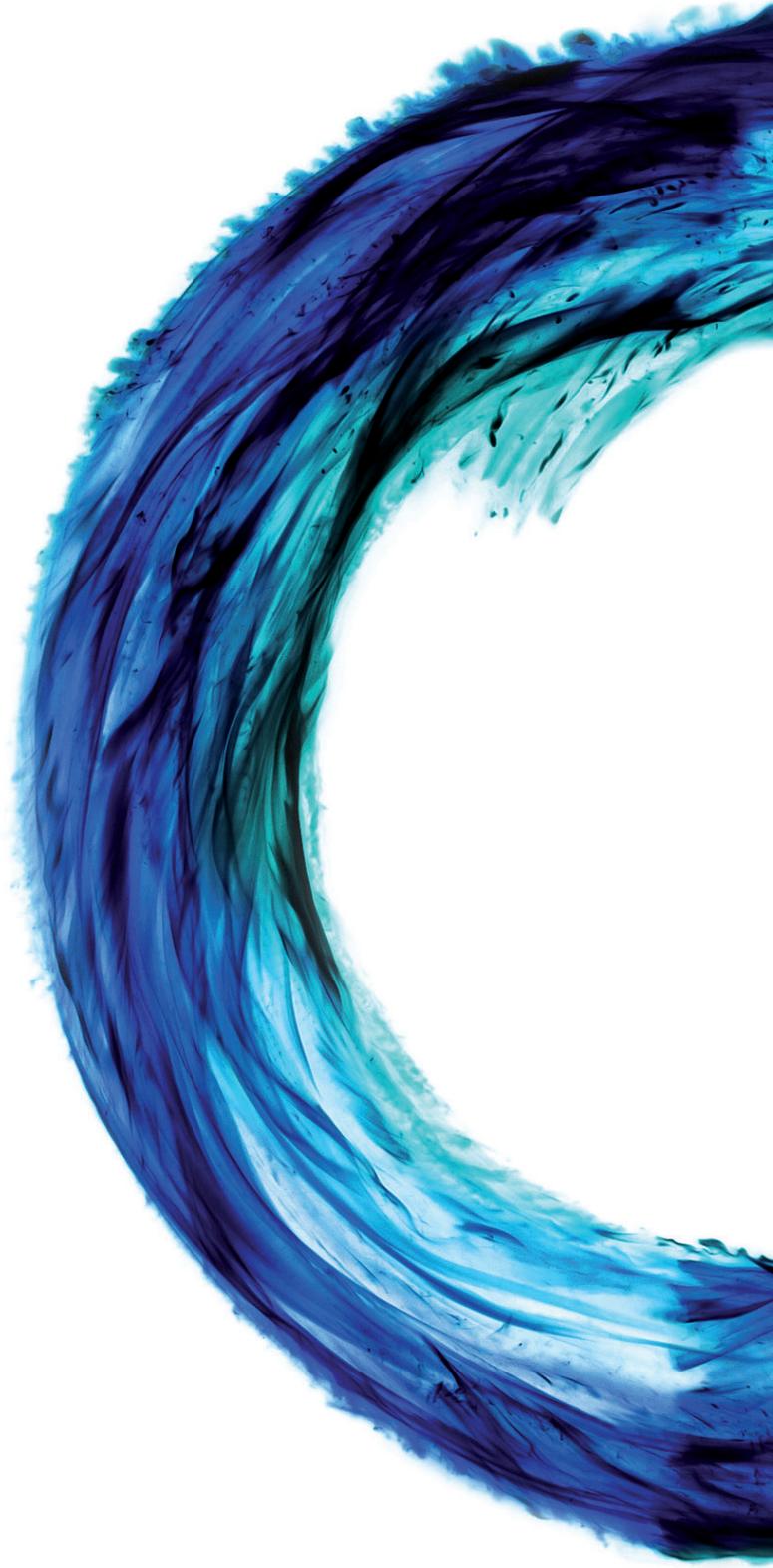


Salary Survey 2013



THE BRIGHTWATER
GROUP



Information Technology

Permanent

An initiative set up by the indigenous Irish software sector supported by Enterprise Ireland "IT's Happening Here" is indicative of what is happening in the IT/software job market in Ireland. Professional bodies in the IT space are trying hard to convey the message that there are extensive job opportunities across the IT industry but there continues to be a scarcity of suitably qualified software engineers, business intelligence, database and QA resources amongst other IT disciplines. In last year's salary survey, we highlighted the relative health of the IT sector given the tough economic environment and the situation has improved even further. The volume of IT roles registered with Brightwater in 2012 has increased by 27% on our 2011 figures. There is a veritable feast of job opportunities for software engineers and software QA engineers and BI staff in particular. For employers looking for appropriately qualified staff in these areas, it is not far off famine.

Salary levels have continued to improve in many areas in recent months. In software development disciplines which continue to be in very high demand, e.g. JEE and C#.Net, they have risen by as much as 10% after comparable increases in the previous year. Competition is increasingly fierce amongst employers for the better software engineers, in particular developers with three to seven years' experience. This is a very positive development for software engineering candidates, however not for employers where the cost to hire is increasing substantially. The concern would be that if this trend continues, Irish software companies could be at risk of losing some of their competitive edge. Given the fact that our technology sector is a core contributor to export led growth in the economy, the hope would be that the supply of suitable talent to the technology sector will improve in the coming year and we will see a slow down in wage inflation. Many salary survey respondents were rightly concerned about this issue.

A recent Brightwater Ireland Technology Survey highlighted the positive perceptions that IT candidates have of the current job market and the importance of remuneration to them. Software engineers amounted to 38% of respondents. Within this category, 58% of them have declined a job offer within the last two years with the majority (32.3%) giving salary not being at the level they had anticipated as their reason for declining. A

further 18% said that they turned it down for an offer from another company and a further 9% accepted a counter offer.

Our technology survey asked respondents seeking a new role, what was the most important thing a new employer could offer? A very high percentage (41%) highlighted improved salary/package whilst 17% saw promotional opportunities as the most important factor. Surprisingly only 4.6% indicated job security as an important factor which further highlights IT candidates' perceptions that the IT market is buoyant and opportunities are plentiful.

Demand for C++/Linux and Python developers remains strong as do opportunities for PHP/SQL web developers. Candidates with experience in real-time systems development and multi-threading are commanding a premium in terms of salary. Salary levels have also risen by about 10% in these areas. Data warehousing and business intelligence development salaries are rising, particularly for Microsoft and Oracle BI developers. Companies looking for Microsoft SSRS, SSIS skills and Oracle BI skills are continuing to resource from a very small pool. As a result, salary levels have risen by about 10% in these areas.

In the 2012 salary survey we mentioned that we expected upward momentum on salaries for IT operations and infrastructure engineers, such as systems administrators and network engineers in the coming year, and that has proven to be the case. Although there are still not as many opportunities for IT operations staff as there are for development staff, Brightwater has seen a 15% increase in the volume of job opportunities coming through in these areas in the last year. For experienced systems administrators with solid design experience, server administration skills and strong exposure to virtualisation, salary levels have improved by about 5%. Opportunities for first and second level support staff have also improved dramatically. Salary levels for more junior infrastructure candidates have stayed relatively stable, however we envisage that we will see salary levels rise at this level going into 2013.

Project management and business analysis salary levels have stayed static in the last year with some exceptions such as when specific domain experience or product knowledge is sought after such as analysis skills in insurance, investment banking, asset management etc.

Executive

| Job Title | Dublin € | Regional € |
|---------------------------------|-------------------|-------------------|
| Chief Technical Officer (CTO) | 90,000 – 130,000 | 85,000 – 120,000 |
| Chief Operations Officer (COO) | 110,000 – 150,000 | 100,000 – 140,000 |
| Chief Information Officer (CIO) | 120,000 – 160,000 | 110,000 – 140,000 |
| IT Director | 90,000 – 125,000 | 85,000 – 120,000 |
| IT Manager | 75,000 – 85,000 | 70,000 – 80,000 |

Software Development

| Job Title | Dublin € | Regional € |
|--|-----------------|-----------------|
| Engineering / Development Manager | 75,000 – 85,000 | 70,000 – 80,000 |
| Technical Architect | 75,000 – 90,000 | 75,000 – 90,000 |
| Senior Engineer / Technical Team Lead (JEE / .Net) | 65,000 – 75,000 | 60,000 – 70,000 |
| Mainframe Developer | 40,000 – 50,000 | 35,000 – 45,000 |
| C / C++ Developer | 35,000 – 65,000 | 30,000 – 60,000 |
| Mid level .Net / C# Engineer | 35,000 – 65,000 | 30,000 – 60,000 |
| Mid level JEE Developer | 35,000 – 65,000 | 30,000 – 60,000 |
| Web Services Developer | 35,000 – 65,000 | 30,000 – 60,000 |
| Android / IOS Developer | 35,000 – 65,000 | 30,000 – 60,000 |
| Ruby on Rails Developer | 35,000 – 65,000 | 30,000 – 60,000 |
| Cold Fusion Developer | 35,000 – 65,000 | 30,000 – 60,000 |
| PHP Developer | 35,000 – 65,000 | 30,000 – 60,000 |
| Python Developer | 35,000 – 65,000 | 30,000 – 60,000 |
| SharePoint Developer | 45,000 – 70,000 | 40,000 – 65,000 |
| Release / Configuration Engineer | 50,000 – 65,000 | 45,000 – 60,000 |

Creative / Design

| Job Title | Dublin € | Regional € |
|---------------------------------------|-----------------|-----------------|
| Art Director | 75,000 – 95,000 | 70,000 – 85,000 |
| Creative Manager | 55,000 – 70,000 | 50,000 – 60,000 |
| Interactive Designer | 45,000 – 60,000 | 40,000 – 60,000 |
| UI / UX Engineer | 50,000 – 65,000 | 45,000 – 60,000 |
| Multimedia / Graphical / Web Designer | 25,000 – 45,000 | 22,000 – 40,000 |
| 3D Modeller / Designer | 35,000 – 55,000 | 30,000 – 50,000 |
| Games Designer | 40,000 – 60,000 | 35,000 – 55,000 |

Security / IT Audit

| Job Title | Dublin € | Regional € |
|--------------------------|-----------------|-----------------|
| IT Security Consultant | 40,000 – 65,000 | 35,000 – 60,000 |
| IT Auditor | 35,000 – 65,000 | 30,000 – 60,000 |
| IT Compliance Specialist | 35,000 – 65,000 | 30,000 – 60,000 |

We anticipate salary levels for project managers and business analysts will improve further over 2013 as many companies continue to ramp up on project initiatives and R&D. The executive market has seen very little movement in terms of remuneration and this remains the most depressed end of the market. There remains very little attrition at the top. There will be a turning point for IT executives in terms of the volume of opportunities. However we do not anticipate that happening in the near future.

Permanent ERP salaries in the SAP and Oracle eBusiness arena will inevitably improve further throughout 2013 as all our survey contributors in these areas have had chronic difficulty finding strong permanent staff and ultimately had to pay a premium for them. A 10% rise was seen for experienced hires in this area.

Looking at our survey responses, core benefits have remained fairly static. One interesting statistic has been that many companies are clearly more open to a degree of home working with a number of respondents articulating this. In relation to holiday days which remain important to many candidates when making a move, the average remains at 23 days. Other benefits have changed little with DC pensions from 6% to 11% on offer in terms of employer contributions, healthcare benefits, life assurance and educational assistance being general standard. Discretionary bonuses are more prevalent and average from 10% to 15%. Bonuses over the last few years have been theoretical as opposed to real. This year, many companies indicated they have paid or intend to pay bonuses.

System Analysis

| Job Title | Dublin € | Regional € |
|--|-----------------|-----------------|
| IT Management Consultant | 45,000 – 90,000 | 40,000 – 85,000 |
| Business Systems Analyst / Consultant | 40,000 – 65,000 | 35,000 – 60,000 |
| QA / Test Manager | 60,000 – 75,000 | 55,000 – 70,000 |
| QA / Test Lead | 55,000 – 65,000 | 50,000 – 60,000 |
| Principal Engineer / Systems Architect | 75,000 – 90,000 | 70,000 – 85,000 |
| Software Test / QA Engineer | 35,000 – 55,000 | 30,000 – 50,000 |
| QA Automation Engineer | 40,000 – 60,000 | 35,000 – 55,000 |
| Business Intelligence Consultant | 45,000 – 75,000 | 40,000 – 70,000 |
| Data Warehousing Consultant | 45,000 – 75,000 | 40,000 – 70,000 |

IT / Project Management

| Job Title | Dublin € | Regional € |
|------------------------|-----------------|-----------------|
| Programme Manager | 75,000 – 95,000 | 70,000 – 90,000 |
| Senior Project Manager | 70,000 – 85,000 | 65,000 – 80,000 |
| Project Manager | 65,000 – 75,000 | 60,000 – 70,000 |
| Product Manager | 65,000 – 80,000 | 60,000 – 75,000 |

Support / Administration

| Job Title | Dublin € | Regional € |
|---|-----------------|-----------------|
| Database Administrator (Oracle / SQL Server / Sybase) | 45,000 – 75,000 | 40,000 – 70,000 |
| Unix / Linux Administrator | 45,000 – 70,000 | 40,000 – 65,000 |
| Systems Administrator | 35,000 – 65,000 | 30,000 – 60,000 |
| Network Engineer | 40,000 – 70,000 | 35,000 – 65,000 |
| Help Desk Support | 23,000 – 35,000 | 20,000 – 32,000 |
| Application Support Consultant | 35,000 – 60,000 | 30,000 – 55,000 |
| Service Delivery Manager | 55,000 – 75,000 | 50,000 – 70,000 |

Localisation / Technical Writers

| Job Title | Dublin € | Regional € |
|------------------------------|-----------------|-----------------|
| Localisation Project Manager | 45,000 – 65,000 | 40,000 – 60,000 |
| Localisation Engineer | 25,000 – 45,000 | 25,000 – 45,000 |
| Localisation QA Engineer | 22,000 – 38,000 | 20,000 – 35,000 |
| Technical Writer / Editor | 35,000 – 55,000 | 30,000 – 50,000 |

ERP Consultancy / Specialist Roles

| Job Title | Dublin € | Regional € |
|---|-----------------|-----------------|
| SAP Consultant (Functional / Technical) | 55,000 – 75,000 | 50,000 – 70,000 |
| SAP Basis Consultant | 45,000 – 65,000 | 40,000 – 60,000 |
| Oracle Application (Functional / Technical) | 60,000 – 80,000 | 55,000 – 75,000 |



Information Technology

Temporary & Contract

The IT sector has continued to perform relatively well over the last twelve months against a backdrop of continued uncertainty in the Irish economy.

Throughout this year, we have seen a continued increase in the volume of permanent and contract roles becoming available. On the contract side of our business, we have seen a very significant 22% rise in active roles through 2012 and expect this to continue throughout 2013.

Demand from new indigenous start ups, continued strong foreign direct investment, and solid growth from a number of established organisations in the ICT sector have led to many new and exciting employment opportunities for skilled candidates. The resulting competition to attract candidates with the skills required to fill these positions, coupled with real skills shortages in many areas particularly around software development, and now increasing emigration all have resulted in a leaner talent pool in Ireland. The imbalance between supply and demand has kept pressure on companies to increase salaries and benefits to both attract and to retain the talent they need.

Companies are still finding some roles

difficult to fill, and many organisations have reported increasingly losing candidates at offer stage to competitors or to counter-offers. Securing talent means companies must sell all of the opportunities and benefits within their organisation. In addition, many clients are speeding up their selection process in order not to lose candidates before an offer can be made.

For IT contractors, the good news over the last twelve months is that employment opportunities have increased, and for many areas the rates on offer increased as well. In addition, respondents to our survey have indicated that the lengths of contracts are increasing with the majority of contracts offered extending beyond the initial term. For candidates who have been reluctant to move jobs in previous years due to the uncertainty in the market, now seems a very good time to reflect on the new opportunities available.

Our 2013 survey indicates that rates in general have held steady. We have not seen signs of downward pressure on rates across any of the disciplines, but have noted increases in some areas. When compared to our last two annual salary surveys, we note that

any changes to rates this year have been less pronounced, and we do not anticipate much change over the coming year.

The survey suggests that many areas within software development have seen increases, primarily across the main development platforms. We have also noted slight increases across web development, principally with PHP and Ruby on Rails developers.

Operational and support roles have seen little movement in terms of rates but there have been a marked increase in the number of roles available during the year when compared to the previous three years. Respondents have pointed to increases in rates relating to business intelligence and data warehousing roles, driven principally by the lack of suitably skilled candidates available to the market. This was noted primarily with respect to Microsoft SSIS/SSRS and Oracle BI roles.

Project management and business analyst roles have been broadly similar to last year in terms of volume, and there are no significant increases in terms of rates to note, other than in niche roles which required very specific experience.

There was a large increase in the number of QA roles available this year and rates have climbed for testers by approximately 5% to 10%. However there has been no rate increase at the QA managers and team lead levels.

Overall, the IT contracts sector is strong when looked at against the wider economy, and some rates, particularly in certain development roles, are now very close to those offered prior to the downturn.

Recently we commissioned a Brightwater Ireland Technology Survey specifically to look at current trends across the ICT sector in Ireland. Both employers and employees participated in the online survey, and consisted of respondents from a wide variety of organisations from small indigenous start ups to the major multinationals. The results were very interesting, and reflected growing confidence in the ICT sector. Specifically in relation to the contracting market, the importance of salary was clearly evident when candidates evaluate opportunities. Both employers and candidates were optimistic both in terms of the growth in jobs over the coming year, and also on the levels of salaries expected next year.

With respect to the overall contracting market, a majority of respondents (58.5%), a roughly equal mix of both contractors and employers, expected the market for contract staff to improve over the course of 2013, while 34% felt there would be no change. Only 7.5% of respondents felt that the market would decline from 2012 levels.

Executive

| Job Title | Dublin € p/d | Regional € p/d |
|---|--------------|----------------|
| Interim Chief Technical Officer (CTO) | 550 – 800 | 500 – 750 |
| Interim Chief Operations Officer (COO) | 550 – 800 | 500 – 750 |
| Interim Chief Information Officer (CIO) | 550 – 800 | 500 – 750 |
| Interim IT Director / Consultant | 450 – 600 | 400 – 550 |
| Interim IT Manager | 450 – 650 | 400 – 650 |

Software Development

| Job Title | Dublin € p/d | Regional € p/d |
|--|--------------|----------------|
| Engineering / Development Manager | 375 – 500 | 350 – 450 |
| Technical Architect | 450 – 550 | 450 – 550 |
| Senior Engineer / Technical Team Lead (JEE / .NET) | 400 – 450 | 350 – 450 |
| Mainframe Developer | 250 – 350 | 250 – 350 |
| C / C++ Developer | 250 – 400 | 250 – 350 |
| Mid level .Net / C# Engineer | 300 – 420 | 275 – 400 |
| Mid level JEE Developer | 300 – 420 | 275 – 400 |
| Web Services Developer | 300 – 400 | 275 – 375 |
| Android / IOS Developer | 300 – 450 | 300 – 450 |
| Ruby on Rails Developer | 250 – 400 | 250 – 400 |
| Cold Fusion Developer | 250 – 400 | 250 – 400 |
| PHP Developer | 250 – 400 | 250 – 400 |
| Python Developer | 300 – 500 | 300 – 475 |
| SharePoint Developer | 300 – 500 | 300 – 500 |
| Release / Configuration Engineer | 250 – 325 | 250 – 325 |

Creative / Design

| Job Title | Dublin € p/d | Regional € p/d |
|---------------------------------------|--------------|----------------|
| Art Director | 450 – 550 | 400 – 500 |
| Creative Manager | 300 – 400 | 275 – 375 |
| Interactive Designer | 275 – 375 | 225 – 350 |
| UI / UX Engineer | 300 – 400 | 250 – 350 |
| Multimedia / Graphical / Web Designer | 175 – 300 | 150 – 275 |
| 3D Modeller / Designer | 175 – 300 | 150 – 275 |
| Games Designer | 300 – 400 | 250 – 350 |

Security / Anti-Fraud

| Job Title | Dublin € p/d | Regional € p/d |
|----------------------------------|--------------|----------------|
| Interim IT Security Consultant | 350 – 450 | 300 – 400 |
| Interim IT Auditor | 300 – 400 | 275 – 350 |
| Interim IT Compliance Specialist | 300 – 400 | 275 – 350 |

System Analysis

| Job Title | Dublin € p/d | Regional € p/d |
|--|--------------|----------------|
| IT Management Consultant | 350 – 500 | 325 – 450 |
| Business Systems Analyst / Consultant | 300 – 400 | 300 – 375 |
| QA / Test Manager | 300 – 450 | 300 – 450 |
| QA / Test Lead | 300 – 400 | 300 – 375 |
| Principal Engineer / Systems Architect | 400 – 600 | 400 – 500 |
| Software Test / QA Engineer | 250 – 350 | 250 – 325 |
| QA Automation Engineer | 300 – 400 | 300 – 400 |
| Business Intelligence Consultant | 400 – 500 | 375 – 500 |
| Data Warehousing Consultant | 400 – 500 | 375 – 500 |

IT / Project Management

| Job Title | Dublin € p/d | Regional € p/d |
|------------------------|--------------|----------------|
| Programme Manager | 400 – 600 | 400 – 550 |
| Senior Project Manager | 400 – 550 | 400 – 550 |
| Project Manager | 350 – 400 | 350 – 400 |
| Product Manager | 300 – 400 | 275 – 375 |
| Management Consultant | 350 – 500 | 325 – 450 |

Support / Administration

| Job Title | Dublin € p/d | Regional € p/d |
|---|--------------|----------------|
| Database Administrator (Oracle / SQL Server / Sybase) | 325 – 450 | 325 – 450 |
| Unix / Linux Administrator | 300 – 400 | 275 – 375 |
| Network / Systems Administrator | 200 – 325 | 175 – 300 |
| Network Engineer | 200 – 350 | 200 – 325 |
| Help Desk Support | 125 – 200 | 125 – 200 |
| Application Support Consultant | 150 – 300 | 125 – 275 |
| Service Delivery Manager | 350 – 450 | 300 – 400 |

QA / Technical Writing / Localisation

| Job Title | Dublin € p/d | Regional € p/d |
|------------------------------|--------------|----------------|
| Localisation Project Manager | 200 – 325 | 175 – 275 |
| Localisation Engineer | 150 – 250 | 125 – 225 |
| Localisation QA Engineer | 150 – 250 | 125 – 225 |
| Technical Writer / Editor | 175 – 250 | 150 – 250 |

ERP Consultancy / Specialist Roles

| Job Title | Dublin € p/d | Regional € p/d |
|---|--------------|----------------|
| SAP Consultant (Functional / Technical) | 400 – 500 | 400 – 500 |
| SAP Basis Consultant | 300 – 400 | 300 – 400 |
| Oracle Application (Functional / Technical) | 500 – 600 | 450 – 550 |

Salary holds significant importance when contractors consider new opportunities. In seeking a new role, 41.2% of respondents held salary as the most important thing an employer can offer, while 22.2% held it as the second most important. An innovative technology environment scored 17%. Of the respondents who had turned down a job offer over the past twelve months, the majority (32.3%) blamed salary not being at the level expected. Regarding respondents' view of salaries across the market during 2012, the majority 39.4% felt that salaries had remained static through the year, while 22.8% felt salaries had increased. Interestingly, 20.5% believed salaries had fallen.

A majority (42.5%) of respondents felt that the current level of IT salaries was not an obstacle to changing jobs, while 40.2% said that salary levels were preventing them from changing job.

In general, we feel the IT market should continue to perform well against a background of what could be continued uncertainty and low growth in the overall economy in 2013. Skill shortages are likely to maintain upward pressure on salaries, especially in the area of software development. Job opportunities are increasing with strong announcements by many large organisations both foreign and indigenous, and hopefully this will encourage more school leavers to give serious consideration to careers in the ICT field.

The contracting market is continuing to strengthen with increasing opportunities and strong rates available. More people are becoming interested in contracting and there is less fear in terms of job security. We expect this to continue over the coming year, irrespective of how the general economy performs.



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