2015 **CIO** VIEWPOINT

Michael Page

Outlook for the technology job market stays optimistic

The technology job market looks fairly optimistic across the Greater China region. Some 46% of respondents foresee the job market improving in the next 12 months, while more than half (53%) of CIOs predict increasing headcounts in the coming year.

There is a more optimistic outlook for hiring in mainland China as compared with Hong Kong and Taiwan, given that a variety of new start-up companies in mainland China will be looking to expand and secure candidates from both domestic and foreign companies.

Technology budgets on the rise

Almost half (49%) of technology professionals stated that their budgets have increased in the past year, with 42% saying their budgets are unchanged.

A high percentage (62%) of CIOs stated that their IT budget is the equivalent of 1%-5% of their company's revenue and a significant proportion (26%) say it is as high as 6% or above.

CIOs spends the most time on operations; budget and communication are two of their biggest concerns

A significant proportion of CIOs' time (38%) is focused on their operations, showing an emphasis on the stability and sustainability of their day-to-day functions.

Budget remains a primary concern for both CIOs in mainland China and Hong Kong, whilst in Taiwan, inadequate communication skills are seen as a key issue.

Mobility and big data are the focus going forward

CIOs throughout Greater China appear to be focusing on big data including consolidation of facts, insights and data applications as they control and direct their businesses.

Mobility is ranked as the top area for new technology spending by CIOs in mainland China and Hong Kong, and second behind cloud services by their counterparts in Taiwan.

Infrastructure maintenance is the most outsourced service in Greater China

Across Greater China, almost half (49%) of CIOs reported that a quarter of their work is outsourced and infrastructure maintenance is the most outsourced service.

Technology start-up firms are becoming more dominant and growing in size in mainland China. In Hong Kong, outsourcing is common because it offers cost savings, control and flexibility.

METHODOLOGY

The 2015 Greater China CIO Viewpoint report, produced by Michael Page, is based on the survey findings of 116 Chief Information Officers (CIOs) working across a range of industry sectors in mainland China, Taiwan and Hong Kong. The report provides a snapshot of CIO perspectives on some of the key considerations facing technology leaders over the coming 12 months, including the introduction of technological innovations and strategies within their organisations, IT budget allocation and resourcing trends.
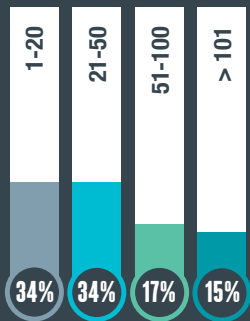
THE CIO ROLE AND FOCUS

The 2015 Greater China CIO Viewpoint shows that 68% of respondents work with a team of less than 50 people and 47% of CIOs work in teams that support over 1,000 users. Senior technology leaders are under pressure to support fast-evolving digital business scenarios. They work with a constraint of resources and have to juggle between engaging with business leaders, their management and the user community they support.
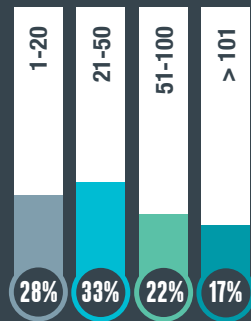
According to the survey results, a large proportion of CIOs' time (38%) is focused on their operations, showing an emphasis on the stability and sustainability of their day-to-day functions. Technology C-suite executives in Greater China are still expected to maintain their traditional role of 'oiling the wheels of the machinery' — that is, implementing, operating and securing their firm's legacy IT systems — managing their team of IT staff and justifying an IT budget that is always facing pressure for reductions and battling constraints.
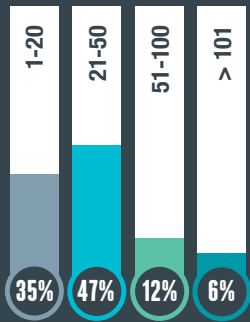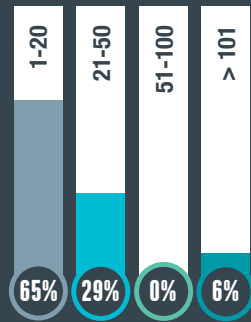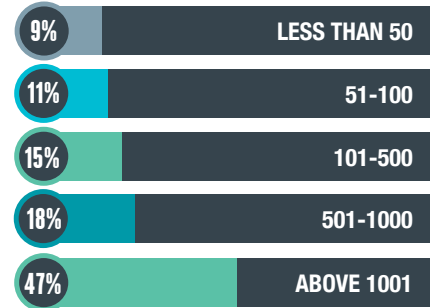
Average size of teams

Greater China

1-20	21-50	51-100	>101
34%	34%	17%	15%

Mainland China

1-20	21-50	51-100	>101
28%	33%	22%	17%

Hong Kong

1-20	21-50	51-100	>101
35%	47%	12%	6%

Taiwan

1-20	21-50	51-100	>101
65%	29%	0%	6%

Number of users supported by CIOs

Greater China

9%	LESS THAN 50
11%	51-100
15%	101-500
18%	501-1000
47%	ABOVE 1001

Mainland China

7%	LESS THAN 50
9%	51-100
15%	101-500
16%	501-1000
53%	ABOVE 1001

Hong Kong

11%	LESS THAN 50
17%	51-100
24%	101-500
24%	501-1000
24%	ABOVE 1001

Taiwan

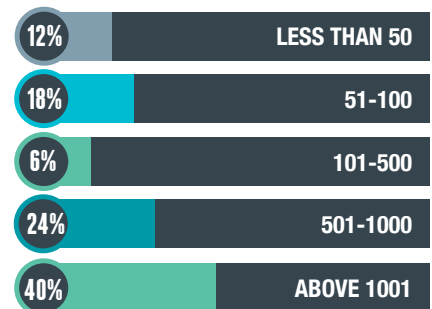|	
12%	LESS THAN 50
18%	51-100
6%	101-500
24%	501-1000
40%	ABOVE 1001
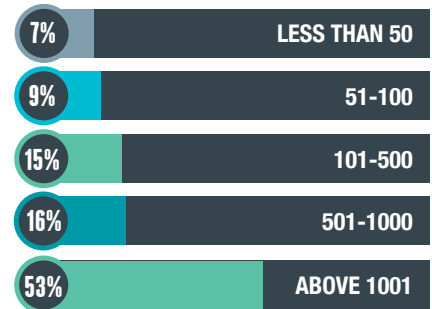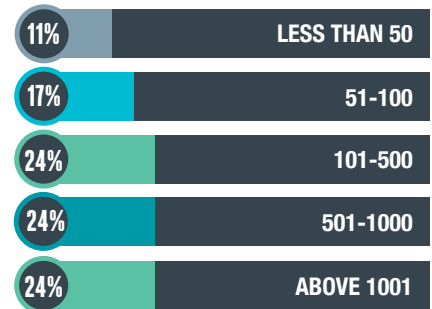
THE CIO ROLE AND FOCUS

CIOs spend the second highest proportion of their time (24%) on strategy. This observation ties in with the importance of CIOs being more strategic in their function. This would imply them expanding on opportunities and working on initiatives that create an impact on the company's vision. Approaching these initiatives will enable them to deploy strategy to build new IT-powered services and products and improve customer relationships through innovation and operations. Moreover, senior technology leaders in Greater China are currently the central players in bringing these innovations to life through new services and channels.

For CIOs in mainland China to be more focused on strategy, they should dedicate themselves to reorganising teams in order to optimise their capabilities and reduce costs. In mainland China, digital too, has also evolved to be more front-end facing as compared with being a back-end function in the past.

Innovation ranks third on the list of what senior technology leaders spend their time on, at 17%. Across Greater China, CIOs have to increasingly address innovation differently in their respective markets.

In Hong Kong, innovation is dependent on the specific industry's business objectives and the solutions needed to reach their market more successfully. Within Hong Kong and mainland China, to boost innovation in businesses, retailers will have to invest in their e-commerce and CRM functions.

They will also support innovation in new product and service initiatives. This is because firms, mostly multinationals in Hong Kong, will be interested to see if their product is up to the market's standards and use innovation to keep pace with evolving market trends. They should also begin devoting more of their time to growth-oriented and customer-centric innovation. In Taiwan, CIOs have to make do with limited resources and talent for innovation and are more concerned with processes and operations as well as project management.

On a broader scale in Greater China, senior technology leaders will need to strike a balance between refining core areas such as infrastructure and data centres and developing capable digital leadership with investments in mobile, cloud or analytics.

Most important activities in the role of CIOs by %

Greater China
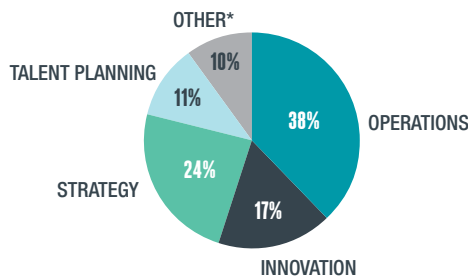
OTHER* 10%
TALENT PLANNING 11%
OPERATIONS 38%
STRATEGY 24%
INNOVATION 17%

* Project implementation and management, research in new technology, stakeholder management, internal and external communication, crisis management, product research and development and market research, liaising with business units, IT sales and maintenance

Mainland China
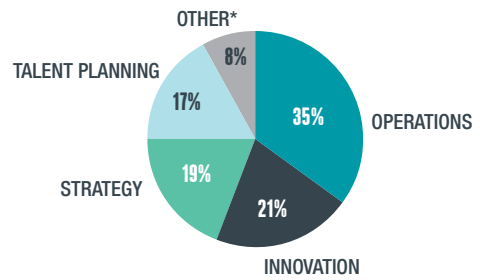
OTHER* 8%
TALENT PLANNING 17%
OPERATIONS 35%
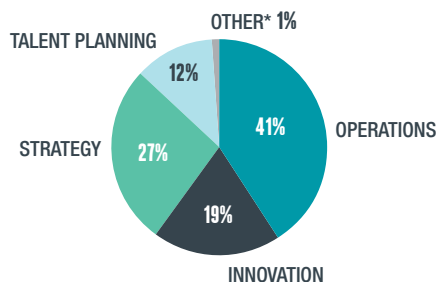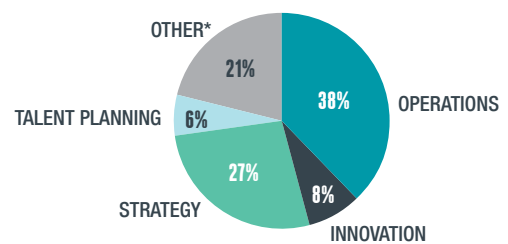STRATEGY 19%
INNOVATION 21%

* Project implementation and management, research in new technology, stakeholder management, internal and external communication, crisis management, product research and development and market research

Hong Kong

OTHER* 1%
TALENT PLANNING 12%
OPERATIONS 41%
STRATEGY 27%
INNOVATION 19%

* Business partnering

Taiwan

OTHER* 21%
TALENT PLANNING 6%
OPERATIONS 38%
STRATEGY 27%
INNOVATION 8%

* Project execution, IT, sales, project management and implementation, communication, research and maintenance
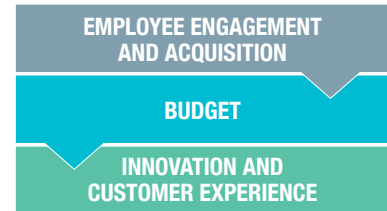
THE CIO ROLE AND FOCUS

Budget issues remain a high-ranking concern for CIOs in both mainland China and Hong Kong. Traditionally in mainland China, the focus has been on enhancing customer experience. Particularly, the IT function in mainland China has a reputation for delivering dissatisfactory service in the past and it has proven difficult in meeting customer demands in the allocated timeframe.

In Hong Kong, CIOs dedicate the bulk of their budget to differentiating their product from other service providers and in turn, refining process improvement and nurturing innovation. Stakeholder management is yet another priority of senior technology leaders as Hong Kong and mainland China CIOs have varying scope of responsibilities and are often not the most senior person in technology. Often, a C-suite technology executive in Hong Kong and mainland China may report to a regional or global CEO, each with varying responsibilities and a different remit.
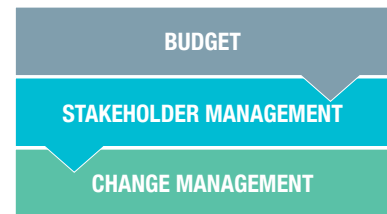
Inadequate communication skills of CIOs are a widely acknowledged gap in Taiwan. They remain a huge obstacle for placing suitable roles and pose challenges for talent to advance in the technology market. Often, many of them may not have an adequate level of English proficiency needed to converse with foreign clients and lack an international view towards business, both of which are needed for them to be globally competitive.

Top concerns faced by CIOs in their roles

Mainland China

- EMPLOYEE ENGAGEMENT AND ACQUISITION
- BUDGET
- INNOVATION AND CUSTOMER EXPERIENCE

Hong Kong

- BUDGET
- STAKEHOLDER MANAGEMENT
- CHANGE MANAGEMENT

Taiwan

- COMMUNICATION ISSUES
- COMPETITIVE ENVIRONMENT
- STRATEGY

INFLUENCING COMPANY STRATEGY

Across Greater China, 67% of respondents are making decisions that impact the overall company strategy. They have to capitalise on the growing importance of technology supporting business growth and will have to be more effective at forging partnerships and extending their accountability to the business.

In mainland China, CIOs are getting more involved in making decisions with business leaders and determining outcomes that are related to the entire business cycle. Particularly in industries such as fast-moving consumer goods, pharmaceuticals and retail, these capabilities will be crucial.

Hong Kong has been recognised as a competitive hub for growing industries for some time and CIOs will have to be versatile in operating in different markets and understanding the structures of varying organisations. In Hong Kong and mainland China, technology C-suite executives may often report to a regional or global CIO head and have differing levels of influence when it comes to the overall strategy.

In Taiwan, there is a growing emphasis on the need for reliable data to support decision-making. Having business savviness and business sensitivity will be required to succeed in the Taiwanese market. CIOs will have to arm themselves with accurate and timely data through utilising increasingly complex and diverse business intelligence tools to make strategic decisions.

Making decisions that impact the overall company
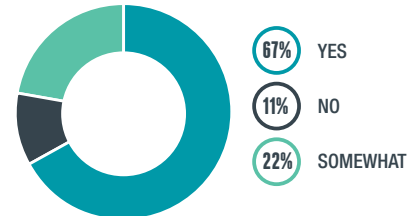
Greater China

67%	YES
11%	NO
22%	SOMEWHAT

Mainland China

68%	YES
8%	NO
24%	SOMEWHAT

Hong Kong

52%	YES
24%	NO
24%	SOMEWHAT

Taiwan

74%	YES
13%	NO
13%	SOMEWHAT

Making company-wide decisions over the past 5 years

Greater China

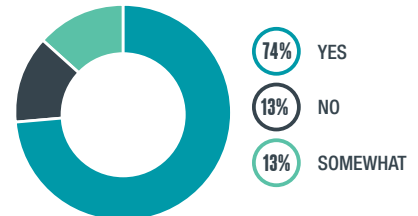| 70% | YES, THIS HAS INCREASED |
| 4% | YES, THIS HAS DECREASED |
| 26% | STAYED THE SAME |
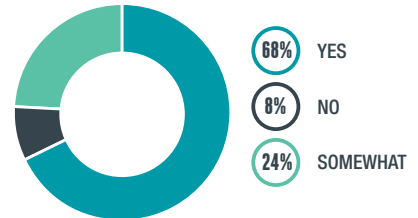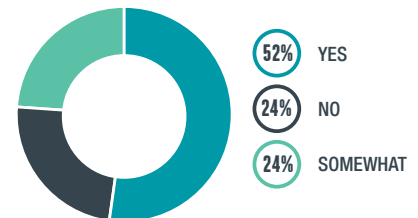
IT INNOVATION AND STRATEGIES

CIOs throughout Greater China appear to be focusing on big data including consolidation of both facts and insights and data applications as they control and direct their businesses. Other improvements to business operations that CIOs are focusing on include process driven initiatives to drive costs down and improve efficiencies and implementing SAP applications.

Mobility was nominated as the top area for new technology spending by CIOs in mainland China and Hong Kong. In these markets, respondents will prioritise being adopters of mobility in their operations over the next 12 months, indicating prominent investments in the drive for heightened agility. In Taiwan, the focus is on cloud services as the most significant form of new technology spending, as senior technology leaders seek to have a better understanding of analytics and manage the drivers of business performance.

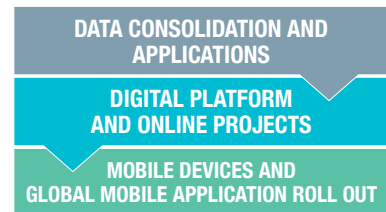## Priorities of CIOs over the next 12 months

Mainland China

1 MOBILITY	2 BIG DATA	3 DIGITAL	4 CLOUD SERVICES	5 CYBER SECURITY

Hong Kong

1 MOBILITY	2 DIGITAL	3 CYBER SECURITY	4 BIG DATA	5 CLOUD SERVICES

Taiwan

1 CLOUD SERVICES	2 MOBILITY	3 BIG DATA	4 DIGITAL	5 CYBER SECURITY

Main business improvement projects in 2015

Mainland China

DATA CONSOLIDATION AND APPLICATIONS
DIGITAL PLATFORM AND ONLINE PROJECTS
MOBILE DEVICES AND GLOBAL MOBILE APPLICATION ROLL OUT

Hong Kong

SALES OPERATIONS, IT STRATEGY AND SALES TOOLS
ERP IMPLEMENTATION
BIG DATA

Taiwan

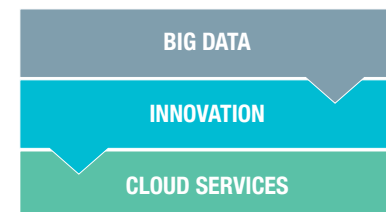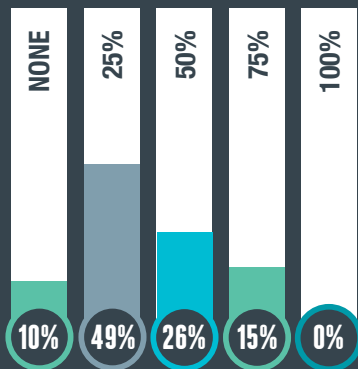| BIG DATA |
|---|
| INNOVATION |
| CLOUD SERVICES |

OUTSOURCED SERVICES

In mainland China, 59% of respondents identified that the most outsourced service is infrastructure maintenance. Foreseeably, for mainland China, there is a demand for external parties with a strong technology background who are able to support operations 24/7. There is also a surging trend to engage external consultants to advise and implement digital strategies of companies.

Small to medium enterprises have more reliance on digital agencies to help build their digital capabilities compared to larger multinationals who can afford to hire in-house talent. This observation correlates with the emergence of more digital agencies in mainland China as technology start-up firms are becoming more dominant and growing in size there. In Hong Kong, outsourcing is common because it offers cost savings, control and flexibility.

In Taiwan, the most commonly outsourced services are infrastructure maintenance, at 46% and ERP implementation, at 31%. For infrastructure maintenance, it is regarded in Taiwan as more cost-effective and productive to engage an external vendor's help. ERP implementation is another conventionally outsourced service in Taiwan as ERP consultants are able to assist pulling together all applications and services to make business' systems operate with more connectivity and align with a digital-ready purpose.
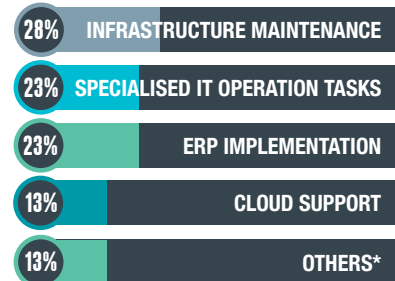
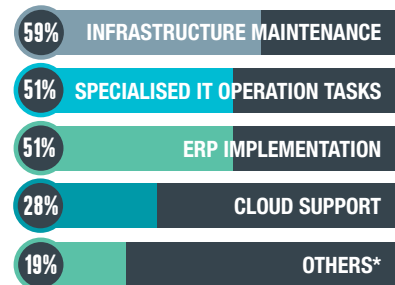## Vendor/external partner support by %

Greater China

NONE	25%	50%	75%	100%
10%	49%	26%	15%	0%

Services most outsourced to vendors

Greater China

28%	INFRASTRUCTURE MAINTENANCE
23%	SPECIALISED IT OPERATION TASKS
23%	ERP IMPLEMENTATION
13%	CLOUD SUPPORT
13%	OTHERS*

* Development, network and infrastructure support, store support, coding, implementation, software development, users' needs, small and new technology, e-commerce, software and hardware development, service desk, client outsourcing, system development and application development, CRM, HRS commoditised system, helpdesk application development and support and programming

Mainland China

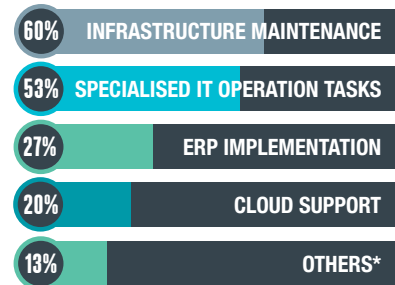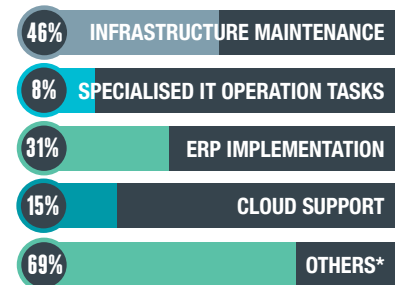|	
59%	INFRASTRUCTURE MAINTENANCE
51%	SPECIALISED IT OPERATION TASKS
51%	ERP IMPLEMENTATION
28%	CLOUD SUPPORT
19%	OTHERS*

* Development, network and infrastructure support, store support, coding, implementation, software development, users' needs, small and new technology, e-commerce, software and hardware development, service desk, client outsourcing, system development and application development

Hong Kong

60%	INFRASTRUCTURE MAINTENANCE
53%	SPECIALISED IT OPERATION TASKS
27%	ERP IMPLEMENTATION
20%	CLOUD SUPPORT
13%	OTHERS*

* CRM, HRS commoditised system

Taiwan

46%	INFRASTRUCTURE MAINTENANCE
8%	SPECIALISED IT OPERATION TASKS
31%	ERP IMPLEMENTATION
15%	CLOUD SUPPORT
69%	OTHERS*

* Helpdesk, application development and support and programming

BUDGET PLANNING

Results from the survey indicate that almost half (49%) of CIOs in mainland China, Hong Kong and Taiwan are operating with increased budgets and for a high proportion (62%) between 1%-5% of their organisation's revenue is reinvested into their IT budget. More than a quarter (26%) of respondents stated that their budget is the equivalent of 6% or more of their company's revenue, giving reason to think that companies across the region are starting to realise that technology can drive the bottom line through improved productivity, efficiency and cost savings.

Across Greater China, most professionals devoted significant parts of their budget to customer service experience (22%) and business opportunity initiatives (21%). In mainland China, many firms are looking to hire business partners to improve customer experience and service delivery, whereas in Hong Kong, CIOs are looking to move into a more customer-service driven and innovation-centred direction in the next 12 months. In Taiwan, a high percentage (40%) of CIOs are devoting their budget to cloud services, which is reflective of the desire for technology companies to keep up with the rest of the fast-changing market.
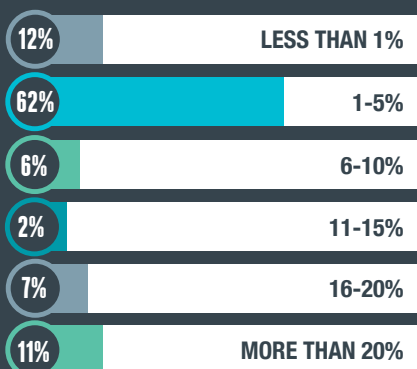
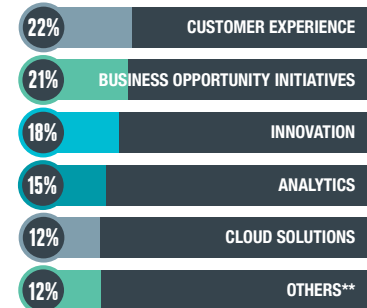## Has IT budget increased or decreased in the past year?

Greater China

- **49%** INCREASED
- **9%** DECREASED
- **42%** REMAINED THE SAME
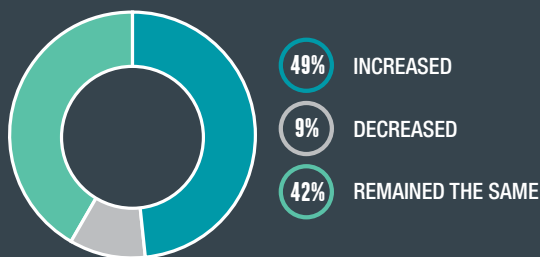
How much of the organisation's revenue gets reinvested into IT budget?*

Greater China

- **12%** LESS THAN 1%
- **62%** 1-5%
- **6%** 6-10%
- **2%** 11-15%
- **7%** 16-20%
- **11%** MORE THAN 20%

Most significant areas of a company's IT budget*

Greater China

- **22%** CUSTOMER EXPERIENCE
- **21%** BUSINESS OPPORTUNITY INITIATIVES
- **18%** INNOVATION
- **15%** ANALYTICS
- **12%** CLOUD SOLUTIONS
- **12%** OTHERS**

** Projects, integration, architecture infrastructure, operations, maintenance, hardware, network maintenance, research & development, ERP, digital sales-related tools, talent, case management situations, market data, CAPEX, security infrastructure upgrade, licensing, vendor contracts, security

Mainland China
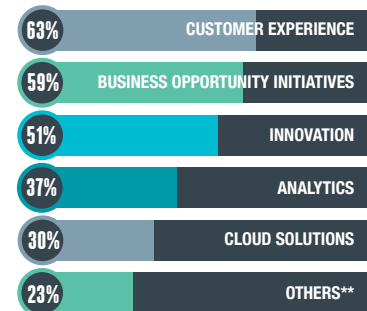
- **63%** CUSTOMER EXPERIENCE
- **59%** BUSINESS OPPORTUNITY INITIATIVES
- **51%** INNOVATION
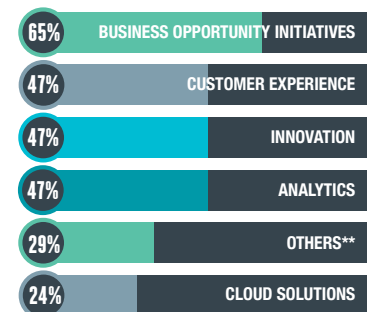- **37%** ANALYTICS
- **30%** CLOUD SOLUTIONS
- **23%** OTHERS**

**Projects, integration, architecture infrastructure, operations, maintenance, hardware, network maintenance, research & development, ERP, digital sales-related tools, talent

Hong Kong

- **65%** BUSINESS OPPORTUNITY INITIATIVES
- **47%** CUSTOMER EXPERIENCE
- **47%** INNOVATION
- **47%** ANALYTICS
- **29%** OTHERS**
- **24%** CLOUD SOLUTIONS

**Case management situations, hardware/server upgrades, market data, maintenance, CAPEX, security, infrastructure upgrade and operations

Taiwan

- **60%** OTHERS**
- **40%** CLOUD SOLUTIONS
- **27%** CUSTOMER EXPERIENCE
- **13%** INNOVATION
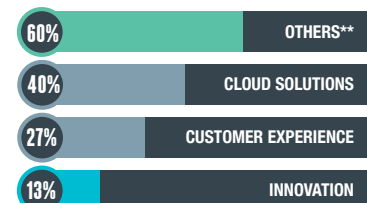
**Licensing, vendor contracts, maintenance, hardware, software, research and development and data security

*Note: This is based on the 116 CIOs that the report has surveyed and this cuts across various industries

TALENT IN DEMAND

Across Greater China, the technology job market is fairly optimistic. Some 46% of respondents foresee the job market improving in the next 12 months. Another 35% predict the job market will remain steady for IT professionals, indicating solid performances from the sector in the region.

In mainland China, there is a growing demand for data analysts as big data remains a popular area for companies to review candidate profiles and to continue to have an impact on the growth of the technology market. Developers form another highly sought after segment of talent. However, the demand from larger multinationals is not as high as in technology companies, where their work is considered more relevant.
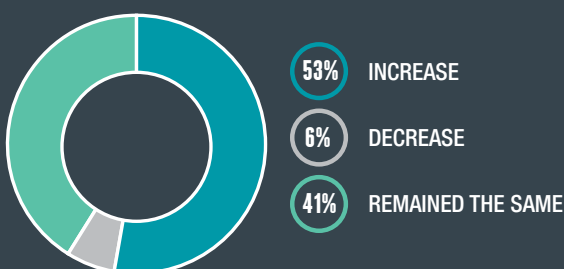
Cyber security is top of the list in Hong Kong and there is a growing demand for developers who are able to interpret and create codes to suit varying business functions. There is also a demand for cyber security experts in industries such as banking and retail, which largely depend on internet businesses for revenue and expansion.

CIOs in Taiwan and mainland China reported that they are looking for talent with both technical skills and business sensitivity. They also need to be able to handle the ever-changing nature of interactions between customers and organisations.

Specific local market conditions will have their own impact on recruitment initiatives and determine growth in talent but it looks as if CIOs need to engage the expertise of professional recruiters to attract talent who are adaptable and have a higher potential for retention. Recruiters in the technology space are highly valued and relied on as they possess wide networks, have access to higher quality candidates and are constantly aware of market trends. This knowledge allows them to be able to advise clients on their talent needs, identify candidates with the right skillsets and stay in contact with high-performing candidates. This makes technology recruiters for clients a viable and productive option when it comes to talent acquisition and retention.
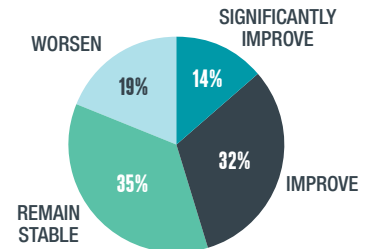
Staff changes in your organisation over the next 12 months

Greater China

- 53% INCREASE
- 6% DECREASE
- 41% REMAINED THE SAME

Expected performance of technology job market in the next 12 months

Greater China

- SIGNIFICANTLY IMPROVE 14%
- IMPROVE 32%
- REMAIN STABLE 35%
- WORSEN 19%

Mainland China

- SIGNIFICANTLY IMPROVE 19%
- IMPROVE 36%
- REMAIN STABLE 31%
- WORSEN 14%

Hong Kong

- SIGNIFICANTLY IMPROVE 6%
- IMPROVE 12%
- REMAIN STABLE 70%
- WORSEN 12%

Taiwan

- IMPROVE 33%
- REMAIN STABLE 20%
- WORSEN 47%
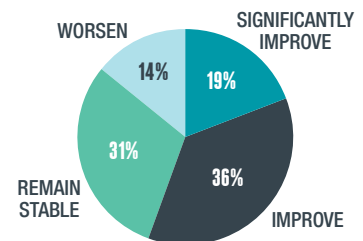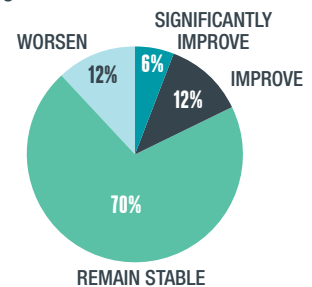
SKILLS FOR SUCCESS IN LOCAL MARKETS

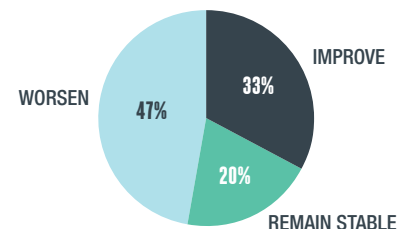Should there be a skills shortage within the local technology industry, talent may have to be sourced from overseas, with 70% of surveyed CIOs considering recruiting international IT professionals.

In Hong Kong, overseas workers have more accessibility to senior jobs because language and cultural factors are not as prevalent as they are when candidates seek more junior roles.

Having a heightened understanding of the ways of doing business in mainland China will be required for anyone who wishes to relocate there. Foreign talent seeking new opportunities in mainland China have to demonstrate relevant knowledge of the market and have an adequate grasp of Mandarin before they can be considered for roles. For internal international transfers, being well versed in Mandarin is not so critical should the proven expertise be adequate.

Skill diversification plays a huge role for foreign talent wishing to seek job opportunities in Taiwan. Taiwanese technology businesses will only consider international talent should they have unique skill sets that are difficult to identify or skills they are unable to train local talent for.

In Taiwan, there is also limited talent with regional exposure in their work experience. This means that it is difficult to train them to manage teams of varying nationalities. There is also difficulty in identifying talent with distinct technical skills such as CMP, material engineering and process optimisation. Unless Taiwanese candidates have the opportunities to study abroad, they can rarely have access to these unique technical skills.

The room for new talent looks promising as over half of all CIOs surveyed expect the number of technology staff in their organisations to increase over the next 12 months. Core skills in demand include managing data and relating it to problem-solving and strategy execution, having the ability to synthesise digital functions into their business and an awareness of how big data, cloud services and mobility can enhance their business. There is a more optimistic outlook for hiring in mainland China as compared with Hong Kong and Taiwan, given that a variety of new start-up companies in mainland China will be looking to expand and secure candidates from both domestic and foreign companies.

This will require organisations to have talent capable of improving efficiency, creating value, ensuring optimisation, and to be a source of inspiration for new ideas and strategies. CIOs will need to have a coordinated approach to talent acquisition and place emphasis on talent retention so as to respond quicker to the needs of the evolving technology market.

Possibilities of recruiting international talent due to difficulty identifying local talent

Greater China
70% YES | NO 30%

Mainland China
72% YES | NO 28%

Hong Kong
47% YES | NO 53%

Taiwan
87% YES | NO 13%

Skill shortages/gaps in the market

Mainland China
- PROJECT MANAGEMENT
- COMMUNICATION SKILLS
- BIG DATA
- DIGITAL EXPERIENCE

Hong Kong
- CYBER SECURITY AND SECURITY QUALIFIED
- ENGINEERS, BAS, PMS

Taiwan
- KNOWLEDGE OF BIG DATA, HAS BUSINESS SENSE AND TECHNICAL SKILLS
- INTEGRATION WITH INFRASTRUCTURE AND SOFTWARE
- SYSTEM ANALYSIS AND SYSTEM UPGRADE
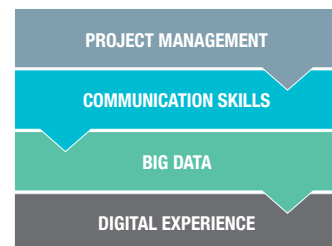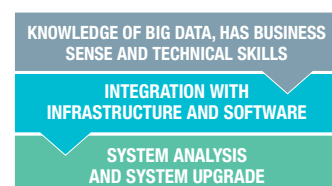
CONCLUSION

There is a good degree of optimism in the technology space across Greater China with budgets increasing, headcounts predicted to rise and CIOs making more company-wide decisions than at any time in the past five years.

With a strong emphasis on operations across Greater China (accounting for 38% of CIOs' time), technology leaders will have to deliver a model with disciplined execution that provides reliable, credible and transparent services. CIOs are also dedicating themselves to defining and strengthening strategy (24%) for their firms, which will largely depend on the scope and size of their business.

Across mainland China, Hong Kong and Taiwan, businesses are placing emphasis on mobility, big data and cloud services as their most pressing areas of innovation. IT businesses will not only have to support innovation but also be a source of innovation by leveraging the speed, agility and cost benefits of their services and business solutions. CIOs will have to look at proactively identifying other opportunities and initiatives to differentiate their organisations in the market.

Customer experience is widely recognised as integral to the growth of most technology businesses, as indicated by 22% of the respondents. CIOs must consider it as a very real business discipline and see it as one of the most important roles of the technology team. To deliver products, capabilities and services with better responsiveness, CIOs will need to get ahead of their customers and lead, not just follow, when it comes to harnessing technology.

Overall, CIOs in Greater China will have to refine the strategy of their organisations, explore ways to implement effective and vibrant innovation and a distinct customer experience that align with their business objectives.

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