



cutting through complexity

PRIVATE ENTERPRISE

# Skilled Migration Survey 2012

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# Introduction

Despite some deterioration in economic conditions and a softening of the labour market, our latest *Skilled Migration Survey* confirms that Australian employers are continuing to recruit overseas workers to fill skill gaps.

KPMG believes that the ability to draw on overseas workers, even if only on a short to medium-term basis, has enabled Australia to extract substantial additional benefit from favourable economic conditions that have existed over much of the past two decades. Access to foreign skills acts as an economic 'shock absorber', buffering the domestic labour market from transitory variations through the business cycle. This is precisely the role the 457 visa system has been designed to fulfil. We believe our survey provides further evidence that the temporary visa system is working as intended.

We do, however, continue to see some serious mismatches between the skills that are locally available and those that are required to satisfy Australia's economic and social needs, which may have resulted from deficiencies in our educational and vocational training systems and, in some places, a lack of expectations. These mismatches also reflect other rigidities and inefficiencies in the domestic labour market.

As well as constraining productivity improvement and our overall growth potential, skill shortages introduce their own distortions into the labour market.

In any event, our *2012 Skilled Migration Survey* reaffirms that, given a choice, most Australian employers prefer to engage locals, and that many are right now training people to bring their skills up to scratch. It is also easy to overlook that bringing in qualified overseas workers involves a valuable transfer of knowledge and experience that can help up-skill the resident workforce.

There are some indications in our latest survey that the demand for foreign skilled workers may be softening, which may indicate growing fears about a further deterioration in economic conditions, both domestically and abroad. Since our survey was completed, news of employment cutbacks and the deferral of some major projects in the resource sector (notably BHP Billiton's Olympic Dam expansion) is expected to have seen some further downturn in sentiment.

However, someone's adversity can be another's opportunity. Present economic troubles in Europe and North America represent a once-in-a-generation opportunity for Australia to attract highly skilled, experienced workers across a range of strategic occupations, in the process adding to our national human capital.

Meanwhile the so-called 'Baby Boomer' generation is starting to clear its desks and head for the exit marked retirement, in the process depleting our reserves of skill and experience. Our latest survey suggests that many Australian organisations are already seeking to manage this generational change within their broader employment and human resource strategies. This is good news, as long-term demographic trends (including rising dependency ratios) will demand that we put a premium on enhancing workforce skills and productivity. Skilled migration should play an important role in that process.

Once again, our thanks to those organisations who took the time and trouble to participate in this study through the survey and supporting case studies. We also would like to thank the Department of Immigration & Citizenship (DIAC) for their statistics and supporting commentary.

We trust you will find the insights contained in our report interesting and useful.



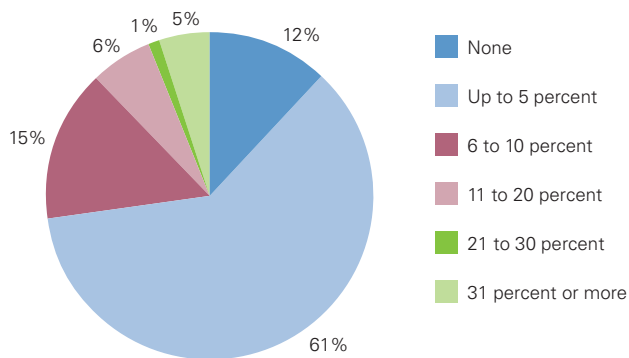
**Karen Waller**  
National Spokesperson  
Migration Services  
KPMG

# 1 Using the 457 visa program

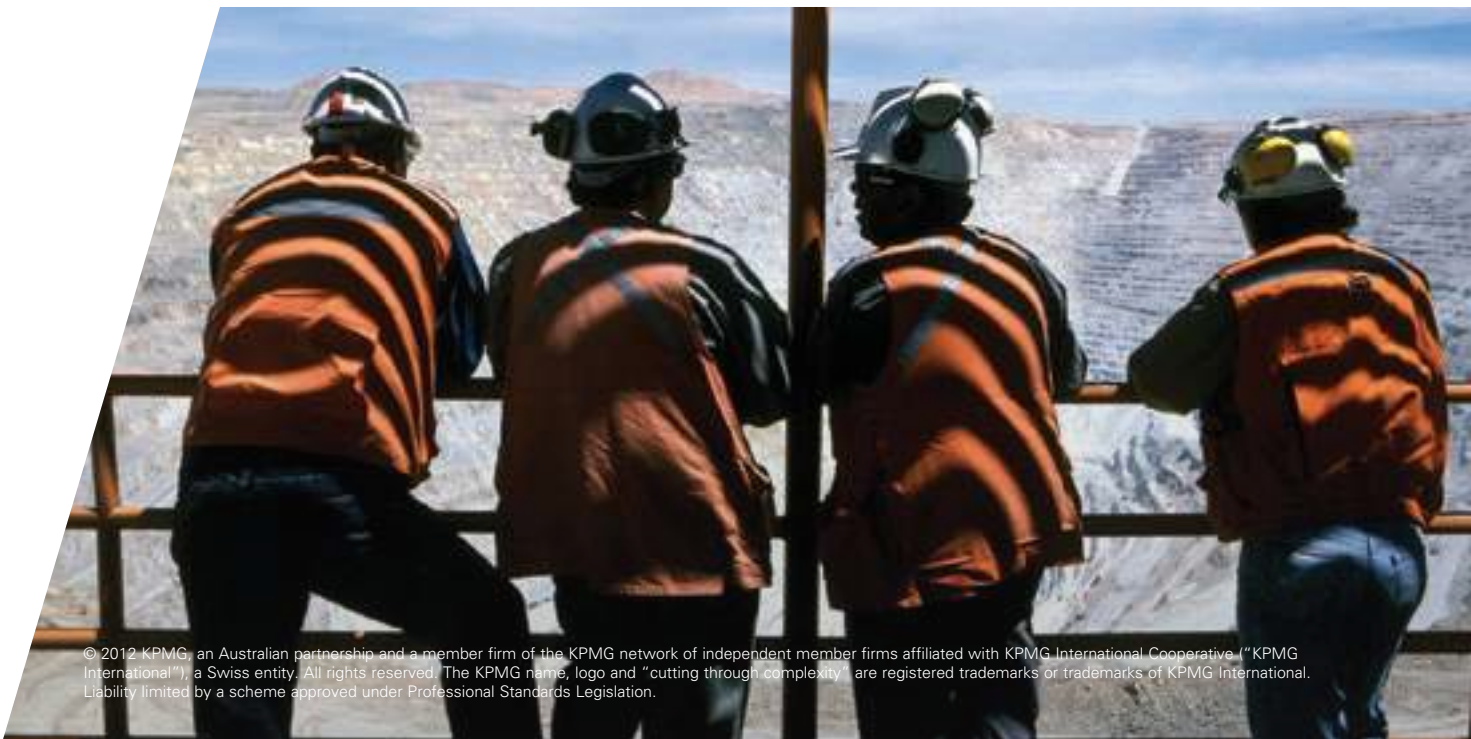
Figures from both KPMG’s 2012 Skilled Migration Survey and the Department of Immigration & Citizenship (DIAC) demonstrate that many Australian employers are continuing to source scarce skills offshore. The government’s *Subclass 457 Business (Long Stay)* visa program remains the most used method of bringing in skilled workers from overseas, no doubt reflecting the program’s flexibility and (relative) simplicity. DIAC has reported the number of primary subclass 457 visa holders in Australia on 30 June 2012 was 91,050, reflecting an increase of 26.4 percent compared with the previous financial year.

It also appears that employers are generally using the program in the way it is intended — to provide an avenue for recruiting workers with specific, specialised skills that are genuinely difficult to source locally. Our survey shows that 61 percent of respondent businesses report fewer than 5 percent of their workforces as employed under 457 temporary visa arrangements (Figure 1).

**Figure 1: Percentage of workforce recruited on 457 visas**



Looking ahead, 25 percent of respondent employers do not expect to recruit any additional workers on 457 visas over the next 12 months, whilst the majority of employers expect to continue to recruit a similar proportion of their workforce (up to 5 percent of total workers) from overseas.



Over the past 12 months, employers primarily recruited their workers from (in descending order) the United Kingdom, the United States, South Africa, Ireland and India. Three of those countries are English speaking and the other two, South Africa and India, possess large English-speaking populations. The survey result closely aligns with DIAC's list of the most popular source countries, although in the DIAC list South Africa is replaced by the Philippines, another pre-eminently English speaking country. The ability to recruit English speakers is obviously important, particularly in many highly skilled occupations where ease of communication is a consideration, as is 'cultural fit'. A notable feature of the survey is the significant increase in the recruitment of workers from the United States, reflecting continuing high unemployment and stagnant wage levels in that country.

*"Because of Australia's better economic situation relative to the rest of the world, almost all citizenship countries have reported an increase in the use of the 457 Program – with the average being an increase of 39 percent between 2011-12 and 2010-11. In relative terms, the growth of 24 percent from the US is relatively modest.*

*In terms of growth, the real story is Ireland, which has grown 74 percent since last year. Specific reasons include ongoing economic difficulties (unemployment close to 15 percent in September), strong cultural ties with Australia, a highly skilled workforce, a common language and a stronger migration philosophy among the Irish (the population of Ireland is only 4.5 million, but ranks in the top 3 amongst countries that are far more populous). There have also been substantial jumps in skilled migrants and Working Holiday Makers from Ireland in 2011-12."*

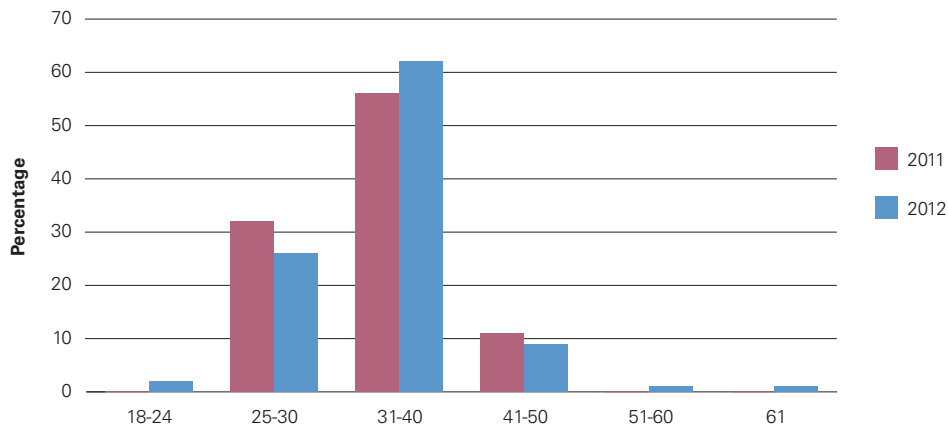
Department of Immigration & Citizenship

### Growth in subclass 457 visa grants

Citizenship Country	2009-10	2010-11	2011-12	Growth between 2010-11 & 2011-12
United Kingdom	15606	21674	28734	33%
India	11446	15810	22078	40%
Ireland, Republic of	3365	5818	10135	74%
Philippines	4781	5898	9167	55%
United States of America	5313	7020	8670	24%
China, Peoples Republic of	2916	2981	4804	61%
South Africa	2778	3495	4087	17%
Canada	2046	2731	3255	19%
France	1715	2089	2412	15%
Germany, Fed Republic of	1698	2144	2346	9%
Malaysia	1133	1436	1875	31%
Japan	1543	1592	1850	16%
Other	13683	17457	25662	47%
<b>Total</b>	<b>68023</b>	<b>90145</b>	<b>125075</b>	<b>39%</b>

Source: Department of Immigration & Citizenship, 2012.

Figure 2 shows the age distribution of workers recruited under the temporary visa system. DIAC 2012 data confirms that the average age of subclass 457 migrants has increased marginally from about 32 years to 33 years. Clearly there is a preference for workers with considerable job experience, but interest seems to fall off sharply for workers 40 years and over. If sustained, current recruitment patterns will help offset the ageing of the existing Australian workforce.

**Figure 2: Average age of skilled workers recruited**

The main reason survey respondents gave for recruiting offshore is an insufficient supply of appropriately skilled workers in the domestic labour market (69 percent of respondents) followed by the 'quality' of locally sourced staff. Perhaps surprisingly, only two employers feel the reluctance of locals to work in remote locations is a significant problem.

Fifty-eight percent of our respondents claimed the government's decision to remove the Commonwealth Living Away From Home Allowance (LAFHA) from temporary residents and visa holders will reduce the value of their offshore-sourced workers' remuneration packages, with 28 percent saying the effect will be significant. It is unclear to what extent employers will top up pay packets to compensate for the removal of the allowance, and whether the willingness or ability to do so will vary across industry sectors. The change could also encourage more 457 visa holders to seek permanent residency. More than 60 percent of surveyed employers said they expect up to 10 percent of their current 457 visa holders will apply for permanent residency over the coming 12 months.

*Based on visa application and grant trends since the announcement of the changes to the tax treatment of living-away-from-home allowances and benefits, the Department does not anticipate a significant impact on the volume of 457 visa applications and grants as it is a demand driven program used by employers to fill vacancies that cannot be filled from Australia's labour market. It is also worth noting that eligibility and taxation matters relating to LAFHA are the responsibility of the ATO and the Treasury.*

*"Based on people who first received their 457 visa from 2003/04 through to 2005/06, around 56 percent of visa holders for each of these years eventually move onto permanent visas. The pathway to permanence can vary, the bulk of these 457 migrants move onto a permanent visa before their 457 visa has expired. Others move onto a second and third subclass 457 visas before securing permanent residence (this is why it takes many years to work out the transition rate for a given cohort). Another group returns to their home country but secures an offshore skilled or family visa some time later.*

*Two further side-points:*

- This 56 percent rate is somewhat higher than it has been in the past, when it used to be around 52 percent. This is probably due to Australia's relatively favourable economic conditions.*
- The majority of subclass 457 visa holders who go onto a permanent visa, end up on an employer sponsored visa."*

**Department of Immigration & Citizenship**

We also asked survey participants to tell us if they thought they were eligible to bring in workers under the Australian Government's new system of Enterprise Migration Agreements. Fifty percent of mining organisations surveyed confirmed their eligibility. Of those who are eligible, fewer than half said they are likely to apply for an agreement over the next 12 months.

# Woodside Energy Ltd

**Lee Sumner**

**Senior HR Advisor International**

Woodside is the largest operator of oil and gas production in Australia. It is Australia's largest independent dedicated oil and gas company.

**Your industry is booming and you are operating in the thriving WA market. What percentage of your workforce are skilled migrants?**

It's currently about 3.5 – 4 percent. We look first in the local market, then more widely within Australia and if we still can't find anybody we reach out overseas. I would expect that this will increase over the next 1-2 years with a couple of major projects coming up and the skills shortage locally. There will be a big recruitment drive from overseas.

**Are you generally able to find people who meet your requirements?**

Yes generally, but it's not always easy. When we look overseas we are really looking for the cream of the crop – people with vast experience in their occupation – so it can take a little longer. But it is a pretty smooth process. Competition to get people is fierce, particularly in WA. We have several major competitors with key projects and we are all trying to get these people.

**How many of your skilled migrants ultimately move to permanent residency status?**

It's around 10-20 percent. We don't really expect this to change with the removal of the LAFHA because we already have established measures in place to encourage people to apply for permanent residency.

**Where do your skilled migrants generally come from?**

We are always looking for experienced people, so many of our people are from the UK (40 percent). The other significant groups are the US and the Philippines. The proportion from the UK has increased but the US is about the same. It can be difficult to tempt people to come from the US because of how our tax rates compare to theirs. Most of our foreign nationals fall into the 35 – 50 age bracket.

**Where specifically do the skills shortages appear?**

The groups we struggle to recruit are the engineering disciplines, specifically in oil and gas exploration. We are often looking for geotechnical, geologists, geosynthesists, petroleum engineers, pipeline engineers. Also experienced contract specialists and projects controls people can be difficult to source.

**We've recently heard a lot about Enterprise Migration Agreements (EMAs). Are you considering applying for one?**

Not at this point and I don't think we will for at least the next 12 months. It will really be in response to major projects. In the next year, with the outcome of some final investment decisions on key projects, it's something we will consider particularly from the perspective of third party contractors.

**Will the ageing of the Baby Boomers impact your skilled migration program?**

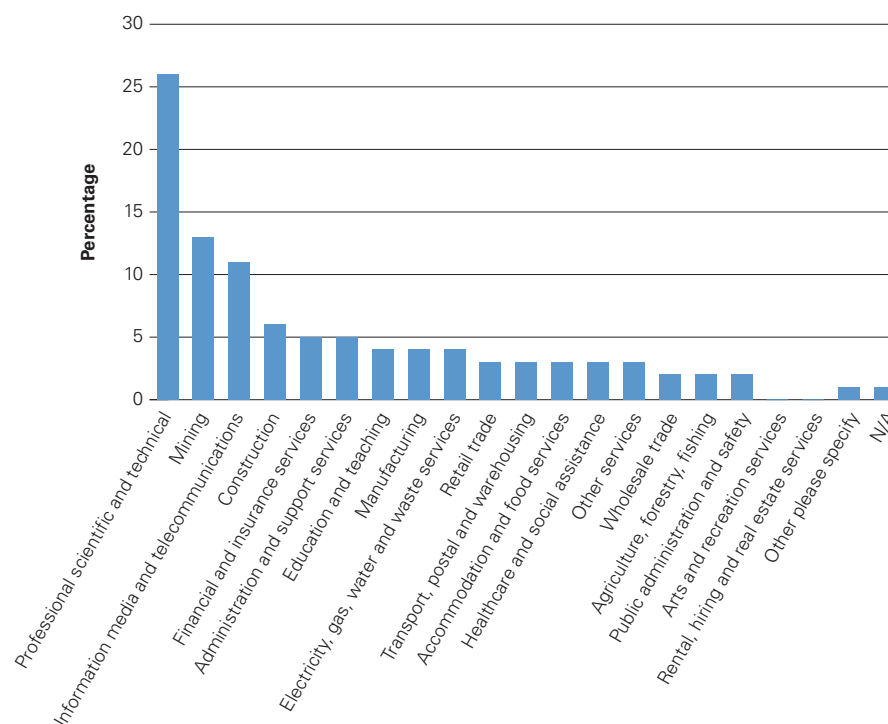
This is really an issue at senior levels with people retiring so we have succession planning to try and promote internally for those positions where possible. This is not really a skilled migration issue.

## 2 Responding to skills shortages

According to our survey, 62 percent of respondents claimed to be experiencing a skills shortage of some kind. The mining sector continues to face significant shortages with two thirds of mining companies reporting problems. Shortages are concentrated in Western Australia followed by Queensland and New South Wales.

Figure 3 summarises the nature of the main skill sets and job areas our respondents are looking to source overseas. As noted in our introduction, the survey results are skewed towards areas such as professional and scientific work (including engineering), mining-related skills and the information, media and telecoms sectors.

**Figure 3: Main skill sets being sought overseas**

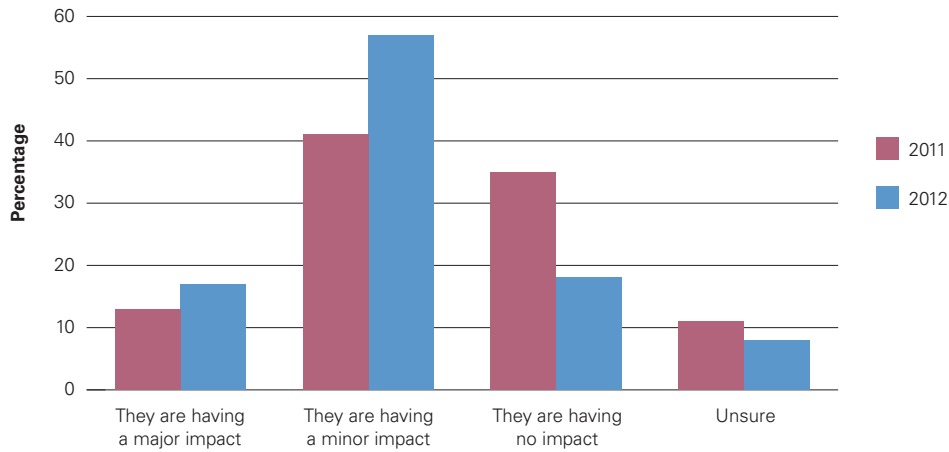


Nine out of 10 respondents said the 457 visa program is effective in filling skill gaps, again suggesting the visa program is working as intended.



On the overall question of skills, three quarters of participants think that shortages are affecting their businesses adversely, although many consider these effects to be relatively minor (Figure 4). This is a significant increase from 2011 responses.

**Figure 4: Are skill shortages affecting business capabilities?**



# Readify Pty Ltd

**Toni-anne Collins**  
**National Human Resources Manager**

Readify, founded in 1999, have established themselves as certified experts on the .NET Application Development Platform within Australia. They assist medium to large enterprises to innovate and develop mission critical, complex software based on the latest .NET technologies.

## **Why do you need to recruit skilled migrants?**

We are a consulting firm operating in the Microsoft.net space. Our point of differentiation has always been to employ the top 10 percent of elite developers. That was fairly straightforward when we were small but we now have 140 employees and finding people in Australia who can pass our recruitment process has become more difficult. So we opened it up to the world and currently we have more applications from outside Australia than within.

Seventeen percent of our consulting pool now comes from overseas. It's very much about the quality of the candidates we're looking for and we pull them from everywhere.

## **Do you have trouble finding people?**

No – we get about 50 applications a month and at the moment about 30 of those come from overseas. We don't really advertise other than online forums.

## **Do you expect the percentage of skilled migrants at Readify will change?**

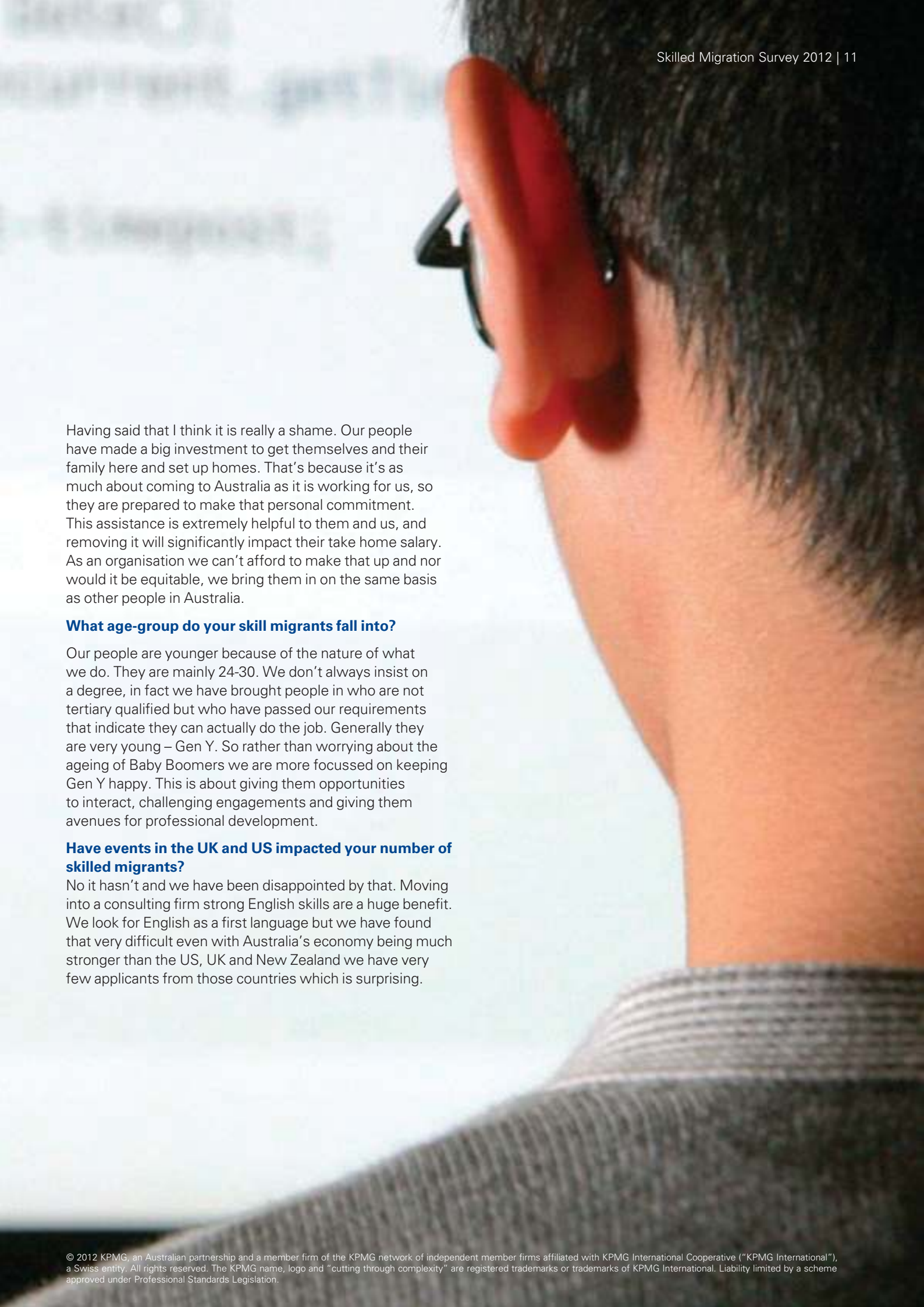
No I think it will remain the same. The country of origin changes a lot. At the moment the greatest number of skilled migrants that we have is from Egypt and until recently that was Russia. There are many other countries represented like Belgium, Iran, Philippines, and some of the South American countries. That does pose some cultural and language issues. We try extremely hard to do a very good on-boarding process both in terms of culture and the organisation.

## **What percentage of your 457 visa holders will move to permanent residency (PR)?**

We would like all of them to. To date we've done eight sponsored PRs and we've lost three of those. Obviously that is very frustrating. It is a much higher cost than the 457 visa and as a result we ask for a longevity clause – but it's difficult.

## **Will the removal of the LAFHA make it harder to get people?**

If people are only coming for economic advantage, LAFHA is a factor, but I don't think that is predominantly why our people are coming. We have an international reputation as one of the places to work if you are an elite developer. We promote a culture of excellence and what they do at work they also do outside of work. They present at conferences, they write books they have strong relationships with Microsoft globally. It is really like an extension of a hobby.



Having said that I think it is really a shame. Our people have made a big investment to get themselves and their family here and set up homes. That's because it's as much about coming to Australia as it is working for us, so they are prepared to make that personal commitment. This assistance is extremely helpful to them and us, and removing it will significantly impact their take home salary. As an organisation we can't afford to make that up and nor would it be equitable, we bring them in on the same basis as other people in Australia.

#### **What age-group do your skill migrants fall into?**

Our people are younger because of the nature of what we do. They are mainly 24-30. We don't always insist on a degree, in fact we have brought people in who are not tertiary qualified but who have passed our requirements that indicate they can actually do the job. Generally they are very young – Gen Y. So rather than worrying about the ageing of Baby Boomers we are more focussed on keeping Gen Y happy. This is about giving them opportunities to interact, challenging engagements and giving them avenues for professional development.

#### **Have events in the UK and US impacted your number of skilled migrants?**

No it hasn't and we have been disappointed by that. Moving into a consulting firm strong English skills are a huge benefit. We look for English as a first language but we have found that very difficult even with Australia's economy being much stronger than the US, UK and New Zealand we have very few applicants from those countries which is surprising.



### 3 Preparing for future skill shortages

Many businesses have concluded that skill shortages will remain a more or less permanent feature of the Australian economic landscape, demanding a longer term, more strategic approach to the issue. Demographic factors coupled with technological change are likely to vindicate this belief. The 457 visa system and other skilled immigration programs represent attempts by government to deal with the problem.

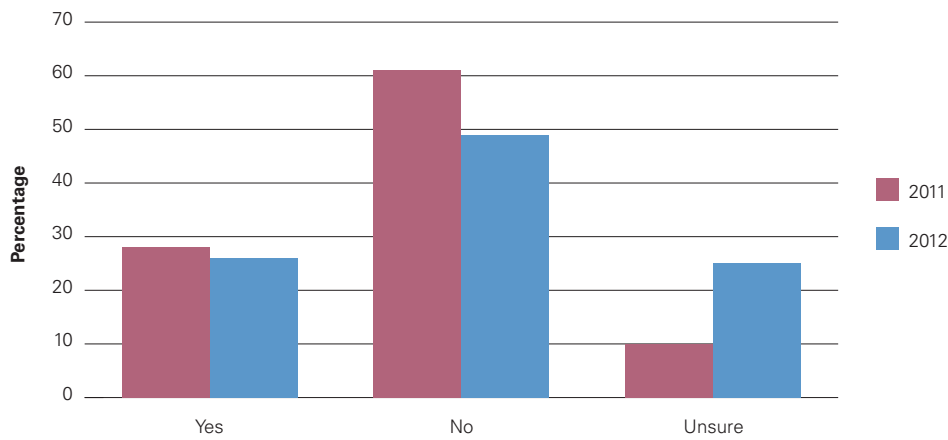
In this context, three quarters of our survey respondents reported that they will hire additional workers from overseas under the 457 visa system during the coming 12 months. The comparable figure for the 2011 survey was 66.5 percent and 59.5 percent in 2010, indicating that skill gaps persist (indeed may be increasing in some sectors) even in the face of softening economic conditions. Half the respondents expect to experience a relatively steady demand for 457 visa holders over the next 5 years while 28 percent expect to become more reliant on workers in this category.

Retention factors for 457 visa holders appear good. While 29 percent of respondents said they had lost workers recruited under the 457 program before the end of the first 12 months of employment, that still leaves 71 percent of workers remaining beyond their first year. Given the ability of a sponsored worker to transfer to a new employer, the departures are not necessarily lost to the broader workforce.

Interestingly, 29 percent of employers think they will rely more heavily on permanent visa holders to fill skill gaps over the next 5 years. The removal of LAFHA for temporary visa holders might encourage this shift. The government has also recently revamped and simplified its permanent employer sponsored visa program via the employer nomination scheme, the regional sponsored migration scheme and labour agreement programs.

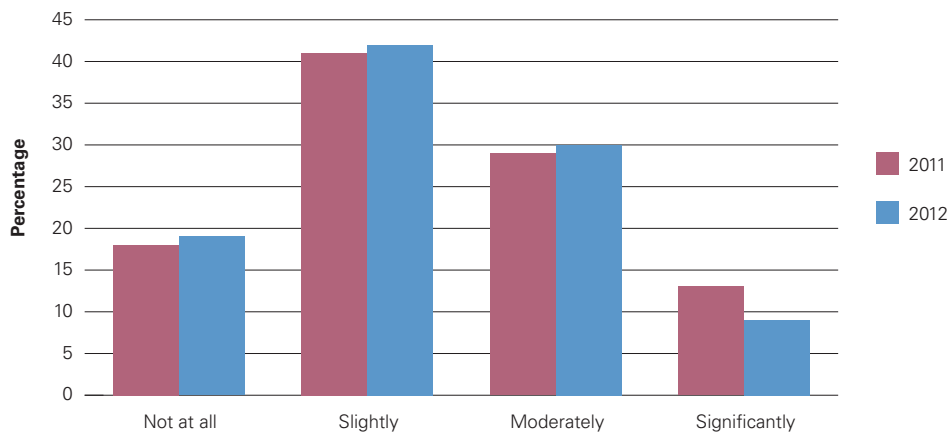
One of the criticisms of the 457 visa program is that it allows employers to duck their responsibility for training local workers. Our survey findings challenge this perception. For example, 81 percent of respondents said they are currently training Australian employees to fill present or future skill shortages while two thirds believe training local workers is more cost effective than bringing in skilled migrant workers. Moreover, to participate in skilled migration programs, employers must be spending at least 1 percent of their gross wages bill on training. Domestic skills formation is a complex matter. However, the numbers of skilled workers coming in on temporary and permanent visas is a symptom of the problem rather than its cause.

**Figure 5: Is the retirement of the baby boomers having an impact on the business yet?**



The progressive retirement from the workforce of the baby boomers is already starting to empty the skills and experience reservoir. As Figure 5 indicates, only just over a quarter of our respondents believe they are currently feeling the consequences of the baby boomer exodus, and that result is actually slightly down on the previous year. But when we asked respondents how Australia’s ageing workforce would affect their businesses *over the next 5 years*, the results were somewhat different (Figure 6). Fewer than 20 percent of respondents think workforce demographics will have no effect on their businesses over this time frame, although more than 40 percent believe the effect on them will be only minor.

**Figure 6: How will Australia’s ageing workforce affect your business over the next five years?**



Sixty percent of respondents claimed they are proactively managing a generational change in their employment strategies while almost as many (58 percent) believe they are capturing the knowledge and experience of the baby boomer generation as it transitions to retirement. Sixty-five percent said they possess some kind of strategy for dealing with current and future skills shortages, although that still leaves 35 percent with no proper plan for managing these issues.

# Mediabrand Australia Pty Ltd

**Daniel Tedesco**

**National Finance Director**

Mediabrand manages and invests over \$35 billion in global media worldwide on behalf of clients. It is Australia's leading marketing services organisation providing expertise in the full spectrum of communications.

## **Why do you need, or choose to use, skilled migrants within your workforce?**

In terms of the media industry on a global basis, Australia is a sophisticated market but, at present, not as sophisticated as the UK or the US. There is a lot of innovation coming out of those markets. We are keen to be an adopter of that innovation but we don't always have the technical skills. On some of the more technical media we look for those people overseas.

## **What sort of percentage of your workforce is made up of skilled migrants?**

We have 415 staff with close to 25 on sponsorship arrangements – so around 6 percent. If we can find a solution in Australia first, we do. We're not looking to disadvantage Australians with job opportunities. The only time we look for foreign nationals is when we can't find that skill set in Australia.

## **Do you expect this number to increase or decrease?**

I expect it to either stabilise or decrease and that's partly because of the changes to LAFHA. We've noticed that many 457 visa holders in our industry have taken the opportunity to apply for permanent residency now that the advantage of LAFHA has been removed. In the past, about 50 percent of our 457 visa holders have moved to permanent visas at the end of their stay but I would now expect that to increase.

## **Have you changed your criteria in terms of levels of experience required?**

It's more simple than that. It's about whether the skills we are seeking are available locally. If there is a need we fill it with a foreign national who has skills in the area.

## **Where do your skilled migrants come from?**

Our people are mainly from the UK and US and fairly evenly spread. We have a small number from elsewhere in Europe and Canada. These are the countries at the forefront of the industry.

## **What are the major areas where skills shortages are experienced?**

We are looking for specific skills in search engine marketing, search engine optimisation and social media. There is a shortage in digital media and digital media strategy skills in the Australian market. Anything with a digital or search background is where the prime demand is for us.

## **Many organisations indicated that it is more cost effective to use skilled migrants that train Australian workers?**

I disagree. I think the training of Australians, if you can retain them, is more cost effective than sourcing those skills elsewhere. If you bring people to Australia who subsequently do not fit in, you can waste a lot of time and money.

## **What age group are the people that you bring from overseas?**

It's a very young industry. Our skilled migrants generally fall into the 20 – 35 year age group.

## **Have you found the 457 visa program easy to use?**

The program is generally good. We have a few hiccups, especially with staff who are around the minimum salary limit but generally DIAC looks at each case on its merits and we are able to get a resolution.

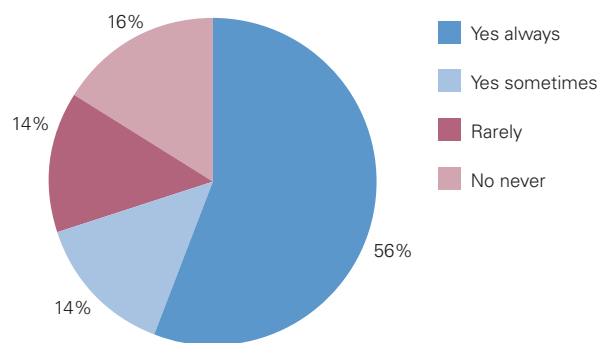


## 4 Learning to make the most of 457 visas

We have been interested to learn how employers are managing the various processes and protocols involved in actually bringing in skilled workers under the 457 visa program and to test for levels of satisfaction/dissatisfaction with the scheme.

In the twelve months to 31 March 2012, DIAC reported 63 percent of 457 visa applications were lodged by migration agents. Our findings were supportive of this data, with most respondent employers advising that they engage a migration agent at least some of the time to manage their 457 visa applications (Figure 7). This practice may reflect less on any inherent complexity in the visa system, and more on the fact that good agents offer cost and time efficient approaches to the entire visa process. That is, it is both more convenient and cost effective to use agents rather than relying on internal HR resources.

**Figure 7: Use of migration agents for 457 visa applications**



Concerns about the 457 program are spread across a range of matters.

- Keeping up to date on changes to migration laws (of high concern to 22 percent of respondents).
- Record keeping issues (23 percent).
- Complying with minimum salary requirements (21 percent).
- Complying with health insurance obligations (16 percent).
- Recruitment cost wastage (14 percent).

Twenty-one percent of survey participants thought the 457 visa process has actually become easier to use in the last 12 months (14.6 percent felt this way in 2011) while two thirds consider ease of use to be essentially unchanged over this period. Fifty-five percent said official government information about the scheme has been useful.

### Managing a Department review

DIAC periodically reviews employers using the 457 visa scheme to make sure they are complying with the various rules involved in the program. If employers are conscientious about their management of the visa system, they should have little to fear from such a review.

The logical starting point is to properly understand your obligations under the scheme, including keeping track of variations to the regulations and procedures that may be introduced from time to time. A competent migration agent can help you make certain all the bases are covered here.

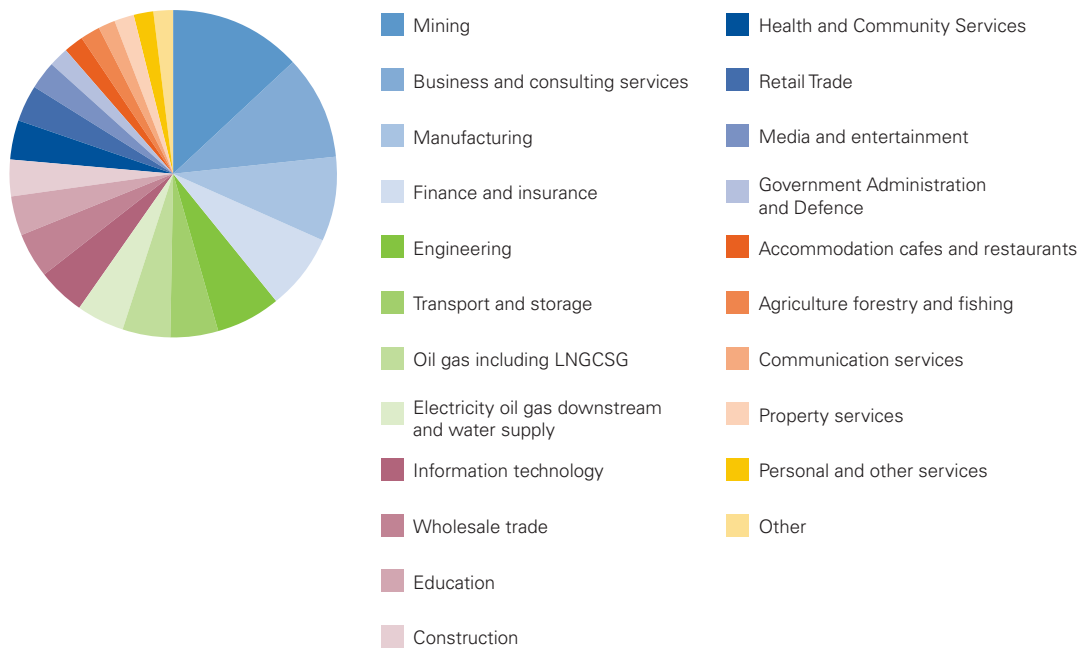
To help expedite the review process, assemble all documentation relevant to individuals employed under 457 visas, including copies of their employment records. Doing this can also alert you to any breaches of DIAC’s requirements, or to gaps in your record keeping.



# About the survey

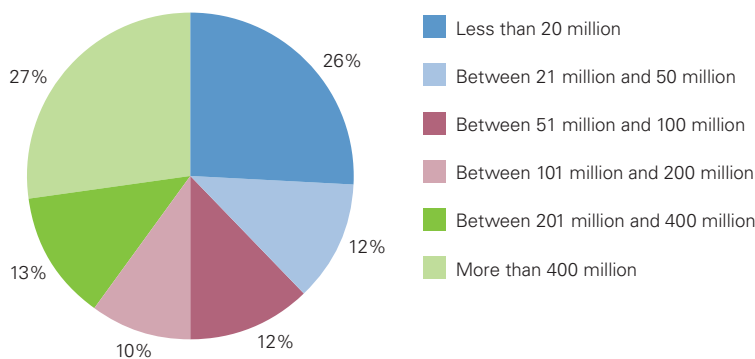
Our survey was conducted during July and August 2012. Responses were obtained from 187 separate businesses and other organisations across Australia. Our sample was drawn from a broad cross section of economic activity, although it was slightly skewed towards the mining and manufacturing sectors (Figure 8).

**Figure 8: Industries and activities represented in 2012 survey**



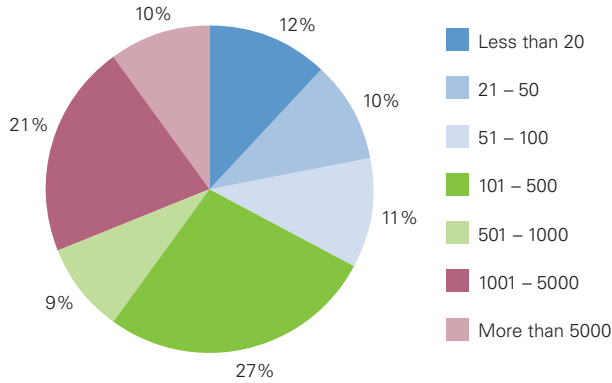
Analysis of the size of the entities sampled shows that 27 percent have annual turnovers in excess of \$400 million each (Figure 9).

**Figure 9: Annual turnover of surveyed entities**



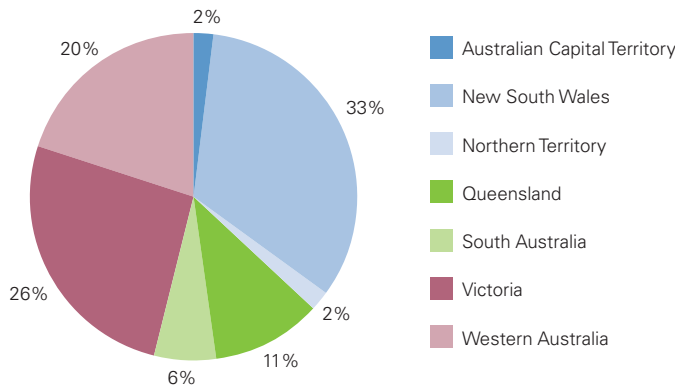
Sixty percent of the surveyed organisations have less than 500 people each on their Australian payrolls (Figure 10).

**Figure 10: Respondent organisations by employee numbers**



The geographic location of surveyed entities (classified by head office location) includes all parts of mainland Australia, but with a significant emphasis on Western Australian firms (Figure 11).

**Figure 11: Geographic location of respondent organisations**



Just under half of the surveyed organisations are foreign owned. This ownership is distributed between many different countries, although just three countries — the United States, United Kingdom and Japan — account for just under half of the foreign-owned entities in the survey.



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October 2012. VICN10272PE.