

ECA International Press Pack

Press pack 2016

eca
INTERNATIONAL

What we do



Data



Software



Consultancy



Training

About ECA International

In an age of increasing global mobility, ECA's products and services inform, guide and support managers handling compensation and benefits for international workers moving around the world on a short-term, long-term or permanent basis.

Recognised since 1971 as a world authority in its field, ECA remains a leader in the provision of knowledge, information and technology, offering organisations of all sizes an unrivalled portfolio of data, calculation tools, salary management software, reports, guides and surveys to help them structure and manage their international reward programmes.

These products are complemented by specialist consultancy, training programmes and dedicated support from in-house client services teams in London, Hong Kong, New York and Sydney.

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ECA International's expertise

Everything a company needs
to manage its international
assignees

ECA advises clients and provides coverage on:

- Trends and challenges in international HR
- Expatriate remuneration benchmarking, salary calculation and delivery methods
- Trends in cost of living and accommodation costs
- Salary trends for locally employed nationals and expatriates
- Expatriate benefits and allowance provision e.g. schooling, accommodation
- Legal and tax issues of international transfers
- Global mobility policy development or review
- Costing assignments and cost containment strategies
- Long-term vs. short-term international assignments
- Factors impacting costs of goods and services, and accommodation around the globe
- Factors impacting quality of living around the world
- Managing expatriates for the first time

ECA's experts: London



David Remedios is **Head of Consultancy** and has over 18 years' experience of working in international assignment management. His responsibilities include recommending changes to compensation and benefit design, offering advice to Management & Line HR on the administration of expatriate compensation and benefits, and helping clients, from both developed and emerging markets, initiate process improvements and prepare international assignment cost estimate analysis.



Jacqueline O'Rourke is jointly responsible for the Client Services team at ECA's London office. Jacqueline has worked at ECA for over twenty years, providing technical support for all ECA products, advising on policy development projects and devising and conducting training courses around the world. She regularly chairs meetings and seminars on various subjects in the field of international assignment management and works particularly with clients in Europe, South Africa and India.



Steven Kilfedder is **Cost of Living and Remuneration Services Manager** having joined ECA in 2008. Steven is responsible for coordinating and developing ECA's Cost of Living and local and expatriate salary products and services as well as advising clients on salary and cost of living issues through specially tailored analysis. He has also written several articles and delivered presentations on expatriate compensation and benefits issues.

ECA's experts: continued



Rebecca Darling is Head of Production, responsible for the teams that research, analyse and publish the information forming ECA's core data offering, including cost of living, tax and social security, accommodation and benefits, location allowances and expatriate remuneration. Manager of Tax Services at ECA between 2002 and 2006, Rebecca then worked as a consultant at Ernst & Young before returning to ECA in 2008. During her time there, she gained extensive experience of managing the assignment lifecycle, including calculating compensation, writing assignment letters, assignee briefings, vendor management, payroll and repatriation.

ECA's experts: Asia-Pacific region



Some of our spokespeople

Lee Quane has been **Regional Director for ECA International's Asia operations** since 2003. Lee and his team provide advice and support to ECA's clients in the region, advising them on compensation and benefits and international assignment policy and management. He works on numerous projects, assisting companies starting out in mobility at one end of the spectrum, and established multinationals wishing to stay ahead of the curve at the other. Lee has been heavily involved in the establishment of ECA as one of the most authoritative HR data and solutions providers in the region. As well as acting as ECA's spokesperson in Asia, he regularly presents at international HR seminars, runs training courses and contributes to industry publications in the region.



Anna Michielsen is **ECA's General Manager for Australia, New Zealand and the Pacific** and is based in Sydney. Anna has worked for ECA since 2007. She works across a diverse range of client organisations headquartered in the region including major corporations, government entities and small and medium size enterprises. In addition to managing day to day client requirements Anna has led and managed major expatriate consultancy projects across a wide range of organisations. Anna regularly leads IHR training courses and discussion forums.

International HR stats and facts

ECA runs a number of policy surveys including its Managing Mobility survey: monitoring trends in mobility, looking at expatriate numbers, assignment types and the policies employed by companies from inception to conclusion of assignments. ECA also runs a Expatriate Salary Management Survey examining how different drivers affect salary management policy and charts developments in use of pay systems. Other recent surveys include: Managing Variety in International Mobility survey and The role of international mobility in resourcing and developing your talent. Below is just a minute selection of our survey findings:

- The world of international mobility continues to grow and diversify. **85% of participating companies employ expatriates of more than one nationality** (*Expatriate Salary Management Survey 2015*)
- **Over 50%** of companies stated that their assignee workforces are comprised of six or more different nationalities. (*Managing variety in international mobility 2014*)
- Approximately 60% of international employers stated that the **most significant challenges in obtaining qualified and experienced local workers** are for the more senior, professional and technical positions, particularly in higher growth emerging markets. (*The role of international mobility in resourcing and developing your talent 2015*)

International HR stats and facts continued

- The average size of companies' expatriate workforces has **increased in the past 12 years by nearly a third**. (*Measuring the cost and value of long-term international assignments 2014*)
- **Nearly 40%** of organisations managing a multinational workforce use more than one salary calculation approach (*Expatriate Salary Management Survey 2015*)
- Nearly **50% of senior executives** perceive that global mobility programmes are essential for **filling skills gaps and managing new operations in important growing markets**. (*The role of international mobility in resourcing and developing your talent 2015*)
- **International relocation is changing for expatriates** - the average proportion of traditional long-term expatriates is predicted to fall to 45% in 2017, compared with over 60% ten years ago. Other types of assignment, such as short-term and permanent moves, are all increasing in relative importance. (*Managing variety in international mobility 2014*)

ECA articles

These, and more, available at: www.eca-international.com/insights/articles

- **Expatriate packages – are you getting yours right?**
ECA's Remuneration Services Manager talks through the benefits of benchmarking expatriate pay and some of the challenges of doing this.
- **Global mobility and the world context**
History has shown a strong correlation between global mobility and world economic development. Andrew Shaw, ECA's Managing Director provides an overview of the context businesses are operating in today and the approaches adopted to keep global mobility practice relevant.
- **Factors affecting rental costs around the world**
Employment rates, political turmoil, growing tourism, the setting up or winding down of new projects – ECA explains how these factors and more can influence rental property price trends around the world.
- **Compensating your employees for change**
Adapting to life in a new location can be challenging for your mobile talent and their families, so how do you recognise this in their remuneration packages?
- **Managing short-term assignments**
With short-term assignments on the rise how do companies manage pay for this assignment type and what are the issues?

Scheduled press releases 2016

February 2016

Location Ratings - quality of living for expatriates

March 2016

Accommodation survey– rental costs for expatriates around the world

May 2016

Expatriate remuneration

June 2016

Cost of living - March survey results - most expensive locations for expatriates

July 2016

Managing Mobility report published

November 2016

Salary Trends – local salary increases

December 2016

Cost of living - September survey results

About ECA's Cost of Living Survey

Living costs for international assignees are affected by inflation, availability of goods and exchange rates, all of which can have a significant impact on assignee remuneration packages.

To help multinational companies calculate cost of living allowances for their assignees, ECA carries out two Cost of Living Surveys per year (in March and September), comparing a basket of consumer goods and services commonly purchased by assignees in more than 400 locations worldwide.

Most expensive locations for expatriates

Top 20 most expensive locations for expatriates

Country	Location	Global rank 2015
South Sudan	Juba	1
Angola	Luanda	2
Switzerland	Zurich	3
Switzerland	Geneva	4
Switzerland	Bern	5
Switzerland	Basel	6
Democratic Republic of the Congo	Kinshasa	7
China	Shanghai	8
China	Beijing	9
Korea Republic	Seoul	10
Norway	Oslo	11
Hong Kong	Hong Kong	12
Norway	Stavanger	13
China	Guangzhou	14
Korea Republic	Busan	15
Japan	Tokyo	16
Guinea	Conakry	17
China	Shenzhen	18
Singapore	Singapore	19
United States of America	Manhattan	20

Source: ECA Cost of Living Survey March 2015

NB This comparison of cost of living was calculated on a base composed of various developed countries and is used to reflect an international lifestyle. Other indices available from ECA reflect specific city-to-city comparisons, and different levels of shopping efficiency.

About ECA's Location Ratings survey

For anyone going to live and work abroad a level of adjustment for them and their family is likely to be necessary. ECA's Location Ratings research is carried out annually and objectively evaluates various factors in order to arrive at a fair and consistent assessment of the quality of living in over 400 locations worldwide.

Categories include climate, health services, isolation, social network and leisure facilities, infrastructure and political tensions.

The system recognises that where an employee is going from and to can affect the level of adaptation required on the part of the assignee for some of these factors, therefore rankings will vary according to the base used to compare the quality of living.

Best & worst quality of living for expatriates

...Asians

Global Rank 2015	Location
1	Singapore
2	Adelaide
2	Sydney
4	Osaka
5	Brisbane
5	Wellington
7	Canberra
7	Copenhagen
7	Nagoya
10	Perth
11	Bern
11	Melbourne
11	Tokyo
11	Yokohama
15	Auckland
15	Dublin
15	Luxembourg City
15	The Hague
19	Antwerp
19	Eindhoven
19	Geneva
19	Gothenburg
19	Stavanger

Top 20 most liveable locations globally for...

...Europeans

Global ranking 2015	Location
1	Bern
1	Copenhagen
3	The Hague
4	Luxembourg City
4	Geneva
6	Basel
6	Stavanger
8	Antwerp
8	Dublin
8	Eindhoven
8	Gothenburg
12	Stuttgart
12	Amsterdam
12	Munich
12	Bonn
16	Frankfurt
16	Rotterdam
16	Hamburg
19	Zurich
20	Dusseldorf
20	Berlin
20	Strasbourg

Source: ECA's Location Ratings Survey 2014/2015

About ECA's Accommodation Survey

ECA's research shows that over 90% of companies sending employees on international assignment contribute to the cost of accommodation in the host country. This can be one of the most significant costs incurred during an assignment.

To assist companies in deciding what accommodation policy to adopt and what level of housing allowance to provide to international employees, ECA International produces Accommodation Reports annually for more than 200 locations.

The reports provide information on the types of accommodation and geographical areas usually favoured by international assignees typically near international schools, embassies or social focal points.

Most expensive locations for rental property

Top 20 global most expensive locations for high-end three-bedroom rental apartments

Location	Global rank 2014
Hong Kong	1
Moscow	2
Caracas	3
New York	4
London	5
Tokyo	6
Singapore	7
Bogota	8
Shanghai	9
Lagos	10
Rio de Janeiro	11
Zurich	12
Seoul	13
Geneva	14
San Francisco	15
Dubai	16
Beijing	17
Paris	18
Sao Paulo	19
Sydney	20

Source: ECA's Accommodation Survey 2014

About ECA's Salary Trends Survey

Countries with the highest & lowest salary increases

ECA's annual Salary Trends Survey is used by international companies to monitor and benchmark company salary increases in local markets around the world. The survey reports current-year salary increases for local national employees and the anticipated increases for reviews in the forthcoming year. It provides information on real pay rises by factoring in inflation rates. Data is collected from 340 multinational companies for 66 countries.

The survey includes data from all seniorities across the following industry groups: Petrochemicals & mining; Chemical & pharmaceutical; Transport & logistics; Manufacturing & consumer goods; Legal & professional services; Engineering & technology; Retail, leisure & other services; Banking & insurance; Non-Profit.

Country	Global rank nominal salary increase 2015	Global rank after inflation (real wage increase) 2015	
Argentina	1	60	↓
Venezuela	2	66	↓
Pakistan	3	3	→
Vietnam	4	1	↑
India	5	7	↓
Bangladesh	6	5	↑
Egypt	7	64	↓
Nigeria	8	58	↓
Indonesia	9	12	↓
Sri Lanka	10	6	↑
Kazakhstan	10	9	↑
Ukraine	12	65	↓
China	13	2	↑
Russia	13	59	↓
Turkey	15	57	↓
Myanmar	16	39	↓
Brazil	17	31	↓
Philippines	18	8	↑
South Africa	18	44	↓
Malaysia	20	24	↓

Top 20 countries where companies are predicting the largest salary increases in 2015

Source: ECA's Salary Trends Survey 2014/15

Global Perspectives reports

PDF copies can be downloaded free from the Insights section of ECA's website: www.eca-international.com/insights/white-paper

ECA's suite of Global Perspectives reports provide global overviews of trends on particular topics including Cost of living, Tax, Accommodation, National Salary Comparisons and Location Ratings.



For more information:

More information available here: www.eca-international.com

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We tweet on cost of living, quality of life, salaries, international business, travel & managing expats. Follow us @ECAintl

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