SALARY SURVEY 2020
IRELAND

ROBERT WALTERS

“ WE ARE POWERING PEOPLE AND ORGANISATIONS TO FULFIL THEIR UNIQUE POTENTIAL. ”

WELCOME TO ROBERT WALTERS

SPECIALIST PROFESSIONAL RECRUITMENT

**ROBERT WALTERS,
CHIEF EXECUTIVE OFFICER**

69% OF OUR BUSINESS IS FOCUSED ON PERMANENT RECRUITMENT, 31% ON CONTRACT

Since opening our doors over 30 years ago, people have been at the heart of everything we do, from the jobseeker to the hiring manager and those who bring them together. As a market-leading global recruitment group, we see our role as that of a trusted advisor – helping our candidates and clients to build fulfilling careers and grow effective teams both now and into the future.

As we continue to grow internationally, we remain committed to our founding principles: a strong team-based culture that puts clients and candidates first, a passion for quality in all that we do, a commitment to treating people with integrity, and an innovative spirit that propels us to constantly improve.

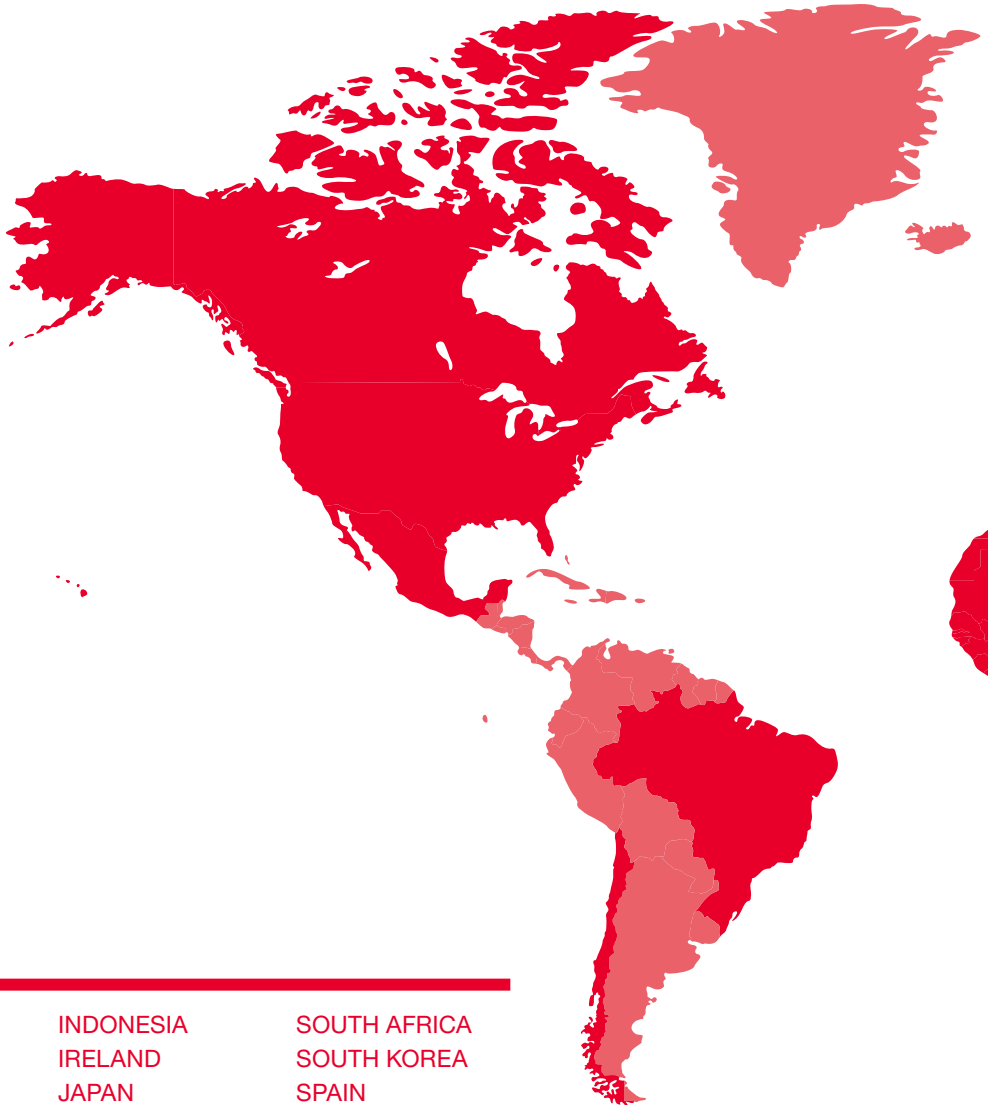
These values lead us to prioritise building long-term relationships – we advise and consult but never force people into making decisions that aren't right for their business or career goals. We believe that our consultative approach sets us apart from the competition and continues to cement our reputation as a recruiter of choice, trusted by the world's leading organisations and professionals.

In addition, we are experts in the disciplines we recruit for, enabling us to provide our clients and candidates with quality insights into hiring and salary trends. Our regional Salary Surveys are designed to help you make informed hiring decisions and salary negotiations. If you would like to discuss these topics further, please don't hesitate to contact your local Robert Walters office listed in the back of this book.

Robert Walters
CEO
Robert Walters Group

GLOBAL REACH, LOCAL EXPERTISE

Countries we operate in



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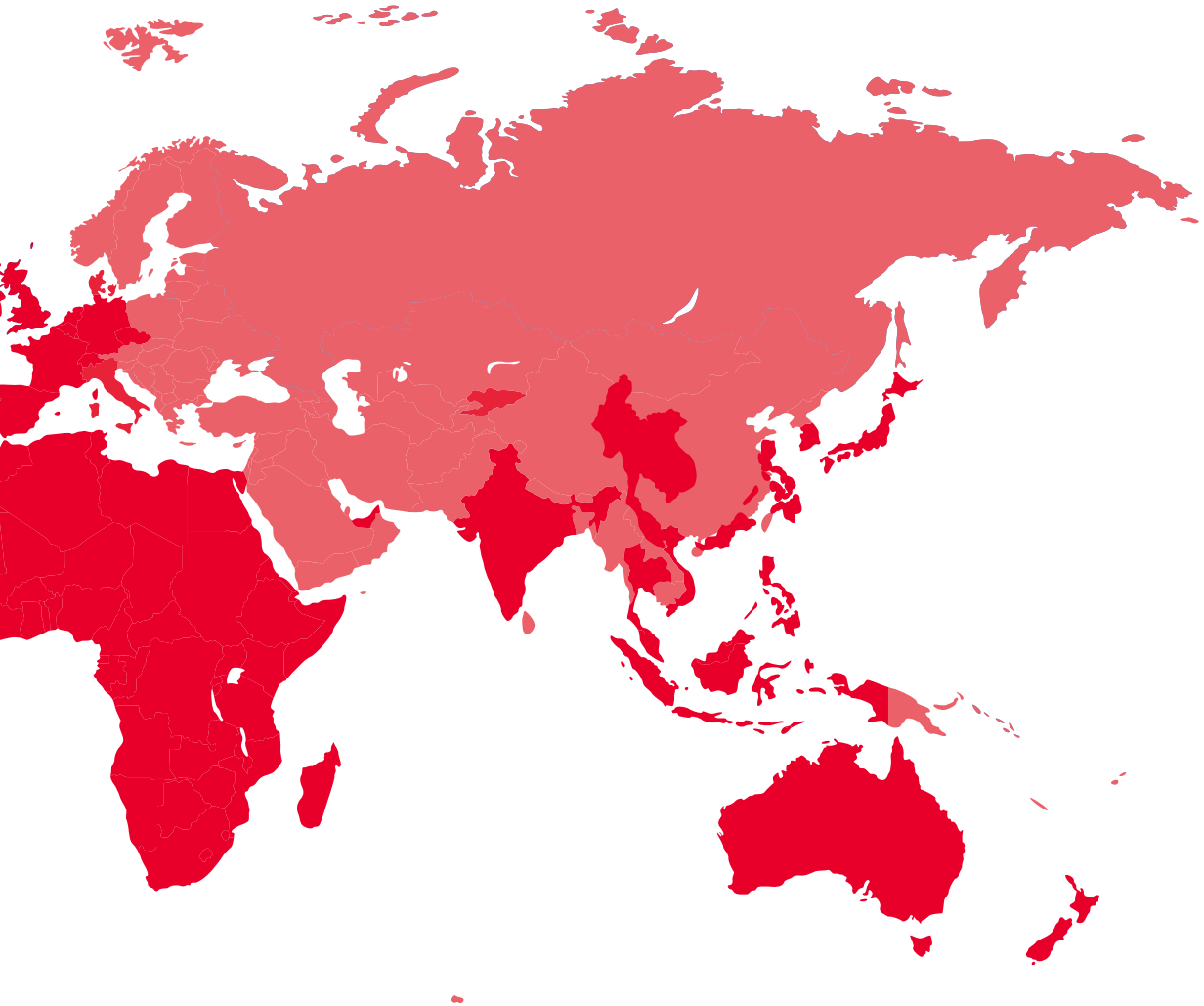
WE RECRUIT ACROSS 31 COUNTRIES GLOBALLY

AUSTRALIA
BELGIUM
BRAZIL
CANADA
CHILE
CHINA
CZECH REPUBLIC
FRANCE
GERMANY
HONG KONG
INDIA
INDONESIA
IRELAND
JAPAN
LUXEMBOURG
MALAYSIA
MEXICO
NETHERLANDS
NEW ZEALAND
PHILIPPINES
PORTUGAL
SINGAPORE
SOUTH AFRICA
SOUTH KOREA
SPAIN
SWITZERLAND
TAIWAN
THAILAND
UAE
UK
USA
VIETNAM



DOWNLOAD OUR SALARY SURVEY BOOKS

To discover hiring and salary trends across the world, read our International Trends on page 52 or download our books covering:

- Australia & New Zealand
- Belgium & Luxembourg
- Netherlands
- United Kingdom
- Greater China & South East Asia
- France
- Portugal
- Middle East & Africa
- Japan
- Germany
- Spain
- Canada
- South Korea
- Ireland
- Switzerland
- Latin America

Download your copy today by visiting **www.robertwalters.com/salary-survey**

OUR SERVICE

In an increasingly complex global recruitment market, the Robert Walters Group builds great teams for our clients by offering an end-to-end recruitment service, on a local, regional or global basis.

OUR CORE DISCIPLINES INCLUDE:

- Accounting & Finance
- Banking & Financial Services
- Compliance
- Human Resources
- Legal
- Business Support
- Risk
- Supply Chain, Procurement, Logistics
- Technology, Projects & Change

WHAT MAKES US DIFFERENT?

Bespoke, consultative service

1. Commitment to quality

We focus on building long-term, high-quality relationships with clients and candidates. We consult and advise, helping our candidates make the right career move. This builds trust and loyalty and ensures we continually have the industry's top talent for our clients.

2. Specialists

We hire from industry to ensure our consultants are specialists in the disciplines they recruit for. They also bring with them strong personal relationships and industry networks, enabling them to find hard to reach talent with niche skill sets.

3. No individual commission

We operate a team-based profit-share system which, we believe, sets us apart from the vast majority of our competitors as it ensures the interests of both the client and candidate remain our number one priority. There is also no ownership of candidates, ensuring clients always see the best talent we have available.

4. Our people and culture

We promote long-term, international careers, which helps us to retain our top people, providing continuity for our clients. We’re proud to say our senior management team is home-grown with an average tenure of 22 years.

5. Innovation culture

We were the first recruiter to launch a recruitment process outsourcing business and we continue to lead the way with an in-house innovation team which tests and trials the latest recruitment technologies.

6. Long-term business focus

Our strategy is one of organic growth through international expansion and discipline diversification. We invest in markets for the long term and maintain our presence, even in tough times.

7. End-to-end recruitment service

We offer clients a true end-to-end recruitment service, from permanent, contract and interim recruitment through to recruitment process outsourcing.

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DOWNLOAD OUR SALARY SURVEYS

DOWNLOAD OUR SALARY SURVEY BOOKS

Drawing on our local knowledge and expertise across six continents we've produced a series of books covering:

- Australia & New Zealand
- Greater China & South East Asia
- Japan
- South Korea
- Belgium & Luxembourg
- France
- Germany
- Ireland
- Netherlands
- Portugal
- Spain
- Switzerland
- United Kingdom
- Middle East & Africa
- Canada
- Latin America

Download your copy today by visiting
www.robertwalters.com/salary-survey

“WELCOME TO THE 21ST EDITION OF THE GLOBAL SALARY SURVEY, PROVIDING CREDIBLE INSIGHT INTO HIRING AND SALARY TRENDS WORLDWIDE.”

ABOUT THE SALARY SURVEY

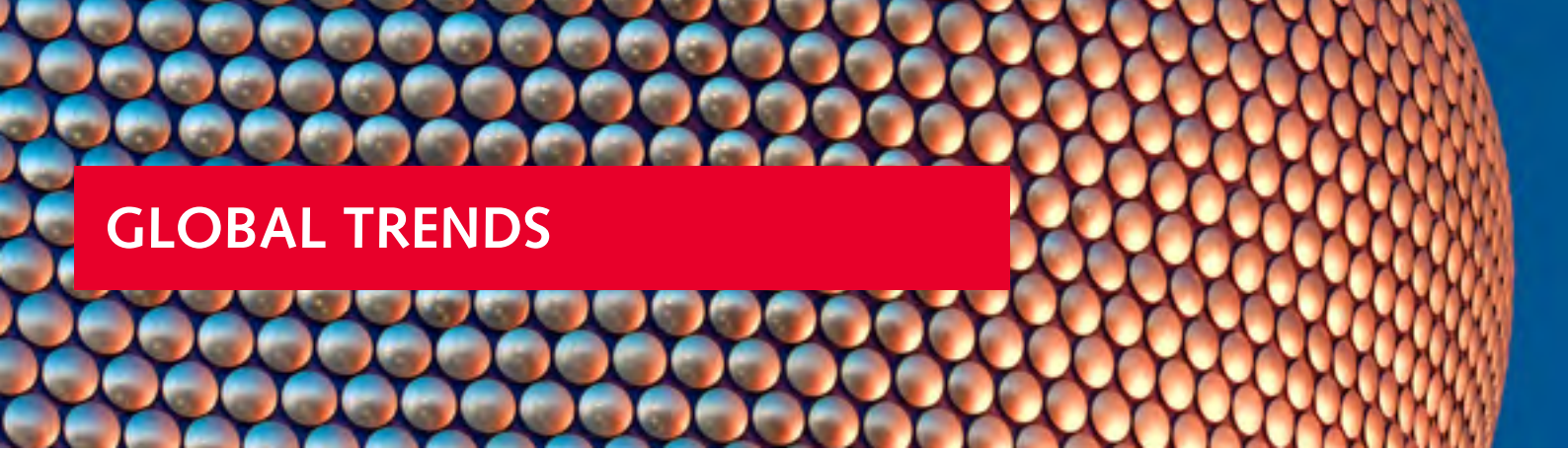
Welcome to the 21st edition of the annual Robert Walters Salary Survey.

As the first recruitment company to produce a comprehensive overview of global salaries and recruitment trends across the world, we are pleased to share the latest edition with you.

Our Salary Survey is based on the analysis of permanent, interim and contract placements made across each of our geographies and recruitment disciplines during 2019, and our predictions for the year ahead.

GET IN TOUCH

If you would like to find out more about salaries and recruitment trends in your industry, call one of our specialist consultants today. Contact details can be found at the back of this book.



GLOBAL TRENDS

GLOBAL OVERVIEW

Overall the global hiring market was active in 2019 despite widespread economic and political uncertainty. Demand for specialist technology skill sets as well as risk, regulatory and compliance professionals led to candidate shortages in many markets.

Across Europe, we saw demand for talent outstripping supply as businesses continued to hire. In France, the recruitment market performed well in 2019 despite employers pausing hiring activity during times of difficulty such as the yellow vests (gilets jaunes) protests.

Belgium experienced strong economic growth in 2019, which led to an active hiring market and widespread talent shortages. Across the border in Germany, hiring was buoyant as traditional Mittelstand companies focused on digitalisation and foreign companies grew their presence. Similarly, in the Netherlands, a strong economy and an exceptionally low unemployment rate led to candidate shortages across all disciplines.

In Spain, hiring activity was high in the first half of 2019 but reduced in the second half due to uncertainty caused by the US-China trade war, Brexit and the difficulty of building a stable government in Spain.

Brexit continued to dominate the headlines in the UK, impacting hiring in many sectors; however, there were pockets of hiring activity across technology, fintech, property and professional services.

In the Middle East, recruitment activity was high for most of 2019. Nationalisation remains a key priority in the UAE and Saudi Arabia, leading to local talent shortages, wage inflation and nationals moving roles more frequently. We saw similar trends across Africa as companies sought to adhere to government nationalisation policies.

Throughout Greater China, the local market outlook became increasingly uncertain in the latter half of 2019, with the US-China trade war weighing heavily on sentiment. Candidates became harder to source as professionals proved reluctant to change roles in uncertain market conditions. We also saw manufacturers taking action to avoid US tariffs by moving specific aspects of production out of Mainland China to locations such as Taiwan and South East Asia, which impacted hiring.

South East Asia experienced a predominantly buoyant hiring market in 2019, particularly in the high-growth markets of Indonesia, the Philippines, Thailand and Vietnam. Demand for 'glocal' talent – professionals with a strong understanding of both global business practices and local cultural mindsets – continued as more businesses internationalised.

In Japan, acute talent shortages continued due to the nation's declining and ageing population as well as high demand for bilingual professionals with international expertise. Companies specialising in cloud computing, AI,

> "As top talent prioritise keeping their skills up to date, we recommend employers offer clear learning and development opportunities to attract in-demand professionals."

future mobility and smart factories increased hiring in 2019 in preparation for the rollout of 5G in 2020.

In Australia and New Zealand, the economic environment looks set to prevent any widespread jobs and salary growth in the near to mid-future. The exceptions will be in sectors where demand outstrips supply – most notably in technology, financial services and infrastructure.

KEY TRENDS

Acute tech talent shortages

Across most markets the demand for technology professionals with specialist skill sets will continue to outstrip supply in 2020. Digital transformations are continuing apace across many industries in China, Hong Kong, Australia and New Zealand, so in 2020 we expect to see employers vying for professionals with expertise in AI, big data, UX, development and cyber security.

Digital experts, data scientists and cyber security specialists will also be in high demand across Brazil, Chile and Mexico as companies migrate their businesses online and deal with the extra security challenges this presents. In San Francisco, companies will struggle to hire software and machine learning engineering specialists due to a shortage of qualified professionals.

Demand for risk and compliance skill sets

As regulatory requirements evolve alongside digitalisation, companies are seeking professionals with expertise in risk, compliance and audit. South East Asia saw strong demand for these skill sets within the banking and financial services sector as businesses sought to adhere to new regulations and guidelines set by their central banks. Japan continued to strengthen its financial regulations and companies faced greater scrutiny over their handling of personal data, leading to high demand for audit, risk and compliance professionals. In the Netherlands, salaries for compliance, regulatory reporting and risk management specialists are expected to rise in 2020 due to extreme talent shortages.

Advice to employers

In order to secure top talent with specialist skill sets we recommend employers run swift and efficient recruitment processes, ensuring offers are made in a timely manner. As in-demand professionals consider moving roles they will focus on more than the salary on offer – they are keenly aware of the need to keep their specialist skills up to date, so we recommend businesses offer clear learning and development opportunities to attract the best talent on the market.

> **IN 2020 WE EXPECT TO SEE EMPLOYERS VYING FOR TALENT WITH EXPERTISE IN AI, BIG DATA, UX, DEVELOPMENT AND CYBER SECURITY.**

IRELAND TRENDS

2019

2019 proved to be a mixed year for recruitment in Ireland. Hiring demand was extremely high in areas such as Risk, Compliance, Audit, Technology, Investment Management, Cyber Security and Legal, with a large proportion of roles created in these areas as a result of firms relocating to Ireland due to Brexit. In contrast, hiring activity was muted across organisations dependant upon exporting their goods / services to the UK.

2020

In 2020, we expect to see high levels of recruitment activity in newly-created Brexit-related organisations and ManCos in Ireland as they look to add substance to their operations.

Industries with constant recruitment demands will include aircraft leasing and FinTech and payments, with a requirement for analytics, cyber security and big data skill sets. We will continue to see high demand for temp and contract workers as organisations flex their headcount needs in accordance with time senstive projects and regulatory deadlines.

We expect many 2019 trends to continue their trajectory in 2020. Salaries will continue along the same incline with niche skill sets demanding a premium. Many Irish candidates working overseas are also expected to return home as newly-created roles offer exciting challenges that play to an international skill set. The ongoing candidate short market will encourage HR departments to invest in, and prioritise staff retention and employer branding to remain competitive.

LOUISE CAMPBELL, MANAGING DIRECTOR, IRELAND

Top areas of growth in Ireland

1. Analytics and Big Data
2. FinTech/RegTech
3. Cyber Security

TALENT POOL ANALYSIS BY DISCIPLINE

Discipline	Talent Pool Growth (%)	Hiring Demand
Accounting & Finance	+ 1.80%	Very High
Banking & Financial Services	+ 1.70%	Very High
Legal	+ 2.80%	High
Technology, Projects & Change	+ 3.90%	Very High
Engineering, Supply Chain & Procurement	+ 2.20%	High

TOP 3 TALENT HOTSPOTS

Operational Risk Manager

Senior Financial Accountant

Senior Compliance Manager

90%

OF WORKING PROFESSIONALS IN IRELAND HAVE INDICATED THAT THEY ARE OPEN TO BEING APPROACHED WITH A NEW OPPORTUNITY

> "The ongoing candidate short market will encourage HR departments to invest in and prioritise staff retention and employer branding to remain competitive."

ACCOUNTING & FINANCE

The Accounting & Finance salary report covers salary and employment trends in Ireland across the following areas:

- Financial Services
- Commerce & Industry
- Part-Qualified & Transactional Finance
- Professional Services

ACCOUNTING & FINANCE
KEY FINDINGS

DETERMINANTS OF JOB SATISFACTION

- Competitive salary & benefits
- Positive company culture
- Good work-life balance

54%
Of accounting & finance professionals are expecting a bonus of up to 10% of their salary

SALARY & BONUS EXPECTATIONS

Accounting & finance professionals expecting a salary increase

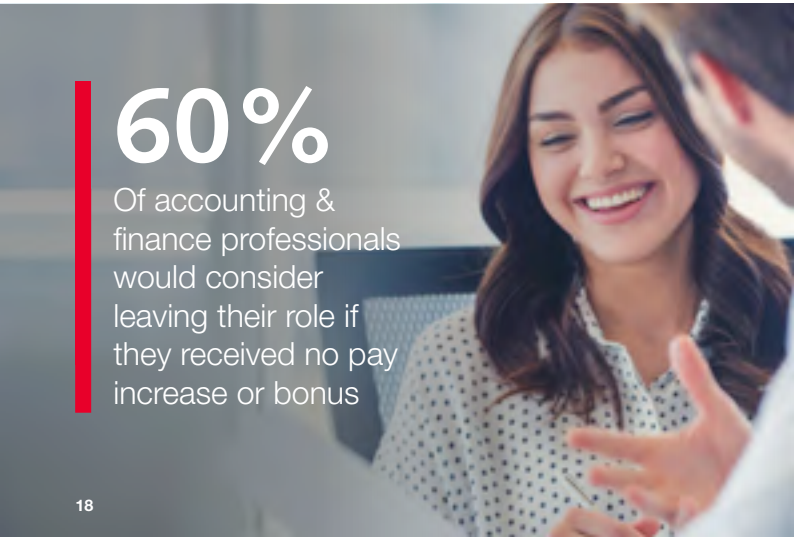
Accounting & finance professionals expecting a bonus

ANNUAL SALARY INCREMENT EXPECTATIONS

Expecting a 1-6% increase

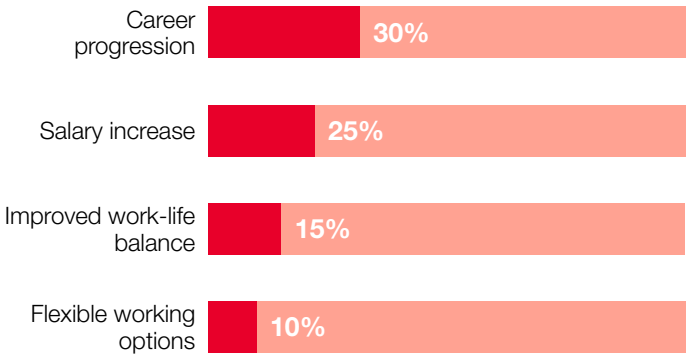
Expecting a 7-15% increase

Expecting a 16%+ increase



60%
Of accounting & finance professionals would consider leaving their role if they received no pay increase or bonus

TOP 4 MOTIVATORS TO MOVE JOBS



ACCOUNTING & FINANCE
DUBLIN

QUALIFIED FINANCE

	Permanent Salary Per Annum EUR (€)	
	Financial Services	
Role	Range	Hiring Demand
CFO/Finance Director	125,000 - 250,000	High
Head of Finance	120,000 - 180,000	Very High
Financial Controller	80,000 - 120,000	Very High
Finance Manager	80,000 - 115,000	Very High
Senior Financial Accountant	65,000 - 80,000	Very High
Head of FP&A	110,000 - 130,000	High
FP&A Manager	80,000 - 105,000	High
Senior Finance Analyst	60,000 - 75,000	High
Head of Internal Audit	110,000 - 150,000	Moderate
Internal Audit Manager	80,000 - 110,000	High
Senior Internal Auditor	65,000 - 75,000	Very High
Newly Qualified Accountant (Financial Accountant/Management Accountant/Financial Analyst)	55,000 - 65,000	Very High

	Permanent Salary Per Annum EUR (€)	
	Commerce	
Role	Range	Hiring Demand
CFO/Finance Director	150,000 - 200,000	High
Head of Finance	125,000 - 250,000	High
Financial Controller	70,000 - 100,000	High
Finance Manager	60,000 - 90,000	High
Senior Financial Accountant	65,000 - 80,000	Very High
Head of FP&A	100,000 - 130,000	Moderate
FP&A Manager	70,000 - 85,000	High
Senior Finance Analyst	65,000 - 75,000	High
Head of Internal Audit	100,000 - 140,000	High
Internal Audit Manager	60,000 - 75,000	High
Senior Internal Auditor	55,000 - 65,000	Very High
Newly Qualified Accountant (Financial Accountant/Management Accountant/Financial Analyst)	55,000 - 65,000	Very High

NB: Figures are basic salaries exclusive of benefits/bonuses unless otherwise specified.

ACCOUNTING & FINANCE
DUBLIN

PART & NON-QUALIFIED FINANCE

	Permanent Salary Per Annum EUR (€)	
	Financial Services	
Role	Range	Hiring Demand
Finalist – ACCA/CIMA	40,000 - 55,000	Very High
PQ Accountant – ACA/ACCA/CIMA	35,000 - 40,000	Very High
Accounts Assistant	30,000 - 40,000	High
Accounts Payable/Accounts Receivable Manager	60,000 - 75,000	High
Accounts Payable Specialist	35,000 - 45,000	Very High
Accounts Receivable Specialist	35,000 - 40,000	High
Payroll Manager	60,000 - 70,000	Very High
Payroll Specialist	32,000 - 45,000	Very High
Credit Control Manager	55,000 - 70,000	High
Credit Controller	30,000 - 40,000	High

	Permanent Salary Per Annum EUR (€)	
	Commerce	
Role	Range	Hiring Demand
Finalist – ACCA/CIMA	40,000 - 55,000	Very High
PQ Accountant – ACA/ACCA/CIMA	35,000 - 40,000	Very High
Accounts Assistant	30,000 - 40,000	High
Accounts Payable/Accounts Receivable Manager	50,000 - 65,000	High
Accounts Payable Specialist	30,000 - 40,000	Very High
Accounts Receivable Specialist	30,000 - 38,000	High
Payroll Manager	50,000 - 60,000	Very High
Payroll Specialist	30,000 - 45,000	Very High
Credit Control Manager	50,000 - 70,000	High
Credit Controller	30,000 - 35,000	High

Part-qualified and Non-Qualified roles in Dublin are supplied by Walters People, part of The Robert Walters Group.

NB: Figures are basic salaries exclusive of benefits/bonuses unless otherwise specified.

ACCOUNTING & FINANCE
DUBLIN

PROFESSIONAL SERVICES

	Permanent Salary Per Annum EUR (€)	
	Big 4	Top 20
Role	Range	Range
Assurance		
Audit Director	90,000 - 120,000	95,000 - 130,000
Senior Audit Manager	70,000 - 90,000	70,000 - 100,000
Audit Manager	60,000 - 80,000	60,000 - 80,000
Assistant Audit Manager	55,000 - 60,000	55,000 - 60,000
Audit Senior	50,000 - 55,000	50,000 - 55,000
Audit Semi-Senior	28,000 - 35,000	28,000 - 35,000
Audit Trainee	24,000 - 28,000	24,000 - 28,000
Outsourcing		
Outsourcing Manager	55,000 - 65,000	55,000 - 65,000
Outsourcing Senior	45,000 - 53,000	45,000 - 53,000
Payroll Manager	50,000 - 65,000	50,000 - 65,000
Payroll Specialist*	32,000 - 45,000	30,000 - 45,000
Advisory		
Corporate Finance/ Transaction Services Director	90,000 - 130,000	80,000 - 120,000
Corporate Finance/ Transaction Services Manager	70,000 - 90,000	65,000 - 85,000

*Roles are supplied by Walters People, part of The Robert Walters Group.

NB: Figures are basic salaries exclusive of benefits/bonuses unless otherwise specified.

BANKING & FINANCIAL SERVICES

The Banking & Financial Services salary report covers salary and employment trends in Ireland across the following areas:

- Corporate/Consumer Banking
- Custody & Trust
- Hedge Funds
- Insurance
- Investment Management
- Operations
- Private Equity
- Quantitative

BANKING & FINANCIAL SERVICES
KEY FINDINGS

> "We expect continued growth in asset management in 2020, with firms looking to secure top talent across investment oversight, portfolio management, risk and compliance."

62%
Of banking & financial services professionals state that they are likely to leave their role if they receive no pay increase or bonus

SALARY & BONUS EXPECTATIONS

Banking & financial services professionals expecting a salary increase

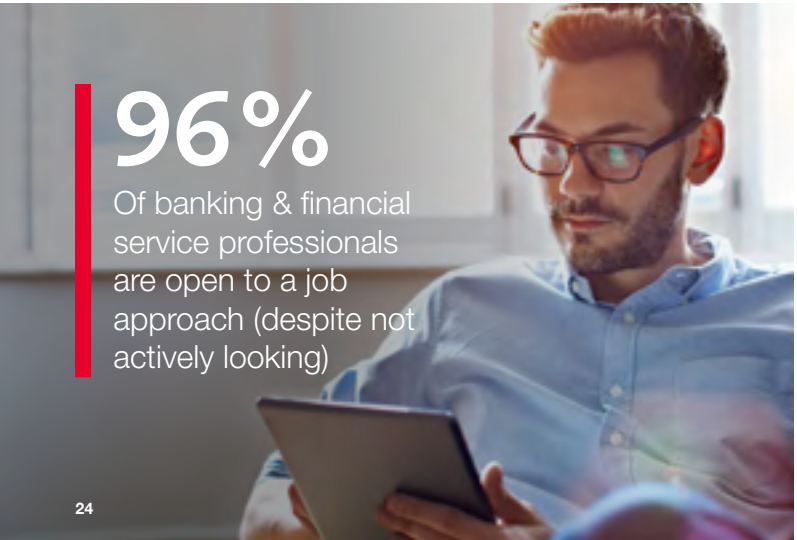
Banking & financial services professionals expecting an increase of up to 10%

ANNUAL SALARY INCREMENT EXPECTATIONS

Expecting a bonus in 2020

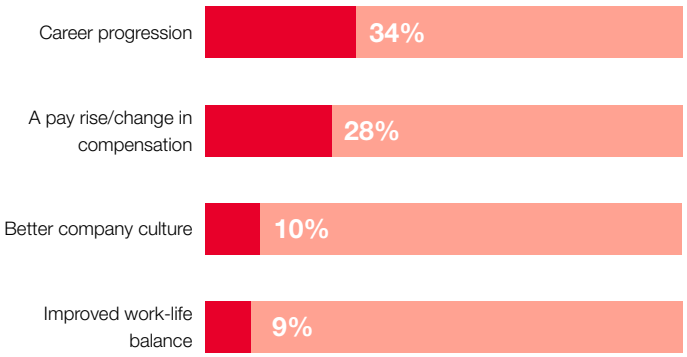
Expecting a bonus of up to 10% of their salary

Expecting a bonus of more than 10% of their salary



96%
Of banking & financial service professionals are open to a job approach (despite not actively looking)

TOP 4 MOTIVATORS TO MOVE JOBS



BANKING & FINANCIAL SERVICES
DUBLIN

FRONT OFFICE

	Permanent Salary Per Annum EUR (€)	Contract Rate Per Day (PAYE) EUR (€)
Role	**Range**	**Range**
Chief Operating Officer	170,000 - 250,000	-
Corporate/Wholesale Banking		
Director	120,000 - 160,000	525 - 800
Associate Director	85,000 - 120,000	425 - 500
Relationship Manager	70,000 - 90,000	310 - 390
Credit Manager	50,000 - 65,000	230 - 350
Credit Analyst	45,000 - 55,000	190 - 290
Relationship Support Analyst	40,000 - 50,000	175 - 210
Corporate Finance/Private Equity		
Director	120,000 - 180,000	525 - 760
Senior Manager/Associate Director	80,000 - 120,000	350 - 510
Manager	60,000 - 90,000	270 - 400
Executive/Analyst	45,000 - 65,000	190 - 290
Asset Management/Stockbroking		
Head of Investments/CIO	140,000 - 200,000	625 - 1,000
Head of Trading/Execution	140,000 - 220,000	625 - 1,000
Senior Strategist/Manager	80,000 - 125,000	350 - 550
Senior Research Analyst	100,000 - 150,000	425 - 675
Portfolio Manager	80,000 - 130,000	350 - 550
Proposition Manager	75,000 - 100,000	330 - 450
Investment Product Manager	80,000 - 120,000	350 - 510
Research Analyst	80,000 - 100,000	350 - 450
Investment Analyst	50,000 - 75,000	220 - 315
Treasury & Global Markets		
Head of Treasury	125,000 - 175,000	500 - 820
Senior Manager	75,000 - 125,000	330 - 550
Treasury Dealer	60,000 - 120,000	300 - 510
Manager	60,000 - 80,000	290 - 365
Analyst	40,000 - 60,000	190 - 275

NB: Figures are basic salaries exclusive of benefits/bonuses unless otherwise specified.

BANKING & FINANCIAL SERVICES
DUBLIN

FRONT OFFICE

	Permanent Salary Per Annum EUR (€)	Contract Rate Per Day (PAYE) EUR (€)
Role	Range	Range
Insurance/Reinsurance		
Pricing Manager	80,000 - 120,000	350 - 550
Senior Underwriter	60,000 - 90,000	275 - 425
Junior Underwriter	40,000 - 50,000	190 - 220
Actuarial Analyst	50,000 - 75,000	250 - 350
Reinsurance Analyst	40,000 - 60,000	190 - 280
Product Manager	60,000 - 70,000	275 - 350
Product Controller	35,000 - 40,000	160 - 200

NB: Figures are basic salaries exclusive of benefits/bonuses unless otherwise specified.

BANKING & FINANCIAL SERVICES
DUBLIN

MIDDLE & BACK OFFICE

	Permanent Salary Per Annum EUR (€)	Contract Rate Per Day (PAYE) EUR (€)
Role	Range	Range
Fund Administration		
Head of Fund Accounting	100,000 - 150,000	450 - 650
Fund Accounting Manager	60,000 - 90,000	300 - 400
Fund Accounting Supervisor	45,000 - 50,000	200 - 250
Fund Accountant	35,000 - 45,000	160 - 200
Trustee Manager	60,000 - 90,000	280 - 400
Trustee Associate	35,000 - 50,000	160 - 250
Head of Transfer Agency	90,000 - 150,000	450 - 650
Transfer Agency Supervisor/Team Leader	45,000 - 55,000	200 - 250
Transfer Agency Administrator	35,000 - 45,000	160 - 200
Client Services Manager	65,000 - 75,000	280 - 325
Client Services Administrator	65,000 - 75,000	280 - 325
Funds Oversight	55,000 - 80,000	250 - 400
Custody Manager	60,000 - 80,000	280 - 380
Custody Team leader	50,000 - 55,000	220 - 270
Middle Office & Operations		
Middle Office/Operations Manager	60,000 - 80,000	280 - 380
Middle Office/Operations Analyst	40,000 - 55,000	180 - 270
Portfolio Operations	35,000 - 45,000	160 - 200
Transaction Reporting Analyst	60,000 - 70,000	-
Transaction Reporting Manager	70,000 - 80,000	-
Banking Operations Administrator	40,000 - 60,000	180 - 280
Treasury Operations		
Operations Payment Specialist	40,000 - 50,000	180 - 250
Global Equity Trade Settlement Administrator	40,000 - 60,000	180 - 280
Trading Operations Specialist	40,000 - 60,000	180 - 280
Treasury Support Group Manager	75,000 - 90,000	325 - 400
Cash Manager	60,000 - 80,000	286 - 350
Insurance		
Pension and Investment Administrator	30,000 - 40,000	140 - 190
Claims Handler	35,000 - 45,000	160 - 200

NB: Figures are basic salaries exclusive of benefits/bonuses unless otherwise specified.

RISK

The Risk salary report covers salary and employment trends in Ireland across the following areas:

- Market Risk
- Credit Risk/Stress Testing
- Operational Risk
- Quantitative Risk & Analysis
- Enterprise Risk

RISK
DUBLIN

	Permanent Salary Per Annum EUR (€)	Contract Rate Per Day (PAYE) EUR (€)	
Role	**Range**	**Range**	**Hiring Demand**
Chief Risk Officer	150,000 - 250,000	-	Moderate
Market Risk			
Director/Head of Market Risk	120,000 - 180,000	480 - 780	Very High
Senior Manager	100,000 - 150,000	425 - 620	High
Manager	80,000 - 100,000	350 - 450	High
Senior Analyst	60,000 - 80,000	250 - 350	High
Analyst	45,000 - 60,000	180 - 250	Moderate
Credit Risk/Stress Testing			
Director/Head of Credit Risk/Stress Testing	125,000 - 175,000	580 - 700	High
Senior Manager	100,000 - 150,000	450 - 600	Moderate
Manager	75,000 - 125,000	300 - 500	High
Senior Analyst	60,000 - 70,000	250 - 300	High
Analyst	45,000 - 60,000	180 - 250	High
Operational Risk			
Director/Head of Operational Risk	120,000 - 150,000	500 - 650	High
Senior Manager	100,000 - 125,000	400 - 500	Very High
Manager	60,000 - 90,000	280 - 400	High
Analyst	45,000 - 65,000	180 - 280	High
Quantitative Risk & Analysis			
Director/Head of Quantitative Risk & Analysis	150,000 - 180,000	600 - 800	Moderate
Senior Manager	100,000 - 150,000	450 - 600	Moderate
Manager	75,000 - 100,000	350 - 450	High
Analyst	50,000 - 75,000	250 - 350	Very High
Enterprise Risk			
Director/Head of Enterprise Risk	110,000 - 140,000	500 - 650	High
Senior Manager	75,000 - 110,000	350 - 500	Moderate
Manager	55,000 - 75,000	250 - 350	High
Analyst	40,000 - 60,000	150 - 250	High
Outsourcing Risk Manager	60,000 - 80,000	-	Very High

NB: Figures are basic salaries exclusive of benefits/bonuses unless otherwise specified.

COMPLIANCE

The Compliance salary report covers salary and employment trends in Ireland across the following areas:

- Regulatory Compliance
- Financial Crime
- Data protection

COMPLIANCE
DUBLIN

	Permanent Salary Per Annum EUR (€)	Contract Rate Per Day (PAYE) EUR (€)	
Role	Range	Range	Hiring Demand
Chief Compliance Officer	160,000 - 220,000	800 - 1000	Medium
Head of Compliance	115,000 - 160,000	550 - 800	Very High
Senior Compliance Manager	90,000 - 130,000	400 - 600	High
Compliance Officer/Manager	65,000 - 90,000	250 - 400	Medium
Compliance Analyst	45,000 - 65,000	175 - 300	Very High
Compliance Administrator	35,000 - 45,000	135 - 190	Medium
MLRO/Head of Financial Crime	100,000 - 150,000	500 - 750	Low
AML/Financial Crime Manager	60,000 - 100,000	250 - 425	Medium
AML/KYC Analyst	45,000 - 60,000	175 - 250	High
AML Administrator	30,000 - 45,000	120 - 175	High
Fraud Manager	65,000 - 90,000	250 - 400	Medium
Data Protection Officer	90,000 - 120,000	350 - 500	Low
Data Protection Executive	60,000 - 80,000	230 - 320	Medium

HIGHEST PERMANENT SALARY GROWTH

Manager - Credit Risk/Stress Testing
20% YOY increase

"We witnessed a major uptick in the compliance market in 2019 due to a variety of factors. Most notably Brexit has driven an influx of financial firms setting up offices in Dublin in order to continue servicing their European client base.

We expect continued demand for compliance professionals in 2020 and a highly competitive candidate market."

TECHNOLOGY, PROJECTS & CHANGE

The Technology salary report covers salary and employment trends in Ireland across the following areas:

- IT Management
- Project Management
- Infrastructure & IT Support
- Cyber Security & IT Risk

TECHNOLOGY, PROJECTS & CHANGE
KEY FINDINGS

28%
Of technology professionals would change jobs for better career progression

TOP SKILLS IN DEMAND

- Software development
- SQL
- JavaScript

DRIVERS OF JOB SATISFACTION

- Competitive salary & benefits
- Good work life balance
- Challenging/ interesting work

SALARY EXPECTATIONS

79%
Technology professionals expecting a pay increase in 2020

64%
Technology professionals expecting a bonus in 2020

86%
Of technology professionals are open to a job approach (despite not actively looking)

"Ireland, and in particular, Dublin, has become a global technology hub.

As a result, demand for technology professionals is soaring, with an emphasis on sourcing talent across development, cyber security, data analytics and RPA."

TECHNOLOGY, PROJECTS & CHANGE
TALENT HOTSPOTS

TOP 5 ROLES IN DEMAND

Talent hotspots are based on the number of vacancies posted within a 12 month period.

Rank	Role	Average tenure (years)	YOY growth (%)
1	Software Engineer	1.5	+ 6.15%
2	Project Manager	1.7	+ 18.00%
3	Developer	1.6	+ 5.45%
4	Solutions Engineer/Architect	2.3	+ 18.35%
5	IT Consultant	2.0	+ 4.10%

NB: Figures are basic salaries exclusive of benefits/bonuses unless otherwise specified.

GREATEST INCREASE IN DEMAND

Project Manager
18% YOY growth

TECHNOLOGY, PROJECTS & CHANGE
DUBLIN

INFORMATION TECHNOLOGY

	Permanent Salary Per Annum EUR (€)	Contract Rate Per Day (PAYE) EUR (€)
Role	Range	Range
Management		
IT Director	95,000 - 175,000	600 - 1,200
IT Manager	70,000 - 95,000	450 - 650
Service Delivery Manager	55,000 - 90,000	250 - 450
Helpdesk/Service Desk Manager	45,000 - 60,000	200 - 300
Project Management		
Programme Manager	90,000 - 130,000	450 - 800
Project Manager	60,000 - 85,000	300 - 600
Junior Project Manager	40,000 - 55,000	175 - 250
Business Analyst (5yrs+)	60,000 - 80,000	275 - 400
Business Analyst (0-5 years)	35,000 - 55,000	150 - 300
Infrastructure & IT Support		
Systems Engineer	55,000 - 75,000	275 - 500
Systems Administrator	45,000 - 57,000	200 - 250
Desktop Support	28,000 - 48,000	125 - 225
Network Engineer CCNA - CCIE	30,000 - 50,000	125 - 225
IT Helpdesk	25,000 - 45,000	110 - 200

NB: Figures are basic salaries exclusive of benefits/bonuses unless otherwise specified.

HIGHEST PERMANENT SALARY GROWTH

Business Analyst (5 yrs'+)

15% YOY increase

HIGHEST CONTRACT RATE PER DAY GROWTH

IT Director

11% YOY increase

TECHNOLOGY, PROJECTS & CHANGE
DUBLIN

CYBER SECURITY & IT RISK

	Permanent Salary Per Annum EUR (€)
Role	Range
CISO	100,000 - 180,000
Cyber Incident Response Analyst	45,000 - 65,000
Cyber Security Analyst	38,000 - 69,000
Cyber Security Manager	65,000 - 85,000
IT Risk Manager	70,000 - 90,000
Head of IT Audit	60,000 - 80,000
Identity Access Management	65,000 - 70,000
Incident Response Manager	65,000 - 85,000
Information Security Architect	90,000 - 120,000
Information Security Engineer	55,000 - 75,000
Information Security Analyst	35,000 - 65,000
InfoSec Ops Analyst	35,000 - 70,000
GRC Analyst	30,000 - 55,000
IT Audit Manager	65,000 - 75,000
IT Risk Analyst	40,000 - 70,000
Penetration Tester	40,000 - 70,000
SOC Analyst	35,000 - 75,000
SOC Manager	75,000 - 95,000

NB: Figures are basic salaries exclusive of benefits/bonuses unless otherwise specified.

HIGHEST PERMANENT SALARY GROWTH

Information Security Architect

22% YOY increase

HIGHEST CONTRACT RATE PER DAY GROWTH

Cyber Security Analyst

23% YOY increase

LEGAL

The Legal salary report covers salary and employment trends in Ireland across the following areas:

- Private Practice
- In-house
- Company Secretarial
- Legal Support

LEGAL
KEY FINDINGS

45%

of legal professionals state that they are likely to leave their role if their work-life balance does not improve

> "From an in-house perspective, General Counsel salaries in particular will be dependent on the size of an organisation and whether the role has global scope."

TOP ROLES IN DEMAND

- Asset Management/ Funds Solicitor
- Company Secretarial - Funds
- Data Privacy Solicitor

MOTIVATIONS TO MOVE JOBS

- Career Progression
- Better Compensation and Benefits
- Improved Work Life Balance
- Flexible Working Hours

72%

Of legal professionals are expecting a salary increase in 2020

> "Given significant shortages in particular legal disciplines, such as asset management/funds, corporate/M&A, real estate and privacy, employers will need to focus on promoting their career progression and working from home options to secure talent, on top of providing a premium salary."

LEGAL
DUBLIN

COMMERCE & INDUSTRY

	Permanent Salary Per Annum EUR (€)
Role	Range
Private Practice	
Salaried Partner	150,000 - 180,000
Senior Associate	110,000 - 130,000
Associate (3 - 8 yrs' exp)	85,000 - 100,000
Associate (1 - 3 yrs' exp)	70,000 - 85,000
Newly-Qualified	60,000 - 70,000
In-house	
General Counsel	180,000 - 240,000
Senior Legal Counsel (8+ yrs' exp)	120,000 - 150,000
Data Privacy Counsel	90,000 - 120,000
Legal Counsel (4 - 8 yrs' exp)	80,000 - 100,000
Legal Counsel (1 - 4 yrs' exp)	70,000 - 90,000
Company Secretarial	
Director of Company Secretarial	100,000 - 130,000
Company Secretarial Manager	80,000 - 90,000
Company Secretarial Assistant	50,000 - 70,000

	Permanent Salary Per Annum EUR (€)		Contract Rate Per Day (PAYE) EUR (€)
	SME	Large Enterprise (HC 250+)	
Role	Range	Range	Range
Legal Support*			
Paralegal	30,000 - 40,000	40,000 - 45,000	125 - 175
Contracts Assistant	30,000 - 40,000	35,000 - 45,000	125 - 175
Legal Administrator	25,000 - 32,000	28,000 - 35,000	110 - 135
Legal Assistant	28,000 - 32,000	30,000 - 35,000	110 - 135
Legal Secretary	35,000 - 42,000	40,000 - 60,000	125 - 175

*Roles are supplied by Walters People, part of The Robert Walters Group.

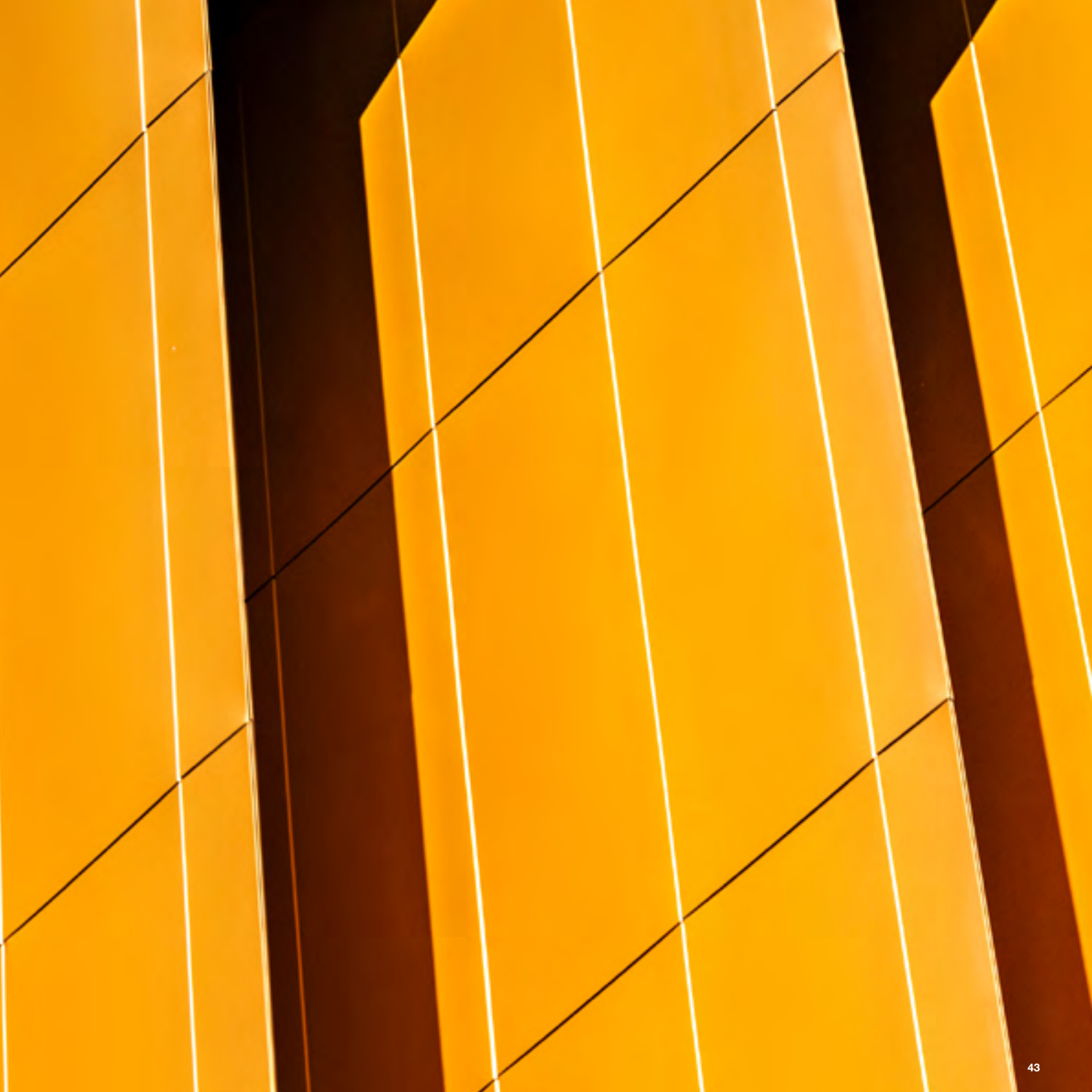
NB: Figures are basic salaries exclusive of benefits/bonuses unless otherwise specified.

BUSINESS SUPPORT & HUMAN RESOURCES

The Business Support salary report covers salary and employment trends in Ireland across the following areas:

- Administration*
- PA/EA*
- Legal Secretary*
- Receptionist*
- Customer Service*
- Human Resources

*The following roles are supplied by Walters People, part of The Robert Walters Group.



BUSINESS SUPPORT
KEY FINDINGS

1 YEAR

The average tenure for business support professionals is 1 year

> "We predict that Business Support will continue to be a fast-growing area within the Irish market. People who apply themselves to learn business applications will become increasingly valuable to employers. As organisations continue to expand, we will witness an increase in temporary roles."

TOP JOBS IN DEMAND

- Administrative Assistant
- Clerical Officer
- Receptionist

ANNUAL SALARY INCREMENT EXPECTATIONS

Expecting a 1-3% increase

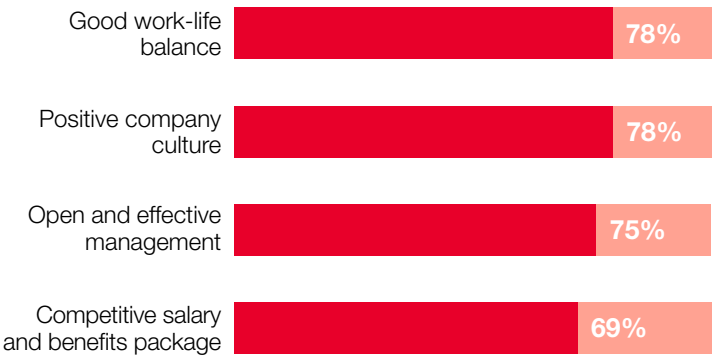
Expecting a 4-6% increase

Expecting a 7-10% increase

92%

Of business support professionals are open to a job offer (despite not actively looking)

TOP 4 DETERMINANTS OF JOB SATISFACTION



BUSINESS SUPPORT
DUBLIN

SECRETARIAL & BUSINESS SUPPORT

	Permanent Salary Per Annum EUR (€)		Contract Hourly Rate (PAYE) EUR (€)
	Medium Enterprise - Headcount 50-250a	Large Enterprise - Headcount 250+	
Role	Range	Range	Range
Office Support			
Executive Assistant	35,000 - 45,000	45,000 - 65,000	20 - 35
Personal Assistant	30,000 - 42,000	40,000 - 50,000	17 - 28
Office Manager	32,000 - 42,000	40,000 - 55,000	19 - 30
Secretary	30,000 - 40,000	35,000 - 42,000	17 - 23
Receptionist	28,000 - 30,000	30,000 - 32,000	16 - 18
Administrator*	28,000 - 30,000	30,000 - 34,000	16 - 19
Marketing Administrator*	28,000 - 30,000	29,000 - 32,000	16 - 18
Marketing Executive	30,000 - 45,000	40,000 - 50,000	17 - 28
Recruitment Administrator*	26,000 - 28,000	26,000 - 30,000	15 - 17
Recruitment Coordinator	26,000 - 30,000	28,000 - 32,000	15 - 18
HR Administrator*	26,000 - 30,000	28,000 - 32,000	15 - 18
HR Assistant	28,000 - 32,000	30,000 - 35,000	16 - 20
Data-entry	25,000 - 27,000	26,000 - 29,000	14 - 16
Facilities Coordinator	30,000 - 40,000	40,000 - 50,000	17 - 28
Site Administrator*	25,000 - 30,000	28,000 - 32,000	14 - 18
Sales Administrator*	26,000 - 30,000	28,000 - 32,000	15 - 18
Contracts Administrator*	26,000 - 30,000	28,000 - 32,000	15 - 18
Customer Service			
Customer Service Team Leader	30,000 - 35,000	35,000 - 40,000	17 - 22
Bilingual Customer Service Agent	26,000 - 30,000	30,000 - 40,000	15 - 22
Customer Service Agent	25,000 - 28,000	28,000 - 40,000	14 - 22
Order Management Administrator	25,000 - 28,000	28,000 - 40,000	14 - 22

NB: Figures are basic salaries exclusive of benefits/bonuses unless otherwise specified.

BUSINESS SUPPORT
DUBLIN

HUMAN RESOURCES

	Permanent Salary Per Annum EUR (€)
Role	**Range**
Head of Human Resources	110,000 - 150,000
Senior HR Manager/Senior HR Business Partner	75,000 - 95,000
HR Manager/HR Business Partner	65,000 - 80,000
Learning and Development Manager	65,000 - 85,000
Organisational Development Manager	65,000 - 95,000
Compensation & Benefits Manager	75,000 - 95,000

NB: Figures are basic salaries exclusive of benefits/bonuses unless otherwise specified.

TOP 3 AREAS OF DEMAND - HUMAN RESOURCES

- Learning & Development
- Organisational Development
- Compensation and Benefits

> "We witnessed a strong year in the HR recruitment market for 2019. As the attraction of talent remains a key challenge for HR, we expect continued investment into in-house recruitment and talent teams in 2020, across both financial services and industry."

SUPPLY CHAIN & PROCUREMENT

The Supply Chain & Procurement salary report covers salary and employment trends in Ireland across the following roles:

- Operations
- Demand/Supply Planning
- Procurement/Purchasing

SUPPLY CHAIN & PROCUREMENT
KEY FINDINGS

2.2 YEARS
The average tenure for supply chain & procurement professionals is 2.2 years

TOP 3 ROLES IN DEMAND

- Channel Manager
- Logistics Manager
- Supply Chain Director

TOP INDUSTRIES HIRING

- Retail
- Construction
- Information Technology

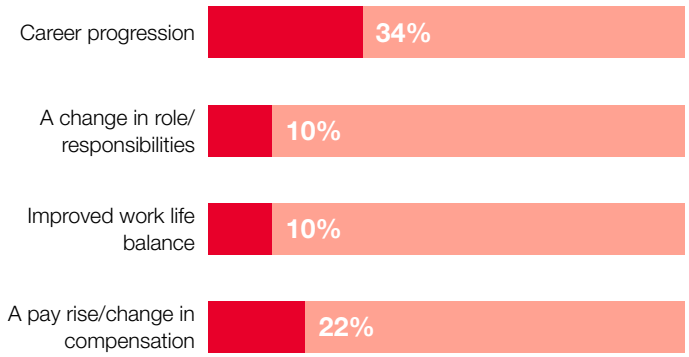
SALARY AND BONUS EXPECTATIONS

Supply chain & procurement professionals expecting a pay increase in 2020

Supply chain & procurement professionals expecting a bonus in 2020

83%
Of supply chain & procurement professionals feel confident about career opportunities in their field

MOTIVATIONS TO MOVE JOBS



SUPPLY CHAIN & PROCUREMENT
DUBLIN

	Permanent Salary Per Annum EUR (€)	
	Headcount 50 - 250	Headcount 250+
Role	Range	Range
Supply Chain		
Operations Manager	50,000 - 80,000	55,000 - 90,000
Demand/Supply Planner	30,000 - 50,000	50,000 - 60,000
Supply Chain Manager	45,000 - 70,000	50,000 - 75,000
Logistics Manager	40,000 - 45,000	50,000 - 70,000
Warehouse Manager	35,000 - 45,000	55,000 - 75,000
Transport Manager	65,000 - 90,000	70,000 - 100,000
Procurement		
Procurement/Purchasing Manager	45,000 - 80,000	50,000 - 90,000
Category Manager	45,000 - 65,000	50,000 - 70,000
Buyer	35,000 - 45,000	45,000 - 80,000
Procurement/Purchasing Specialist	35,000 - 50,000	50,000 - 70,000
Vendor Manager	35,000 - 45,000	40,000 - 50,000

NB: Figures are basic salaries exclusive of benefits/bonuses unless otherwise specified.

HIGHEST PERMANENT SALARY GROWTH

Category Manager

8.33% YOY increase

HIGHEST CONTRACT RATE PER DAY GROWTH

Category Manager

4.29% YOY increase

INTERNATIONAL TRENDS

With our presence spanning 31 countries across six continents our specialist teams offer in-depth knowledge of the sectors they recruit for. In this section our regional managing directors share their insights on hiring and salary trends in 2019 and their predictions for the year ahead.

Our regional overviews include:

- Australia & New Zealand
- Greater China
- Japan & South Korea
- South East Asia
- Europe
- Middle East & Africa
- US & Canada
- Latin America

THE GROUP'S INTERNATIONAL NETWORK OF OFFICES SPANS 31 COUNTRIES AND SIX CONTINENTS ENABLING US TO MEET THE DEMANDS OF CLIENTS AND CANDIDATES WHOSE NEEDS EXTEND BEYOND LOCAL MARKETS

AUSTRALIA & NEW ZEALAND

INTRODUCTION

The prevailing global and local economic headwinds look set to prevent any widespread jobs and salary growth in the near to mid future. That said, in the Australia and New Zealand markets, 2020 offers some reasons for cautious optimism, as we anticipate salary growth in selected sectors where there is high demand and limited supply — most notably in technology, financial services and infrastructure.

BRIGHT FUTURE FOR TECH SPECIALISTS

Technology transformations are continuing unabated across every industry in Australia and New Zealand. As a result, 2020 will see employers vying for professionals with expertise in development, UX, data management and cyber security. For professionals with these more niche skill sets, we anticipate further salary increases and premium rates for contractors.

Concerns about widespread unemployment due to automation and artificial intelligence have, so far, proved unfounded. In 2020, we expect some transactional roles to become obsolete, but new technology jobs will be created in areas such as design, programming and analysis.

REPAIR JOBS AT THE BANKS

In the wake of Australia's recent Royal Commission, financial institutions are under enormous pressure from regulators, legislators, government, media and their customers. The result is an unprecedented focus on risk, remediation and compliance projects across the banking, financial services and insurance sectors — on both sides of the Tasman. Experienced professionals who can deliver these massive programs are relatively

Our presence in Australia & New Zealand:

- Adelaide
- Auckland
- Brisbane
- Chatswood
- Christchurch
- Melbourne
- Perth
- Sydney
- Wellington

scarce, and so demand (and salaries) are likely to remain high.

CAUTIOUS GROWTH IN INFRASTRUCTURE

Australia and New Zealand will remain committed to long-term nation-building programs throughout 2020. Investment in traditional infrastructure projects such as transport, health and education will continue to stimulate demand for civil engineers and project managers, as well as professionals in ancillary sectors. And while the emerging renewables sector is showing signs of promise, and the creation of some new jobs, uncertainty may linger until the Australian Government articulates a more comprehensive energy policy.

ADVICE FOR EMPLOYERS

Where skills shortages exist, hiring managers have much to do in 2020. Money talks, of course, but high salaries and premium rates may not be enough to entice specialists to join your organisation. Apart from flexible working, which remains a high priority for many, professionals are acutely aware of the need to keep their specialist skills up-to-date, so employers who can offer cutting-edge projects and substantial personal development opportunities will be those who attract and retain the best talent.

'Potential' should be the watchword for many employers in 2020. During selection processes, employers should remain open-minded when candidates are a good cultural fit but short on technical experience. A comprehensive learning and development strategy can help plug technical gaps, whilst also helping to ease the disconnect between skills that the next generation of talent are being taught and what businesses need.

> "In 2020, we anticipate salary growth in selected sectors of high demand and limited supply, most notably in technology, financial services and infrastructure."

ADVICE FOR CANDIDATES

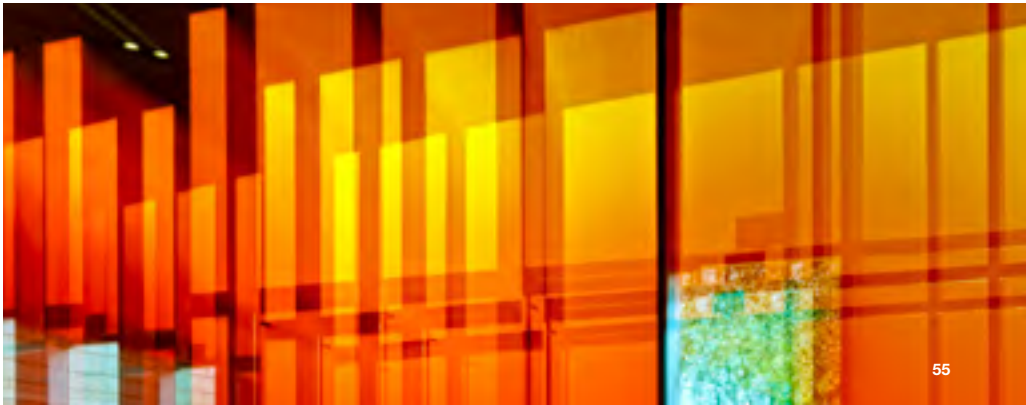
2020 will be a year of opportunity for professionals with skills in the aforementioned areas of high demand and short supply. Approaches and offers from prospective employers are likely to be common, but our advice to these individuals is that not every job is equal. Do your research about possible employers, know what your market value is, and remember that in a fast-moving jobs market this golden moment may not last long. In 2020, we recommend that in-demand specialists seize the day.

POLITICAL LANDSCAPE IN 2020

While the outcome of New Zealand's 2020 general election currently appears too close to call, we can predict two possible knock-on effects. First, many employers are likely to wait until after the election before embarking upon any major hiring campaigns. Second, the jobs market in Wellington will be dominated by contract and contingent roles until after the election result is known.

In Australia, 2020 will see local elections in Queensland and the Australian Capital Territory. Enterprise employers in these states may see elections as an opportunity to gain an advantage over their competitors. Aggressive hiring campaigns in areas of skills shortages during election season could yield a windfall of talent, as many other employers may have scaled down their recruitment activity.

Both the Australian and New Zealand governments are currently tightening immigration restrictions. For many employers, this means that their best chance of hiring overseas talent in 2020 will be to work with a recruitment partner who can offer access to an international talent network as well as expert, up-to-the-minute skilled migration advice and support.



GREATER CHINA

GREATER CHINA

The global economy and local market outlook became increasingly uncertain in the second half of 2019, with the impact of the US-China trade war continuing to weigh on sentiment, particularly in Hong Kong and Mainland China.

Despite the risks, we saw demand for candidates in key growth areas. The technology industry was one of the fastest-growing markets across Greater China and, because of the innovative and highly skilled nature of the industry, there was an ongoing shortage of suitably qualified candidates. Employers found talent harder to source, as professionals were reluctant to switch roles because of the uncertainty caused by changing market conditions.

MAINLAND CHINA

The impact of lingering economic trade frictions and market uncertainties put pressure on the job market in 2019. The slowdown in hiring was more apparent in the manufacturing sector where companies are trying to avoid tariffs by moving specific aspects of production out of Mainland China.

Organisations in the region took steps to adapt by adding value to their existing products and considering expansion into international markets through free trade zones and the Belt and Road initiative. This drove demand for candidates with strong technical skills, solid business development capabilities and international work experience. Despite relatively slower growth, the country continues to strengthen its digital transformation capabilities, through initiatives such as the development of Shenzhen as a hi-tech model city. Technology will remain a growth sector with employers looking to secure experienced professionals in R&D, big data and artificial intelligence.

In 2020, we expect both candidates and hiring managers to remain cautious due to uncertain market conditions.

Our presence in Greater China:

- Beijing
- Shanghai
- Suzhou
- Southern China
- Hong Kong
- Taipei

While the total number of jobs may decline, demand is expected to continue for highly skilled professionals.

HONG KONG

With ongoing political and economic uncertainty, Hong Kong has faced a challenging period in 2019, from trade and tourism to consumer sentiment and capital markets. Nevertheless, it retains its appeal to companies as a global business and finance hub.

In 2019, financial services firms took a relatively cautious approach to hiring, with the exception of virtual banking and fintech. With the issue of eight virtual banking licences, the demand for specialists ranging from C-level to managers has been on the rise in all areas of finance, legal, technology and risk and compliance, as well as operational and HR roles. This has been the backbone of financial services hiring over the last 12 months and we expect to see strong growth in this area in 2020.

Organisations across a range of different industries will continue their digital transformations, leading to sustained demand for analytics, big data, DevOps and digital specialists. At the same time, we have seen a noticeable shift towards contract hiring as businesses looked to build an agile workforce that can adapt to the fluid economic conditions. We expect this trend to continue in 2020.

TAIWAN

Taiwan started 2019 with better-than-expected economic growth, resulting in buoyant hiring levels across several industries, including technology, FMCG and healthcare.

Towards the second half of the year, export-oriented companies became more conservative in their operations due to the US-China trade war. We saw manufacturers and electronics companies reshoring some production lines from Mainland China to other regions in Asia, including Taiwan. The inflow of investment has driven demand for technology and software talent. At the same time, there is continuous demand for engineering specialists within renewable energy industries. Compensation is expected to be steady, with levels set on a case-by-case basis, depending on individuals' expertise and performance.

> "There is an atmosphere of cautiousness across the region and the outcome of the US-China trade war will play a determining role in the market and employment conditions in 2020."

OUTLOOK FOR 2020

Demand for specialists is likely to continue in 2020, despite the uncertain economic situation. With skills shortages likely to be exacerbated, companies are expected to place greater emphasis on retention strategies. Moderate salary rises are anticipated across Greater China, and companies are advised to promote clear career development and smart workplace policies like flexible working, which are increasingly valued by employees.

Candidates looking for a new role should embrace digitalisation and innovation to ensure they remain current and relevant in a changing job market. In-demand professions and specialist roles will continue to command premiums and yield lucrative new opportunities, but general salary inflation will be subject to, and defined by, the outcome of the variable macroeconomic conditions.

JAPAN & SOUTH KOREA

JAPAN

Despite global economic and geopolitical uncertainty, demand for talent far outstripped supply in 2019 with a job openings-to-applicants ratio of 1.6 to 1. Japan's labour shortages continued unabated due to its declining and ageing population, as well as increased demand for talent with English-language skills and international expertise. Both foreign-affiliated firms and Japanese companies operating internationally are driving this demand for bilingual talent with international or global business exposure. Other businesses operating locally, such as transport networks, retailers, hotels and service and entertainment companies, are beginning to follow suit.

Companies specialising in cloud computing, artificial intelligence (AI), mobility (connected cars and autonomous driving), smart factories and medtech increased hiring in 2019 in preparation for the rollout of 5G in 2020. In addition, the digital sector has seen strong growth in smartphone payment services, with many new offerings launching in quick succession. As a result, talented individuals have flocked to the industry, including candidates with financial backgrounds, app developers, security experts and other professionals able to draw from a diverse range of experience and skills.

The medical industry continues to hire in order to keep pace with Japan's ageing population, with life sciences specialists in particularly high demand. Medical device firms and pharmaceutical companies are searching for professionals specialising in central nervous system disorders, and oncology and regenerative medicine. Following Japan's interest in the 100-year lifespan concept, which focuses on positive longevity, hiring has increased at manufacturers producing ingredients for dietary supplements and organic food products.

In 2019, Japan continued to strengthen its financial regulations following several high-profile incidents involving

Our presence in Japan & South Korea:

- Osaka
- Seoul
- Tokyo

cryptocurrencies and smartphone payment fraud. Similarly, companies are under increased scrutiny regarding their collection and usage of personal data, which requires compliance with the Personal Information Protection Law. Both these things have led to increased demand for cyber security, audit, risk and compliance professionals.

In 2020, legislation designed to ensure equal pay for equal work will come into force. This will give those in part-time and temporary work more stable employment conditions, an uplift in wages and an increase in opportunities to receive full-time employment. On the employer side, we expect to see companies utilising contractors even more as they seek to secure specialised talent at short notice in order to launch new projects or move into new markets.

SOUTH KOREA

With the implementation of the 52-hour workweek, another rise in the minimum wage and prolonged US-China trade tensions, foreign direct investment (FDI) in Korea declined in the first half of 2019 compared to 2018. Despite this, FDI in the first half of 2019 actually surpassed the 10-year average, indicating that general upward movement continues.

In 2019, the Korean government invested heavily in the biotechnology sector, along with future mobility (autonomous and electric vehicles) and renewable energy, to lead the country's economic growth into the future. As a result, the biotechnology industry drew exceptional attention from foreign investors in 2019, with demand for highly skilled talent in this potentially high-growth field remaining strong. In addition, the rapid growth of the biotechnology industry has expanded the market for analytical devices and diagnostics, leading to increased hiring in these areas.

> "Both foreign-affiliated firms and Japanese companies operating internationally are driving demand for bilingual talent with overseas experience."

Competition for technology specialists continued to intensify with the development of new business models converging IT and healthcare, as well as across-the-board digitalisation of many industries including retail, logistics, manufacturing and finance. Demand for new technology skills remains strong in the manufacturing sector, where a transition to smart factories is taking place as part of the Fourth Industrial Revolution. Whereas manufacturers of internal-combustion engine vehicles experienced a decline against a backdrop of poor business performance in South Korea, the autonomous and electric car industries continued to boom. With that, the demand for bilingual data scientists, deep learning engineers and autonomous system platform specialists in the manufacturing field will continue in 2020.

Turning to new and renewable energy, the Korean government has announced the 'Renewable Energy 3020 Implementation Plan', with the goal of producing 20% of the country's energy from renewable sources by 2030. With the accelerated introduction of infrastructure for solar, wind and hydroelectric power generation, the demand for top talent in these areas is growing steadily.

SOUTH EAST ASIA

A SOLID GROWTH TRAJECTORY

In 2019, hiring activity in South East Asia was predominantly buoyant, particularly in the high-growth markets of Indonesia, the Philippines, Thailand and Vietnam. Elections in the first half of the year saw businesses take a more conservative approach to hiring, but activity recovered in the latter half of 2019. In Malaysia and Singapore, hiring showed steady signs of growth, with robust activity in technology.

Across the region, technology and transformation remains a major focus for businesses, which is in turn shaping hiring trends.

KEY HIRING TRENDS

Hybrid skill sets sought after

As companies continue their digitalisation journeys, hiring managers are looking for experienced technology professionals with hybrid skill sets. Specifically, they are seeking mid-level and senior managers who can help their teams navigate change and ensure the successful adoption of new technologies.

Outside of the technology function, employers are seeking professionals with the ability to leverage new technology within their work to drive the business forward. For example, HR professionals who are well-versed in workforce analytics and finance professionals with expertise in business intelligence are increasingly in demand.

Our presence in South East Asia:

- Indonesia
- Malaysia
- Philippines
- Singapore
- Thailand
- Vietnam

Across the board, there is strong demand for professionals who are able to apply their technical expertise to a broader commercial context that positions the organisation for growth. ‘Glocal’ talent, or professionals who have a good understanding of both global and local cultures and mindsets, are also in demand as businesses continue to internationalise.

Risk and compliance professionals in demand

Regulatory requirements and guidelines across the region have evolved alongside digitalisation. This has resulted in strong demand for risk and compliance professionals as businesses within the banking and financial services sector seek to align themselves with new regulations and guidelines set by their central banks.

As digital banking, fintech and online payment solutions continue to grow, so does the demand for risk, compliance and legal talent with specialist knowledge in technology.

Manufacturing growth drives hiring activity

The manufacturing industries in Thailand and Vietnam saw healthy growth in 2019, driven by a multitude of factors, including the Eastern Economic Corridor project in Thailand, the establishment of free trade agreements in Vietnam and growing external confidence in these markets. The US-China trade war also played a part as manufacturers and electronics companies moved some production lines from Mainland China to South East Asia to avoid tariffs.

This has spurred demand for professionals within the industry across key functions, such as human resources, accounting & finance, engineering, supply chain & procurement and logistics.

HIRING TOP TALENT

Broadly speaking, demand outstrips the supply of well-rounded talent who demonstrate strong expertise in their own field, the ability to leverage new technologies to drive efficiencies in their own work and a commercial mindset. As such, forward-thinking employers are starting to emphasise potential and transferrable skill sets over market

> “Across functions, employers are seeking professionals with the ability to apply their technical expertise to a broader commercial context.”

sector experience. For instance, businesses in fast-moving consumer goods (FMCG) are starting to hire technology talent from other industries such as financial services or retail.

The talented, modern jobseeker is looking for fresh challenges and the opportunity to deliver value to a business through their role. To secure and retain top professionals, hiring managers will need to show a commitment to learning and development, while also demonstrating how the role contributes to the wider organisation.

To meet the need for ‘glocal’ talent, we encourage employers to search internationally, thereby tapping into the pool of local professionals based overseas. Organisations in the region have found high-quality local talent with niche skill sets and international expertise via our ‘Return Home’ campaigns - Pulang Kampung (Indonesia), Balik Bayan (Philippines), Balik Kampung (Singapore) and Come Home Phở Good (Vietnam).

LOOKING AHEAD

Global events like the US-China trade war may negatively influence hiring activity in specific industries and markets, but overall, we expect healthy levels of hiring across the region. Digitalisation will continue to build momentum and be a major driver of hiring trends in the coming year, and there will be growing demand for well-rounded, ‘glocal’ professionals, particularly for both mid-level and senior positions.

EUROPE

2019

Despite much publicised economic and political uncertainty across Europe, businesses continued to recruit in 2019.

In France, businesses adopted a "stop-and-go" approach to hiring. Concerns about the economy and the yellow vests (gilets jaunes) protests meant companies were quick to stop recruitment activity in times of distress. However, in general the recruitment market performed well in 2019 as companies had to make up for talent shortages in all sectors. Real estate and construction were particularly busy as Paris geared up for the 2024 Olympic Games and worked on delivering the Greater Paris project.

The Dutch economy was in great shape in 2019. The unemployment rate was at an all-time low, resulting in increased scarcity of candidates across all disciplines, especially at the junior and mid levels. In a market where candidates were calling the shots, employers were forced to act fast to secure the best candidates. To overcome candidate shortages companies hired more expats, from countries both within and outside the EU, such as Turkey and South Africa.

Belgium continued to benefit from strong economic growth in 2019, which led to a busy hiring market. However, businesses were still constrained by widespread candidate shortages. This resulted in companies hiring permanent staff more quickly than in previous years whilst increasing interim recruitment in the fields of finance and project management.

Our presence in Europe:

- Belgium
- France
- Germany
- Ireland
- Luxembourg
- Netherlands
- Portugal
- Spain
- Switzerland
- United Kingdom

While the UK was defined by a year of political and economic instability due to Brexit, the hiring market performed better than anticipated. There were pockets of hiring activity within sectors that received notable VC funding such as technology

and fintech. Other areas of positive recruitment in 2019 were property, professional services and specific areas within banking such as hedge funds.

In 2019 there was a lot of negative press in Germany concerning the economic environment, political uncertainty and difficulties within the automotive industry. However, these stories did not lead to a slowdown in hiring. The professional skills shortage across finance, legal, technology and digital marketing showed no sign of abating and the market remained busy as traditional Mittelstand companies focused on digitalisation and international businesses grew their footprints in Germany.

Hiring activity in Spain was very high in the first half of the year as the strength of the economy facilitated growth. Businesses in the technology, automation, renewable energy, construction, chemical, pharmaceutical and tourism sectors were busiest. The second half of the year saw a reduction in hiring activity as commercial conflicts surrounding the USA and China, the UK's exit from the European Union and the difficulty of building a stable government in Spain reduced the appetite for hiring.

2020

It's very hard to predict what the European hiring market will look like in 2020 due to the unknown outcome of Brexit (at the time of writing) and ongoing economic and political uncertainty. However, we are confident that widespread candidate shortages will continue, resulting in demand for skilled professionals.

Recruitment has become less cyclical than it once was as business leaders have realised the value of being quick to adapt to market conditions, whilst remaining right-sized in order to take advantage of future growth.

In Belgium, we expect businesses will continue to expand in 2020. As a result, we will see an increase in demand for support professionals in HR, marketing, administration and supply chain. Like previous years, support staff with strong language capabilities in Dutch, French and English will be highly desirable.

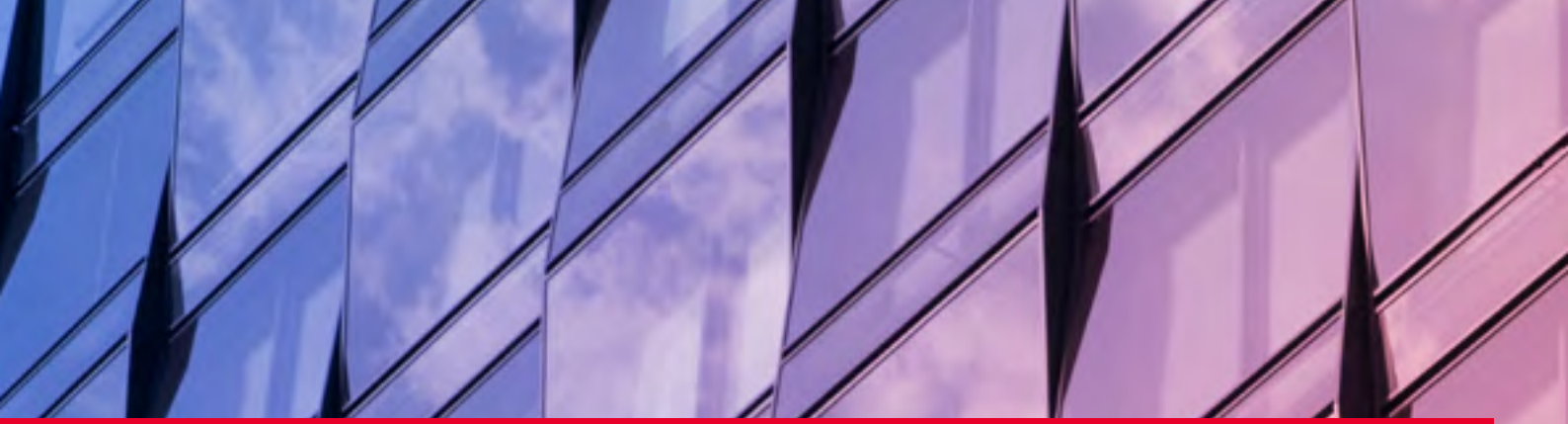
The French hiring market is expected to remain relatively strong. For the first time in years the unemployment rate has fallen, causing further candidate shortages. As a result, companies will place greater emphasis on staff retention and succession planning.

In Spain, the technology sector will continue to be one of the biggest drivers of hiring. The focus on digital transformation is set to increase, which will lead to businesses recruiting specialist technology professionals. These professionals will need to have strong communication skills in order to work effectively and efficiently with departments outside of technology.

Whatever the outcome of Brexit in the UK, we will still see plenty of hiring activity amongst emerging industries, disruptors and SMEs. It's businesses in these categories that will drive the hiring agenda by recruiting agile, tech-proficient and commercially savvy professionals who have their finger on the pulse of developing markets. Salary increases will be most lucrative at the mid to senior level as companies try to attract more risk-averse talent who are conscious about job moves during a time of uncertainty.

In the Netherlands, the scarcity of candidates is expected to continue in 2020 at all levels of seniority and across all disciplines. After two years of substantial growth, salaries are expected to stabilise in 2020. However, pay for specialists in compliance, regulatory reporting, risk management and technology will continue to grow, as these specialists are extremely scarce.

In Germany, hiring volumes in financial services will be dependent on the outcome of Brexit. If economic conditions worsen, we may see finance departments hire professionals who focus on cost efficiencies rather than business partnering and growth. Due to candidate scarcity we will continue to see salary increases across the market.



MIDDLE EAST

2019

Recruitment activity was high across the Middle East for the majority of 2019, following a relatively flat first quarter. Businesses in the UAE, Saudi Arabia and Kuwait benefited from improved economic optimism and were the most active hirers.

In the UAE, the growing demand for nationals increased. Companies attempted to comply with 'Emiratization' legislation but struggled, due to available talent pools still being dominated by foreign expats. As a result, we have seen wage inflation for nationals at all levels and a trend of local candidates moving roles more frequently.

Multinationals continued to open their regional headquarters in Dubai, bringing further opportunities for skilled professionals. Digitalisation was at the forefront as companies looked to optimise performance and stay relevant. This led to greater demand for marketing and sales professionals with digital experience.

The job market in Saudi Arabia continued to be busy for government roles, with the private sector starting to follow suit in the second half of the year. The rush to hire good-quality Gulf candidates resulted in increased candidate movement, especially in Saudi Arabia. Kuwait, often overshadowed by its larger neighbours, significantly increased hiring activity and continued to be a growing market.

> "In 2020, the UAE economy is set to go through a new growth cycle, bringing about an increase in business confidence."

2020

In 2020 the UAE economy is set to go through a new growth cycle, bringing about an increase in business confidence. While Expo 2020 is not the silver bullet to solve everything, it is expected to act as a catalyst to kick-start 2020. With an optimistic economy forecasted, we expect a positive hiring market.

There will be a renewed focus on nationalisation, especially in the UAE and Saudi Arabia. Saudi Arabia has been the most stringent in enforcing nationalisation polices. This trend will accelerate throughout the year and we expect other GCC countries to follow suit.

The expected growth in Saudi Arabia means there are excellent career opportunities for Western-educated Saudi nationals and expats bringing best-practice skill sets from multinationals. The nation has immense hiring-potential and tangible opportunities that continue to grow in number. Social changes, such as the introduction of cinemas and women being permitted to drive, will continue at a steady pace and further investment into infrastructure is expected to support business growth. Kuwait will continue to be an area of focus for many companies and as a result we predict an active hiring market.

As the wider Middle East economic environment continues to improve, we expect to see salaries increasing during 2020.

AFRICA

SOUTH AFRICA

2019

2019 was characterised by cautious hiring due to the general elections, a sluggish economy and unemployment of up to 29%. When businesses did hire, they sought internationally minded professionals with high adaptability and strong business acumen to minimise the downtime during onboarding.

The demand for employment equity (EE) professionals continued to influence hiring processes, resulting in salary increases of 10-15% for applicable candidates. Legal and finance specialists with high levels of technical competence and industry knowledge also received premium salaries.

2020

In 2020, we expect to see high demand for professionals with both technical ability and strategic acumen. Productivity and effectiveness of employees will be the highest priorities. Historically, specialist skill sets in candidates were considered a 'value-add', but we expect this to be a minimum requirement moving forward.

The modernity and agile approach of SMEs has made them more competitive in the hiring market than their larger competitors. In order to compete, larger businesses need to have a clear picture of the professional they are looking to hire and operate swift recruitment processes. Due to continued economic instability, salary increases are expected to be in line with inflation.

REST OF AFRICA

2019

Across Africa there was an increasing drive towards nationalisation and a demand for diaspora professionals. The development of employees, succession planning and youth development were key focus areas for companies. Experienced finance professionals were highly sought after as companies looked to train and develop local staff.

Recruitment in both East and West Africa was particularly fast-paced due to the increased need for mid to senior level professionals within finance, legal, sales and operations. Across Central Africa the need for sales, marketing and finance professionals continued, with an increased focus on digitalisation and engineering. As companies sought to adhere to government nationalisation policies while also facing a lack of local talent, we saw increased salary offers made to nationals for roles previously held by expats.

2020

The competition for skilled nationals will remain high across the continent. In East Africa, international companies can expect inflated salary demands due to candidate shortages. Businesses in more developed parts of Africa, such as the Indian Ocean region, can expect to see multiple counter-offers presented to top talent. With increased stability across North Africa, salary increases of 3-7% are likely.

Investment in skills development, staff retention and competitive benefits will be key trends in 2020. Employers looking for skilled nationals with international and cross-border experience will struggle to recruit these roles themselves and will need to rely more on specialist recruiters.

US & CANADA

SAN FRANCISCO

In 2019, we saw an unprecedented demand for talent across the Bay area. Strategic, hands-on leaders were the most highly sought after.

Hiring activity spiked across design functions as companies realised the impact that design-led thinking can have on business success. Sectors with the highest levels of recruitment included AI, autonomous vehicles, robotics, online marketplaces and fintech.

In 2020, machine learning and AI will remain challenging areas to recruit in, with demand for talent far outweighing the availability of qualified professionals. Hiring managers should streamline their recruitment processes in order to attract more candidates and remain competitive in securing top talent.

We have seen a significant increase in salaries across the board, in part due to the change in law in California which prohibited employers from asking job applicants for salary history information. Salaries continued to rise due to the highly competitive nature of the market, and we expect this to continue in 2020.

LOS ANGELES

In LA, businesses faced a shortage of CPA-qualified controllers with audit backgrounds, especially those with start-up experience. We expect this to continue in 2020.

Demand for operational leaders remained high in 2019. Many start-ups sought general managers and operational heads to manage the P&L, launch new markets, evaluate M&A possibilities, and provide insightful product and marketing feedback.

Our presence in the US & Canada:

- Los Angeles
- New York
- San Francisco
- Toronto

LA will continue to be at the centre of frontier categories such as e-commerce, direct to consumer, logistics, manufacturing and aerospace as well as AR/VR and gaming/esports in 2020. These categories will be powered by increases in venture capital, a pipeline of diverse engineering talent and a legacy of expertise in specialised industries.

In 2020, employers are advised to run swift and efficient hiring processes. By engaging all relevant stakeholders

at the outset, hiring managers can build a clearer profile of their ideal candidate and move quickly to make an offer to promising candidates.

NEW YORK

2019 saw high demand for talent in areas such as technology, data privacy, cyber security, AI and machine learning, leading to candidate shortages in these areas. Hiring activity was more measured in traditional areas such as accounting and finance, financial services operations and support functions. However, businesses in the fintech space and in pockets of the investment management industry were still strong hirers.

In many cases, interview processes were drawn out and due to the lack of swift decision making, clients missed out on securing top talent.

Demand for professionals in revenue generating roles, such as sales professionals across all industries and lawyers in private practice, remained high, and we expect this to continue in 2020.

In the financial services sector, highly quantitative candidates will remain in high demand, both in research and trading strategy roles and risk management positions.

VC-backed high-growth tech start-ups were major hirers in 2019. The need for hands-on leadership candidates will still be a high priority for all early stage firms looking to scale.

TORONTO

Canada witnessed a buoyant recruitment market in 2019 as the economy continued to grow and unemployment rates reached their lowest levels in decades.

Large cohorts of baby boomers retiring combined with low numbers of millennials with STEM (science, technology, engineering, mathematics) skill sets entering the workforce is causing an acute skills shortage in the Canadian market.

> “Hiring managers should streamline their recruitment processes in order to effectively increase candidate attraction and remain competitive in securing top talent.”

Accounting and finance professionals who remained in their current roles either did not receive a salary review or had their salary adjusted in line with inflation (2% forecast for end of 2019). Those who did start new roles saw an average increase in base salary of 14%. This caused significant movement in the market.

In 2020, top calibre candidates will have multiple opportunities to consider when moving jobs. The Canadian government will continue turning towards mass immigration for highly skilled workers to ensure all skill gaps are filled.

Salaries for lawyers in private practice will increase $10-20k with each year post-call, before stabilising at the nine-year post-call mark at between $150k (in small- to medium-sized law firms) and $220k (for national or Seven Sister firms). Lawyers who move firms will see an average increase of 7% on base salary, while compliance professionals moving firms will receive pay increases of up to 10%.

LATIN AMERICA

2019

Brazil, Chile and Mexico all experienced a challenging economic environment in 2019, which saw central banks cut interest rates to stimulate their economies.

Chile's economic slowdown was driven by weakening domestic demand and a slumping copper price, which drives many aspects of the economy. In Mexico, it was widely agreed that signs of economic stagnation were due to decisions made by the new president, most notably the cancellation of several high-profile construction projects, which shook investor confidence and dampened hopes for growth. In Brazil, early optimism that the new government would be good for business quickly cooled, following a series of distracting scandals and ongoing delays with the vote on pension reforms.

Despite these economic challenges the demand for specialist technology talent remained consistent across all countries. While construction suffered in Mexico, the energy sector grew in Chile and there was an increased shortage of cyber security specialists in Brazil.

2020

Brazil, Chile and Mexico could all take very different paths in 2020, leading to a very mixed recruitment outlook for the region.

After years of economic misery, Brazil may finally see a long-awaited recovery spurred on by pension reform, which will most likely increase the level of foreign direct investment. The recovery of the oil and gas sectors, as well as the construction industry, will also start to have an impact on the economy in 2020, but the overall gains will still be modest by international standards.

The government's focus on economic equality policies at the expense of economic growth and decisions such as the cancellation of government contracts will likely have a negative impact on the economy, especially in the construction and energy industries. However, it remains to

Our presence in Latin America:

- Brazil
- Chile
- Mexico

be seen if the government's budget stabilisation fund will be needed and if confidence will return.

Across the Andes, in Chile, where the business community has more confidence in the government's ability to manage economic challenges, the planned injection of USD $600 million into the country's budget (for road construction, subsidised housing, healthcare and water projects) throughout 2020 should see the economy weather any challenges better than most in the region.

HIRING TRENDS

With independent and diverse economic challenges across the region there are unique hiring environments in each country; however, there are also some common trends.

In all markets the recruitment of professionals with a high level of business English will remain a key challenge, especially for finance, commercial and engineering roles. This is driven by two factors. Firstly, in many global firms, expats are being replaced with local employees, but as these roles are the main interface with head office, professionals with a high level of fluency in English are needed. Secondly, many domestic firms are looking to expand internationally, so they are now competing with global companies for the same talent.

In all countries there are shortages of digital experts, data scientists and cyber security specialists, as firms look to migrate their businesses online and deal with the extra security challenges this presents. In many cases 'digital-first' businesses are taking most of the talent due to the attractiveness of this business model.

As a rule, employers seeking digital skill sets are looking for multi-skilled profiles, hoping to add greater value to their businesses, so there will be more demand for commercial finance profiles as well as digital natives who combine technology and marketing expertise.

> "Despite economic challenges the demand for specialist technology talent remained consistent across all countries."

There is increasing demand from candidates for better work-life balance, with firms having to offer flexible and innovative working options, which, in many cases, are just as important as salary increases to professionals looking for their next career move. In addition to this, employers need to be able to demonstrate equal opportunities for women in the workplace with proven examples of women progressing their careers while having a family.

Firms should also consider hiring from international talent pools, where they can attract professionals who will often be in the role for longer, which easily compensates for the time and cost of arranging work visas.

CONTACT US

IRELAND

DUBLIN

Level 3
Custom House Plaza 2
IFSC
Dublin 1
Ireland
t: +353 (0) 1 633 4111

CONTACT US

REST OF WORLD

AUSTRALIA

ADELAIDE
Level 20
25 Grenfell Street
Adelaide
SA 5000
Australia
t: +61 (0) 8 8216 3500

BRISBANE
Level 27
Waterfront Place
1 Eagle Street
Brisbane
QLD 4000
Australia
t: +61 (0) 7 3032 2222

CHATSWOOD
Level 15
67 Albert Avenue
Chatswood
NSW 2067
Australia
t: +61 (0) 2 8423 1000

MELBOURNE
Level 41
385 Bourke Street
Melbourne
VIC 3000
Australia
t: +61 (0) 3 8628 2100

PERTH
Level 10
109 St Georges Terrace
Perth
WA 6000
Australia
t: +61 (0) 8 9266 0900

SYDNEY
Level 53
Governor Phillip Tower
1 Farrer Place
Sydney
NSW 2000
Australia
t: +61 (0) 2 8289 3100

BELGIUM

ANTWERP
ROBERT WALTERS
Antwerp Gate 1
Uitbreidingstraat 2-8
B-2600 Antwerp
Belgium
t: +32 (0) 3 202 79 00

WALTERS PEOPLE
t: +32 (0) 3 202 79 10

BRUSSELS
ROBERT WALTERS
Avenue Louise 326
10th Floor
B-1050 Brussels
Belgium
t: +32 (0) 2 511 66 88

WALTERS PEOPLE
Finance
t: +32 (0) 2 542 40 40

Business Support
t: +32 (0) 2 627 75 10

GHENT
WALTERS PEOPLE
Axxess Business Park - Building C
Guldensporenpark 25
B-9820 Merelbeke
Belgium
t: +32 (0) 9 210 57 40

GROOT-BIJGAARDEN
WALTERS PEOPLE
West End - Building C
Noordkustlaan 16c
B-1702 Groot-Bijgaarden
Belgium
t: +32 (0) 2 609 79 00

ZAVENTEM
WALTERS PEOPLE
Leuvensesteenweg 555
Entrance 3
B-1930 Zaventem
Belgium

Finance
t: +32 (0) 2 613 08 00

Business Support
t: +32 (0) 2 613 08 88

CONTACT US

REST OF WORLD

BRAZIL

SÃO PAULO
Rua do Rócio
350, 4º andar
Vila Olímpia
São Paulo
04552-000
Brazil
t: +55 (11) 2655 0888

CANADA

TORONTO
145 King Street West
Suite 720
Toronto
ON M5H 1J8
Canada
t: +1 647 288 2438

CHILE

SANTIAGO
Rosario Norte, 555 - Oficina 1802
Piso 18
Las Condes
Santiago
+56 9 4297 9475

MAINLAND CHINA

BEIJING
Room 1579, 15/F, NCI Tower
12A Jianguomenwai Ave
Chaoyang District
Beijing 100022
China
t: +86 10 8523 3026

SHANGHAI
2206-2207, 22nd Floor
Park Place Office Tower
No.1601 West Nanjing Road
Shanghai 200040
t: +86 21 5153 5888

SHENZHEN
Level 3, Tower 1
Kerry Plaza
No.1 Zhong Xin Si Road
Futian District
Shenzhen 518048
China
t: +86 755 3304 0350

SUZHOU
Room 1906, Block A
Building #58, Suzhou Centre
Suzhou Industrial Park
Suzhou 215021
Jiangsu Province
China
t: +86 512 6873 5888

FRANCE

LYON
ROBERT WALTERS
63 quai Charles de Gaulle
69006 Lyon
France
t: +33 4 72 44 04 18

WALTERS PEOPLE
3 rue de l'Arbre Sec
69001 Lyon
France
t: +33 4 72 69 77 15

NANTES
12 avenue Carnot,
44017 Nantes
France
t: +33 2 72 24 26 24

PARIS
ROBERT WALTERS
25 rue Balzac
75008 Paris
France
t: +33 1 40 67 88 00

WALTERS PEOPLE
251 boulevard Pereire
75017 Paris
France
t: +33 1 40 76 05 05

SAINT-QUENTIN
WALTERS PEOPLE
41 avenue du Centre
78180 Montigny-le-Bretonneux
France
t: +33 1 30 48 21 80

TOULOUSE
56 - 58 rue d'Alsace Lorraine
31000 Toulouse
France
t: +33 6 60 57 82 66

GERMANY

COLOGNE
Design Offices Köln
Gereon GmbH
Christophstraße 15-17
50670 Köln
Germany
t: +49 (0) 221 65086 160

DÜSSELDORF
Königsallee 76-78
40212 Düsseldorf
Germany
t: +49 (0) 211 30180 000

FRANKFURT
Main Tower
Neue Mainzer Str. 52-58
60311 Frankfurt am Main
Germany
t: +49 (0) 69 9203 840 000

HAMBURG
Gorch-Fock-Wall 1a
20354 Hamburg
Germany
t: +49 (0) 40 377 0739 90

HONG KONG

HONG KONG
20th Floor Nexxus Building
41 Connaught Road Central
Central
Hong Kong
t: +852 2103 5300

INDONESIA

JAKARTA
World Trade Centre 3
18th Floor, Jl. Jend.
Sudirman
Kav. 29-31
Jakarta
12920
Indonesia
t: +62 (21) 2965 1500

JAPAN

OSAKA
Pias Tower 15th Floor
3-19-3 Toyosaki
Kita-ku, Osaka-shi
Osaka
531-0072
Japan
t: +81 (0) 6 4560 3100

TOKYO
Shibuya Minami Tokyu
Building 14th Floor
3-12-18 Shibuya
Shibuya-ku
Tokyo
150-0002
Japan
t: +81 (0) 3 4570 1500

LUXEMBOURG

LUXEMBOURG
681, rue de Neudorf
L-2220 Luxembourg
Luxembourg
t: +352 2647 8585

MALAYSIA

KUALA LUMPUR
Level 24, Menara 3 Petronas
Persiaran KLCC
Kuala Lumpur 50088
Malaysia
t: +603 2380 8700

NORTHERN REGION
t: +6010 931 9803

MEXICO

MEXICO CITY
Av. Paseo de la Reforma
296
Piso 24
Colonia Juarez 06600
Mexico City
Mexico
t: +52 55 7100 4777

NETHERLANDS

AMSTERDAM
ROBERT WALTERS
WTC, Tower H 3rd Floor
Zuidplein 28
1077 XV Amsterdam
Netherlands
t: +31 (0) 20 644 4655

WALTERS PEOPLE
t: +31 (0) 20 796 9040

CONTACT US

REST OF WORLD

EINDHOVEN

ROBERT WALTERS
Begijnenhof 4-6
5611 EL Eindhoven
Netherlands
t: +31 (0) 40 799 9910

WALTERS PEOPLE
t: +31 (0) 40 799 9912

ROTTERDAM

ROBERT WALTERS
Millenniumtoren
Weena 690, 29th floor
3012 CN Rotterdam
Netherlands
t: +31 (0) 10 799 8090

WALTERS PEOPLE
t: +31 (0) 10 752 7200

UTRECHT

Herculesplein 44
3584 AA Utrecht
t : +31 (0) 30 799 8050

NEW ZEALAND

AUCKLAND

Level 9
22 Fanshawe Street
Auckland
New Zealand
t: +64 (0) 9 374 7300

WELLINGTON

Level 15
Harbour Tower
2 Hunter Street
Wellington
New Zealand
t: +64 (0) 4 471 9700

PHILIPPINES

MANILA

37/F Philamlife Tower
8767 Paseo De Roxas
Makati City 1226
Philippines
t: +63 2 8816 4972

PORTUGAL

LISBON

Av. da Liberdade, 110
1st floor
1269-046, Lisbon
Portugal
t: +351 211 221 863

SINGAPORE

SINGAPORE

6 Battery Road
22nd Floor
Singapore 049909
t: +65 6228 0200

SOUTH AFRICA

JOHANNESBURG

19th Floor
GreenPark Corner
Cnr West Road South and
Lower Road
Morningside, Sandton
Johannesburg
2196
South Africa
t: +27 (0) 11 881 2400

SOUTH KOREA

SEOUL

21F, East Center, Center 1
Building
26 Eulji-ro 5-gil
Jung-gu
Seoul 04539
South Korea
t: +82 (0) 2 6454 7000

SPAIN

BARCELONA

ROBERT WALTERS &
WALTERS PEOPLE
Passeig de Gràcia nº 55-57
3ª planta
08007 Barcelona
Spain
t: +34 93 216 30 00

MADRID

ROBERT WALTERS &
WALTERS PEOPLE
Paseo de Recoletos nº 7-9
5ª - 6ª planta
28004 Madrid
Spain
t: +34 91 309 79 88

VALENCIA

Avenida de Aragón nº 30
8ª planta
46021 Valencia
Spain
t: +34 96 046 86 46

SWITZERLAND

GENEVA

Rue de la Cité 1
1204 Genève
Switzerland
t: +41 (0) 22 561 84 77

ZÜRICH

Claridenstrasse 41
8002 Zürich
Switzerland
t: +41 (0) 44 809 35 00

TAIWAN

TAIPEI

Room F, 10th Floor
No.1 Songzhi Road
Xin-yi District
Taipei
Taiwan
t: +886 2 8758 0700

THAILAND

BANGKOK

Q House Lumpini, 12th Floor
Unit 1201
1 South Sathorn Road
Thungmahamek, Sathorn
Bangkok 10120
Thailand
t: +66 (0) 2 344 4800

EASTERN SEABOARD

Level 12, Room No.1259-1260
Harbor Mall Office
4/222 Moo 10, Sukhumvit Road,
Thungsukhla, Sriracha,
Chonburi 20230
Thailand
t: +66 (0) 33 030 780

UAE

DUBAI

Unit C 1008
10th floor Burj Daman
DIFC
P.O. Box 506851
Dubai
UAE
t: +971 4 8180 100

UNITED KINGDOM

BIRMINGHAM

9th Floor
11 Brindley Place
Birmingham
B1 2LP
United Kingdom
t: +44 (0) 121 281 5000

BRACKNELL

The Lightbox
Willoughby Road
Bracknell
RG12 8FB
United Kingdom
t: +44 (0) 134 423 3280

LIVERPOOL

3rd Floor
No.1 Mann Island
Liverpool
L3 1BP
United Kingdom
t: +44 (0) 151 433 5612

LONDON

ROBERT WALTERS &
WALTERS PEOPLE
11 Slingsby Place
St Martin's Courtyard
London
WC2E 9AB
United Kingdom
t: +44 (0) 207 379 3333

MANCHESTER

9th Floor
3 Hardman Street
Manchester
M3 3HF
United Kingdom
t: +44 (0) 161 214 7400

MILTON KEYNES

1st Floor
Altius House
North Fourth Street
Milton Keynes
MK9 1NE
United Kingdom
t: +44 (0) 190 804 4000

ST ALBANS

1st Floor
4 Beaconsfield Road
St Albans
AL1 3RD
United Kingdom
t: +44 (0) 172 761 7010

UNITED STATES

LOS ANGELES

1925 Century Park E
Suite 1700
Los Angeles, CA 90067
USA
t: +1 424 204 8725

NEW YORK

7 Times Square
Suite 4301
New York, NY 10036
USA
t: +1 212 704 9900

SAN FRANCISCO

575 Market Street
Suite 2950
San Francisco, CA 94105
USA
t: +1 415 549 2000

VIETNAM

HO CHI MINH CITY

Unit 1, Level 9,
The Metropolitan
235 Dong Khoi Street
District 1
Ho Chi Minh City
Vietnam
t: +84 28 3520 7900

AUSTRALIA
BELGIUM
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