGES TO

LONG-TERM DOMESTIC ASSIGNMENTS:

1. Compensation issues
2. Family resistance to moving
3. Cost-of-living differences

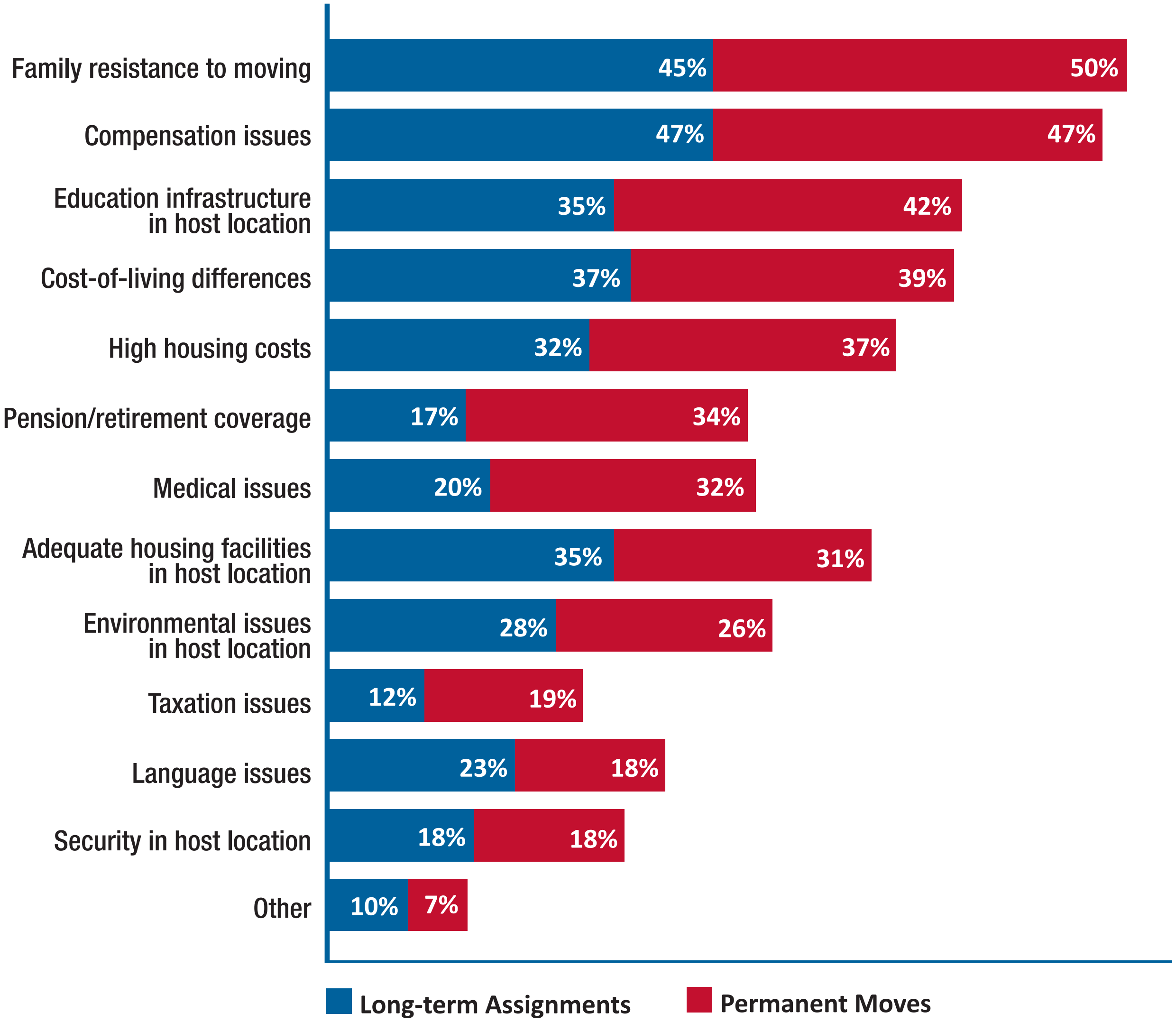
TOP 3 CHALLENGES TO

DOMESTIC PERMANENT MOVES:

1. Family resistance to moving
2. Compensation issues
3. Education infrastructure in the host location

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

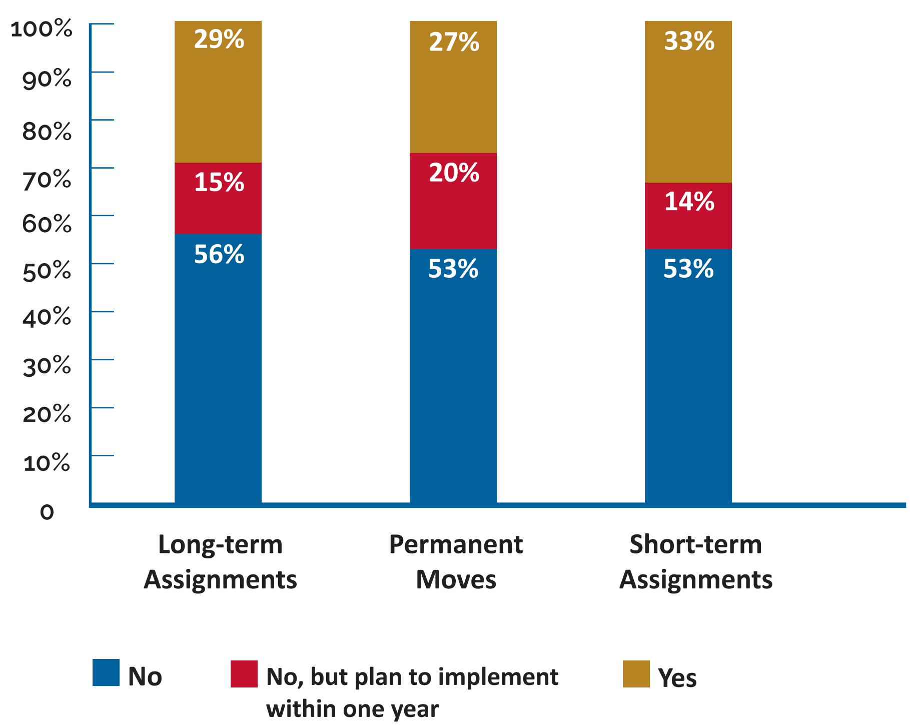


Percentages do not total 100% due to multiple responses.

Most companies do not have formal China domestic mobility assistance policies. At the same time, family resistance to moving remains a top challenge. Implementation of formal policies could help mitigate resistance.

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

Percent of companies



PARTICIPATING ORGANIZATIONS

Air Products
Alsafi Danone Company, Ltd.
AIG, Inc.
Amkor Technology
ARCADIS
Avanade, Inc.
BAE Systems
BALtrans International Moving, Ltd.
Bentley Systems, Inc.
Biological E, Ltd.
bioMerieux Vitek, Inc.
Black & Veatch
Blount International
BNP Paribas
BOGE Elastmetall (Shanghai) Company, Ltd.
BorgWarner, Inc.
Cadence Design Systems, Inc.
Canada Pension Plan Investment Board
Cargill, Inc.
Celestica
Charles & Keith Group
Cisco Systems
Coach
Covestro
Cristal USA, Inc.
Dahua Technology
Dell
ECKART Asia
Fonterra
FrieslandCampina Nederland, BV
Fuji Xerox Far East, Ltd.
Fujitsu Consulting Private, Ltd.
Google, Inc.
Great Eastern Life
Hanison Construction Holdings, Ltd.
HCL Technologies
Hewlett-Packard, Inc.
HKR International, Ltd.
Hong Kong RFID, Ltd.
HOYA Surgical Optics
HPI
Hutchison Port Holdings, Ltd.
Hyatt Hotels Corporation
IHG, plc
IKEA
ING Group
Ingersoll Rand
Jabil Circuit, Inc.
Jaguar Land Rover
JG Textile, Ltd.
Johnson & Johnson
Johnson Electric
K2 Corporate Mobility
L Brands
Lear Corporation
Lee Kum Kee International Holdings, Ltd.
LEGO Systems, Inc.
Lion
Macquarie Group
MAHLE Technologies (China) Holding Company, Ltd.
Micron Technology, Inc
Mitel

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