

ASIA-PACIFIC NGO DIGITAL CAPABILITY REPORT 2023



 Infoxchange

techsoup
ASIA-PACIFIC

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We're based on the lands of the Wurundjeri, Kurna and Turrbal peoples, the traditional custodians of the land, waters and knowledge for this place where we gather to collaborate and strengthen communities.

In our work, we recognise the importance of Country – not just as a place, but how it also maintains community, family, kin, lore and language.

We pay our respects to Elders past and present. This always was, always will be aboriginal land.

We support the Uluru Statement from the Heart.





ABOUT THIS REPORT

The 2023 APAC NGO Digital Capability Report aims to recognise the unique digital strengths, challenges and opportunities present for NGOs, NPOs, charities and not-for-profits in the Asia-Pacific region.

It explores and summarises insights gathered from the region during the 2023 APAC Digital Capability Survey conducted by Infoxchange.

It also marks the first stage of the wider APAC NGO Digital Transformation Project, designed to elevate the digital skills and confidence of NGOs in the region.

Represented countries & territories:

- » Australia
- » India
- » Indonesia
- » Japan
- » Malaysia
- » New Zealand
- » Philippines
- » Singapore
- » South Korea
- » Taiwan
- » Thailand
- » Vietnam

WHO IS INFOXCHANGE?

Infoxchange is a leading not-for-profit social enterprise that has been delivering technology for social justice for over 30 years. We tackle the biggest social challenges through the smart and creative use of technology.

We work with community, government and corporate partners to solve issues around homelessness, family violence, mental health and disability, as well as supporting Indigenous communities, women, youth and families. Our products and services are used by over 35,000 government and community services. We provide the right tools to improve efficiency and deliver greater impact.

And through our work in digital inclusion and social innovation we use technology to empower people experiencing disadvantage, driving social inclusion and creating stronger communities. We believe no-one should be left behind in today's digital world.

We are Australia and New Zealand's leading not-for-profit dedicated to using technology to improve the lives of people experiencing disadvantage and the organisations that support them.

An illustration of a person with brown hair, wearing a yellow long-sleeved shirt and blue trousers, standing with their arms raised holding a large white sign. The sign has a dotted border and contains the text: "We strengthen communities using technology to create positive social change".

We strengthen communities using technology to create positive social change



INFOXCHANGE MESSAGE

I am delighted to present the 2023 Asia-Pacific NGO Digital Capability Report.

This report explores the complex and diverse issues confronting organisations across the region, while showcasing their unwavering strength and perseverance during times of uncertainty. Community need is high, and it has never been more important for NGOs to build digital capability and resilience.

A key insight emerging from the report is the growing awareness of cyber security risks. One in six organisations surveyed experienced a cyber security incident in the last 12 months, and 24% of organisations currently provide cyber security training for their staff. This highlights the urgent need to prioritise cyber security practices and invest in the necessary training and infrastructure to protect sensitive data.

While 98% of organisations store emails in the cloud, only 54% store files in an NGO cloud platform, and a mere 27% report they have moved a significant portion of their IT to the cloud. There is a clear opportunity for organisations in the region to further embrace NGO cloud technology platforms and reap the benefits of increased efficiency, cost savings, and enhanced collaboration.

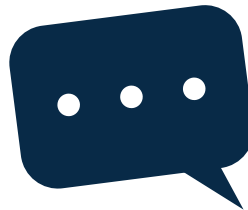
Organisations in the region are aware of the importance of raising digital capabilities for staff and volunteers, with 50% of respondents recognising this as a priority. A focus on upskilling and empowering the workforce will not only lead to more efficient operations, but enable organisations to better serve their communities and achieve their mission.

The insights from this report will guide the upcoming Digital Capability Training Program for organisations in the region. We intend, through that program, to support organisations to take steps in resolving some of the critical issues presented in these pages, and to continue building upon their strengths.

We are grateful to the nearly 1,600 organisations who took the time to share information about their digital capacity, challenges and opportunities. This initiative was made possible with support from Google.org. We also extend our thanks to our delivery partners TechSoup Asia, Kitabisa.com, Japan NPO Center and NPO IT Support Center. We appreciate their commitment to bringing this report and the APAC NGO Digital Transformation Project as a whole to life.



David Spriggs
CEO, Infoxchange



GOOGLE MESSAGE

We are pleased to support Infoxchange in developing this report, identifying the digital capability, challenges and priorities of NGOs across the region.

Google.org, Google's philanthropy, brings the best of Google to help solve some of humanity's biggest challenges combining funding, product donations and technical expertise to support underserved communities and provide opportunity for everyone. We engage nonprofits, social enterprises and civic entities who make a significant impact on the communities they serve, and whose work has the potential to produce scalable, meaningful change.

At Google.org, we believe the first steps to making a real difference are to ask a community what they need and to listen to the answers. This report represents those answers. It will serve as a guiding star for the broader digital transformation project, leveling up the skills and capability of NGOs in the region.

Infoxchange has a strong track record of working to build digital capability in the sector and we are proud to be supporting this initiative.



Annie Lewin
Head of Google.org APAC

EXECUTIVE SUMMARY

The 2023 Asia-Pacific NGO Digital Capability Report explores the digital landscape of NGOs, NPOs, charities, and not-for-profits (referred to collectively as “organisations”) in the Asia-Pacific region. It identifies strengths, weaknesses, and areas of improvement, as well as key training and technology priorities.

The report is based on data collected from 1,589 organisations across Australia*, India, Indonesia, Japan, Malaysia, New Zealand*, Philippines, Singapore, South Korea, Taiwan, Thailand and Vietnam, providing a unique overview of the digital capabilities of organisations in the region. These organisations strive to create a civil society which is stronger, more inclusive, equitable and sustainable. Whether supporting people experiencing disadvantage, enabling sustainability initiatives or working to eliminate poverty, digital capability is critical for Remote working capabilities, efficient collaboration and improved service delivery, enhancing community impact.

There are many digital strengths across the region. On average, **50% of staff in organisations are confident using technology to perform their roles.** Australia (52%), India (47%), and Vietnam (46%) are leading in staff satisfaction with their digital environment. Where a technology plan is in place (45% of organisations), this correlates to a 26% rise in staff confidence and 24% rise in satisfaction with their digital environment.

However, cyber security is a pressing and growing concern, with **1 in 6 organisations experiencing a cyber security incident in the past year.** Only 24% of organisations provide cyber security training for staff, and just 44% have multi-factor authentication enabled on internet-facing systems storing sensitive data. Support for remote work is also limited, with 1 in 2 organisations not adequately meeting staff needs.

The technology priorities expressed by surveyed organisations highlight the importance of digital transformation and

efficiency in communication. **A majority of 53% of organisations identified the need to improve their website,** while 50% recognised the value of enhancing the digital capabilities of their staff and volunteers. 49% of organisations consider making better use of social media and digital marketing as a key priority. **Exploring new technologies and innovations to help achieve their social mission is considered essential by 34% of organisations,** and 35% expressed the need to improve data protection and information security practices, demonstrating the growing awareness of cyber security risks.

Training priorities identified by surveyed organisations emphasise a need to adapt and enhance their digital capabilities. **A significant 38% of respondents see training to support migration to an NGO cloud collaboration environment as a priority** and 33% express the need for training to effectively support such an environment. Additionally, 30% of organisations prioritise learning how to use spreadsheets and forms for data capture and analysis, and 27% acknowledge the importance of personal computer, mobile phone, or tablet management and support.

Infoxchange and its delivery partners will conduct a digital capability training program for organisations in the Asia-Pacific region. The training will cover four key areas of digital capability that Asia-Pacific organisations have identified as priorities:

- » NGO cloud collaboration environments, with a focus on selection, migration, and support.
- » Data capture and analysis to enhance service delivery and understand impact.
- » Digital marketing techniques and skills to effectively connect with audiences, attract funding, and drive support.
- » Cyber security protections to ensure the safety of data and employees.

The APAC NGO Digital Capability Training Program will commence in the second half of 2023.

Some of our key findings include:



1 in 2 organisations are not adequately meeting remote working needs.



62% of organisations do not have a system that enables them to understand their impact.



Only **24%** of organisations provide cyber security training for staff and volunteers.



*Australia and New Zealand data was collected in late 2022. All other data was collected in early 2023.

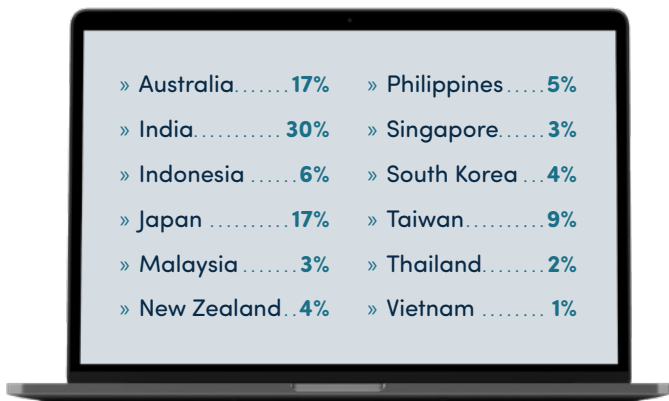
PARTICIPANT SNAPSHOT



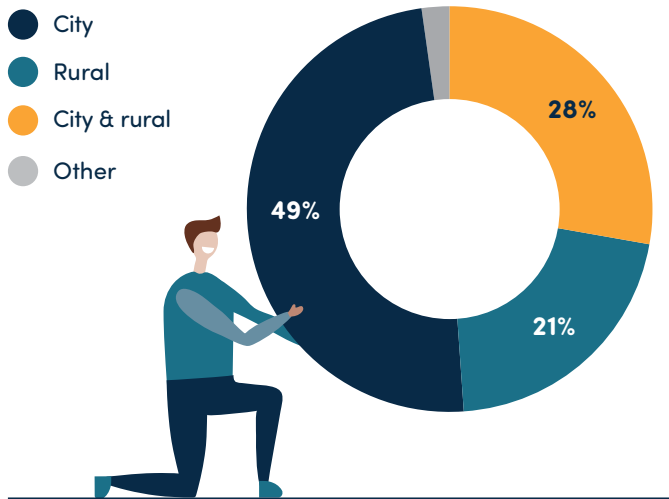
Organisation by primary service area



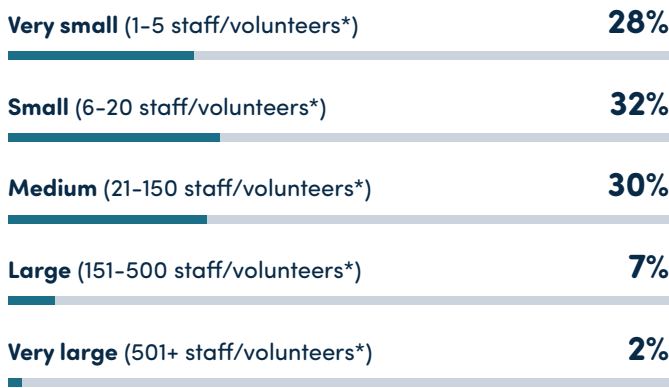
Respondents by location



Locations where organisations deliver services



Organisation size



Please note that this does not add up to 100% as many organisations provide services across more than one area.

*Full time equivalent

[^]Other services include: Womens and gender empowerment, water, sanitation & hygiene, tribal development, science, agriculture, HIV/AIDS prevention, historical societies.

THE BIG PICTURE

In the Asia-Pacific region, hundreds of billions of dollars is invested in international aid and for NGOs to deliver services to people and regions in need.

Despite the critical role these organisations play, many struggle to effectively leverage digital technology and have little capacity to undertake digital transformation.

Many organisations lack the appropriate funding and

resources to invest in the technology infrastructure required for digital transformation initiatives. Language and cultural diversity across the region also makes it more difficult to implement standardised solutions.

Despite these challenges, embracing digital technology can streamline the operations and impact of NGOs, creating efficiencies for staff and resources and opening up untapped potential.

Why Digital Transformation Is Critical



CLOUD COLLABORATION

As organisations expand their reach and collaborate with stakeholders across the globe, effective communication and project management tools have become critical. Online cloud collaboration platforms are both more important and accessible to NGOs than ever before.

Remote working arrangements are becoming more common, as organisations seek to attract and retain diverse talent while increasing operational efficiency. Well-implemented cloud collaboration platforms enable seamless communication and file-sharing among geographically separate team members, keeping everyone on the same page.



SYSTEMS AND DATA

The Asia-Pacific region continues to develop at a fast pace, and organisations must leverage data to maximise their impact. Through effective data collection and analysis, organisations can identify patterns and trends, enabling them to make informed decisions, optimise resource allocation, and better understand their communities' needs.

As the world becomes increasingly connected, competition for funding and support has grown. Donors, foundations, and governments are placing greater emphasis on transparency, accountability, and demonstrable impact. Data is an essential tool for organisations to evaluate their success and showcase tangible results to existing and prospective supporters.



DIGITAL MARKETING

The Asia-Pacific region has experienced a rapid surge in internet availability and smartphone adoption. Audiences of supporters, donors, and clients are available in ways they have never been before, presenting both a great opportunity and a great challenge.

Supporters have come to expect tailored and meaningful interactions with the organisations they support. Organisations must effectively meet and exceed these expectations, building engagement, trust and loyalty among their target audiences. Those that succeed in doing so create a powerful base from which to grow into the future. Those that fail risk stagnation.



CYBER SECURITY

Cyber security is vital to protect sensitive data, safeguard the privacy of clients, stakeholders, staff and beneficiaries, ensuring the organisation's reputation is maintained.

Organisations in the Asia-Pacific region must prioritise cyber security in their strategic planning. By investing in security protections, staff training, and regular security assessments, organisations can better protect themselves from outside cyber threats. A proactive approach to cyber security helps ensure long-term resilience and sustainability of digital transformation efforts.








While each country and territory has its unique challenges, the message from the entire region is clear. Organisations must get the most out of their digital infrastructure to remain adaptable, resilient, and able to address the needs of their communities.

		Challenged ☹️	Leading 😊	Why ★
CLOUD COLLABORATION PCs, network, telephony, servers, email, file sharing and collaboration platforms such as Microsoft 365 and Google Workspace 		Individual devices sharing files and information via email attachments	Staff can work and access information from anywhere, enabled by cloud-collaboration platforms	Staff can collaborate from anywhere, creating a resilient, mobile organisation
SYSTEMS AND DATA Client/case management, CRM, membership, finance, HR and related systems to deliver services and understand activities, outputs and outcomes 		Paper based systems, or individual spreadsheets tracking everything for delivery and reporting	Integrated, accessible solutions enable efficient processes and rapid responses to any issues that arise	Painless reporting, efficient processes and client outcomes tracked
DIGITAL MARKETING Website, email marketing, social media, events management systems, and fundraising processes and systems 		No social media presence, and a basic, static website	An engaged audience across multiple digital channels, connecting with your organisation and services	Attract new funds, supporters, volunteers, staff, and clients
CYBER SECURITY Information security, threat protection processes, systems and governance 		"I hope it doesn't happen to us."	Our staff, systems, and processes keep information safe and secure	Organisation, client, and staff information kept safe, and reputation protected

DIGITAL LANDSCAPE ACROSS THE REGION

Asia-Pacific region snapshot

 <p>File sharing & collaboration platform</p>	<p>Google Workspace</p>	 <p>Primary solution to store stakeholder data</p>	<p>Documents & spreadsheets <small>(e.g. Google Docs/Sheets, Microsoft Word/Excel)</small></p>
 <p>Average IT spend %OpEx</p>	<p>3.4%</p>	 <p>Overall technology environment</p>	 <p>Functional</p>



Australia



Microsoft 365



An information/ database system



4.8%



Functional

India



Email



Documents & spreadsheets



3.3%



Functional

Indonesia



Google Workspace



Documents & spreadsheets



4.3%



Functional

Japan



Google Workspace



Documents & spreadsheets



3.4%



Basic

Malaysia



Google
Workspace



Documents &
spreadsheets



3.5%



Functional

New Zealand



Microsoft 365
/ Google
Workspace*



An information/
database system



3.2%



Functional

Philippines



Google
Workspace



Documents &
spreadsheets



2.9%



Basic

Singapore



Google
Workspace



An information/
database system



3.6%



Functional

South Korea



Google
Workspace



Documents &
spreadsheets



1.7%



Basic

Taiwan



Google
Workspace



Documents &
spreadsheets



2.5%



Basic

Thailand



Google
Workspace



Documents &
spreadsheets



3.1%



Basic / Challenged*

Vietnam



Google
Workspace



Documents &
spreadsheets



3.9%



Challenged

*Even split

WHAT TECHNOLOGY ARE NGOS USING?

Current file storage and collaboration solution

On average, 55% of organisations use an NGO cloud collaboration platform (e.g., Google Workspace, Microsoft 365). The remaining 45% of organisations' file management solutions varies across the region.



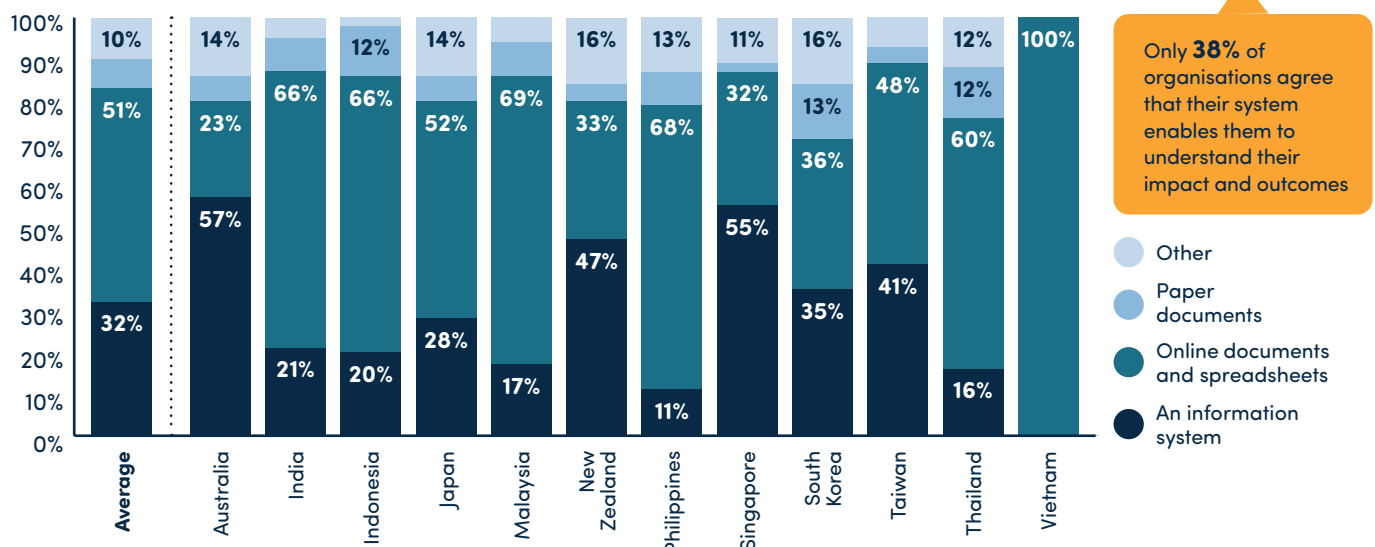
Google Workspace is the most commonly used solution across the region, with exception to Australia and New Zealand, where Microsoft 365 is favoured

Country / Territory	Google Workspace	Microsoft 365	Personal Google Drive	Email	Dropbox	Server-based file sharing	Other
Average	36%	19%	10%	16%	4%	8%	6%
Australia	20%	48%	0%	0%	5%	15%	12%
India	29%	8%	11%	47%	1%	2%	3%
Indonesia	42%	5%	28%	20%	2%	2%	0%
Japan	25%	21%	7%	12%	12%	15%	8%
Malaysia	62%	0%	16%	16%	3%	0%	3%
New Zealand	29%	32%	0%	0%	6%	17%	16%
Philippines	45%	11%	13%	24%	3%	1%	3%
Singapore	42%	22%	11%	9%	4%	9%	2%
South Korea	27%	16%	7%	16%	4%	13%	16%
Taiwan	32%	16%	13%	16%	3%	16%	4%
Thailand	44%	8%	12%	20%	4%	4%	8%
Vietnam	38%	46%	0%	15%	0%	0%	0%

Primary systems used to capture stakeholder data

In Australia, Singapore and New Zealand, the majority of organisations use a system to manage their stakeholders rather document/spreadsheet based solutions. This may be associated with cost to implement and manage a system, and the availability of localised solutions to support service delivery needs.

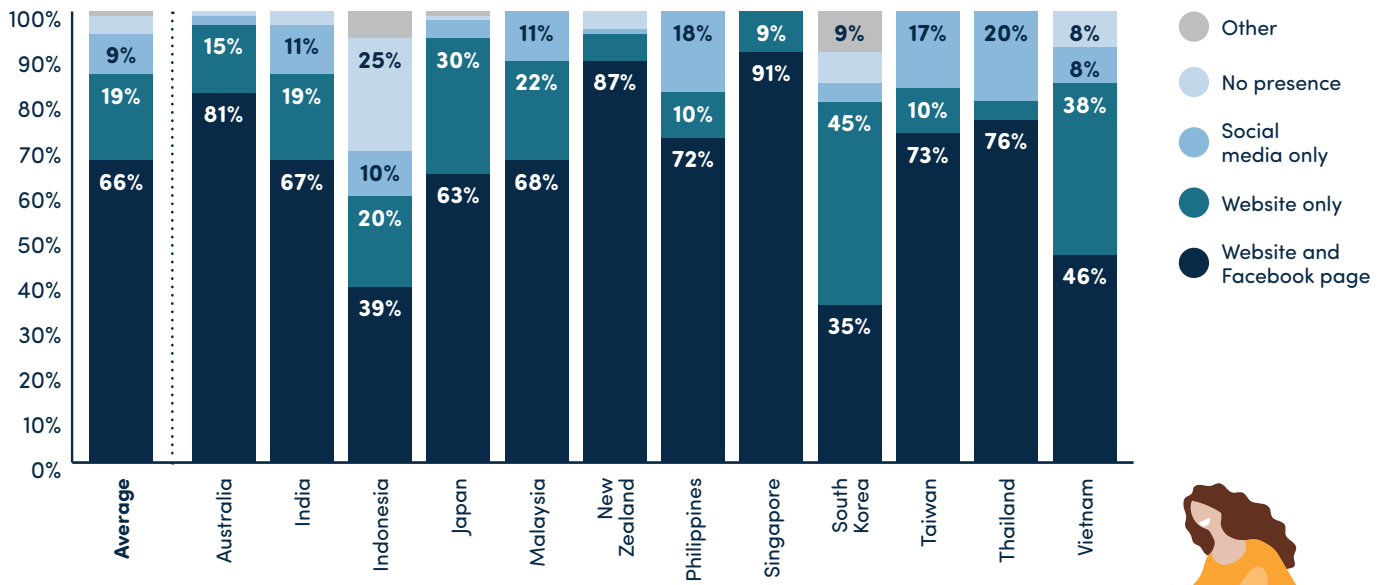
In other locations, organisations primarily use online documents and spreadsheets to store and manage client, member, volunteer and stakeholder information. This can make it more difficult for staff to directly enter quality data, and for structured analysis and reports to be produced.



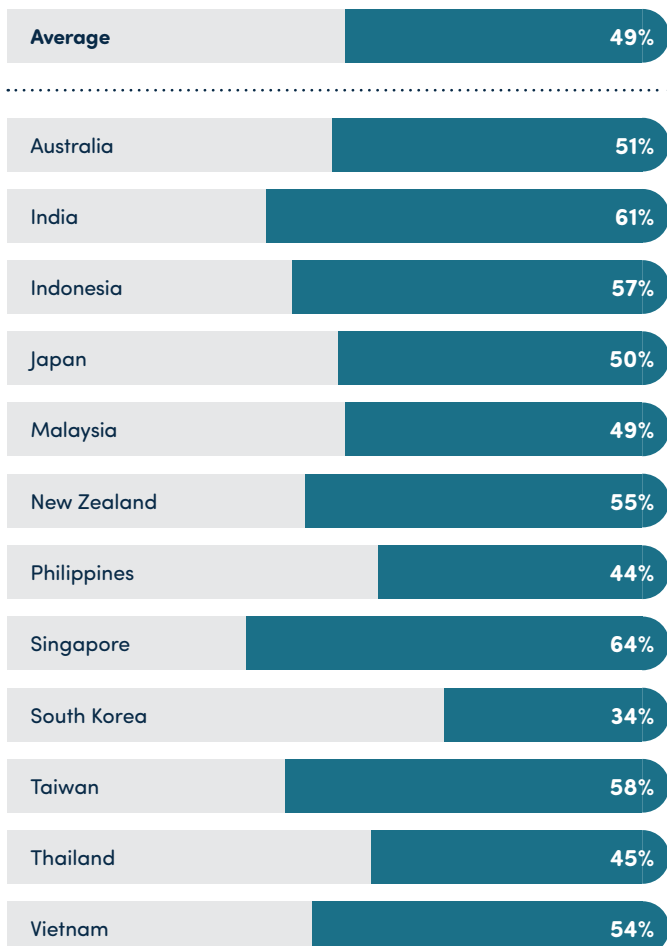
Only 38% of organisations agree that their system enables them to understand their impact and outcomes

- Other
- Paper documents
- Online documents and spreadsheets
- An information system

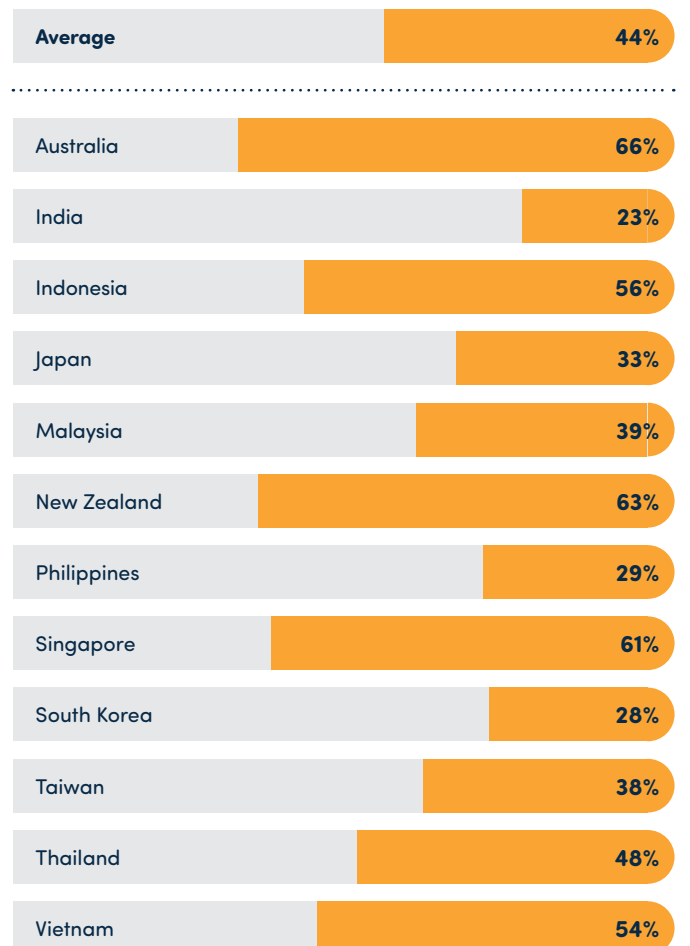
Online presence across the region



Have data backups for all important systems



Have multi-factor authentication enabled*



*% of organisations that have Multi-factor authentication enabled for internet-facing systems with sensitive data

STRENGTHS ACROSS THE REGION

It's encouraging to note that, on average, **50% of staff across the region are confident or better in using their NGO's technology to perform their roles.**

The highest levels of staff satisfaction are found in Australia (52%), India (47%), and Vietnam (46%). Interestingly, staff satisfaction is closely linked to the organisation's technology environment, with over 60% of organisations expressing satisfaction when their technology environment is functional or leading.

Additionally, 45% of NGOs on average have or partially have a technology plan in place. The presence of a technology plan correlates with a 26% increase in confidence and a 24% rise in satisfaction.

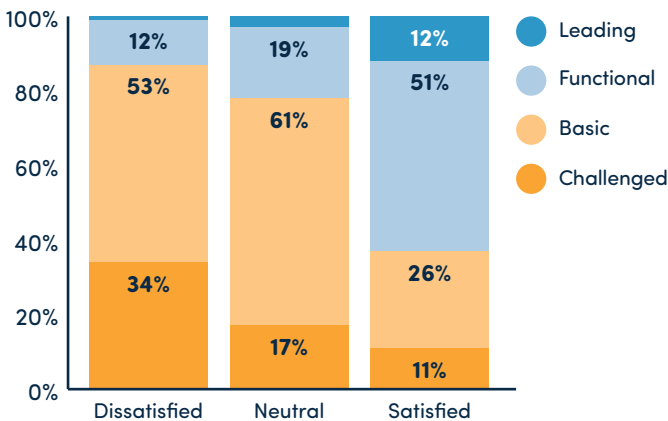
84%



of staff are satisfied with their technology when there is a technology plan in place

63% of staff are confident or better when their technology environment is functional or leading

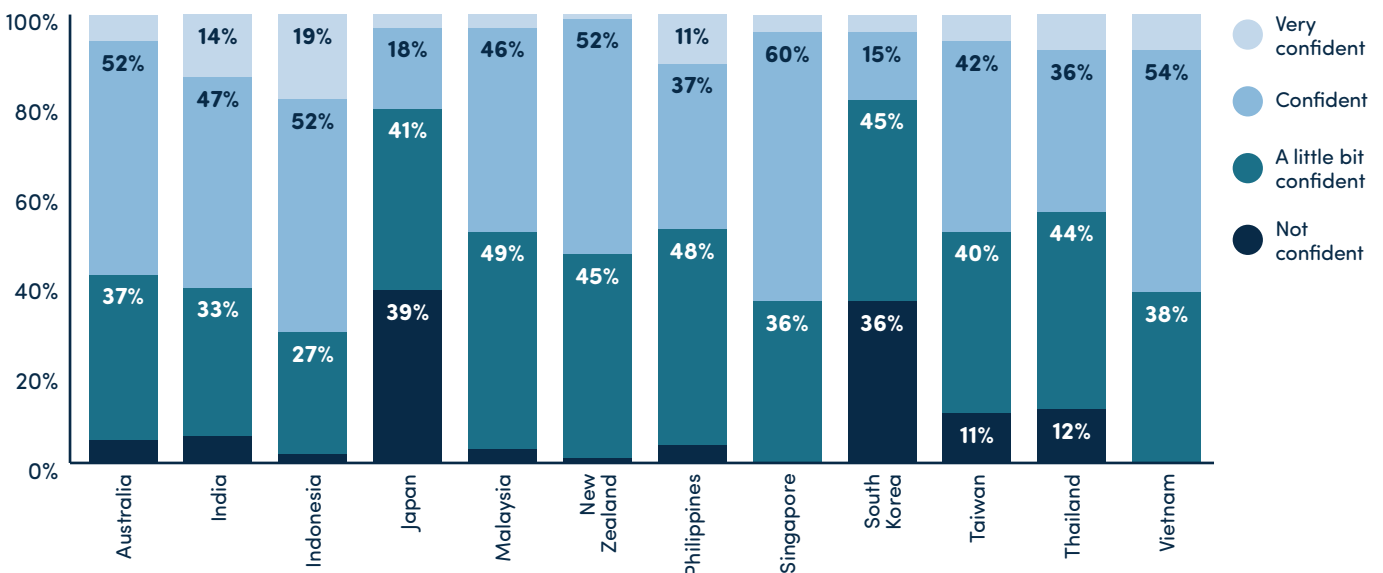
Staff satisfaction is relative to the success of the technology environment



When staff are confident, **1 in 2** are willing to introduce new or emerging technologies into their organisation



Confidence of staff to use technology to perform their roles



CHALLENGES FACING THE REGION

Cyber security remains a significant challenge for NGOs across the region.

This is especially the case in Indonesia, where 1 in 3 have experienced a cyber security incident in the last 12 months. Similarly, 1 in 4 in Taiwan. 46% of the Taiwanese NGO's top training priority for 2023 is cyber security training to protect their clients and staff.

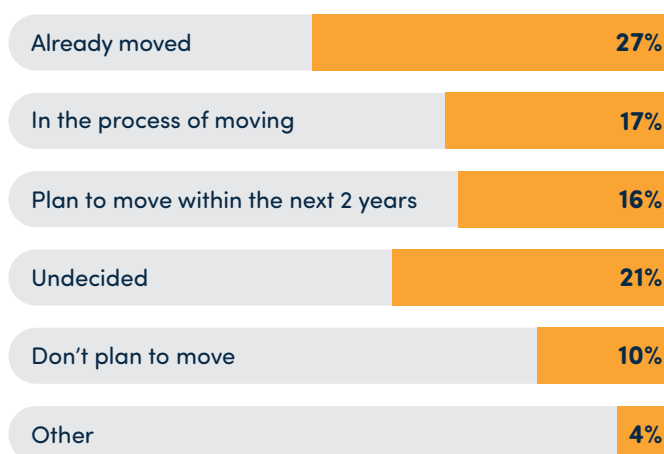
Whilst 98% of organisations store emails in the cloud, only 54% store files in an NGO cloud platform and only 27% report they have moved a significant proportion of IT to the cloud. 21% of organisations have not decided if they will move to the cloud, with the top reason for not moving being the lack of skills or knowledge.

Vietnam is leading the way, with 85% of organisations storing files in a NGO cloud platform. However, things are different in South Korea, with 53% using emails or server solutions to work with files. Additionally, only 2% of South Korean NPOs have moved a significant proportion of IT to the cloud. This differs from New Zealand where 60% of organisations have moved.

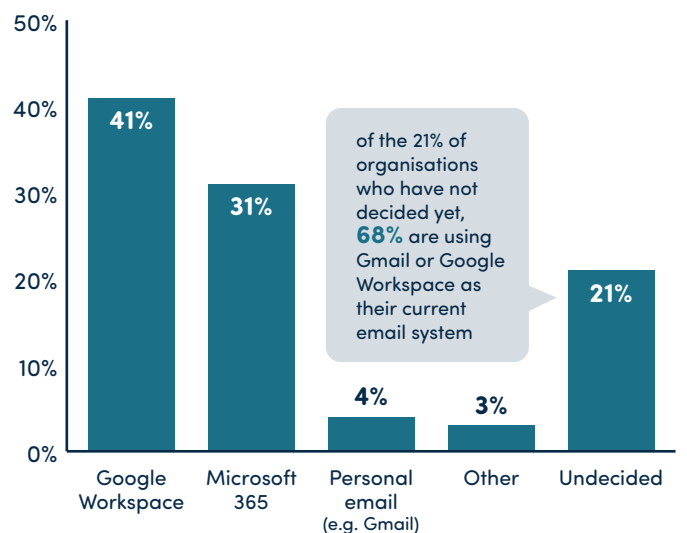
When asked which cloud collaboration platform organisations would like to use, **Google Workspace was the preferred solution (41%), with Microsoft 365 as a close runner up (31%).** Of the 21% of organisations that are undecided, over two thirds are using Google Workspace or personal Gmail accounts.



NGO plans to use cloud collaboration services



Preferred NGO cloud collaboration platforms





AUSTRALIA

On average, Australian NGOs allocate **4.8%** of their annual operating expenditure towards IT, surpassing the regional average of **3.4%**. This higher investment enables Australian NGOs to make significant progress in their digital transformation journey.

Australian organisations may be investing these extra funds in their cyber security mitigation activities. Notably, 48% of Australian NGOs have MFA enabled on internet-facing systems, compared to the regional average of 41%. However, there is still room for improvement, as only 27% of organisations currently provide cyber security training for their staff.

Key statistics

66%



Of organisations have Multi-Factor Authentication enabled

97%



Of organisations have at least a website to market their services

4.8%



Average IT spend relative to Operational Expenditure (OpEx)

51%



Of organisations have data backups for all important systems

77%



Of organisations use a crowdfunding or e-commerce facility on their website

52%



Of staff are satisfied or better with their IT

#1



Microsoft 365 is the most popular staff email service

43%



Of organisations have a documented plan to improve cyber security protections



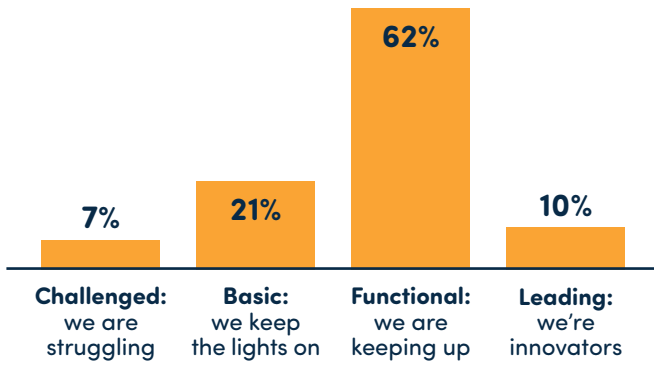
Top technology priorities

01	Improve website	
02	Make better use of social media or digital marketing	
03	Improve the digital capabilities of staff and volunteers	

Top priorities to improve digital resilience

01	Building staff members' digital skills	
02	Setting up better team collaboration tools	
03	Setting up better video conferencing tools	

Overall technology environment

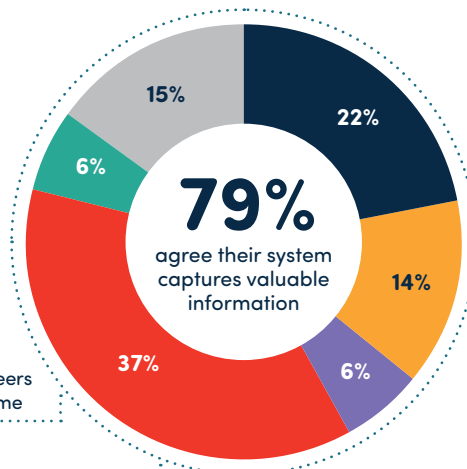


Remote working capabilities



Primary systems used to capture information about your clients, members, volunteers, and/or stakeholders

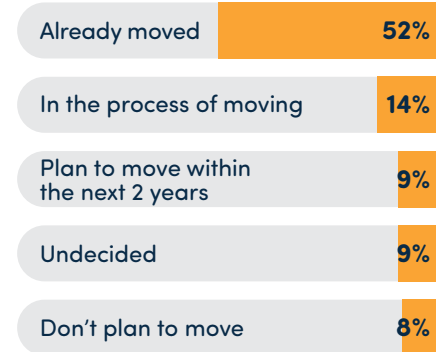
- Microsoft Word/Excel
- Google Docs/Sheets
- Custom-developed system
- Paper documents
- Commercially available system
- Government-mandated system
- Other/unsure



60% agree their system enables staff/volunteers to work efficiently both in the office and at home

42% agree their system enables them to understand the impact of services and outcomes

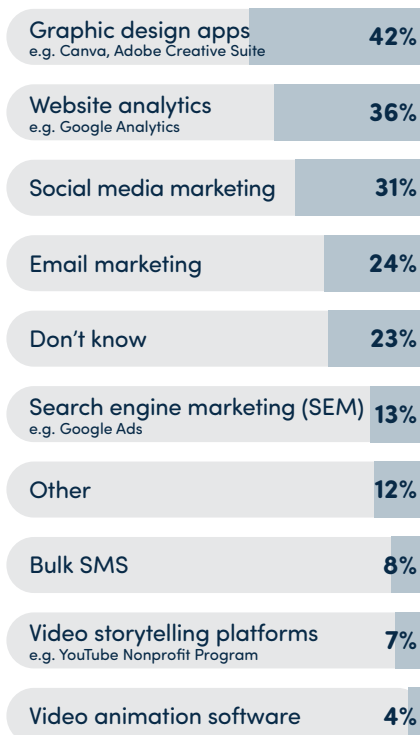
Plans to move to the cloud



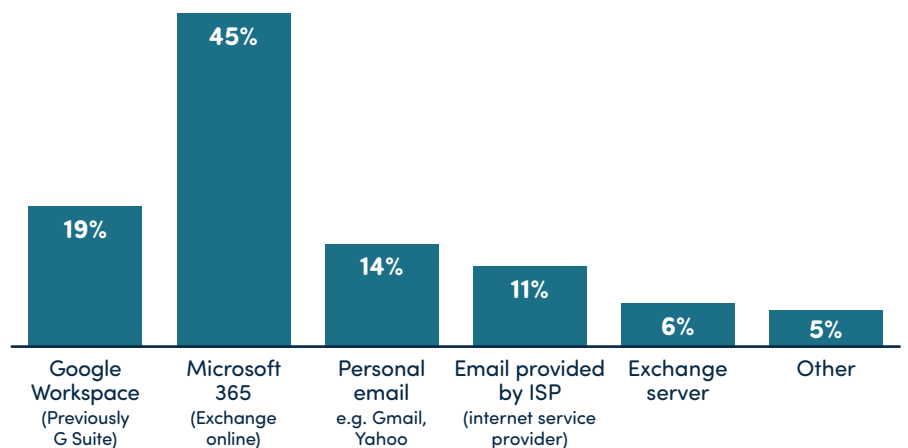
Key reasons for not moving:

- » Not a priority
- » Lack of skills/knowledge
- » Data security, sovereignty, or data privacy concerns

Digital marketing tools



Current email service



New or emerging technologies being used to help achieve the NGO's social mission





INDIA

50% of the surveyed Indian organisations have 20 or fewer staff members, and an encouraging 61% of staff in Indian NGOs express confidence or higher in their current technology usage, surpassing the regional average of 50%.

However, there is still progress to be made in enhancing the use of technology for Indian NGOs. Two-thirds of these organisations are not effectively utilising collaboration platforms, such as Google Workspace and Microsoft 365. This likely contributes to 45% of organisations planning or currently undergoing a transition to cloud-based solutions.

Key statistics

43%



Of organisations have Multi-Factor Authentication enabled

86%



Of organisations have at least a website to market their services

3.3%



Average IT spend relative to Operational Expenditure (OpEx)

60%



Of organisations have data backups for all important systems

#1



WhatsApp is the most popular staff communication channel

47%



Of staff are satisfied or better with their IT

23%



Of organisations provide staff with cyber security training

69%



Of organisations are confident they do not use pirated software



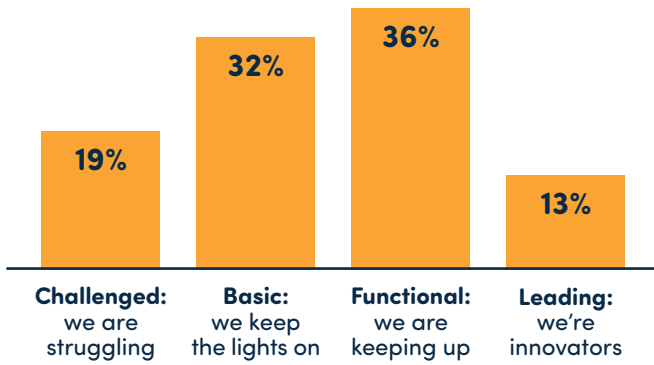
Top technology priorities

01	Improve the digital capabilities of staff and volunteers	
02	Improve website	
03	Make better use of social media or digital marketing	

Top training priorities

01	Migrating to a nonprofit cloud collaboration environment	
02	Using spreadsheets and forms for data capture & analysis	
03	Personal computer, mobile phone or tablet management & support	

Overall technology environment

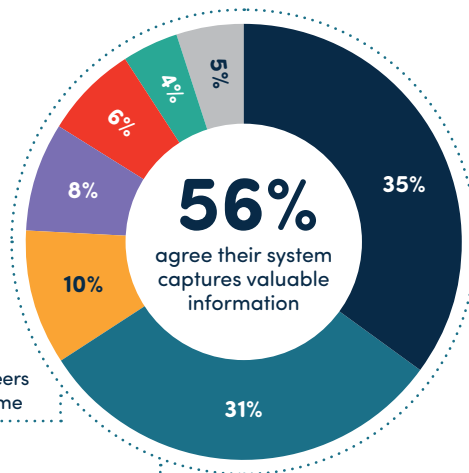


Remote working capabilities



Primary systems used to capture information about your clients, members, volunteers, and/or stakeholders

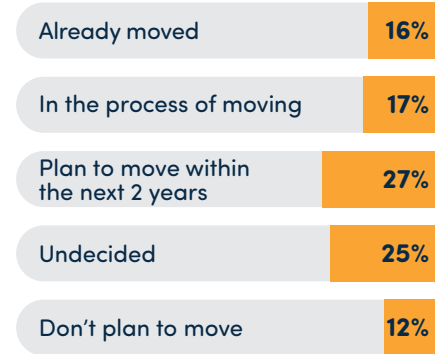
- Microsoft Word/Excel
- Google Docs/Sheets
- Custom-developed system
- Paper documents
- Commercially available system
- Government-mandated system
- Other/unsure



57% agree their system enables staff/volunteers to work efficiently both in the office and at home

48% agree their system enables them to understand the impact of services and outcomes

Plans to move to the cloud



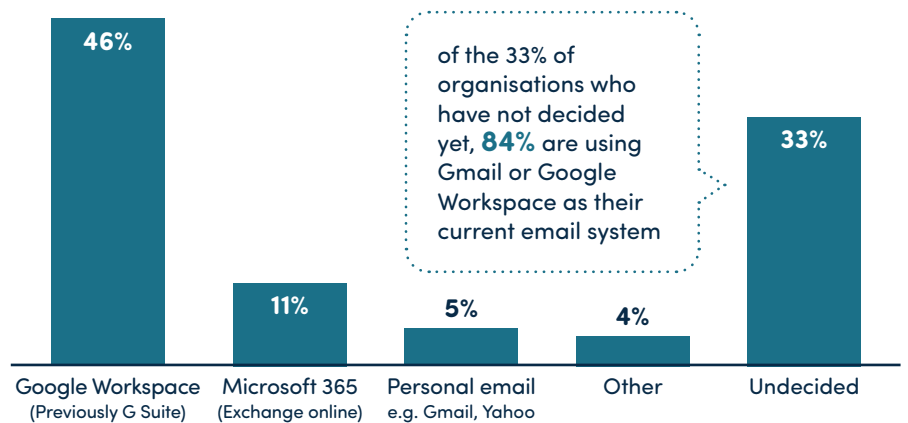
Key reasons for not moving:

- » Lack of skills/knowledge
- » Not a priority
- » Migration cost

Digital marketing tools



Preferred collaboration platform



Internet speed and reliability





INDONESIA

In Indonesia, NGOs achieve greater value from their information systems than most with 66% of organisations agreeing that their systems enable staff to work remotely, exceeding the regional average of 54%. Furthermore, over half of them agree that their systems facilitate understanding of impact and outcomes.

Google Workspace is the preferred file collaboration environment among Indonesian NGOs, with 42% utilising this platform to support their services. However, it is noteworthy that 28% of organisations still rely on personal Google Drives, a figure that is considerably higher than the regional average of 9%.

Key statistics

#1



WhatsApp is the most popular staff communication channel

59%



Of organisations have at least a website to market their services

4.3%



Average IT spend relative to Operational Expenditure (OpEx)

57%



Of organisations have data backups for all important systems

27%



Of organisations use a crowdfunding or e-commerce facility on their website

38%



Of staff are satisfied or better with their IT

35%



Of organisations provide staff with cyber security training

57%



Of organisations are confident they do not use pirated software



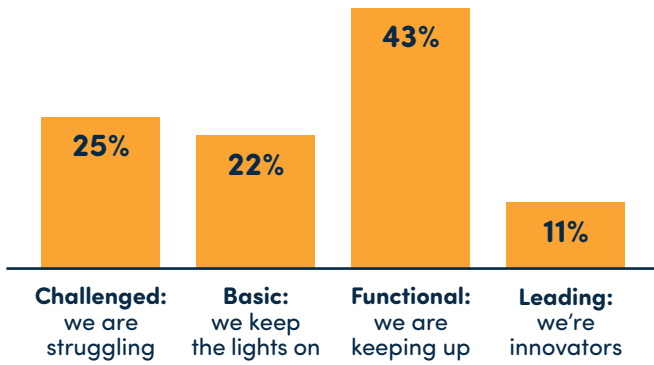
Top technology priorities

01	Make better use of social media or digital marketing	
02	Improve the digital capabilities of staff and volunteers	
03	Improve website	

Top training priorities

01	Migrating to a nonprofit cloud collaboration environment	
02	Using spreadsheets and forms for data capture & analysis	
03	Supporting a nonprofit cloud collaboration environment	

Overall technology environment

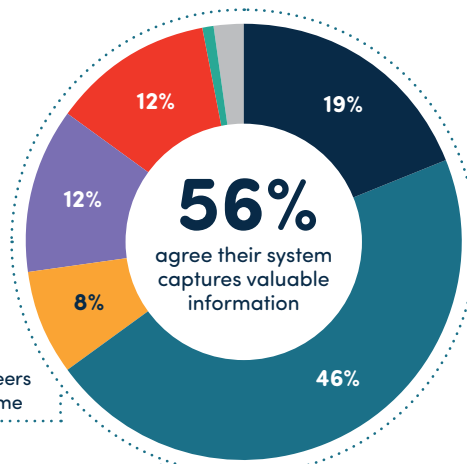


Remote working capabilities



Primary systems used to capture information about your clients, members, volunteers, and/or stakeholders

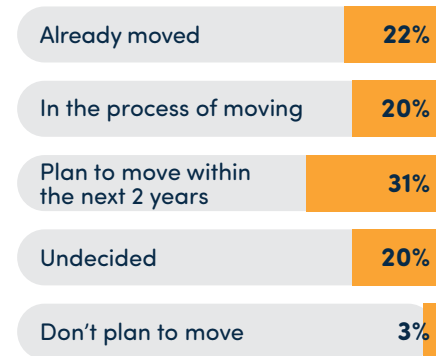
- Microsoft Word/Excel
- Google Docs/Sheets
- Custom-developed system
- Paper documents
- Commercially available system
- Government-mandated system
- Other/unsure



65% agree their system enables staff/volunteers to work efficiently both in the office and at home

55% agree their system enables them to understand the impact of services and outcomes

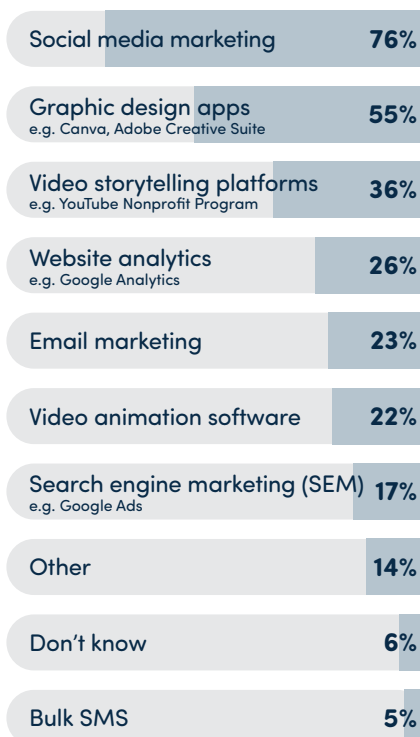
Plans to move to the cloud



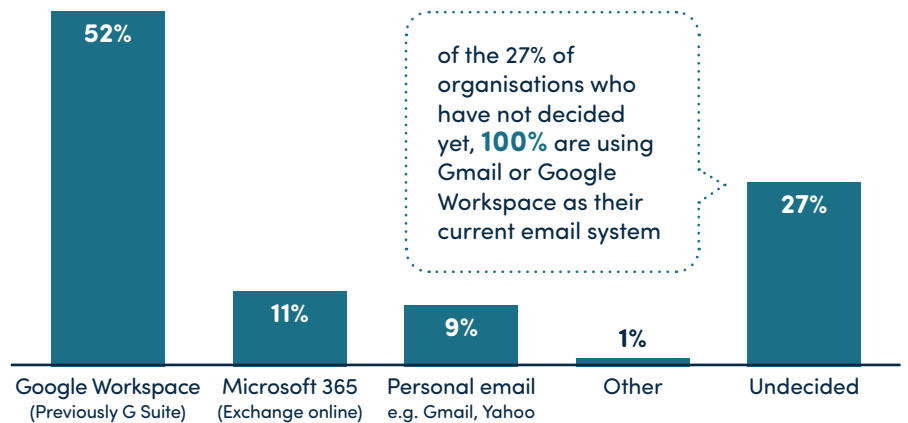
Key reasons for not moving:

- » Not a priority
- » Data security, sovereignty, or data privacy concerns
- » Lack of skills/knowledge

Digital marketing tools



Preferred collaboration platform



Internet speed and reliability





JAPAN

In Japan, over half of the responding organisations operate with 5 or less staff or volunteers. This differs from the regional average of 5-20 staff members or volunteers. Additionally, only 18% of organisation staff feel confident using digital technology in their roles.

82% of organisations in Japan utilise at least a website to communicate their services, and 62% of these organisations also employ social media. Contrary to the regional trend, where social media is the most popular marketing tactic, 39% of Japanese organisations identified website analytics as their primary marketing tool. Moreover, 42% list improving the organisation's website as their top technology priority, aligning with the top priority of the region.

Key statistics

32%



Of organisations have Multi-Factor Authentication enabled

93%



Of organisations have at least a website to market their services

3.4%



Average IT spend relative to Operational Expenditure (OpEx)

49%



Of organisations have data backups for all important systems

#1



SMS/Text message is the most popular staff communication channel

18%



Of staff are satisfied or better with their IT

12%



Of organisations provide staff with cyber security training

92%



Of organisations are confident they do not use pirated software

21% of organisations use a crowdfunding or e-commerce facility on their website

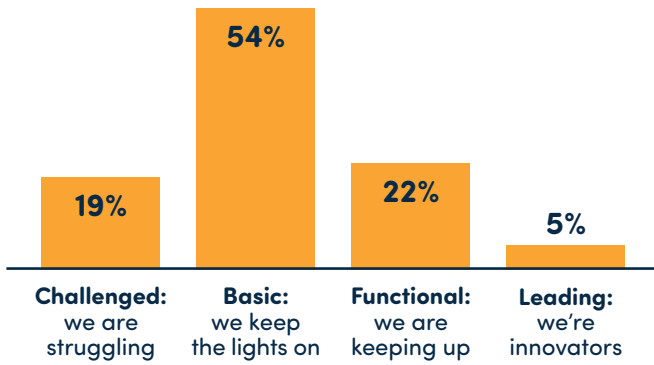
Top technology priorities

01	Improve website	
02	Improve the digital capabilities of staff and volunteers	
03	Make better use of social media or digital marketing	

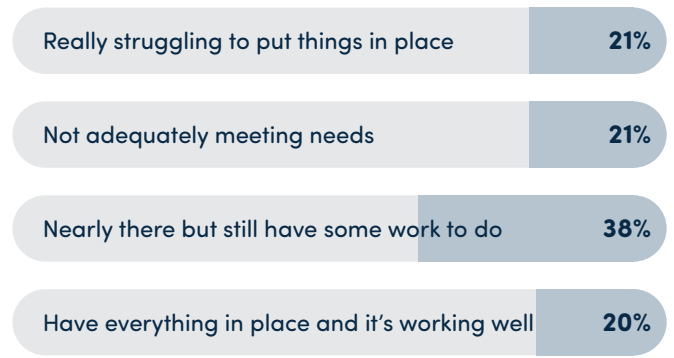
Top training priorities

01	Supporting a nonprofit cloud collaboration environment	
02	Migrating to a nonprofit cloud collaboration environment	
03	Personal computer, mobile phone or tablet management & support	

Overall technology environment

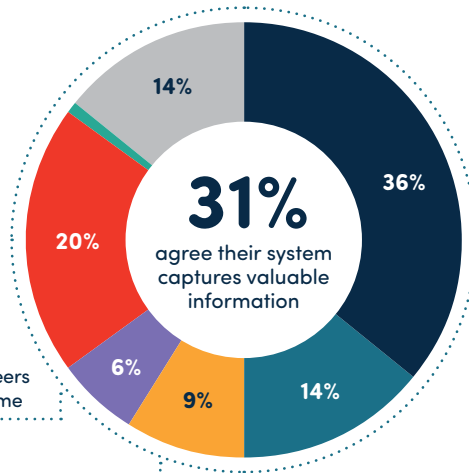


Remote working capabilities



Primary systems used to capture information about your clients, members, volunteers, and/or stakeholders

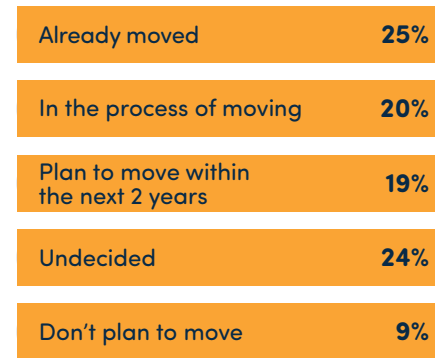
- Microsoft Word/Excel
- Google Docs/Sheets
- Custom-developed system
- Paper documents
- Commercially available system
- Government-mandated system
- Other/unsure



39% agree their system enables staff/volunteers to work efficiently both in the office and at home

23% agree their system enables them to understand the impact of services and outcomes

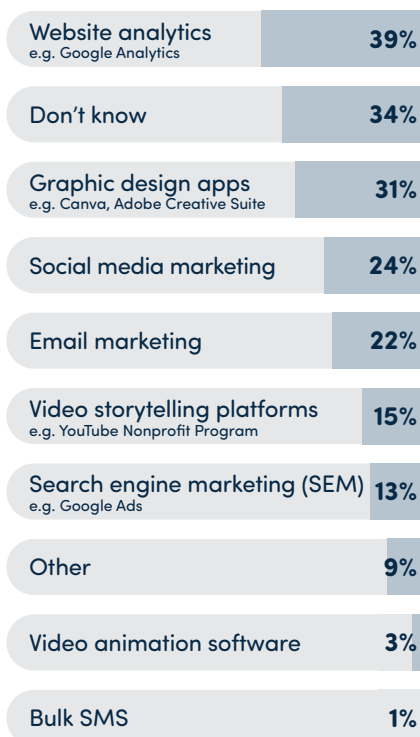
Plans to move to the cloud



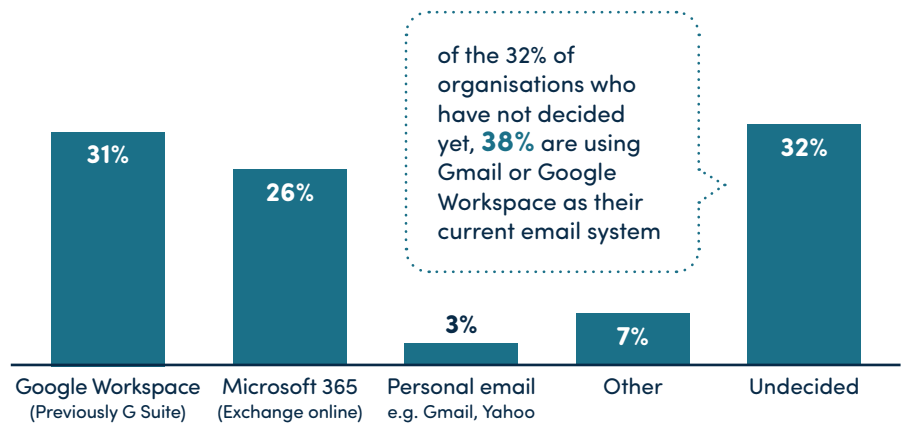
Key reasons for not moving:

- » Data security, sovereignty, or data privacy concerns
- » Lack of skills/knowledge
- » Not a priority

Digital marketing tools



Preferred collaboration platform



Internet speed and reliability





MALAYSIA

In Malaysia, Google Workspace is the preferred collaboration platform among NGOs, with 70% favouring it and 62% currently using it.

For those not yet effectively leveraging cloud technology, 59% plan to migrate or are in the process of doing so. Among these respondents, 67% intend to adopt Google Workspace, while 14% plan to move to Microsoft 365.

Malaysian NGOs lag behind their regional counterparts in terms of cyber security mitigation activities. Only 25% of them are confident that security updates and patches are applied on all devices, compared to the regional average of 50%. Furthermore, just 9% provide cyber training.

Key statistics

36%



Of organisations have Multi-Factor Authentication enabled

89%



Of organisations have at least a website to market their services

3.4%



Average IT spend relative to Operational Expenditure (OpEx)

#1



WhatsApp is the most popular staff communication channel

28%



Of organisations use a crowdfunding or e-commerce facility on their website

73%



Of staff are satisfied or better with their IT

9%



Of organisations provide staff with cyber security training

68%



Of organisations are confident they do not use pirated software



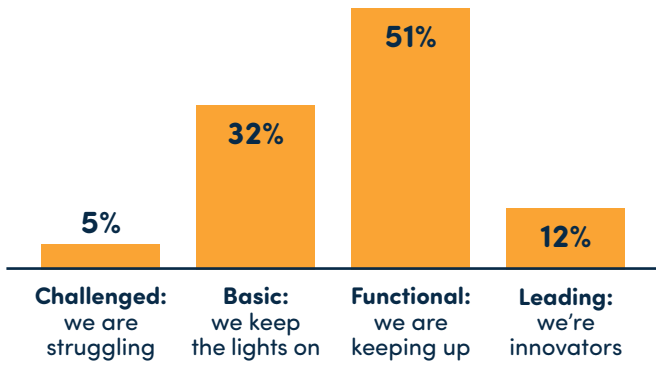
Top technology priorities

01	Improve website	
02	Improve the digital capabilities of staff and volunteers	
03	Make better use of social media or digital marketing	

Top training priorities

01	Data analysis, dashboards and business intelligence	
02	Using spreadsheets and forms for data capture & analysis	
03	Creating an impactful website	

Overall technology environment

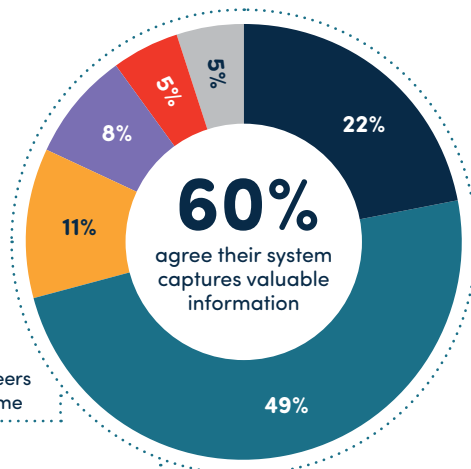


Remote working capabilities



Primary systems used to capture information about your clients, members, volunteers, and/or stakeholders

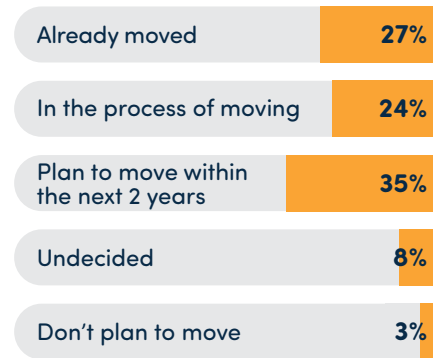
- Microsoft Word/Excel
- Google Docs/Sheets
- Custom-developed system
- Paper documents
- Commercially available system
- Government-mandated system
- Other/unsure



56% agree their system enables staff/volunteers to work efficiently both in the office and at home

37% agree their system enables them to understand the impact of services and outcomes

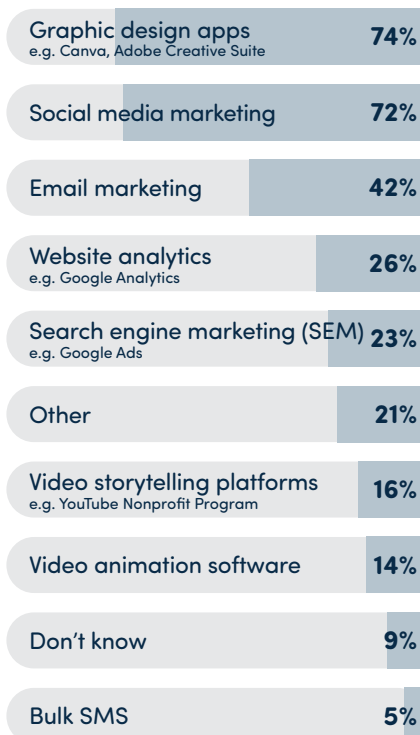
Plans to move to the cloud



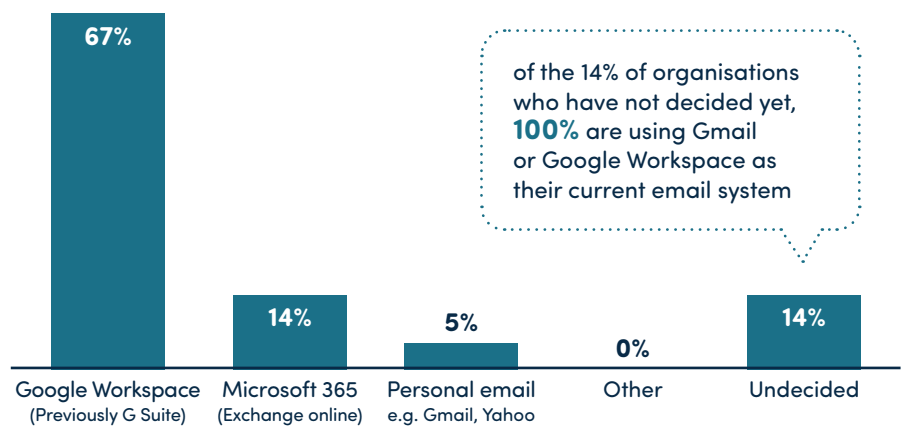
Key reasons for not moving:

- » Lack of skills/knowledge
- » Data security, sovereignty, or data privacy concerns
- » Internet connectivity is too expensive or insufficient quality

Digital marketing tools



Preferred collaboration platform



Internet speed and reliability





NEW ZEALAND

New Zealand are leading the way, with 1 in 2 organisations providing staff with the required systems, software and infrastructure to support mobile working.

This is supported by 60% of organisations who have already moved to the cloud. With a close split in use between Google

Workspace (33%) and Microsoft 365 (29%) as the preferred collaboration and email platforms.

However, 1 in 3 organisations use spreadsheets and word documents to manage their stakeholder information. For these organisations, only 22% have a system that enables them to understand impact and outcomes. When compared to organisations that do have a system, 48% have a system that enables them to understand impact and outcomes.

Key statistics

63%



Of organisations have Multi-Factor Authentication enabled

93%



Of organisations have at least a website to market their services

3.2%



Average IT spend relative to Operational Expenditure (OpEx)

55%



Of organisations have data backups for all important systems

70%



Of organisations use a crowdfunding or e-commerce facility on their website

78%



Of staff are satisfied or better with their IT

#1



Google Workspace is the most popular staff email service

45%



Of organisations have a documented plan to improve cyber security protections



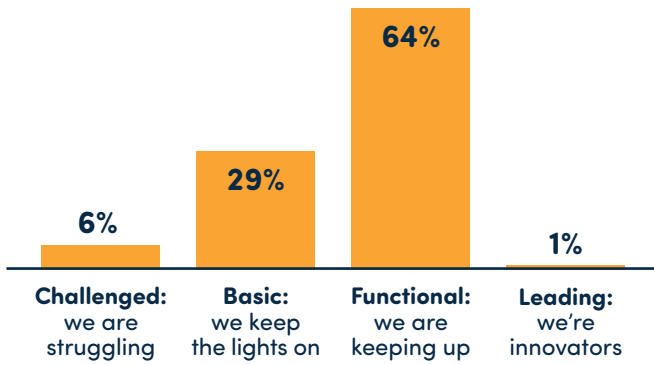
Top technology priorities

01	Improve website	
02	Improve the digital capabilities of staff and volunteers	
03	Make better use of social media or digital marketing	

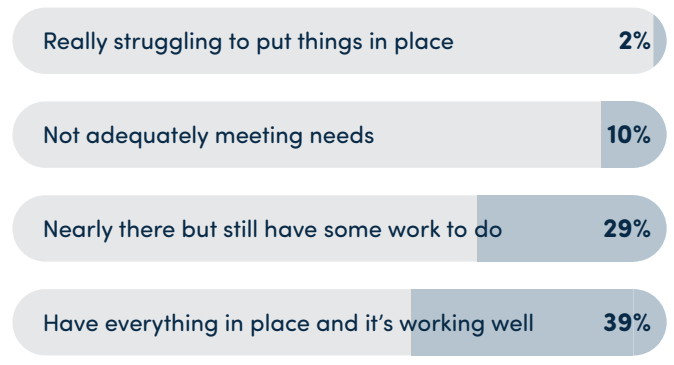
Top priorities to improve digital resilience

01	Building staff members' digital skills	
02	Setting up better team collaboration tools	
03	Managing our information security and data privacy better	

Overall technology environment

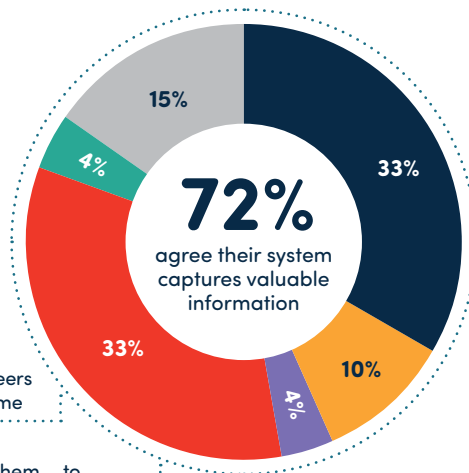


Remote working capabilities



Primary systems used to capture information about your clients, members, volunteers, and/or stakeholders

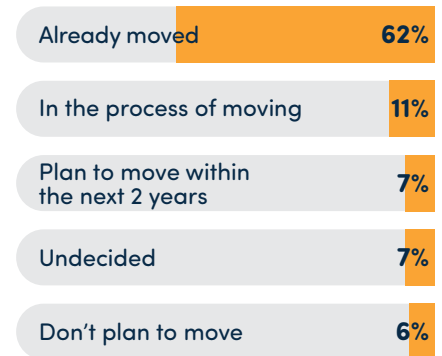
- Microsoft Word/Excel
- Google Docs/Sheets
- Custom-developed system
- Paper documents
- Commercially available system
- Government-mandated system
- Other/unsure



60% agree their system enables staff/volunteers to work efficiently both in the office and at home

38% agree their system enables them to understand the impact of services and outcomes

Plans to move to the cloud



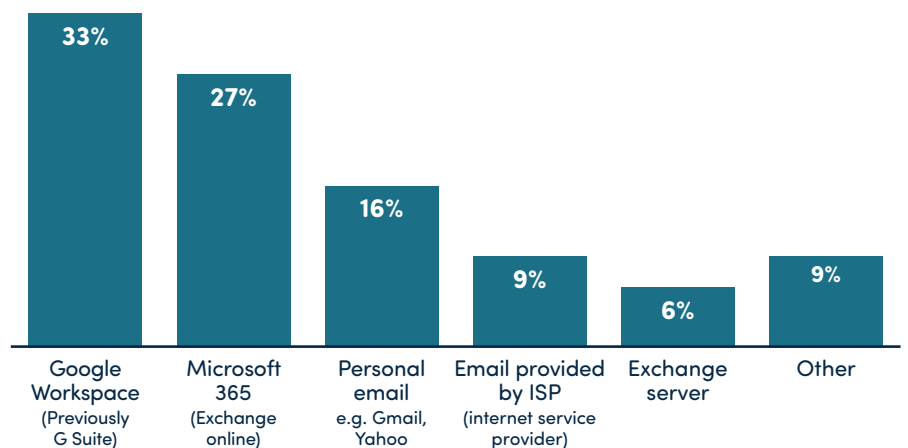
Key reasons for not moving:

- » Not a priority
- » Lack of skills/knowledge
- » Data security, sovereignty, or data privacy concerns

Digital marketing tools



Current email service



New or emerging technologies being used to help achieve the NGO's social mission



14% Mobile Apps



6% Assistive technology (e.g. for people with disabilities or the elderly)



4% Artificial intelligence (AI)/machine learning



PHILIPPINES

In the Philippines, internet connectivity is among the weakest in the region, with only 37% of respondents agreeing that their office internet is fast and reliable, and a mere 6% stating the same for their internet in the field.

Despite these challenges, Filipino NGOs are striving to utilise technology within their organisations, with 44% working towards incorporating emerging technologies into their operations.

As for file management systems, 45% of organisations in the Philippines use Google Workspace. However, 28% have not yet decided if they will move a significant portion of their IT to the cloud. Among those undecided, 25% do not view it as a priority, and 22% believe the migration would be too costly.

Key statistics

29%



Of organisations have Multi-Factor Authentication enabled

#1



Facebook messenger is the most popular staff communication channel

2.9%



Average IT spend relative to Operational Expenditure (OpEx)

44%



Of organisations have data backups for all important systems

29%



Of organisations use a crowdfunding or e-commerce facility on their website

77%



Of staff are satisfied or better with their IT

20%



Of organisations provide staff with cyber security training

72%



Of organisations are confident they do not use pirated software



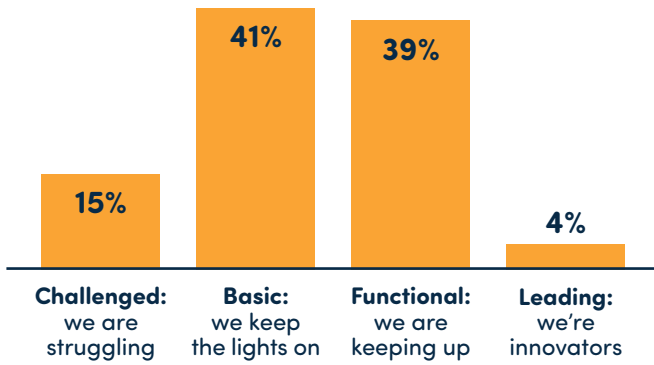
Top technology priorities

01	Improve website	
02	Improve the digital capabilities of staff and volunteers	
03	Make better use of social media or digital marketing	

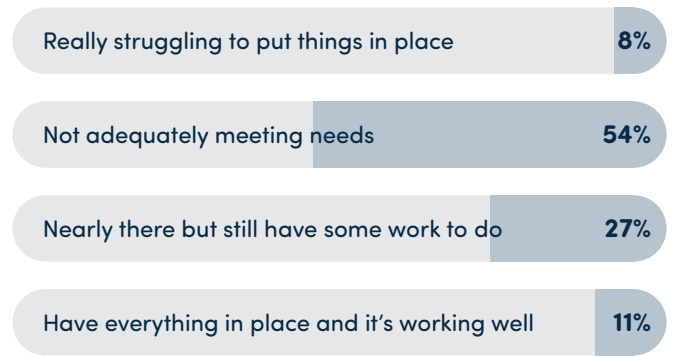
Top training priorities

01	Migrating to a nonprofit cloud collaboration environment	
02	Using spreadsheets and forms for data capture & analysis	
03	Personal computer, mobile phone or tablet management & support	

Overall technology environment

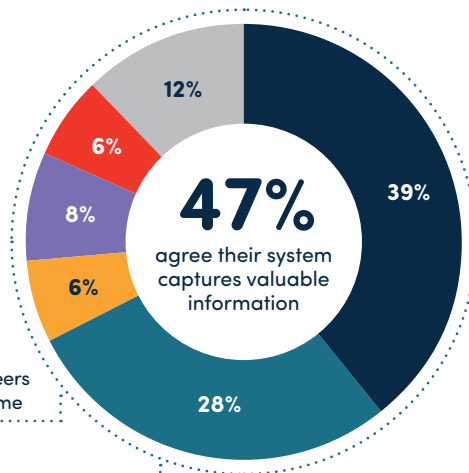


Remote working capabilities



Primary systems used to capture information about your clients, members, volunteers, and/or stakeholders

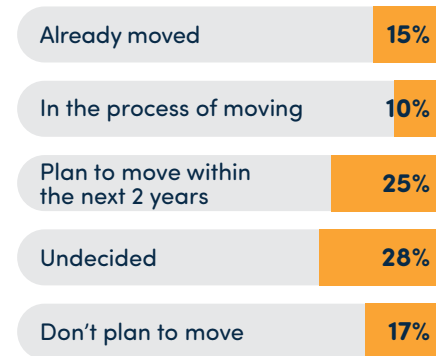
- Microsoft Word/Excel
- Google Docs/Sheets
- Custom-developed system
- Paper documents
- Commercially available system
- Government-mandated system
- Other/unsure



43% agree their system enables staff/volunteers to work efficiently both in the office and at home

35% agree their system enables them to understand the impact of services and outcomes

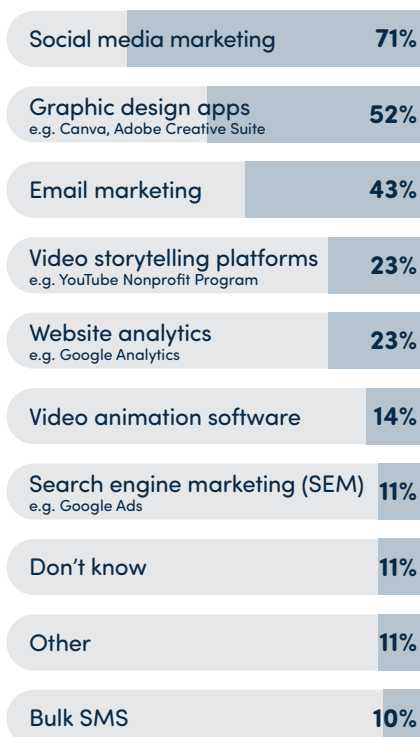
Plans to move to the cloud



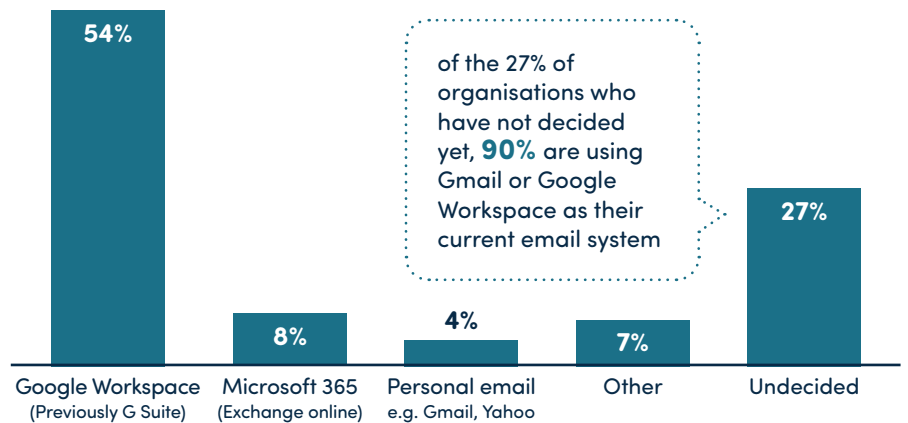
Key reasons for not moving:

- » Not a priority
- » Migration cost
- » Data security, sovereignty, or data privacy concerns

Digital marketing tools



Preferred collaboration platform



Internet speed and reliability





SINGAPORE

In Singapore, 66% of NGOs agree that their overall technology environment is functional or better, enabling staff and volunteers to effectively perform their jobs.

Additionally, 80% of organisations are either almost there or currently providing all the necessary systems, software, and

infrastructure for staff to work remotely. This is supported by the fact that four out of five organisations in Singapore utilise a NGO file collaboration platform.

Distinct from the region, over half of Singaporean NGOs employ a system (e.g., commercially available CRM, government-mandated system, custom-developed system) to store stakeholder information. When such a system is in place, 64% of organisations agree it captures valuable information.

Key statistics

62%



Of organisations have Multi-Factor Authentication enabled

100%



Of organisations have at least a website to market their services

#1



WhatsApp is the most popular staff communication channel

64%



Of organisations have data backups for all important systems

28%



Of organisations use a crowdfunding or e-commerce facility on their website

38%



Of staff are satisfied or better with their IT

30%

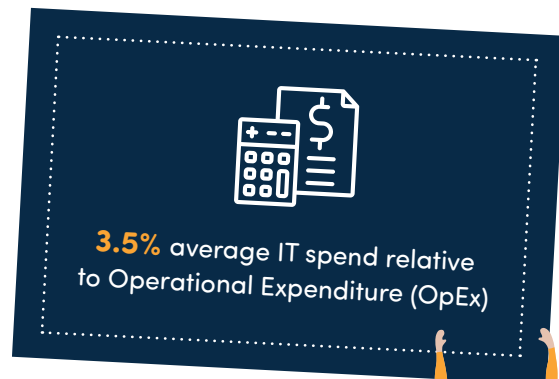


Of organisations provide staff with cyber security training

85%



Of organisations are confident they do not use pirated software



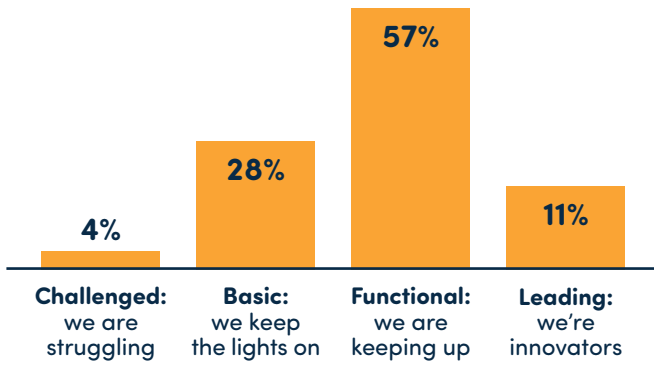
Top technology priorities

01	Make better use of social media or digital marketing	
02	Improve website	
03	Improve the digital capabilities of staff and volunteers	

Top training priorities

01	Cyber security protections for your information systems	
02	Migrating to a nonprofit cloud collaboration environment	
03	Personal computer, mobile phone or tablet management & support	

Overall technology environment

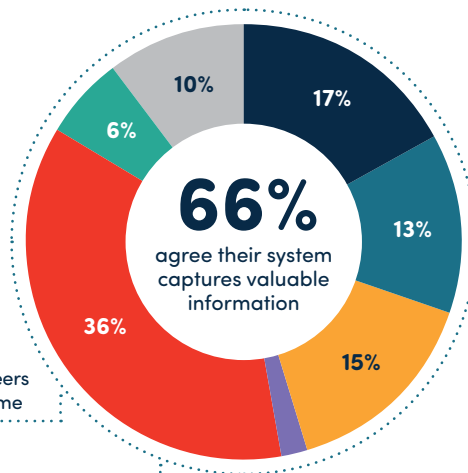


Remote working capabilities



Primary systems used to capture information about your clients, members, volunteers, and/or stakeholders

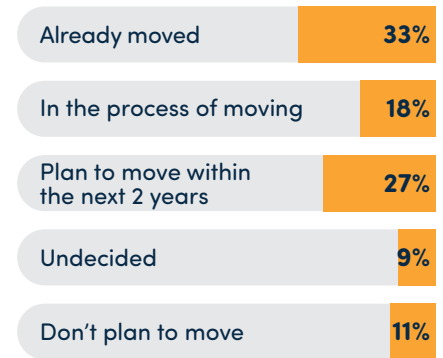
- Microsoft Word/Excel
- Google Docs/Sheets
- Custom-developed system
- Paper documents
- Commercially available system
- Government-mandated system
- Other/unsure



57% agree their system enables staff/volunteers to work efficiently both in the office and at home

45% agree their system enables them to understand the impact of services and outcomes

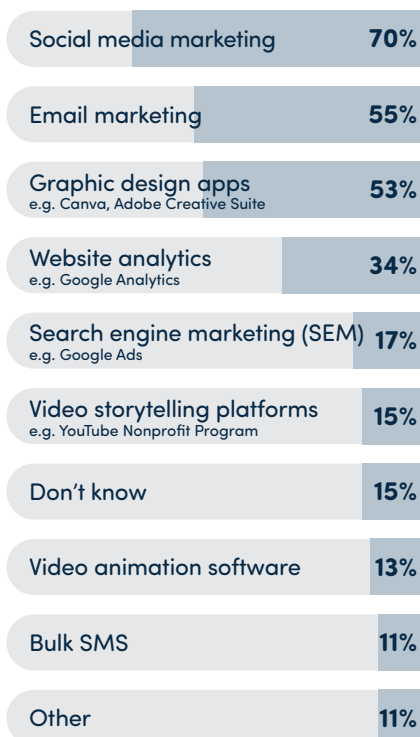
Plans to move to the cloud



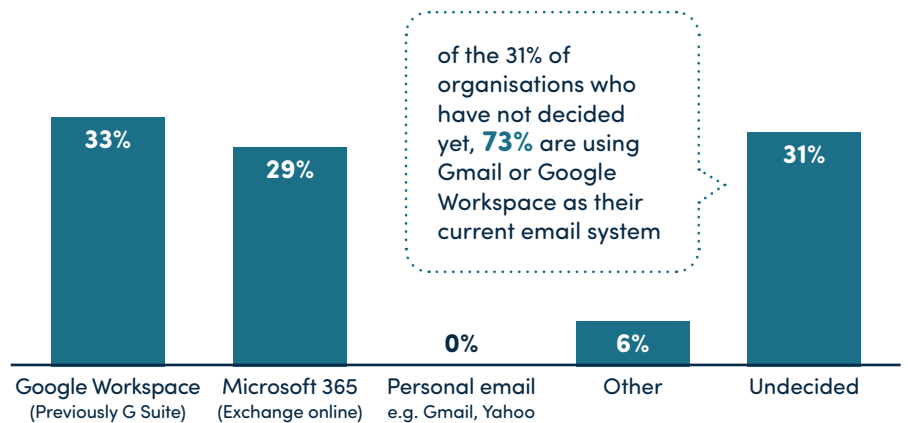
Key reasons for not moving:

- » Data security, sovereignty, or data privacy concerns
- » Migration cost
- » Not a priority

Digital marketing tools



Preferred collaboration platform



Internet speed and reliability





SOUTH KOREA

In South Korea, organisations allocate 1.7% of their operational expenditure to IT, which is the lowest in the region compared to the average of 3.4%.

Despite this, 30% of organisations are either planning or in the process of moving to the cloud, with migration to a non-profit cloud collaboration environment being their top training priority. Interestingly, 41% of organisations remain

undecided about migrating, with lack of skills and knowledge being the primary reason for their hesitation.

One in three organisations in South Korea utilises spreadsheets and documents to track stakeholder information (e.g., stakeholders, clients, donors, members, etc.). Among these organisations using these documents, 45% agree that they capture valuable information, and 40% believe that it helps them understand impact and outcomes.

Key statistics

28%



Of organisations have Multi-Factor Authentication enabled

80%



Of organisations have at least a website to market their services

1.7%



Average IT spend relative to Operational Expenditure (OpEx)

34%



Of organisations have data backups for all important systems

23%



Of organisations use a crowdfunding or e-commerce facility on their website

24%



Of staff are satisfied or better with their IT

23%



Of organisations provide staff with cyber security training

34%



Of organisations are confident they do not use pirated software



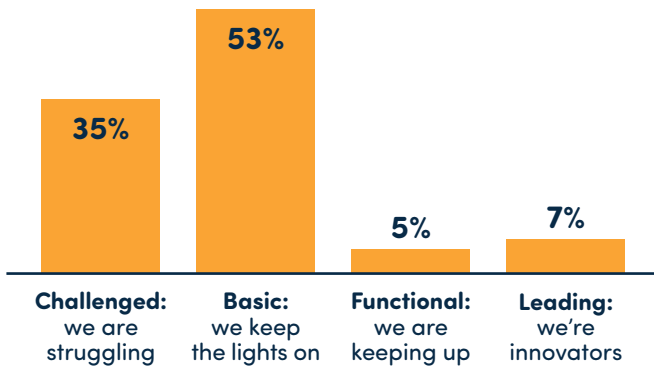
Top technology priorities

01	Improve the digital capabilities of staff and volunteers	
02	Make better use of social media or digital marketing	
03	Improve our website	

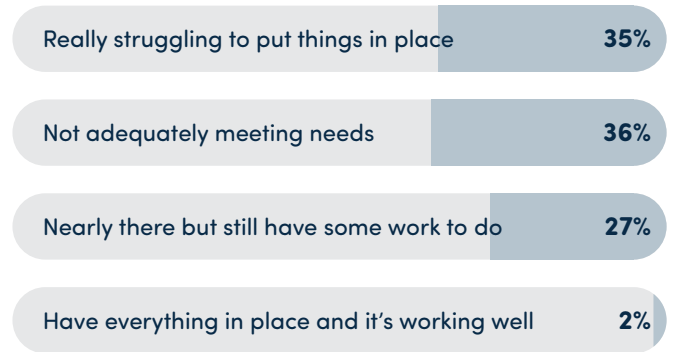
Top training priorities

01	Migrating to a nonprofit cloud collaboration environment	
02	Process and data automation	
03	Assessing your technology environment and identifying your strengths and weaknesses	

Overall technology environment

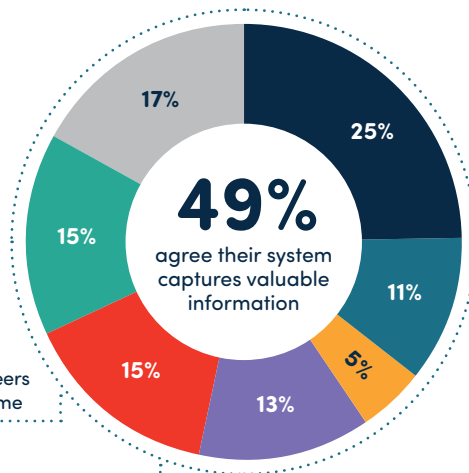


Remote working capabilities



Primary systems used to capture information about your clients, members, volunteers, and/or stakeholders

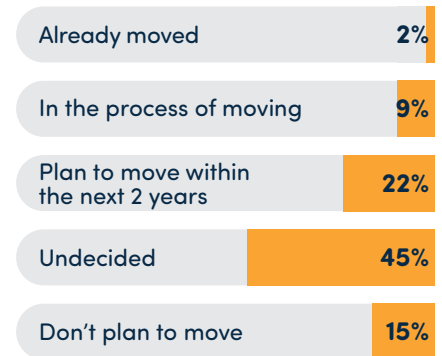
- Microsoft Word/Excel
- Google Docs/Sheets
- Custom-developed system
- Paper documents
- Commercially available system
- Government-mandated system
- Other/unsure



34% agree their system enables staff/volunteers to work efficiently both in the office and at home

44% agree their system enables them to understand the impact of services and outcomes

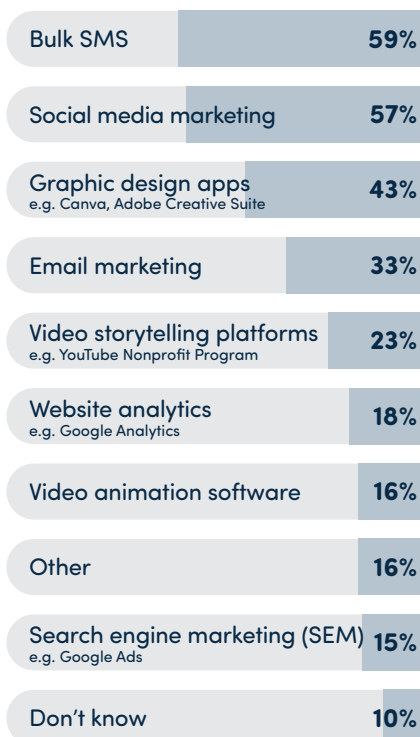
Plans to move to the cloud



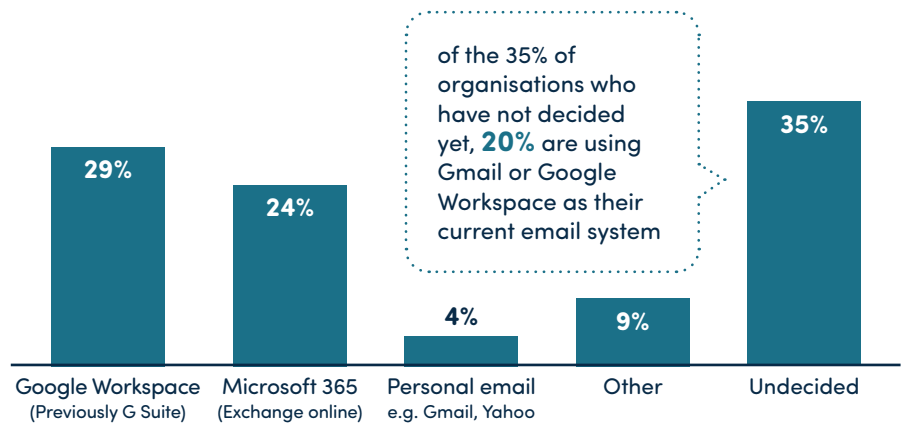
Key reasons for not moving:

- » Lack of skills/knowledge
- » Not a priority
- » Migration cost

Digital marketing tools

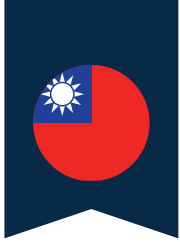


Preferred collaboration platform



Internet speed and reliability





TAIWAN

In Taiwan, one in four responding organisations have experienced a cyber security incident in the past 12 months.

Considering that statistic, it's encouraging to see 61% have antivirus software installed on all devices, and 46% of organisations consider cyber security as their top technology

priority for 2023. There is still more work to do though, as only 9% of organisations have a documented plan to enhance cyber security protections.

On another note, half of the organisations are not yet effectively using file collaboration platforms such as Microsoft 365 or Google Workspace. However, 21% of organisations have already moved a significant portion of their IT to the cloud, and 31% are either planning or in the process of doing so.

Key statistics

39%



Of organisations have Multi-Factor Authentication enabled

83%



Of organisations have at least a website to market their services

2.4%



Average IT spend relative to Operational Expenditure (OpEx)

58%



Of organisations have data backups for all important systems

27%



Of organisations use a crowdfunding or e-commerce facility on their website

35%



Of staff are satisfied or better with their IT

#1



LINE is the most popular staff communication channel

16%



Of organisations are confident they do not use pirated software



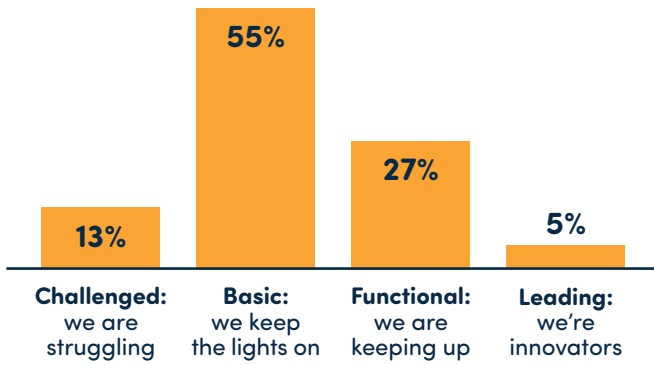
Top technology priorities

01	Make better use of social media or digital marketing	
02	Improve the digital capabilities of staff and volunteers	
03	Improve website	

Top training priorities

01	Supporting a nonprofit cloud collaboration environment	
02	Migrating to a nonprofit cloud collaboration environment	
03	Process and data automation	

Overall technology environment

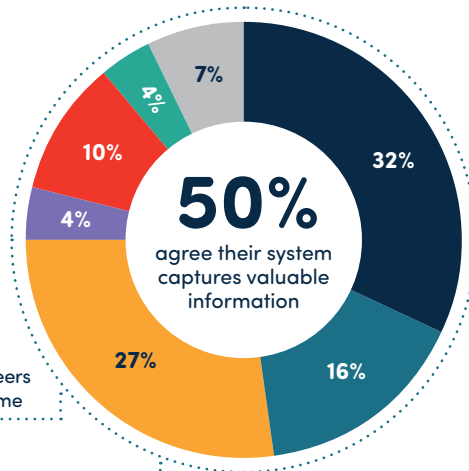


Remote working capabilities



Primary systems used to capture information about your clients, members, volunteers, and/or stakeholders

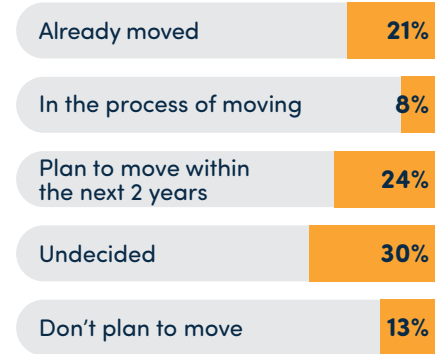
- Microsoft Word/Excel
- Google Docs/Sheets
- Custom-developed system
- Paper documents
- Commercially available system
- Government-mandated system
- Other/unsure



54% agree their system enables staff/volunteers to work efficiently both in the office and at home

42% agree their system enables them to understand the impact of services and outcomes

Plans to move to the cloud



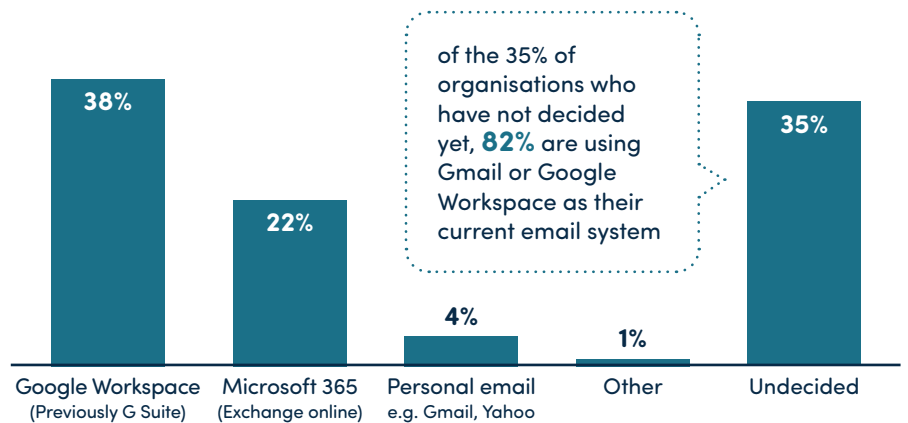
Key reasons for not moving:

- » Data security, sovereignty, or data privacy concerns
- » Lack of skills/knowledge
- » Migration cost

Digital marketing tools



Preferred collaboration platform



Internet speed and reliability





THAILAND

In Thailand, Google Workspace is the preferred NGO file collaboration environment. 28% of organisations have already moved a significant part of their IT to the cloud and 52% plan or are in the process of moving to the cloud. Of the 52%, 46% plan to move to Microsoft 365, and 38% plan to move to Google Workspace.

6 in 10 organisations use online documents and spreadsheets (e.g. Google Docs/Sheets, Microsoft Word/Excel) to collect stakeholder information. With 1 in 10 still using paper documents. This likely explains why only 20% of organisations systems' in Thailand enable them to understand impact and outcomes. This is significantly below the average of 40% across the region.

Key statistics

48%



Of organisations have Multi-Factor Authentication enabled

80%



Of organisations have at least a website to market their services

3.1%



Average IT spend relative to Operational Expenditure (OpEx)

45%



Of organisations have data backups for all important systems

45%



Of organisations use a crowdfunding or e-commerce facility on their website

36%



Of staff are satisfied or better with their IT

32%



Of organisations provide staff with cyber security training

68%



Of organisations are confident they do not use pirated software



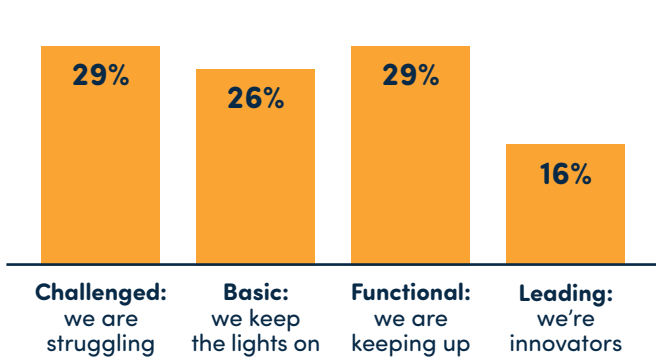
Top technology priorities

01	Improve website	
02	Make better use of social media or digital marketing	
03	Improve the digital capabilities of staff and volunteers	

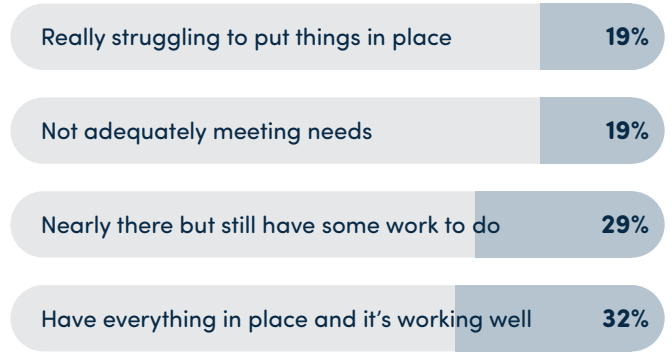
Top training priorities

01	Supporting a nonprofit cloud collaboration environment	
02	Data analysis, dashboards and business intelligence	
03	Migrating to a nonprofit cloud collaboration environment	

Overall technology environment

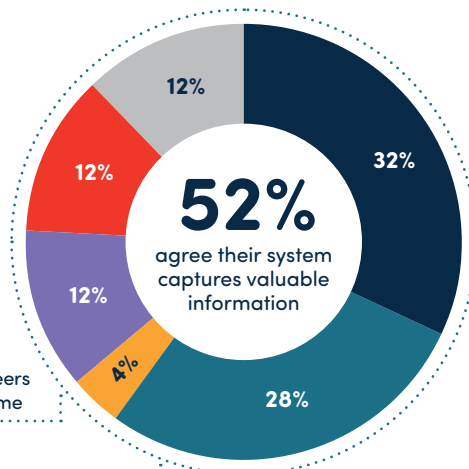


Remote working capabilities



Primary systems used to capture information about your clients, members, volunteers, and/or stakeholders

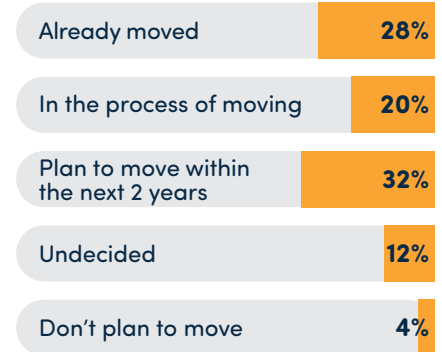
- Microsoft Word/Excel
- Google Docs/Sheets
- Custom-developed system
- Paper documents
- Commercially available system
- Government-mandated system
- Other/unsure



52% agree their system enables staff/volunteers to work efficiently both in the office and at home

32% agree their system enables them to understand the impact of services and outcomes

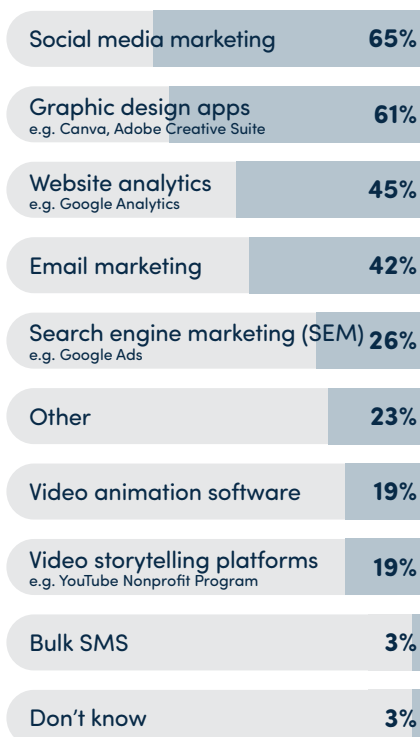
Plans to move to the cloud



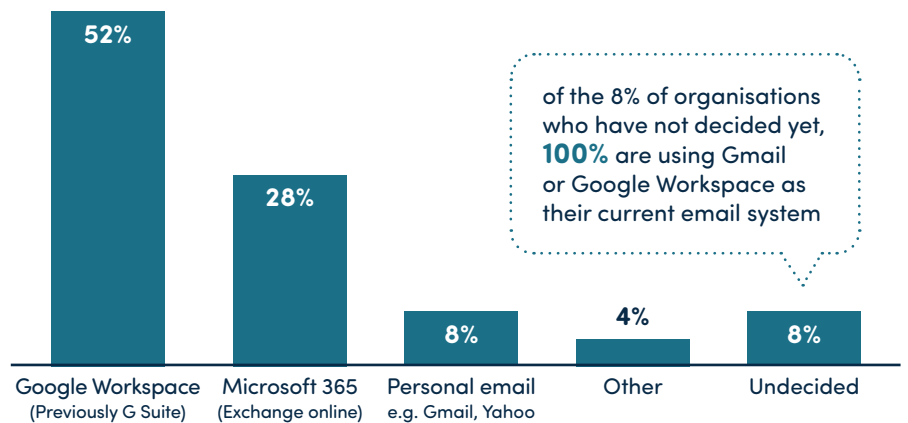
Key reasons for not moving:

- » Not a priority
- » Internet connectivity is too expensive or insufficient quality
- » Lack of skills/knowledge

Digital marketing tools



Preferred collaboration platform



of the 8% of organisations who have not decided yet, 100% are using Gmail or Google Workspace as their current email system

Internet speed and reliability





VIETNAM

Vietnam is leading the way for effective NGO collaboration platform usage, with 85% of organisations employing a tool like Google Workspace and Microsoft 365.

Additionally, 62% of Vietnamese NGOs are planning or currently undergoing a transition to cloud-based solutions, a figure higher than the average of 38%. 23% of organisations

have already moved a significant portion of their IT infrastructure to the cloud.

A noteworthy 54% of staff in Vietnam feel confident using the existing technology to perform their roles. However, there are areas that require attention, particularly in terms of cyber security. While 54% of organisations have Multi-Factor Authentication (MFA) enabled on internet-facing systems, only 31% possess a documented plan to improve cyber security protections.

Key statistics

#1



Google Chat is the most popular staff communication channel

85%



Of organisations have at least a website to market their services

3.3%



Average IT spend relative to Operational Expenditure (OpEx)

54%



Of organisations have data backups for all important systems

32%



Of organisations use a crowdfunding or e-commerce facility on their website

46%



Of staff are satisfied or better with their IT

31%



Of organisations provide staff with cyber security training

53%



Of organisations are confident they do not use pirated software



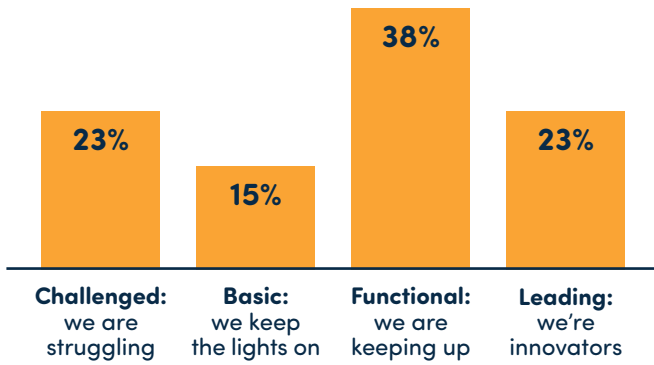
Top technology priorities

01	Explore new technology/innovations	
02	Upgrade our IT infrastructure	
03	Improve website	

Top training priorities

01	Migrating to a nonprofit cloud collaboration environment	
02	Developing an IT plan and operating budget	
03	Creating an impactful website	

Overall technology environment

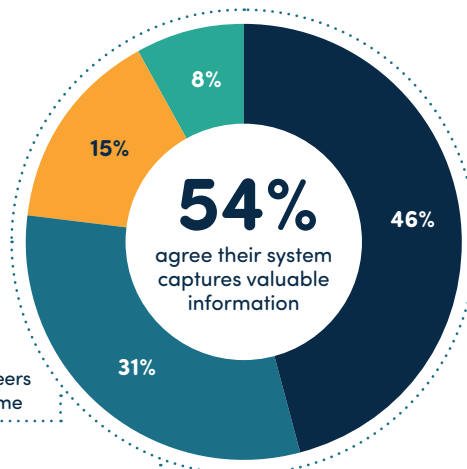


Remote working capabilities



Primary systems used to capture information about your clients, members, volunteers, and/or stakeholders

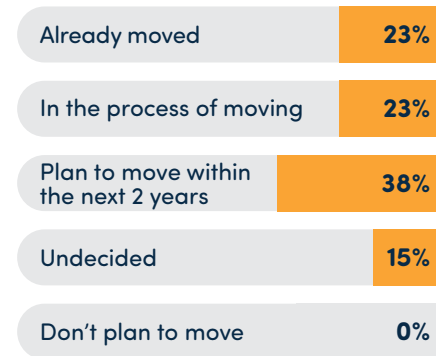
- Microsoft Word/Excel
- Google Docs/Sheets
- Custom-developed system
- Paper documents
- Commercially available system
- Government-mandated system
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46% agree their system enables staff/volunteers to work efficiently both in the office and at home

54% agree their system enables them to understand the impact of services and outcomes

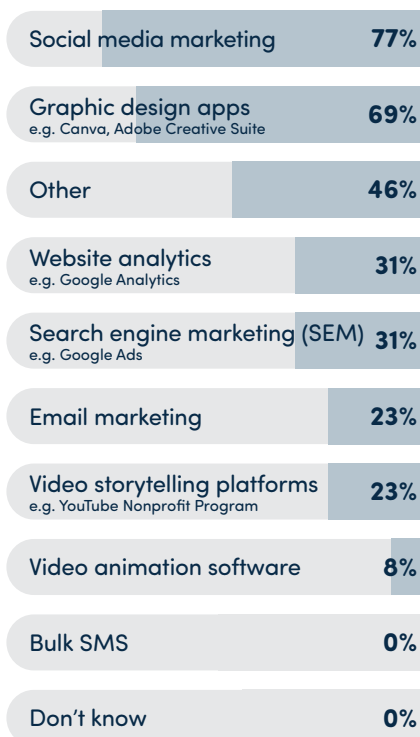
Plans to move to the cloud



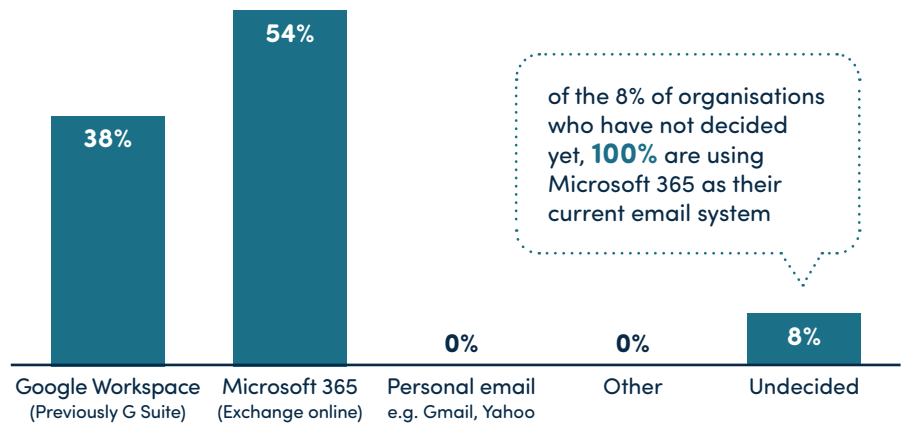
Key reasons for not moving:

- » Lack of skills/knowledge
- » Internet connectivity is too expensive or insufficient quality

Digital marketing tools



Preferred collaboration platform



of the 8% of organisations who have not decided yet, 100% are using Microsoft 365 as their current email system

Internet speed and reliability

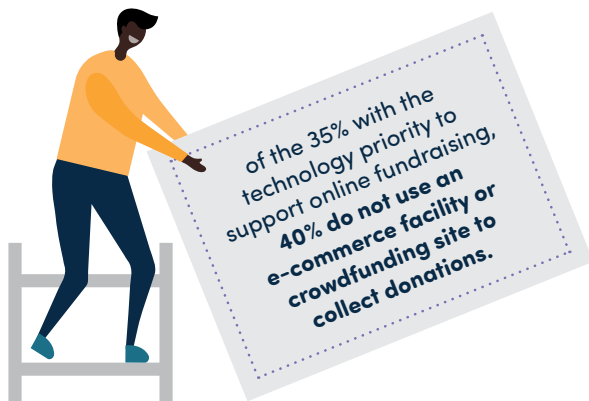


TECHNOLOGY PRIORITIES

Improving NGOs' website, improving the digital capabilities of staff and volunteers and boosting social media marketing are consistent top priorities for all countries and territories across the region.

Contrasting the averages, Indonesia (62%), Malaysia (56%), and India (51%) and Singapore (48%) prioritised exploring new technologies and innovations to help achieve their social mission.

Of the NGOs where their priority is to improve the digital capabilities of staff and volunteers, 53% of staff are not confident or a little bit confident.



Five countries - Vietnam (57%), Indonesia (53%), Malaysia (50%), Singapore (52%) and Taiwan (46%) have a higher level of interest in improving their cyber security practices

	Improve website	53%
	Improve the digital capabilities of staff	50%
	Make better use of social media &/or digital marketing	49%
	Explore new technologies/ innovations to help achieve social mission	34%
	Improve our data protection and information security practices	35%
	Supporting online fundraising	35%
	Upgrade IT infrastructure	32%
	Enable staff and volunteers to work effectively out of the office	28%
	Move to the cloud	27%
	Implement a new client, stakeholder or member information management system	26%
	Develop an IT/Digital transformation plan	22%
	Supporting delivery of our services online	20%



















Please note that this does not add up to 100% as many organisations requested training in more than one area.

TRAINING PRIORITIES

When organisations were asked what digital technology training they would like to see available in the next 12 months, migrating and supporting a nonprofit cloud collaboration platform (Microsoft 365, Google Workspace etc.) and optimising data capture and analysis

to support service delivery and understand impact are the top areas of interest.

Of the 38% that requested training in migrating to a nonprofit cloud collaboration platform, 39% of organisations would prefer to use Google Workspace and 43% would prefer to use Microsoft 365.

	Migrating to a nonprofit cloud collaboration environment (Microsoft 365, Google Workspace etc)	38%		Cloud server management and support	16%
	Supporting a nonprofit cloud collaboration environment (Microsoft 365, Google Workspace etc)	33%		Leveraging social media	14%
	Using spreadsheets and forms for data capture and analysis	30%		Developing, implementing and monitoring your fundraising campaign	13%
	Personal computer, mobile phone or tablet management & support	27%		Developing an IT plan and operating budget	13%
	Data analysis, dashboards and business intelligence	23%		Cyber security protections for your information systems	12%
	Process and data automation	20%		Assessing your digital marketing strengths and opportunities	12%
	Creating an impactful website	20%		Best practice technology management and governance practices	11%
	Assessing your technology environment and identifying your strengths and weaknesses	16%		Developing high impact marketing content	10%



Four key training themes NGOs are seeking

<p>27-38%</p> <p>NFP cloud collaboration migration/support as well as user device support</p>	<p>20-30%</p> <p>Data capture and analysis to support service delivery and understand impact</p>	<p>10-20%</p> <p>Digital marketing techniques and skills to connect with your audience, attract funding, and drive support</p>	<p>8-12%</p> <p>Cyber security protections to keep your data and employees safe</p>
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WHAT'S NEXT?

For NGOs, NPOs, charities, and nonprofits in the Asia-Pacific region, embracing digital transformation is a necessity.

It's time to take the next step and equip your organisation with the digital capability it needs to thrive.

For more information, and to sign up for the APAC Digital Capability Training Program which will commence in the second half of 2023, visit www.digitaltransformation.ngo

The training will cover four key areas of digital capability that Asia-Pacific organisations have identified as priorities:

#1

NFP cloud collaboration environments, with a focus on selection, migration, and support.

#2

Data capture and analysis to enhance service delivery and understand impact.

#3

Digital marketing techniques and skills to effectively connect with audiences, attract funding, and drive support.

#4

Cyber security protections to ensure the safety of data and employees.



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