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Insights SSOA Summit

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Executive Summary

The 4th Annual KPMG Shared Services Outsourcing summit held in Beijing brought together industry leaders to discuss the current status and prospects of the China shared services and outsourcing (SSO) market. Representatives from Proctor & Gamble, Hackett and the Ministry of Commerce in China headlined the speakers, and panel discussions were well represented by Siemens, HSBC, Thomas Reuters and four other leading service providers. As you shall read in this document, the discussions were enthusiastic, insightful and very bullish on the future of China's SSO industry.

This year's summit was our biggest with over 350 attendees representing various industries and sectors throughout China. Some key messages and insights from the constructive discussions centred on innovation, data analytics and China's move towards a Global Business Strategy (GBS). Since China is becoming a global focal point for growth, to the country must transform and innovate through leveraging shared services and data analytics.

Panel discussions exploring three important questions – "Where's the innovation coming from?", "What does good look like?" and "Analytics and the future of Shared Services and Outsourcing" – generated a lot of insights. As you shall find throughout this report, there were some highly interesting perspectives regarding China moving forward. Enjoy!!!

State of the Nation – Shared Services and Outsourcing in China

Kai Cui
China Leader,
Shared Services and
Outsourcing Advisory,
KPMG

Companies around the world are continuously exploring shared services and outsourcing (SSO) opportunities as a means to improve business operations and control costs under global economic pressure. China's outsourcing industry has become a top SSO destination thanks to these evident advantages:

- Dedicated investment and strong support from the government
- Huge pool of affordable educated talents
- Growing SSO market

The service industry has been a focus of China's economic development, and China's12th five-year plan reaffirms this strategic direction. The proportion of service industry in total GDP is expected to rise from the present 43 percent to 47 percent in 2015.

In addition to a variety of tax incentives, financial subsidies and other exemptions, the Chinese government has also invested heavily in infrastructures and technologies to develop Tier 2 and Tier 3 cities, and encouraged businesses to move west from coastal regions to inland cities. KPMG's Inside the Dragon 2013 – Outsourcing Destinations in China features 29 outsourcing destination cities in China, compared to 21 in our 2010 edition, reflecting the government's continuous focus on the service market. The study also noted a trend for these SSO cities to differentiate themselves from each other by focusing on specific services and markets.

China has a huge graduate pool. Each year, there are about 7 million people graduating with a bachelor degree or above. More and more universities are developing specific SSO courses and subjects. Many SSO service providers and companies provide training programmes to students.

In China's growing SSO market, MNCs are currently the most active outsourcing buyers. In the medium term, however, it is the government that will become one of the most important sources of revenue. State-owned enterprises (SOEs) are expected to be the growth engine for China's SSO industry. As Chinese enterprises begin to appreciate the benefits of SSO and become more open to the idea, they will use more of these services and mature faster.

Another trend of SSO in China is for it to move up the value chain. Information technology outsourcing (ITO) is still dominant but the knowledge processing outsourcing (KPO) market is growing much faster, suggesting that China's service outsourcing is moving from the low and medium end of the industrial chain to high-end sectors such as biochemical R&D, financial back-office, technological research, as well as industrial design and inspection.

Nowadays, services mean more than IT and business processes, and innovation and skills are necessary to drive growth. They are now assessed by performance rather than cost, so the real differentiators are business models, talents and technologies, all important factors to trigger an "explosion" of innovation in the economy.

Global Shared Services and Outsourcing – China Impact

Dr. Matthias Trinn
CIO and Shared Services Director at Procter and Gamble Greater China introduced their GBS model and shared his view of China's impact on the global economy.

Despite its long history, P&G is relatively young as it only entered the Chinese market 25 years ago. "We really want to touch and improve the lives of our customers every day", Dr. Matthias Trinn said. Global Business Services (GBS) is one of the means for P&G to achieve this end. P&G has 170 GBS centres in 75 countries employing more than 6,000 people. This truly global network has a number of regional hubs located in the US, Eastern Europe, India and China. The GBS centre in Guangzhou mainly serves the China market.

Dr. Matthias enthused over the ubiquity of GBS: "There is hardly any area in P&G that GBS is not involved," which at present provides a broad range of services: people management, IT and communications, meeting and travel arrangements for employees, strategic sourcing and procurement, financial services and solutions, product innovation, supply network solutions, consumer solutions and business intelligence.

Before GBS was implemented, tasks were duplicated, staff were under-utilised and things were generally inefficient. As a response to these problems, P&G came up with a new vision: transforming the way business is done. "A company has to balance scale and agility because it is impossible to rely only on one; moreover, it cannot lower its service quality to save cost otherwise it will run out of business soon."

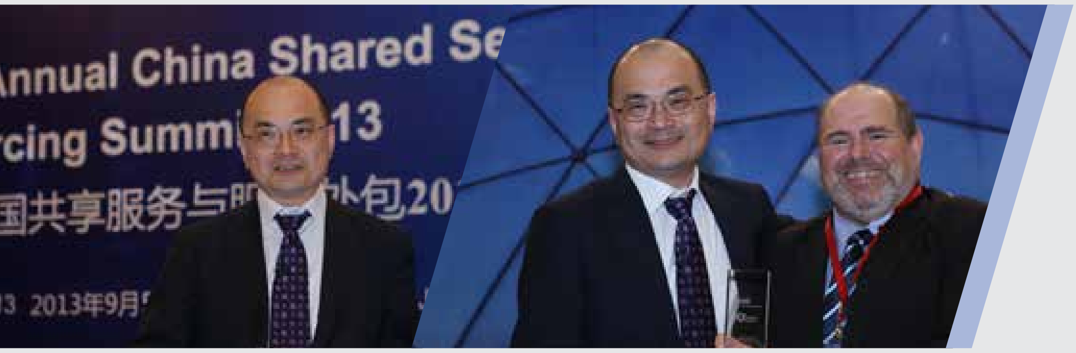
With this in mind, P&G chooses its strategic partners based on a symbiotic growth relationship: Hewlett-Packard for IT, Jones Lang Lasalle for facilities management and IBM for employee services as their three initial partners.

P&G's business transformation started with centralisation from 1999 to 2002, reengineering a lot of processes and operating models. Then came a number of acquisitions in 2006 which took three to five years to integrate. It was at this point of a broader business transformation that it started to use GBS as a tool to stitch together business, functions, and cross-functional processes with Shared Service Partners to create scalable capabilities.

On China, Dr. Matthias stressed how very capable his China team was and how he could see huge potential in China. "They are brilliant, punctual and committed to work." However, Dr. Matthias cautioned that innovation was not answered at this point of time. The skills were great but not the best and cost was no longer the lowest in the world. He predicted that the biggest challenge would be language – China would have to be the biggest English-speaking country in the world – if it wanted to be a global player.

The Future of China – Shared Services and Outsourcing Trends in China

Shang-ling Jui
Executive Vice President & Chief Technology Officer of Pactera Technology International Ltd shared his views of China's Outsourcing and Shared Service trends.



From 2007 to 2011, the average growth of offshore delivery in China was 19.6 percent while the average growth of the global offshore delivery was 6.6 percent. This means that China is gaining global market share. But Mr Jui believed that "there are weaknesses at the same time, including the extensive development pattern, blind expansion and the low position in the value chain.

Yet, despite these challenges, Jui believed that technologies would continue to democratise and empower workers and customers in China, thanks to the rise of social media, mobile and cloud technologies as well as machine-to-machine communication. These technologies will transform the information industry and stimulate business innovation.

Chinese IT providers nowadays have to understand their clients' requirements better because their clients know what exactly they want. The age of information asymmetry is over, and IT providers have to offer professional and advanced technologies to meet their clients' needs in digital marketing and digital sales. Indeed, customers tend to do more diversified outsourcing now. Whereas in the past, clients had to sign long-term and high-value contracts with providers, they now tend to negotiate for short-term and low-value contacts. Mr. Jui also mentioned that the budget for IT was decreasing but they were now required to deliver more.

Jui pointed out three development trends in the development of SSO: the first is the increase in "homeshoring" or home-based work, but the shortage of technological resources in rural regions will pose a problem. The second trend is that offshoring will come under greater pressure, with increased protectionism from the US and Europe, higher wages in China and more stringent requirements for local presence in many countries. The third trend suggests that insourcing will emerge as one of the global movements making the vendor market even more challenging.

He went on to say that "there are also challenges from cloud computing. We have to look at the combined effect of big data, mobility, cloud computing and social media." All these present a huge challenge to IT. The boundaries between outsourcing, hosting and managed services are becoming blurred, meaning that new competitors can come from other business sectors, and their number is growing fast. For instance, the biggest competitor for banks now is internet companies.

To meet these challenges, Mr Jui told vendors to provide their own service portfolio and offer a more diverse range of services. For Chinese companies, they should focus on verticalisation, increase their end-to-end service offering and stepping up their innovation. To do so they would need to review their existing service portfolio and improve the capability of their IT services. "We should pick those industries that we are familiar with," suggested Jui.

In his conclusion, Mr Jui pointed out that SSO would have to be industrialised through standardisation and automation of multitenancy, which he believed could change the competition landscape. Moreover, companies would have to employ different strategies for different businesses with different IT providers.

Government's Viewpoint

Wan Lianpo
Director-General of the Ministry of Commerce, PRC described the current performance of outsourcing in China.

Mr Wan appreciated the efforts of local governments as well as local and national businesses in helping to build the outsourcing industry in China, which in his opinion has now become much more professional in delivery and supportive in the development of the broader services industry in China. Mr Wan reminded the audience that a healthy outsourcing industry is key to the continual growth of China's economy, the building of a modern service industry, the optimisation of industrial standards and the creation of opportunities for the increasing number of university students.

The following figures reflect the positive growth in the outsourcing industry:

- China's value of the outsourcing industry in 2012 was USD 33.64 billion, up from USD 4.69 billion in 2008 and representing an annual growth of over 60 percent.
- China's global market share rose from 7.7 percent to 27.7 percent from 2008 to 2012, and is now the second largest offshore service outsourcing destination in the world.
- Between January and July 2013, over 86,000 outsourcing contract were signed with Chinese companies amounting to around USD 44 billion, an increase of 38.6 percent compared to the same period in 2012.
- In 2013, there were over 22,000 service outsourcing companies in China, hiring a total of 4.8 million employees, of which 3.2 million (67.6 percent) had a Bachelor degree or above.

According to Wan, the service outsourcing industry in China is booming. The new Chinese government is putting a great emphasis on the quality of economic growth. Reiterating Vice Premier Li Keqiang's message delivered at the Beijing International Fair for Trade in Services, he emphasised that the service industry would be a driver of China's economic growth.

The Chinese government has a number of initiatives to support the growth of service outsourcing industry in China, and Wan told the audience that the MOFCOM would make sure that the momentum is kept. China will work to improve its legal and market environments, intensify training and invest in innovation. As outsourcing services, including IT, business process and knowledge process outsourcing, are growing rapidly in China as well as around the world, Wan thought that it was imperative for China to follow this trend and attract new businesses.

Mr Wan closed his remark by acknowledging the work that KPMG has been doing for the service outsourcing industry in China. As a network of professional service firms with offices across the world, KPMG maintains a wonderful relationship with the Chinese government as well as local companies in China. The MOFCOM will continue to cooperate with KPMG to develop standards and good practice.

Major Trends

Egidio Zarrellai
Clients and Innovation
Partner, KPMG

Who was the most innovative country in the last 20, 30, or 40 years? In the next five years, which countries will be perceived as the most innovative? And ten years after that, who will lead innovation globally? KPMG's 2013 Technology Innovation Survey finds that US and China are the countries that will mostly likely to offer disruptive breakthroughs that impact globally.

China continues to innovate at an impressive speed, driven by its domestic consumption. China will continue to innovate for China's sake because Chinese consumers' desire for local brands will grow.

As with the rest of the world, cloud computing, new payment methods and mobile technologies are trending in China, bringing enormous opportunities to the service outsourcing industry.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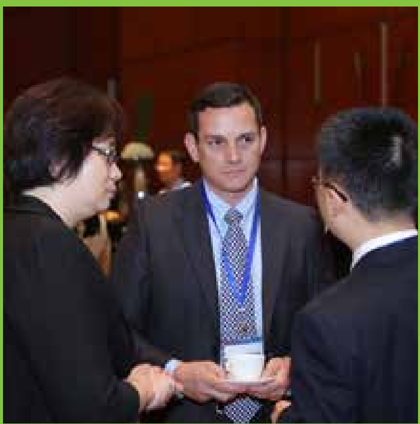


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Panel A: Where's the Innovation Coming from?

Moderator:

Egidio Zarrella
Clients and Innovation Partner, KPMG

Panellists:

Kai Cui
China Leader, Shared Services and Outsourcing Advisory, KPMG

Eric Rongley
Founder and CEO, Bleum

Panellists:

Xiong Guanghai
General Manager, Changhong Finance Shared Services Centre

Dr. Eugen Tjong
Head of Elektron Managed Services, Asia Pacific Thomson Reuters

Maureen Liang
Head of Operations Retail Banking & City Manager, Foshan, HSBC

The first panel discussed where innovation comes from. It brought out a number of key topics surrounding innovation in the SSOA market and established its importance in the continuous development of the industry.

The panel opened with this statement: With RMB appreciating, China's cost advantage in SSOA is diminishing. So enhancing the quality and diversity of services and seeking innovation to create value for global and domestic clients should be the driver for the China SSOA industry.

The panel generally agreed that both overseas and domestic SSO users and providers had confidence in China's potential for innovation and its ability to realise that potential. However, overseas clients and investors were eager to see changes in the environments surrounding information security and intellectual property protection before they would fully embrace more innovative business models and service offerings in China. On the other hand, domestic companies would emphasise more on finding solutions through innovation to bridge the gap between global practices and business realities in China.

Entrepreneurial culture, supply chain capability and the ability to think freely are key elements for innovation

According to Eric Rongley, there are three factors that will turn US and China into innovation leaders of the world. First, entrepreneurial culture, determined by access to capital and the need and hunger for innovation. This is the raw material for innovation. China and US are both more entrepreneurial than Japan and the EU. China has the advantage of coming from a long tradition of valuing education, whereas in the US, the standard of university education is extremely high and it helps steer the country forward.

Second, the capability of the supply chain. The success of both the auto and IT industries in the US hinged on an ecosystem that supported a local supply chain for companies to play off each other. China is no different. China is no longer cheap compared to countries like Vietnam and Cambodia, but a well-developed supply chain will sharpen China's competitive edge as the destination for outsourcing.

Third, the ability to think freely. This is something very available in the States but lacking in China. To innovate, companies and individuals must not be afraid of new ideas, and more importantly, competition. Where there is competition, there is diversity, there is adaptation and innovation. In the long term, if China wants to lead innovation worldwide, it has to incubate a culture of free thinking and competition between businesses.

Innovation is a culture and a habit of simplifying work and life

Positive changes in business environment and mentality is evident in China. People in China have now become more open to new ideas, accepting innovations in government policy and infrastructure development, and they are answering or trying to answer the world's requests. More and more young people now have the opportunity to study abroad, and upon their return they bring their western experience to contribute to the exciting creation of a new culture, one that contains the seeds of innovation. But innovation is not necessarily about fancy technologies, as Maureen Liang of HSBC suggests. It comes from the mindset, the urge and the habit of continually simplifying our work and life. It is important that in shared services we build a culture that establishes this habit from day one.

To Chinese companies, localising leading practices is innovation in a more practical sense

Mindset, culture and an enabling mechanism are all important factors for innovation. However, for Chinese companies like Changhong, guidance from leading practices still plays an important role at the present stage of development. According to Mr Xiong Guanghai, Chinese companies will still need to learn from the experience and advanced models of foreign companies and MNCs, and that is by no means an antithesis to innovation, as customising them to address their own issues and adapting them to the country's unique market environment would also require innovation. This kind of innovation is more practical to Chinese companies.

As Maureen Liang points out, innovation does not necessarily entail a brand new idea. As long as one can answer the local market needs through customisation and fine tuning, one can call that innovation. The popular social platform, WeChat, is a good example of standing on the shoulders of previous innovation.

Information security and a mechanism to build trust are also key to innovation of SSO in China

The real value for outsourcing is not only cost savings, but to be empowered by a partner who knows the best practices. But such value creation is based on the condition that a company feels safe to let its outsourcing partner to manage their business and core data in order to bring innovation, i.e., it has to feel comfortable to let its partner identify the hitherto hidden market potentials in its data. Letting the client feel safe to be empowered is how China can get to the next stage.

Gain sharing as an innovative business model will further enhance outsourcing

One innovative idea that the industry could adopt is gain sharing between clients and outsourcing vendors. Take ecommerce for example, vendors can go beyond providing ecommerce platforms to their clients, and venture into running the entire ecommerce business for them in China. They can share the gain by virtue of the improved efficiencies in marketing, operation and fulfilment of the business. That puts the provider in a position where it will invest, take risks and innovate.

Legal and Tax Issues

Mark Parsons
Partner at Freshfields Bruckhaus Deringer gave an overview of the legal issues impacting SSO in the region.

"The hottest topic is data privacy regulations," Mark Parsons, Partner of the leading law firm said. Recent updates on data privacy regulations across the region included the MIIT's introduction of European regulations in dealing with data interception in telecommunication services and the internet, bringing everything from mobile apps to web pages regulations on a par with European standards now.

It has become quite clear that the region is taking regulation more seriously than ever before. We have seen Singapore, Malaysia, the Philippines, Indonesia, Taiwan and South Korea all passing European style data privacy laws that affect the SSO industry. Encouraged by the potential economic benefits, the laws were passed with the purpose to raise regulatory standards in Asia so that companies from other regions, such as the US and Europe, would be more comfortable to send over their data; the development also hoped to allow greater movement of data across the region.

In the context of shared services, Parson pointed out that regulation does not draw a distinction between outsourced data and data held in a captive organisation. But he also said that in practical terms, the core of European regulation is about consent, meaning that a service provider can use the data in any manner provided that consent has been given by its owner. It is therefore, imperative to look at contract terms and policies and be clear about the data being handed over. Parson further added that policies around security and security breaches, audit rights and procedures for the return or secure destruction of data would need to be in place.

Since regulators focus on data that moves out of a group or business, Parsons urged businesses to pay special attention to that area. But he reassured the audience that it was not an insurmountable task, as long as a business has a clear understanding of its data, it should be able to come up with a plan to deal with compliance measures and to put the plan in place to smooth out the process.

In 2008, the Chinese government proposed policies to support outsourcing and in 2011 the policies were implemented. As a response, outsourcing companies should consider their structure and business models, and whether they should start a new company or make changes within the existing division, as their choice for outsourcing will lead to different tax consequences. Shared service centres as a business model can be operated independently or treated as an internal department, and depending on the purpose of the shared service centres, they are treated differently in taxation. For those companies preparing to carry out shared services, the location for the holding companies also needs to be considered. For example, companies can set up their SSO centres in locations where beneficial tax rates can be leveraged based on bilateral preferential agreements.

For a company to have access to preferential tax rates, it has to look at its source of revenue. For example, the revenue generated by the centre must comprise more than half of the total revenue for the company.

Tax policy guidance in fact encourages companies to provide offshore outsourcing services in order to develop the services industry. As a result the original tax incentives that were supposed to end in 2013 have been extended to 2018.

Grace Xie
Partner at KPMG briefed us on the tax implications of using shared services.

A Global Perspective – SSO Around the World

Tom Bangemann
Senior Vice President of Business Transformation at The Hackett Group gave an overview of the market along with insights into how businesses are using SSO in their business models.

Mr Bangemann believed that most companies have a multi-functional setup that is not always cross functional. "We're not always doing things end-to-end and we don't typically have one governance model. What normally happens is that we have a mix of finance, HR and IT." But Global Business Services (GBS) is now becoming a cornerstone of the enterprise model. Bangerman explained that understanding the end-to-end process is highly relevant to getting more scale and integrity out of process improvement. In addition, he told the audience that an increasing number of shared services were dealing with the end customer directly, and such development would fundamentally shift the role of shared services away from a mere support function.

Bangemann further explained that "both outsourcing and captives are still growing at the same speed and there is still growth in the SSO market." But most companies prefer to use a hybrid model with some outsourcing elements and some captive activities. Bangerman reflected that there are no definitive rules on how to get the mix right, but focusing on clear and transparent communication with key stakeholders and the actual achievements of the GBS organisation would help.

Although around three quarters of companies today use shared services for at least two functions, Bangemann observed that HR, IT and procurement, GBS only has a third of services in scope on average when we look across all functions including finance.

When talking about implementing and adopting GBS, Bangemann suggested the following stages:

Stage 1 – Complexity Reduction. Characterised by a focus on complexity reduction through automation and process improvements, with a limited service management orientation.

Stage 2 – Operating Excellence. Defined by a focus on quality improvement and scope expansion to include value-added activities. The GBS operates as a semi-commercial unit, with a defined service portfolio that is communicated to customers.

Stage 3 – Strategic Business Enablement. The GBS provides business intelligence and innovative services for business partnering across the end to end process. The GBS leads innovation in service portfolio design and delivery.

Panel B: What does good look like?

Moderator:

James O'Callaghan
Partner, KPMG

Panellists:

Monika Valtwies
Head of NE Asia Accounting and Controlling, Siemens

Sidney Yuen
CEO, HBC

Panellists:

Wendy Wang
Vice President – Asia Sales Director, GENPACT

James Dolan
GBS Partner, Strategy & Transformation Center of Excellence, Greater China Group, IBM

Steven Wang
APJ Autonomy Practice Lead, HP Enterprise Services

The Panel explored best practice and the question of "what does good look like?"

James O'Callaghan, Partner at KPMG opened the panel with the topic of governance – a very hot topic in ASPAC in which different organisations – whether they were captives or vendors – demonstrated different response approaches.

The idea of "good" varies from organisation to organisation but eliminating uncertainty is crucial

Monika Valtwies described how Siemens created a project called "finance process bundling" to help lower the level of uncertainty associated with accountability in certain activities. The project broke down the processes and identified ownership and responsibility for accounting policy.

James Dolan of IBM went on to say how vendors have a slightly different view of best practice as they are more service level driven, and therefore it is in their interest to have it agreed with the service user from the start. But this is still an ongoing challenge as organisations evolve constantly.

Technology must be backed by operation and management for it to fully realise its power

The discussion then turned to examine how technology, especially automation and workflow optimisation can be used to improve SSO. Wendy Wang of GENPACT expounded on the importance of using technology to connect operations and helping their clients realise business benefits rather than letting it slip back to being an IT conversation.

Sidney Yuen from HBC surmised that IT-related shared service projects did not succeed because of the change management associated with their implementation and the broader business impact of establishing a shared service centre. Dolan expanded on this notion and talked about how IBM managed and controlled changes incrementally, and how thinking about the organisational structure and process dependencies, and having a deliberate management process could help promote adoption. He also emphasised the importance of engaging the business and senior management.

For Siemens, a corporate infrastructure process team is established to look across the organisation with an objective to ensure that all changes are communicated to and heard by all parties affected. Valtwies also explained how the team is also tasked to make sure that the change is not a one-off exercise, and that the change process will become part of the everyday business operation.

People are the mainstay of SSO

The discussion then turned to discovering how the role of people in SSO is evolving and where the future leadership lies. The consensus was that no matter how job titles change, the core skills to understand and interpret the needs of customers should stay. In addition, project managers' ability to drive innovation and change should never be underestimated.

The panel closed with highlighting the importance of innovation in SSO, and a note on how future leaders may have to be entrepreneurial, either having come from or passed through such increasingly important part of a business.

Panel C:
Analytics and the Future of Shared Services and Outsourcing

Moderator:

Egidio Zarrella,
Clients and Innovation Partner, KPMG

Panellists:

Mark Toon
Global Head, Data & Analytics, KPMG

Webster Shao
Director, KPMG

Panellists:

Tom Bangemann
Senior Vice President, Business Transformation, The Hackett Group

Gene Reznik
Managing Director – Asia Pacific, Communications, Media & Technology, Accenture

Edge Zarrella, Partner of KPMG, opened the third panel with a question: "how will we use Shared Service and Outsourcing with Big Data and Analytics in the future?" To this, Mark Toon of KPMG answered by highlighting the importance of analytics in SSO, stating that data is crucial, and effective and efficient types of analytics must be found to support business decisions.

The ability to incorporate data and analytics into daily operation will give companies a definitive competitive edge

The panellists pointed out the need to build more centres of excellence for analytics and those who get this right would have a competitive edge. In other words, data and analytics must become a unifying component of the conventional operating model, encompassing people, process and technology.

The potential of data is yet to be fully realised

What the world is experiencing now is only the first wave of data revolution. Only very few companies are using data to derive business insights and generate predictions. Gene Reznik of Accenture believed that analytics would have to be industry oriented, while Tom Bangemann of Hackett added that GBS must be supported by the use of data and analytics to increase customer-facing and multi-functional cooperation.

China will lead analytics and innovation in the years to come

When asked which country would be leading in the area of analytics and innovation, Webster Shao of KPMG argued that China would definitely lead the way given the clear support from the central government, and the level of investment that was generated in China in 2012, though its path to leadership would be a steady and gradual one over the coming years.

SSO will go while analytics will stay

The discussion on the future of SSO generated many interesting and insightful ideas. Based on his years of experience in this area, Bengemann expected SSO processes and activities to be either automated or diminished over time. Others panellists, however, thought that data and analytics would drive change through identifying new trends and insights.

Data and analytics is the new internet

When asked during the Q&A session how we should utilise data and analytics and how to overcome the challenges associated with capturing and using data, Mark Toon simply answered, "history repeats itself". He contended that "data and analytics is no different to the internet 15 or 20 years ago when issues like talent, speed, software, hardware etc. gave executives many sleepless nights. So let's learn from history and instead of worrying over it, try to uncover the huge potential and benefits hidden in data and analytics."


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Publication number: CN-MC13-0001

Publication date: December 2013