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Market Overview Report

About Market Overview Report

The BRS's annual Market Overview Report introduces market trends, salary information and predictions for the year ahead across all the industries and functions that BRS covers.

In the 2021 Market Overview, we have a special focus on our clients' response to the COVID-19 pandemic and how businesses have adapted in the new normal.

The Market Overview Report 2021 was based on BRS data taken from October 2019 to September 2020, a client survey conducted in October 2020, and the knowledge and expertise of the BRS consultants who have strong client and candidate relationships.

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Introduction



Managing Director
Naeem Iqbal

The Recruitment Industry Today

It is undeniable that 2020 was a year full of challenges and new norms. The COVID-19 pandemic took center stage but was far from the only cause of the tumultuous 12 months. Circumstances such as the heightened tensions surrounding trade between the US and China, and an already slowing Japanese economy all contributed to the difficulty and a relative slowdown in recruitment-related activities. Most of the damage was incurred in the 1st half of 2020, with society and organizations implementing policies of the new norm that allowed for a gradual recovery in the 2nd half.

Within the April-June quarter of 2020, Japan's economy shrank by an unprecedented 7.8 percent, as the COVID-19 pandemic took its toll on markets across the world. However, even prior to 2020, Japanese exports had suffered greatly, due in part to the US & Chinese trade tensions, with 2019 showing some alarming drops. While this had adverse effects on all industries, it was most visible within the manufacturing, chemical, and automotive sectors – almost all of which ceased hiring due to the uncertainty of the aforementioned trade issues. Furthermore, the tax increase, slowing demand from China, extraordinary drops to the tourism industry, and a series of natural disasters all played their part in Japan officially falling into recession. The Bank of Japan responded to this economic downturn by launching emergency measures, which have stabilized the market to a degree and led to retail sales rebounding. This volatility had a direct impact on hiring for the 1st half of 2020, as most organizations were reluctant to hire until the proverbial smoke cleared.

Throughout the first 6 months of 2020, we witnessed an extraordinary evolution firsthand. We started arranging interviews for our clients and candidates via video conference. We saw clients implementing cutting-edge tech solutions to cover data security and communication. We watched as clients successfully shifted their entire business direction in an extraordinarily short period of time. The process was not flawless, and there were many missteps along the way. However, each obstacle overcome brought us closer to where



we are now - a fully functioning society with business in full swing and an economy on the mend. Normally, all these shifts and changes would take years in such a rigid business culture but since hands were forced, Japan responded marvelously. It was this exceptional performance by the country that allowed such a quick recovery - and in Q3, we saw some extremely positive signs. We started seeing hiring managers urgently look to backfill positions, hoping to get a head start on the competition. We saw highly qualified professionals become more active in their job searches. We watched as the technology and life science sectors surged back with an urgency of hiring unseen in recent memory. Other areas, such as manufacturing, chemical, and automotive also saw a recovery, albeit a little more modest. We remain cautiously optimistic regarding the aviation, tourism, and hospitality sectors but recognize that any real recovery will be dependent upon a major break in the travel-restrictions via a vaccination or herd immunity.

Looking to 2021, we expect a gradual economic recovery, as exports are expected to turn upward. This can only be positive news for hiring activity as we forecast a return to pre-2020 levels, providing the pandemic does not escalate.

During the lockdown, BRS went through a phase of innovation and creativity to meet the challenges caused by the pandemic. Our Salesforce-based ATS allowed for a smooth transition to remote work and our consultants were able to continue

their recruitment activities using proprietary and third-party cloud-based services to communicate with both clients and candidates.

The recruitment industry has undoubtedly undergone significant change. Like many industries, we have learnt that remote work has its benefits. It is better for the environment, reduces cost and gives staff the freedom to manage their work location / schedule. If managed correctly, a well-structured remote work environment can result in increased productivity and a reduction in cost. Over the coming years we expect to see the recruitment industry veer away from the traditional office setup and move partially into a cloud-based remote work environment. This paradigm shift will be dependent upon how the Japan labor office deals with regulations that require recruitment consultants to work at the official registered address on the recruitment license. Hence, post coronavirus, remote work will require amendments to these dated regulations.

As is almost always the case, hardships have brought to light invaluable lessons. We have learnt that every obstacle can be overcome through diligence and strong leadership. Even throughout this crisis, we provided our clients and candidates with market information and relevant industry movements. Our aim was then, as is always, to empower our counterparts to make the most well-informed decisions for themselves. We will continue working towards this goal and do our utmost to offer our support.

COVID-19 Responses

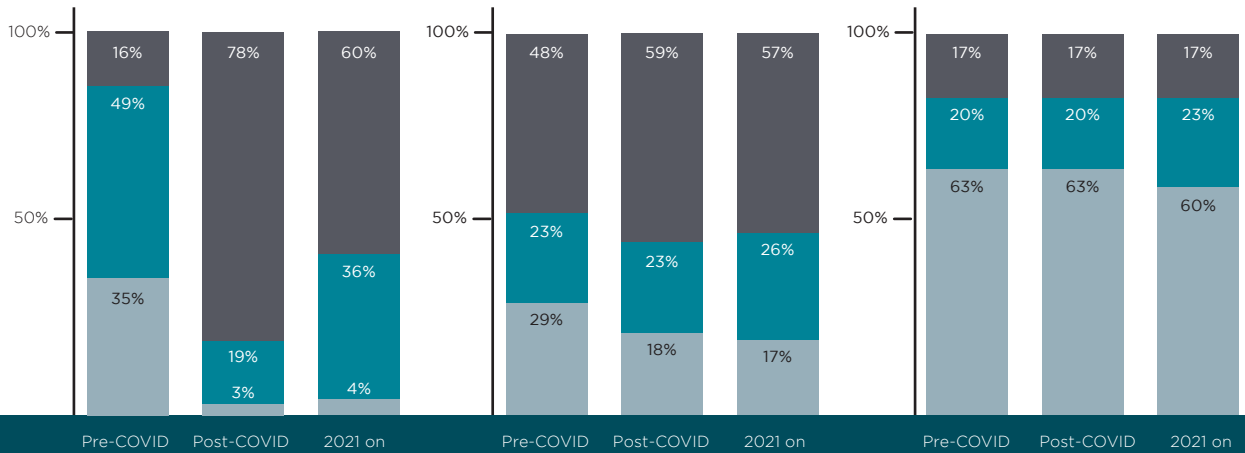
The COVID-19 pandemic had a major impact across all businesses in 2020. To understand how different companies have been responding to COVID-19, we conducted a survey and received 119 responses from our top clients. In this report, we refer to March 2020 as “pre-COVID”, and from April 2020 as “post-COVID”. From the results of this survey, it is apparent that many measures implemented in the wake of COVID-19 are set to continue through 2021 and beyond.

Yes
 Limited
 No

Do you have a remote work environment?

Do you have flexible working hours?

Do you allow employees to work on the side?



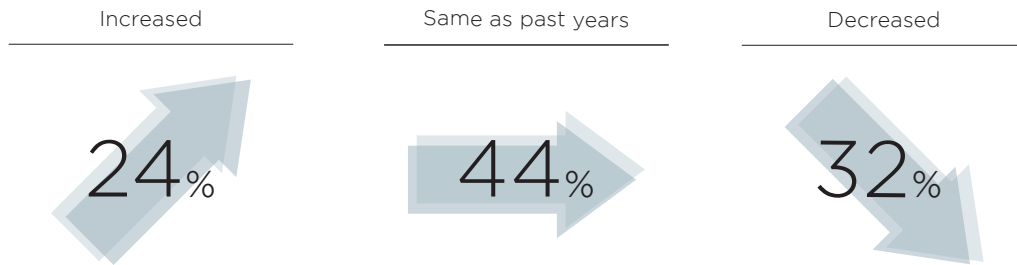
In this report, we refer to “remote work environment” as conditions where employees can work 3 or more days per week remotely. Including “limited”, 65% of the companies had remote work environments pre-COVID, which increased to 97% post-COVID. Most companies plan to continue remote working environments in 2021 and beyond, and only 4% answered “no”.

As it was encouraged to avoid commuting during rush hours post-COVID, many companies introduced flextime. However, in this survey 70% of all companies, including those who answered “limited”, already had flextime pre-COVID hence there was only a 10% point increase post-COVID.

As the remote work population increased post-COVID, many people gained extra hours that they formerly used up commuting. Given this, an increasing number of companies are advertising part-time jobs as a way of attracting highly qualified professionals into their businesses. There were no changes between pre and post-COVID, however, there may be more companies allowing side-jobs from 2021.

Change in number of job applications

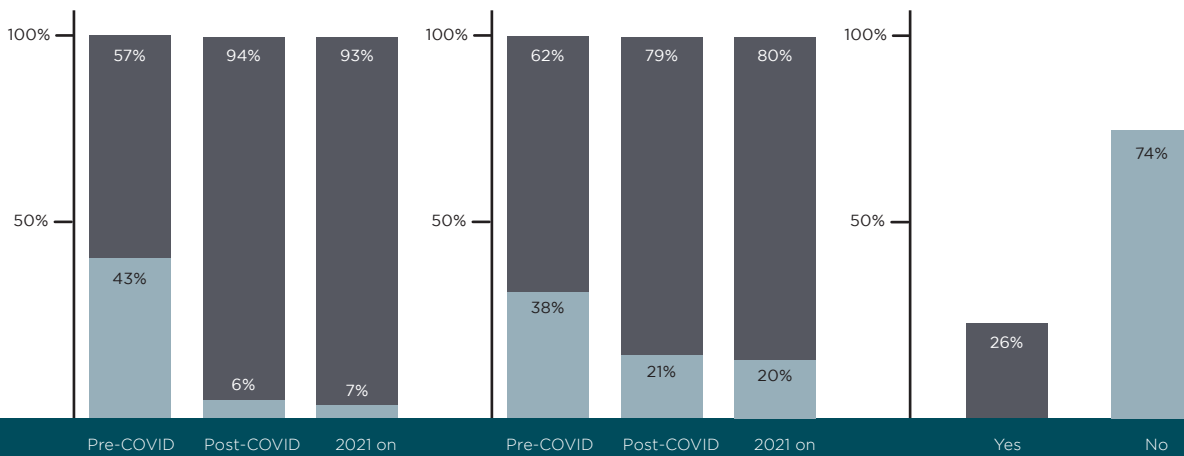
During 2020, was there a change in the number of applicants per job compared to previous years?



Do you have measures to ensure that ill employees stay home?

Do you have a BCP team?

Do you provide remote work allowances?



Companies need to avoid having employees come to their office when they are feeling sick. This is for both the health and safety of employees, and there needs to be measures and rules set to ensure this is done. In this survey, 57% of the companies had existing measures in place pre-COVID increasing to 94% post-COVID. This is set to continue through 2021 and beyond.

Japan is prone to natural disasters such as earthquakes and floods making crisis management highly important for organizations. Having a BCP team ensures quick and efficient responses in the event of a disaster. In this survey, 79% of the companies answered that post-COVID they have a BCP team which is a 17%-point increase compared to pre-COVID.

An increasing number of companies are providing remote work allowances on either a one-time or monthly basis. A one-time allowance is to create a work environment at home by purchasing a desk, chair, or a monitor. Monthly allowances are to cover the heating and lighting expenses while working at home. In this survey, only 26% of companies provide remote work allowances.

Clients' Remote Work Environment

Predictions vs Actual

We asked a set of further questions to clients who had answered that they provided a remote work environment to their employees. We asked about their prospects before going remote and actual performance after going remote in 5 different areas: productivity, management, onboarding new employees, training and communication. We also asked if they made any changes for improvement after the start



Predictions before starting remote work

Maintaining productivity

58%

expected difficulty in maintaining productivity under the remote environment

Managing members

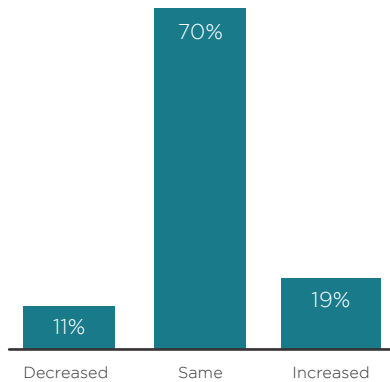
71%

expected difficulty in managing employees under the remote environment

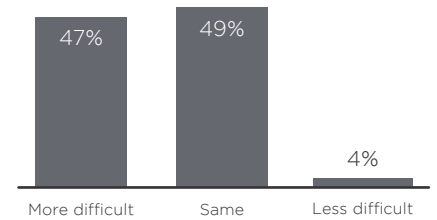


Actuality after starting remote work

In actual practice, 70% answered productivity stayed the same during remote work



In actual practice, 47% experienced difficulties, however 49% answered that the difficulty of management remained the same under the remote environment



Changes for improvement
(Changes in style / introduction of new tools, etc.)

42%

made changes to maintain productivity under the remote environment

59%

implemented changes to improve management under the remote environment



Improvements from changes

40%

answered the changes improved productivity under the remote environment

42%

answered these changes had positively impacted management in the remote environment

of remote work, such as changes of management style or the introduction of new tools and their efficiency. Prior to remote work, many companies expected to see difficulties in maintaining productivity, managing members and maintaining smooth communication amongst employees. However, in actual practice these were not as difficult as they thought. On the other hand, the expectations around difficulties with training was very close

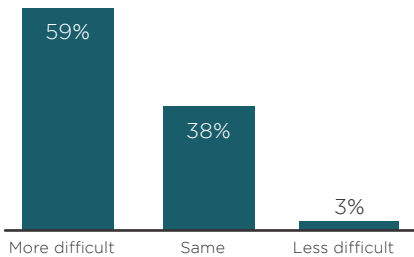
to reality. Onboarding new employees was more difficult than expected for many companies. Maintaining productivity had the largest gap between projected and actual. 58% of companies expected it to be difficult, while, only 11% answered that productivity had decreased. 70% answered it had stayed the same and 19% answered that productivity increased in remote work environment.

Onboarding new employees

51%

expected difficulty in onboarding new employees under the remote environment

In actual practice, 59% experienced difficulties in onboarding new employees under remote environment



52%

made changes to improve the onboarding process for new employees

42%

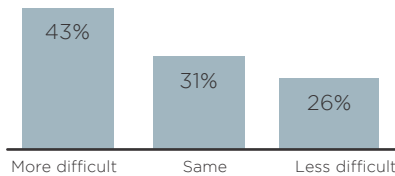
answered these changes improved the onboarding process for new employees

Training employees

44%

expected difficulty in training employees under the remote environment

In actual practice, 43% had difficulties, 31% saw no change and for 26% it became easier to train employees remotely



60%

made changes to improve training under remote environment

53%

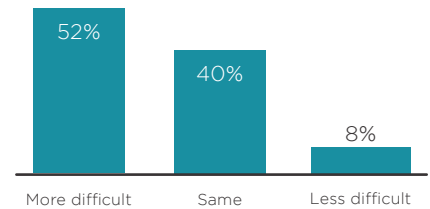
answered these changes improved training under the remote environment

Communication amongst employees

83%

expected difficulties in communication amongst employees under the remote environment

In actual practice, 52% experienced difficulties, however these difficulties remained the same for 40%



68%

made changes to improve communication under the remote environment

61%

answered the changes improved communication under the remote environment

Industries



Aiko Tokuhisa
Director

3 major trends in 2020

With the launch of 2021, we have renewed hope that the future will be better than the past. As 2020 presented some major challenges for all sectors, it is important to look back on the trends of the previous year and highlight the lessons that could be learnt.

The reliance on IT is increasing across all industries, from AI automated diagnosis and remote operations in the medical industry to the use of automated harvesting machinery in farming. As a result, there has been a high demand for professionals with both strong industrial knowledge and IT know-how, a trend which has increased post COVID-19. Globalization today is not merely Japanese companies expanding overseas, but a philosophical shift whereby companies aim to operate in line with global standards and best practices. As the raw materials are imported, parts manufactured locally, assembled in a third country, and then sold yet again on the global market, it is critical for candidates to possess strong language skills and strong global project management experience.

Adaptability and flexibility are key. With an easing of industry regulations and an ever-competitive global market, many companies within the pharmaceutical or chemical sectors have been engaged in M&A activities to diversify and expand on their core business lines. Therefore, professionals who can create and lead businesses from zero and demonstrate high levels of adaptability and flexibility are in high demand, but in low supply in the current Japan market.

Companies' COVID-19 responses

After the state of emergency was declared, we have seen numerous changes to working environments and to recruitment in general. In the manufacturing industry, foreign affiliated companies, regardless of size, were able to adapt quickly as many had pre-existing remote work systems in place. Within the life sciences area, pharmaceutical and medical device companies were the quickest to react. Currently, most candidates, regardless of industry, place great consideration both on the availability of and the companies' attitudes toward remote work. Furthermore, there is a large gap between companies who are having logistical challenges establishing a remote environment, and those who are still having doubts regarding its merits. This change in work style has inevitably brought about unique obstacles for each organization to overcome.

We must overcome outdated
stereotypical thinking and evolve
with the ever-changing market



Letting go of stereotypes

After the COVID-19 pandemic was declared, the number of job seekers registering with BRS increased significantly. This, however, does not directly translate to an equally significant increase in the numbers of people changing jobs; rather, more people are open to changing jobs due to the uncertain economic outlook. Therefore, the number of potential and passive candidates has increased dramatically, providing new possible talent pipelines for the near future. Regardless of the candidate pools' size, hiring the most in-demand professionals will remain as challenging as ever.

There are some important points to consider when strategizing about how to hire top quality candidates. Firstly, hiring speed. While some organizations have adjusted their hiring process due to COVID-19, there still remain a majority of companies sticking to their long-embedded interview practices. We have seen several cases where all interviews have been conducted remotely, and whereby candidates join a new employer without ever having had a physical interview.

Secondly, employment systems. Compared to the IT industry, the manufacturing industry is lagging in the provisions of remote work environments and flexible working practices. This is extremely visible when looking at the leading global tech companies, where such practices are the norm. Indeed, after the state of emergency was declared, those leading global firms were quick to provide a variety of special allowances and extra paid holidays. To hire professionals from these companies, it is important to benchmark the competitors' compensation and benefits, as well as their working conditions

so that you can become more attractive as an employer. Lastly, flexibility. As demand increases for professionals who can understand global standards and bring fresh impetus to existing and new business, it is important that companies show flexibility around their hiring processes and working conditions. Furthermore, after on-boarding, it is also critical to create and maintain an environment where new joiners have enough discretion to work freely within their corporate environment. No matter how skilled new hires may be at working effectively on the global stage, they will never become the change agents anticipated without flexibility and support from their new employer. As these types of candidates are rare, companies should consider hiring professionals who have the correct skill set but may be lacking in Japanese language ability. Flexibility shown in terms of hiring preferences, such as age and the number of job changes, will undoubtedly broaden the available candidate pool. If there is a special position, for example, created whereby a candidate will be working directly under the CEO with the task to make improvements within the firm, the company should first visualize the background and skills of the ideal candidate. With all probability, the candidate for this kind of role would be more mature and would have changed jobs every five years or so, therefore, rejecting potential candidates on the grounds of too many job changes would be erroneous.

Today, a new style of work has arrived, and it is necessary to recognize that change to succeed in hiring the best talent in the market. We must overcome outdated stereotypical thinking and evolve with the ever-changing market.

Automotive

With the outbreak of COVID-19, global sales of cars for 2020 fell year-on-year by nearly 20%. This obviously had an impact on the industry as a whole, which directly affected hiring. However, CASE (Connected, Autonomous, Shared, Electric) continues to be a key initiative in the sector, and while overall hiring has slowed, demand for CASE-related positions remains stable. Furthermore, in addition to traditional, finished auto manufacturers, IT companies have also been making noticeable advancements which has led to a demand for experienced embedded engineers.



Skills and experiences in high demand

- ADAS
(Advanced Driving Support System)
- EV vehicle R&D
- Global project management



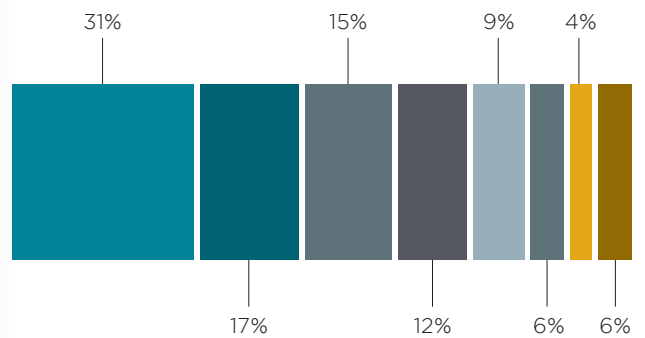
Candidate priorities

- CASE related job
- Growth potential
- Compensation and benefits

An important consideration for candidates when changing jobs is whether or not a position is related to CASE.



BRS Registered Candidates Ratio

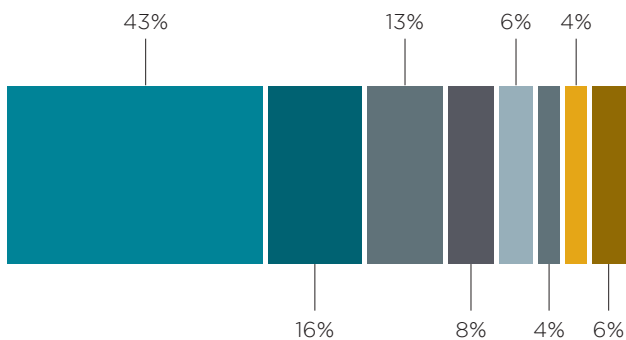


- Sales
- Research & Development
- Project Management
- Electrical Engineer
- Embedded Engineer
- Mechanical Engineer
- Process Engineer
- Other

Salary Table/Forecast

Roles	Salary (Million Yen)		
	Low	Middle	High
CAD / Design Engineer	5	6	7
Electrical Engineer	6	7.5	9
Embedded Engineer	6	8	10
Mechanical Engineer	6	7.5	9
Process Engineer	6	7	9
Production Management	5	6	9
Production Planning	5	6	9
Project Management	7	9	11
Quality Assurance	6	7	9
Research & Development	6	8	10
Sales	7	9	11
Technical Services	6	7	9

BRS Job Opening Ratio



- Sales
- Research & Development
- Embedded Engineer
- Mechanical Engineer
- Technical Services
- Electrical Engineer
- Quality Assurance
- Other



IT engineers experienced in areas such as AI, cloud and data science are ever more in demand, inevitably causing a hiring target shift to include those working in IT companies. With many IT companies offering flexible work environments and systems, the key to hiring exceptional talent lies in offering competitive compensation and flexible work styles.

Chemical

Although there are differences depending on area, overall, chemical companies still have many obstacles to overcome. Some of the challenges that the industry is still working through would be inventory valuation losses resulting from reduced crude oil market prices, a decrease in demand for general-purpose products, and a downturn of investments in the automotive industry. As for hiring, there continues to be demand for R&D, production engineering, and digital transformation. However, we have yet to see a return to pre-COVID hiring demand in foreign national companies.



Skills and experiences in high demand

- Materials informatics
- Environmentally friendly chemical R&D
- Weight-saving technology know-how

The ability to negotiate with overseas counterparts and to bring proposals that can fulfill client needs based on R&D is in high demand



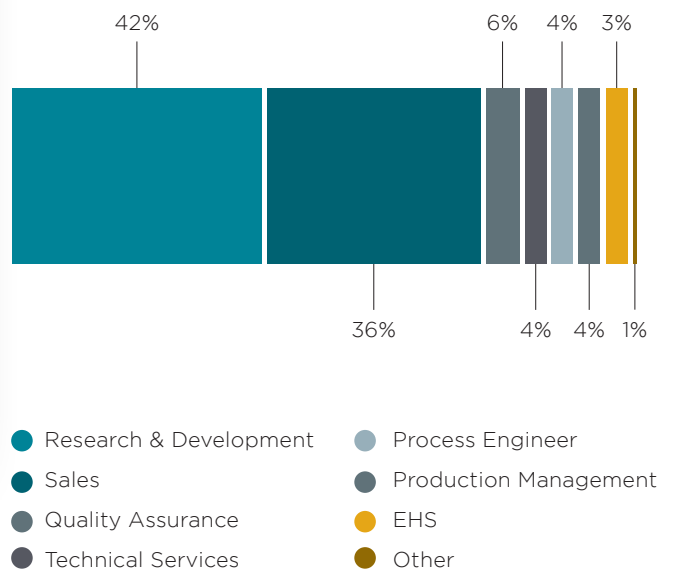
Candidate priorities

- Job security
- Growth potential
- Scope of responsibility

Stability and growth potential has grown more critical with COVID-19



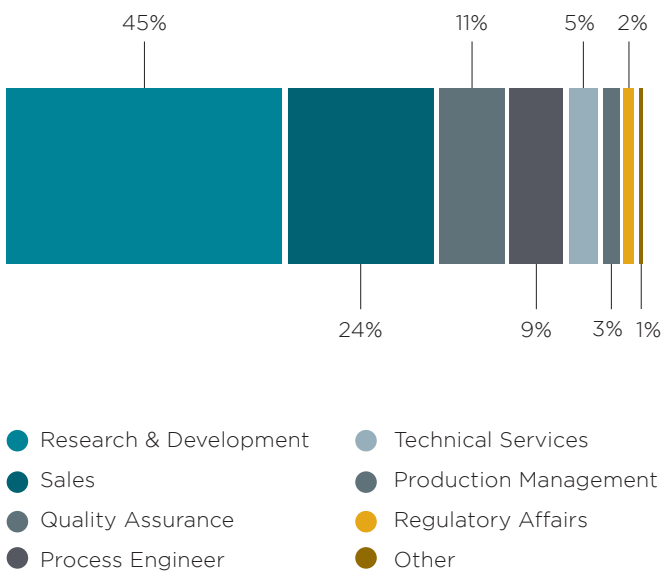
BRS Registered Candidates Ratio



Salary Table/Forecast

Roles	Salary (Million Yen)		
	Low	Middle	High
EHS	6	7.5	9
Flavorist	6	7.5	9
Process Engineer	6	7.5	9
Production Management	6	7.5	9
Quality Assurance	6	7.5	9
Regulatory Affairs	6	7.5	9
Research & Development	5	8.5	12
Sales	5	8.5	12
Technical Services	6	7.5	9

BRS Job Opening Ratio



With more interviews being conducted remotely, the issue of how long a hiring process takes is crucial; cases of companies losing key talent on account of lengthy hiring processes are regrettable and avoidable. Moreover, although there is demand for candidates who can conduct global negotiations and propose strategic solutions, there is a definite lack of such talent within the chemical industry. Companies are thus advised to actively consider non-Japanese people as well.

Consulting

The importance of technology is increasing in the consulting industry, escalated by the COVID-19 pandemic. DX is the focus and the key to future business growth. This is the cause behind the increase of IT-related job posts in not only the big 4, traditional consulting firms, but also in business consulting firms. The demand for qualified professionals in traditional consulting such as business consultants and accounting consultants will remain consistent going forward.



Skills and experiences in high demand

- Digital transformation (IoT, AI, Blockchain)
- Planning and development of new businesses
- Management of global IT delivery projects

Professionals with expertise in ERP, cloud technology and IT Security are in high demand



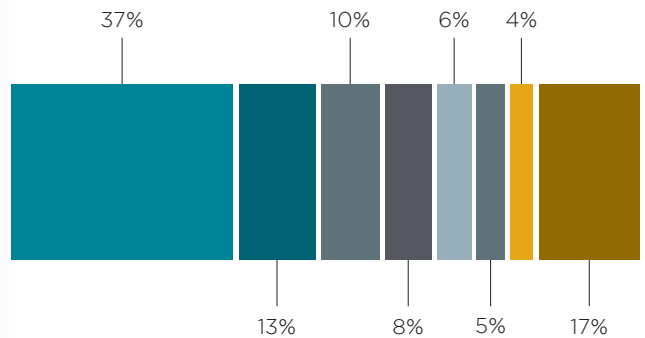
Candidate priorities

- Career path
- Fully remote work environment
- Compensation

Many candidates are focused on working on projects that will help them acquire the skills and experiences to escalate their career



BRS Registered Candidates Ratio



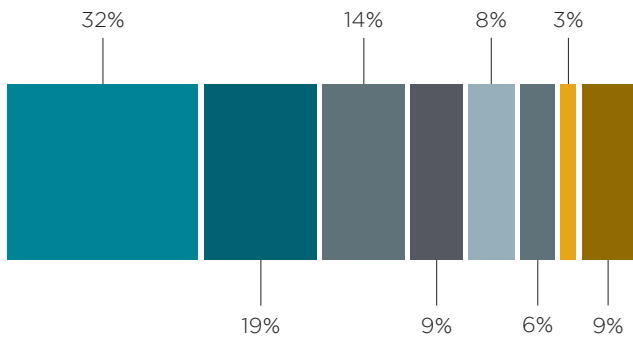
- Technology Consultant
- M&A Advisory
- Consultant
- Management Consulting
- Advisory
- BPR
- Financial Advisory
- Other

Salary Table/Forecast

Roles	Salary (Million Yen)		
	Low	Middle	High
Advisory	7	10	15
BPR	7	10	15
Business Development	7	10	15
Consultant	9	15	20
Corporate Strategy	9	15	20
Development & Training	7	9	12
Financial Advisory	7	10	15
HR Consulting	7	10	15
Industrial Consulting	7	10	15
IT Security & Audit	7	10	15
M&A Advisory	7	10	15
Management Consulting	9	15	20
Partner	18	25	35
Pre Sales / Post Sales	6	9	12
Risk Consulting	7	10	15
Senior Consultant	12	15	20
Technology Consultant	7	10	15

Consulting

BRS Job Opening Ratio



- Technology Consultant
- Consultant
- M&A Advisory
- Financial Advisory
- Risk Consulting
- HR Consulting
- BPR
- Other



With the activation of DX, the demand for business consultants who can lead clients' problem solving using business and IT is increasing. In IT consulting firms, consultants who can identify the clients' issues and make proposals are in high demand. Also the demand of "hands-on" technology professionals who can develop and deliver the system or those with expertise such as cyber security is increasing and becoming more competitive.

Electronics

The electronics industry had been on a growth trajectory following advancing automatization, IoT and AI initiatives. However, company revenues have been varied since the spread of COVID-19. 5G-related products, forecasted to expand even before the onset of the COVID-19, as well as home entertainment electronics, have all seen high demand. At the same time, companies will find future forecasts difficult to build with heightened tensions surrounding trade between the US and China.



Skills and experiences in high demand

- Telecommunication based engineering
- Semiconductor memory
- Automation

A growing number of opportunities to work with overseas alliances has prompted a rise in demand for those with language skills



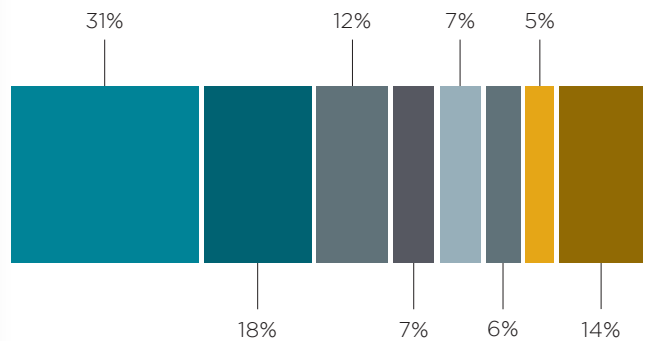
Candidate priorities

- Cutting-edge technology
- Corporate culture
- Challenging role

The growth potential and future prospects of a business - in particular, how technology is adapted - is key



BRS Registered Candidates Ratio

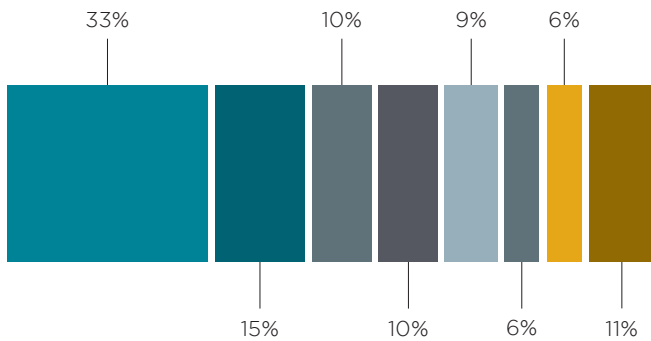


- Sales
- Electrical Engineer
- Process Engineer
- Product Development
- Research & Development
- Project Management
- Quality Assurance
- Other

Salary Table/Forecast

Roles	Salary (Million Yen)		
	Low	Middle	High
Application Development	6	7	10
Electrical Engineer	5	7	9
Embedded Engineer	5	7	10
Field Service Engineer	5	6.5	8
Maintenance Engineering	5	6	7
Mechanical Engineer	5	6.5	8
Plant Manager	8	12	20
Process Engineer	5	6.5	10
Product Development	5	7	10
Production Management	5	6.5	8
Project Management	6	7	10
Quality Assurance	6	7	10
Research & Development	6	7	9
Sales	5	7	10
Technical Advisor	6	7	9
Technical Sales	5	7	10
Technical Service	5	6	7

BRS Job Opening Ratio



- Sales
- Electrical Engineer
- Process Engineer
- Product Development
- Quality Assurance
- Mechanical Engineer
- Technical Sales
- Other



The industry's main rivals for hiring talent with IoT, automotive EV, and 5G experience are not companies within the electronics industry, but rather, top IT companies including GAFAM. In order to successfully hire the right talent, companies are seeing the need to provide compensation and work environments comparable in flexibility to that of GAFAM companies, while devising ways to present the potential of their technology in an attractive way to candidates.

Energy

The energy industry is undergoing major changes due to the construction of sustainable energy systems and the creation of renewable energy-based economies. Industry wide deregulation has allowed new companies to enter the energy industry, and this coupled with the M&A activities of large firms to become total energy providers has fueled greater competition than ever. In this changing environment, professionals who are strong in initiating new business from scratch, have high agility, and can show strong leadership are in high demand.



Skills and experiences in high demand

- Renewable energy
- High voltage power engineering
- LNG (Liquefied Natural Gas)

In order to deal with cross-border projects, global project management skills are in high demand



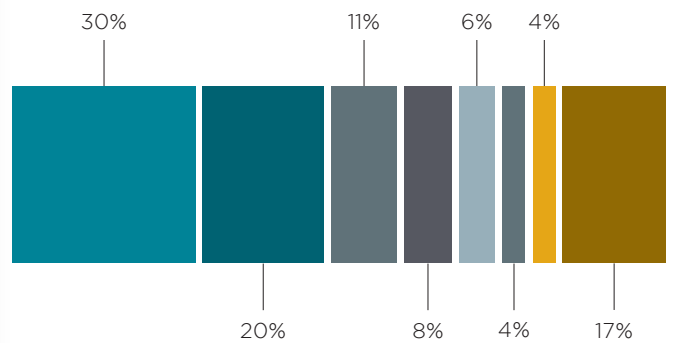
Candidate priorities

- Scope of responsibility
- Future business plan
- Company brand and reputation

In the changing environment with poor visibility into the future, candidates are focusing on businesses with strong future potential



BRS Registered Candidates Ratio

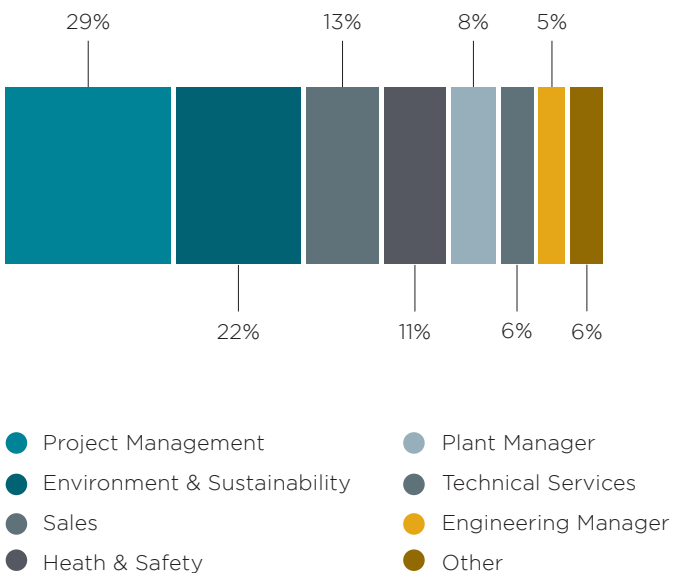


- Project Management
- Environment & Sustainability
- Sales
- Health & Safety
- Electrical Engineer
- Plant Manager
- Mechanical Engineer
- Other

Salary Table/Forecast

Roles	Salary (Million Yen)		
	Low	Middle	High
Electrical Engineer	6	7.5	9
Engineering Manager	8	10.5	13
Environment & Sustainability	5	6.5	8
Field Service Engineer	5	6.5	8
Health & Safety	6	7.5	9
Mechanical Engineer	6	7.5	9
Plant Manager	8	10.5	13
Process Engineer	6	7.5	9
Production Engineer	6	7.5	9
Project Management	8	10.5	13
Quality Assurance	6	7.5	9
Sales	6	8.5	12
Technical Services	6	6.5	8

BRS Job Opening Ratio



As the energy industry is an infrastructure business supporting people's daily lives, it has suffered less impact from COVID-19 than other industries. The restrictions set on overseas travel have slowed the number of new projects. However, as positive news circulates about the possible end to the pandemic, borders will soon reopen, projects will commence soon after, and hiring will be needed to meet the demand. We also expect the renewable energy business to grow in 2021 and beyond.

Machinery

The overall machinery industry is in a challenging situation as companies stopped investing in facilities and equipment due to the COVID-19 pandemic. However, machinery related to digital technologies such as 5G, the automation of distribution warehouses, and energy saving initiatives in factories is expected to grow. Hiring demands are expected to be for qualified professionals with relevant technical experience.



Skills and experiences in high demand

Automation related technology

Energy saving related technology

Robotics

In sales, the demands are high for those who are able to obtain new clients rather than simply maintain existing relationships



Candidate priorities

Product / business potential

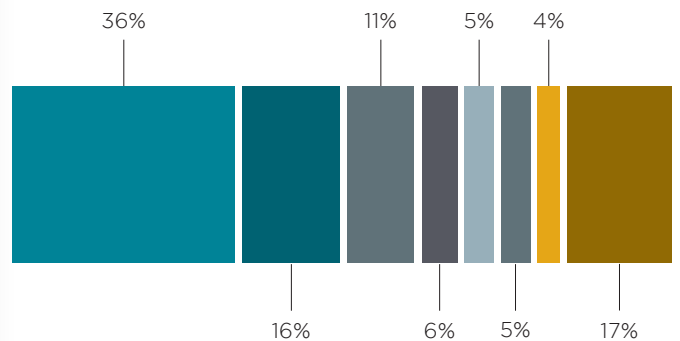
Involvement with cutting-edge technology

Job security

Engineers have a strong preference to work at companies utilizing cutting-edge technology



BRS Registered Candidates Ratio

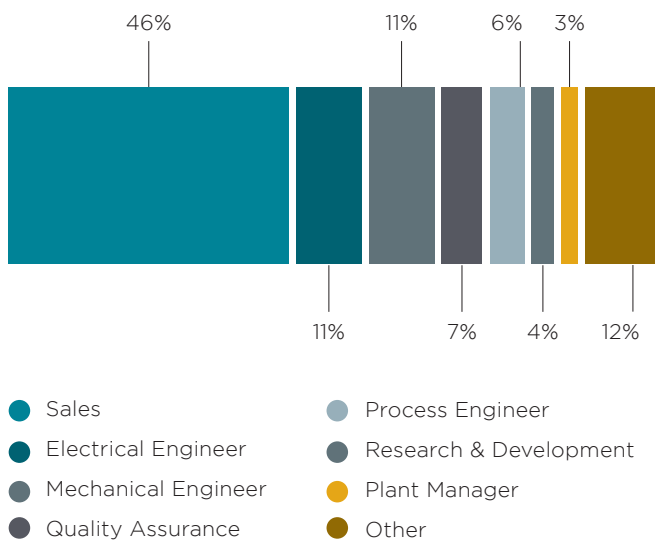


- Sales
- Mechanical Engineer
- Electrical Engineer
- Product Development
- Process Engineer
- Project Management
- Quality Assurance
- Other

Salary Table/Forecast

Roles	Salary (Million Yen)		
	Low	Middle	High
Construction Engineer	5	6.5	9
Construction Manager	6	7	10
Electrical Engineer	5	6	8
Embedded Engineer	5	6	9
Field Service Engineer	5	6	8
Health and Safety	6	8	10
Maintenance Engineer	5	6	7
Mechanical Engineer	5	6	8
Plant Manager	8	12	20
Process Engineer	5	6.5	8
Product Development	5	7	9
Production Management	5	6.5	8
Project Management	5	7	9
Quality Assurance	5	7	9
Research & Development	5	7	9
Sales	6	8	10
Technical Services	5	6	7

BRS Job Opening Ratio



The current situation is not expected to change in 2021 and it is predicted that the gap between the types of machinery being used will increase. Automation-related businesses are expected to grow. Also machinery related to logistics and delivery, such as material handling, will grow due to the increasing demand of e-commerce. Professionals with IoT utilization-related skills will be in high demand.

Medical Device

Medical device companies suffered a negative impact from COVID-19 due to the restrictions placed upon medical facility visits and the postponement of operations. However, the situation has somewhat recovered in the summer with the new demand for products related to PCR testing. Demand for online marketing and commercial excellence professionals has increased as needs for in-person sales has dropped. Additionally, greater importance is being placed on communication skills in order to strengthen overseas relationships as well as assist in succeeding within a remote work environment.



Skills and experiences in high demand

- Surgical robotics
- Negotiation skills with governmental bodies
- AI medical diagnosis

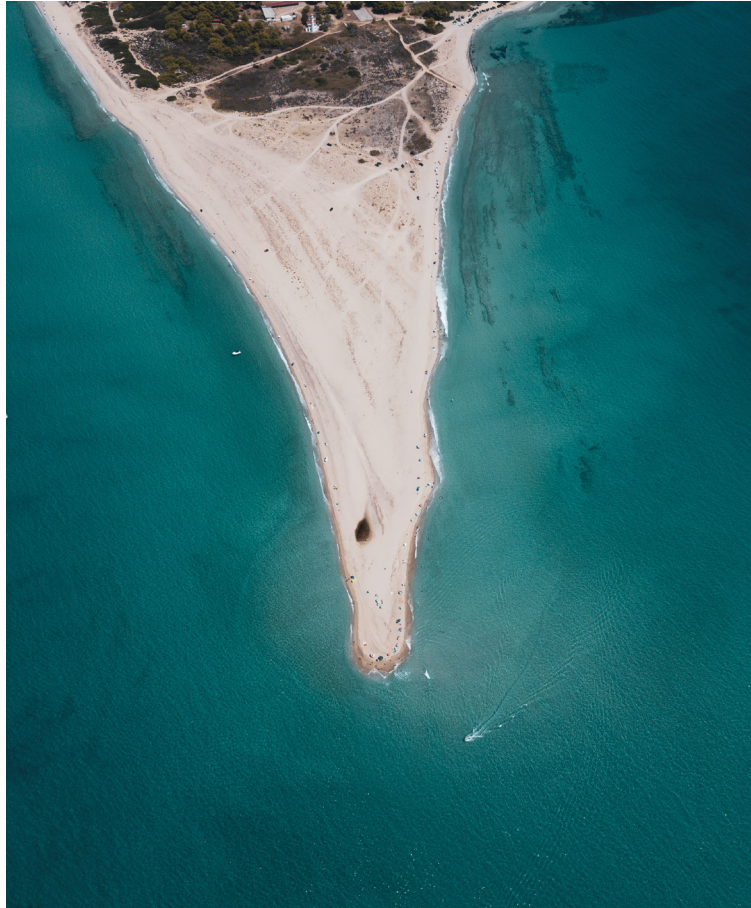
Clients are in search of candidates that have expertise in automated diagnosis by AI



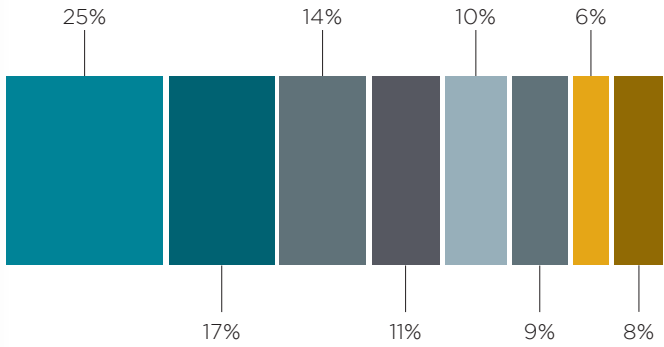
Candidate priorities

- Engagement in global projects
- Range of products
- Career advancement opportunities

Candidates put weight on whether new products are related to cutting-edge technology such as medical robots



BRS Registered Candidates Ratio

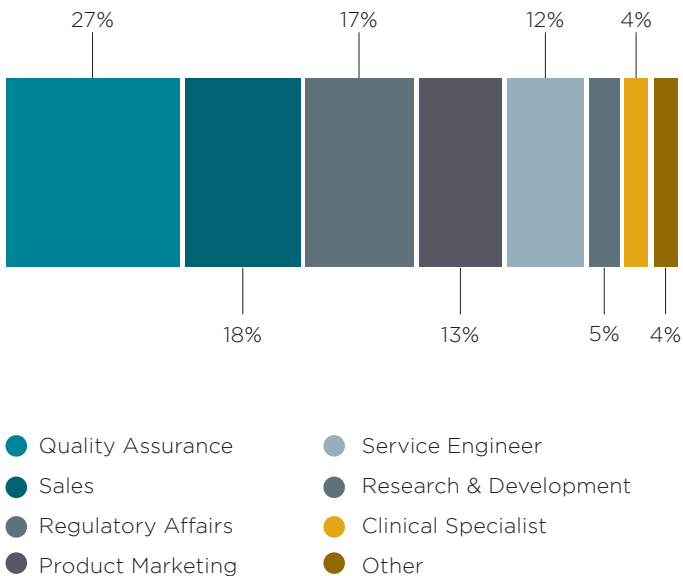


- Product Marketing
- Sales
- Research & Development
- Regulatory Affairs
- Quality Assurance
- Clinical Specialist
- Service Engineer
- Other

Salary Table/Forecast

Roles	Salary (Million Yen)		
	Low	Middle	High
Clinical Specialist	6	8	11
Marketing Communication	6	8	10
Medical Device Manufacturing	6	7.5	9
Product Management	7	9	11
Product Marketing	8	10	14
Quality Assurance	7	10	15
Regulatory Affairs	8	10	15
Research & Development	5.5	8	12
Sales	6	9	13
Service Engineer	5.5	8	10
Training & Development	6	9	12

BRS Job Opening Ratio



The majority of hiring within foreign capital companies was done online as many of these firms already had full remote work environments in place. As a result, more companies have shortened the time from application to placement with a smoother and speedier hiring process. Also, as an increasing number of professionals are looking for a fully remote working environment, many companies are starting to consider that their work environment will be one of the keys in successfully meeting their hiring goals.

Pharmaceutical

There are not many cases within the pharmaceutical industry where the COVID-19 pandemic has influenced business negatively. However, demand for OTC drugs has dropped with the exception of infection prevention related products. Also, the CRO space fell into a negative in 2019 for the first time in the past decade and the suspension of projects due to COVID-19 has made the situation worse. As an overall trend, we will continue to see growth in the area using medical and IT, such as the utilization of CRM, automation within manufacturing and digital transformation. Overall hiring should remain active and will vary from company to company.



Skills and experiences in high demand

- Digital transformation
- Global clinical trial
- Unmet medical needs



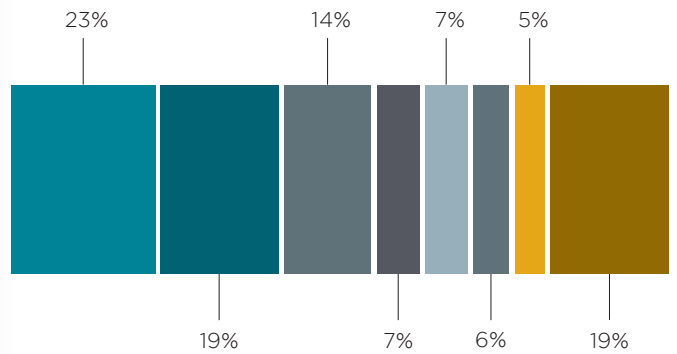
Candidate priorities

- Pipeline of products
- Company vision and values
- Engagement in global projects

Candidates tend to make judgment on potential opportunities based upon their ability to grow within the organization



BRS Registered Candidates Ratio

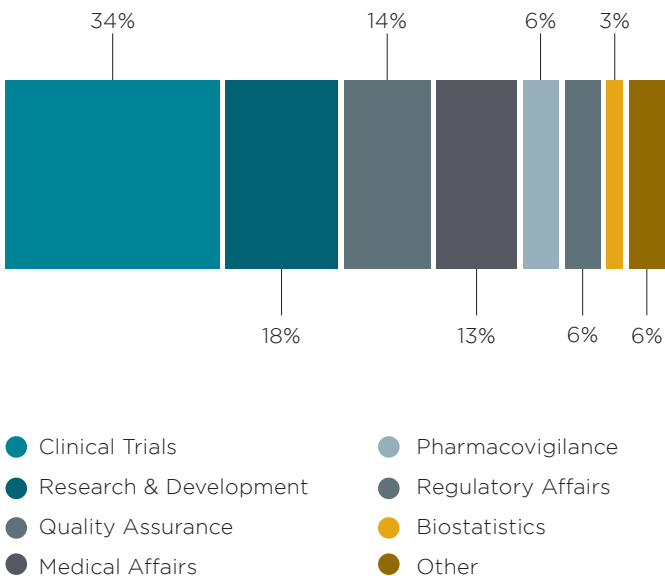


- Clinical Trials
- Research & Development
- Quality Assurance
- Alliance Management
- Biostatistics
- Pharmacovigilance
- Regulatory Affairs
- Other

Salary Table/Forecast

Roles	Salary (Million Yen)		
	Low	Middle	High
Alliance Management	8	11	15
Biostatistics	6	9	13
Clinical Trials	6	8.5	12
Drug Manufacturing	6	8.5	12
Medical Affairs	8	13.5	18
Medical Doctor	8	14	20
Medical Researcher	8	14	20
Nurse	5	6	7
Pharmacist	5	6	7
Pharmacovigilance	6	9	12
Pre-Clinical Trials	6	9	12
Pricing	8	11	15
Production Management	6	8	11
Quality Assurance	6	9	12
Regulatory Affairs	6	10	15
Research & Development	6	9	12

BRS Job Opening Ratio



We expect hiring activities in the pharmaceutical industry to remain active in 2021 and beyond. With the increase of work involving overseas counterparts in important global projects, language skill is becoming a must-have rather than a nice-to-have. The demand for professionals with high pharmaceutical expertise and IT skills will continue to increase. Also, many companies especially foreign-capital firms are improving on their time to hire through the utilization of remote interviews.

Corporate Functions



Eiko Kishida
Senior Manager

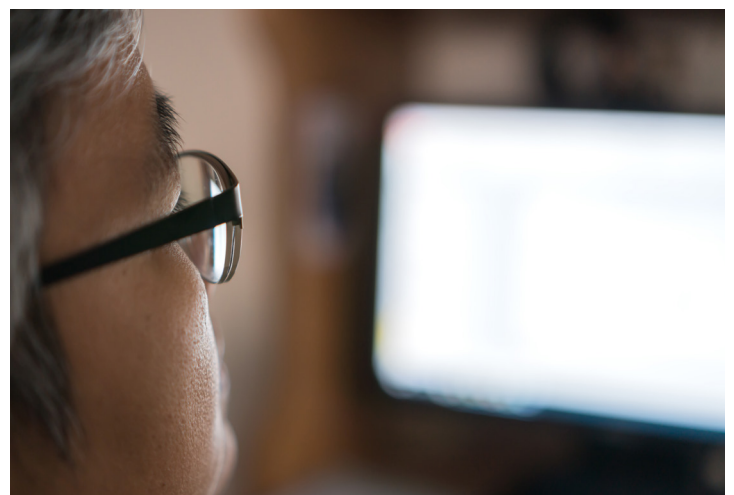
Overall hiring trends of 2020

The initial global economic shock caused by the outbreak and onset of the COVID-19 pandemic had a major impact for both Japanese multinationals and foreign affiliated firms with Japan businesses. Hiring budgets and plans to add new headcount for 2020 were widely put on hold and only urgent business critical positions remained open. As a result, the overall job opening to candidate ratio, which remained constant at 1.57 through October 2019 to January 2020 had dropped to 1.04 by August*. After initial uncertainty, some market stability returned within the new normal around July 2020 and we have since seen a gradual increase in overall hiring activity across most corporate functions and within the B to C sales & marketing area.

Candidate demand

While the number of job openings within both the corporate functions and the B to C sales & marketing space has undoubtedly decreased within foreign affiliated companies, the total number of applicants per job has not significantly changed. Therefore, as with previous years we are still in a candidate driven market with those with the strongest skills and experience levels still receiving multiple job offers. For some job seekers the uncertainty in the market has meant that they are extra cautious about changing jobs and do not want to risk potentially being last-in-first out. As a result, as with past years, companies are still having to compromise on certain criteria such as age, level of experience and salary.

As companies continue to drive efficiency and streamline costs, we foresee continued cross-industry demand in 2021 for talented financial professionals with strong FP&A and accounting skills. Within the HR space, hiring appetite will remain strong for proactive strategic business partners who can drive the HR agenda and implement value add solutions to the business. Additionally, with employee engagement and wellness being high priority for many firms, HR professionals with demonstrated track records in these fields will be in the high demand. Needs within the legal and compliance function will remain stable and we believe there will be even more demand within large Japanese firms as they look to shore up their in-house legal





Companies should create a stronger and more engaging candidate experience through increasing the quality of interviews

capabilities. Overall, there will be no significant changes in needs for bilingual office support professionals, however, demand will remain strong for talented technical translators and interpreters within the life science and IT industries. For marketing and business development, the continued growth of e-commerce and online businesses will further drive opportunities for talented bilingual professionals with strong digital marketing experience and business planning backgrounds.

Employer branding and the candidate experience remain crucial

Successful hiring in 2021 will be dominated by those companies with either products or business models that remain strong and

robust within the new economic climate. The challenges and competition to hire the most qualified candidates will remain high, even if volume remains below pre-COVID levels.

Our advice to get ahead of the competition and to secure the best talent in the market is to continue working on employer branding through improving flexible working practices and refining existing employee benefits. Increasingly these are becoming more and more important factors for job seekers when deciding on which jobs and companies to apply to, therefore it is important to benchmark against other firms to gain a competitive edge. Additionally, with a reduction in physical face to face interviewing, all companies should be creating a stronger and more engaging candidate experience through increasing the quality of all interviews both online and in person. By implementing well-structured interviews, utilizing competency or behavioral based assessment techniques, assessment quality will be improved, and candidates will receive a strong impression of a highly professional and organized company. This in turn will have a positive impact both upon individual candidates and companies' overall employer brand. Additionally, it is also of great importance for companies to provide a strong narrative regarding their business that outlines their strengths, not only in terms of financials and market positioning but also in terms of culture, work style and as an employer of choice.

*This is according to data presented by the Japan Ministry of Health, Labor and Welfare

Accounting and Finance

Although demand differed between companies and industries, the overall needs for accounting and finance professionals was relatively stable and we have not seen a big difference from previous years. Immediately after the COVID-19 pandemic hit, the market slowed drastically due to headcount freezes, however, from July hiring resumed. One noticeable trend for this year is that it has been more challenging for professionals across all ages to find employment. The exception to this has been seen in a higher demand for candidates in their early 30s with relevant qualifications and high English ability.



Skills and experiences in high demand

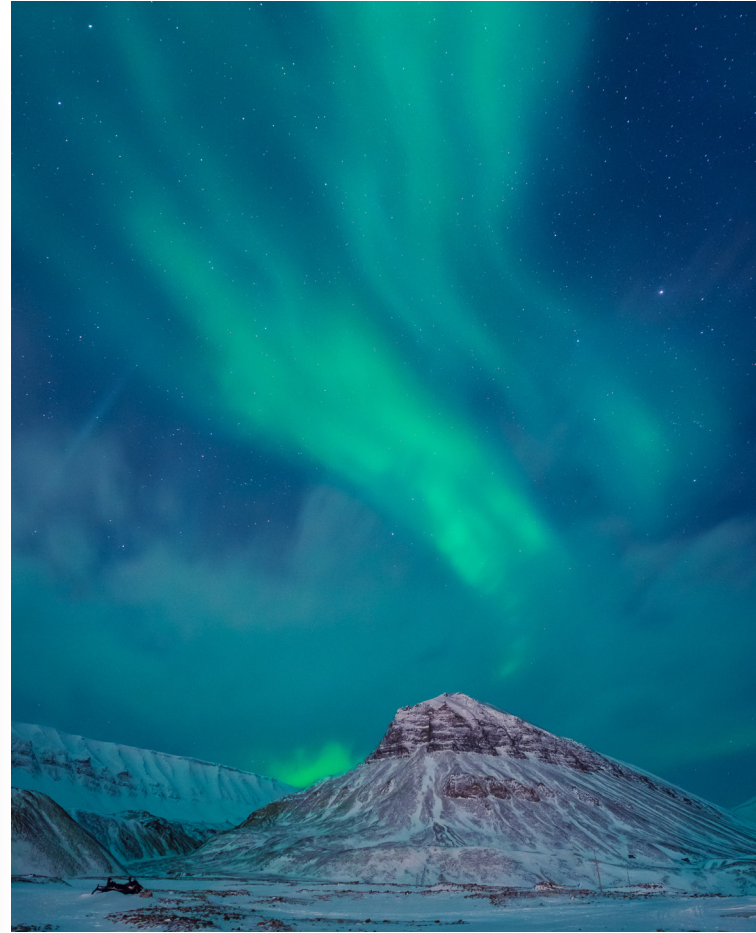
- Financial planning and analysis
- CPA and USCPA
- International stakeholder management



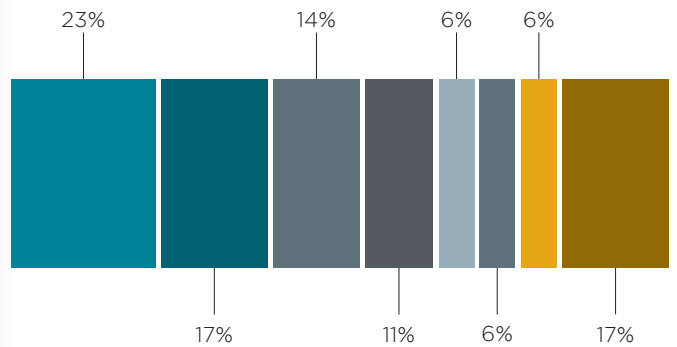
Candidate priorities

- Career advancement opportunities
- Compensation and benefits
- Company brand and reputation

Candidates are increasingly placing more importance on company brand and reputation as they seek greater future potential and job security



BRS Registered Candidates Ratio

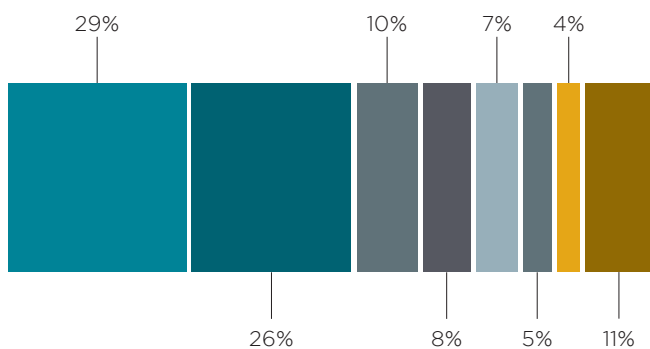


- Corporate Strategy
- AP / AR
- Financial Accounting
- Finance Manager
- Advisory / Consulting
- CFO
- Other

Salary Table/Forecast

Roles	Salary (Million Yen)		
	Low	Middle	High
Accounting Manager	8	11	14
Accounts Payable / Accounts Receivable	5	7	9
Advisory / Consulting	7	11	15
Audit / Risk	6	9	14
CFO	18	25	35
Controller	10	16	24
Corporate Strategy	8	12	20
Finance Manager	8	11	14
Financial Accounting	6	8	10
Financial Planning & Analysis	8	10	14
Investor Relations	7	9	13
Tax / Treasury	6	8	12

BRS Job Opening Ratio



- AP / AR
- Corporate Strategy
- Financial Accounting
- FP&A
- Audit / Risk
- Finance Manager
- Advisory / Consulting
- Other



Although there are a larger number of candidates in the market than pre-COVID, the competitiveness and difficulties in hiring remain unchanged as most companies are looking to hire the same type of qualified candidates. With the introduction of remote interviews, hiring speed is one of the keys to acquiring quality candidates. In order to achieve this, shortening the total hiring process by setting more than one interview on the same day is an effective strategy to be considered.

Legal / IP / Compliance

The Legal / IP / compliance market has been active for the last several years as companies continuously look to strengthen these internal functions. Immediately after COVID became pandemic, the market slowed drastically from April to June due to the headcount freezes, however, from July hiring seems to have resumed. This was seen not only in large enterprises but also within IT / digital payment companies. Post-COVID saw the introduction of remote interviewing which has led to smoother and quicker interview processes.



Skills and experiences in high demand

- Dealing with international legal counterparts
- The patent attorney qualification
- Personal and information compliance experience

For compliance, experience and knowledge around privacy policy has been in heavy demand due to the expansion of digitalization



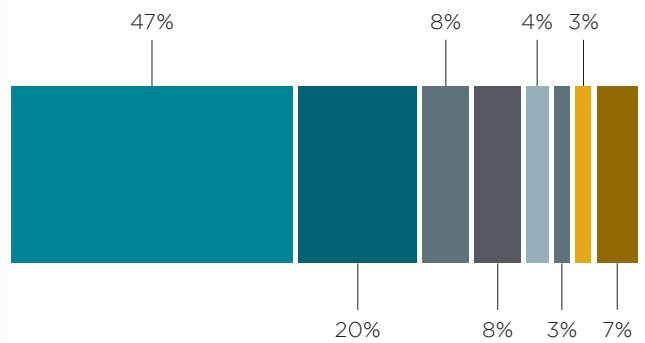
Candidate priorities

- Scope of responsibility
- Compensation and benefits
- Remote and flexible work

Positions that have a global remit are particularly attractive for bilingual legal professionals



BRS Registered Candidates Ratio

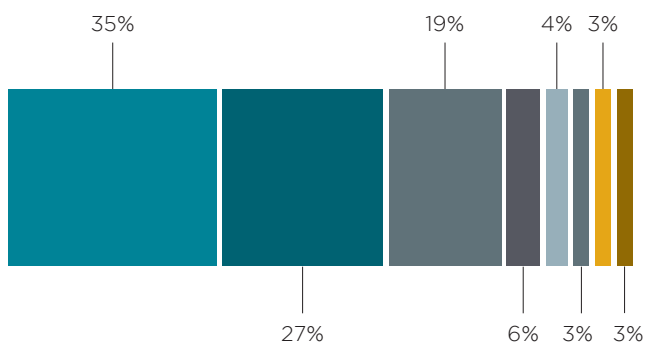


- In-house Legal
- Intellectual Property
- Corporate Law Specialist
- Governmental Affairs
- In-house Lawyer
- Paralegal
- Legal Counsel
- Other

Salary Table/Forecast

Roles	Salary (Million Yen)		
	Low	Middle	High
Commercial Law Specialist	6	7	9
Corporate Law Specialist	6	7	9
Governmental Affairs	6	8	11
In-house Lawyer	9	12	25
In-house Legal	6	9	17
Intellectual Property	6	8	10
Legal Counsel	10	15	25
Paralegal	5	6	8
Partner	35	45	60
Private Practice	9	13	30

BRS Job Opening Ratio



- In-house Legal
- Governmental Affairs
- Intellectual Property
- Corporate Law Specialist
- Paralegal
- Private Practice
- Legal Counsel
- Other



Companies seem to have resumed hiring, hence current demands are relatively high and we expect this to continue. In the new online world, clients should increase the number of applicants they interview at the first interview stage in order to get a better understanding of the broader and available candidate pool.

Human Resources

Since the state of emergency, there has been huge pressure on HR to adapt quickly to remote work both from an HRIS and a technology perspective. Also, with remote work being widely adopted across many firms, employee wellness and engagement has been on the agenda more so than before. Post-COVID, there was a large initial slow down in needs as many clients halted hiring both for new and replacement roles. This changed in the second half and we are seeing rising needs across multiple industries.



Skills and experiences in high demand

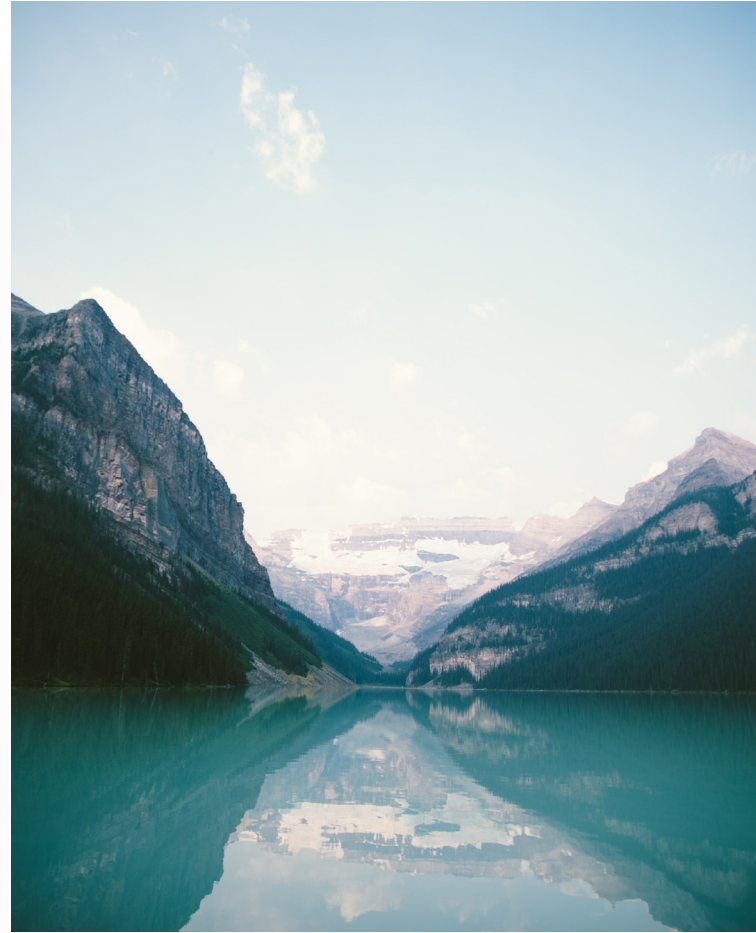
- Agile and solution focused HR
- Wellness and engagement
- Client facing business partner experience



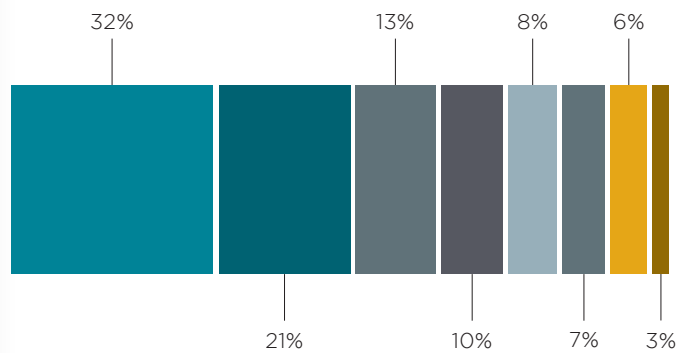
Candidate priorities

- Employer brand and company culture
- Development opportunities and a clear career path
- Flexible working arrangements

Candidates are particularly interested in companies that see HR as a key driver in business performance



BRS Registered Candidates Ratio

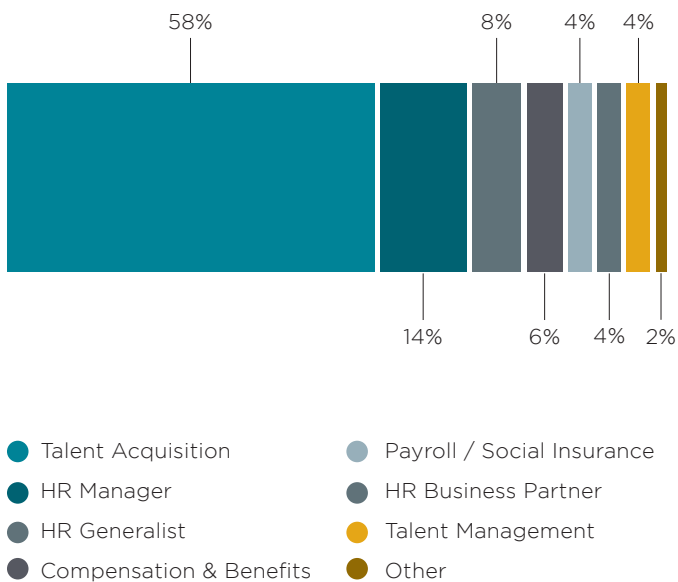


- HR Generalist
- Talent Acquisition
- HR Director
- HR Manager
- HR Business Partner
- Talent Management
- Payroll / Social Insurance
- Other

Salary Table/Forecast

Roles	Salary (Million Yen)		
	Low	Middle	High
Compensation & Benefits	7	10	15
Employee Relations	7	9	13
Global HR	6	8	12
HR Business Partner	8	12	15
HR Director	14	18	28
HR Generalist	7	9	12
HR Manager	8	10	13
HRIS	5	7	9
Learning & Development	6	9	15
Payroll / Social Insurance	5	7	10
Talent Acquisition	6	8	12
Talent Management	8	10	13

BRS Job Opening Ratio



In 2021, we foresee strong demand for agile HR professionals able to adapt and add HR value to changing business and physical environments. The greatest needs will be for bilingual HR business partners and generalists with experience in driving the HR agenda. In addition, the competition will be high for professionals with wellness and engagement-related experience.

Office Support

Post-COVID there was a large initial slow down in needs as many clients halted hiring both for new and replacement roles. Furthermore, with less physical meetings and business trips, many clients have looked to reduce the size of their administrative support functions. The office support market started to recover from Summer 2020 and we have seen renewed demand in most areas, and particularly for technical translators and interpreters.



Skills and experiences in high demand

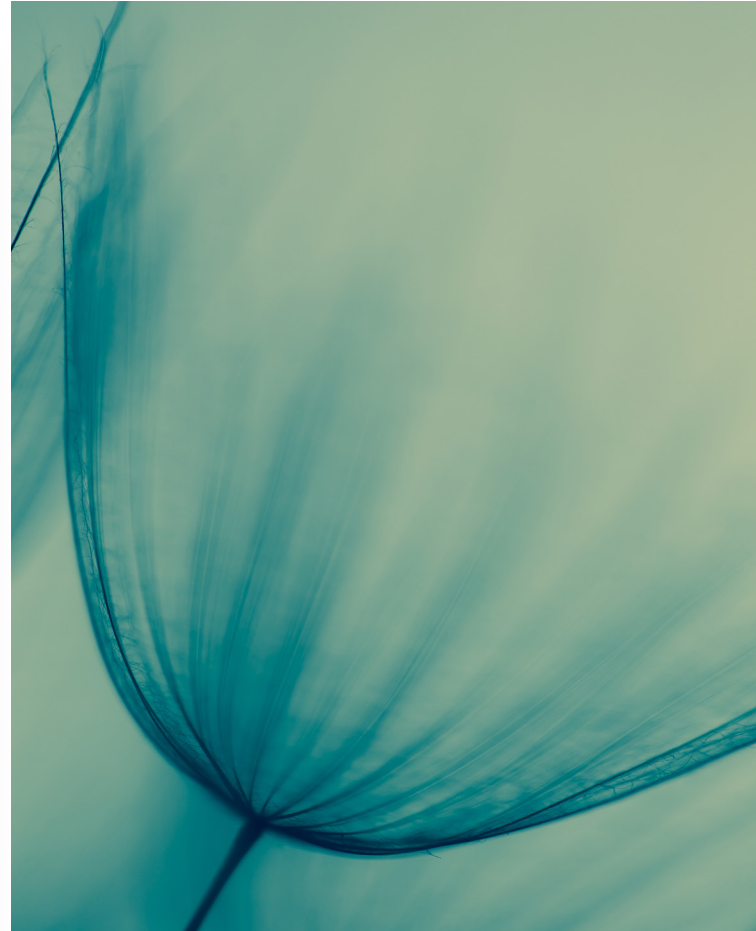
- Proactive and detail-oriented administration
- Strong IT and organizational skills
- Accurate and high quality technical translation



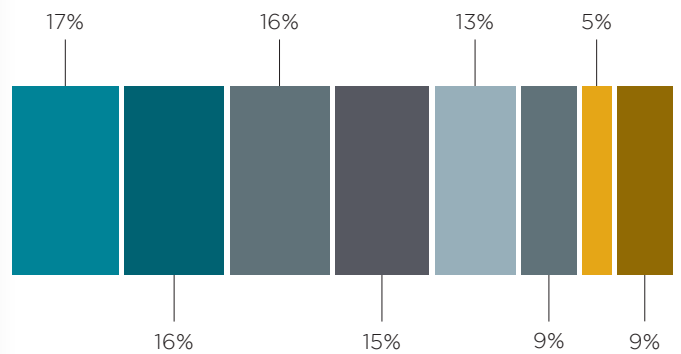
Candidate priorities

- Flexible hours and remote work
- Job security
- Company name and employer brand

Office support professionals are placing even greater importance on employer brand and job security



BRS Registered Candidates Ratio

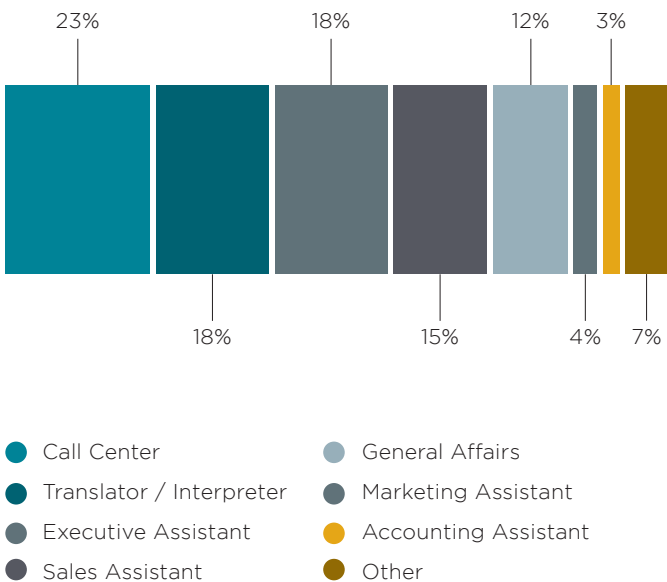


- General Affairs
- Translator / Interpreter
- Sales Assistant
- Executive Assistant
- Accounting Assistant
- Call Center
- Marketing Assistant
- Other

Salary Table/Forecast

Roles	Salary (Million Yen)		
	Low	Middle	High
Accounting Assistant	4	5	6
Call Center	3.5	4.5	6
Executive Assistant	4	6	10
General Affairs	5	8	12
HR Assistant	4	5	6
Logistics Assistant	4	5	6
Marketing Assistant	4	5	6
Office Manager	7	9	12
Sales Assistant	3.5	4.5	6
Team Assistant	3.5	4.5	5.5
Translator / Interpreter	6	8	10

BRS Job Opening Ratio



The market started to recover in Summer 2020 as the economic and social climate stabilized. We foresee continued needs for talented assistants, translators and office professionals. Despite the current economic conditions, this is still a candidate driven market and clients should look to improve online engagement and the candidate experience in online interviews to gain an edge over their competitors.

Sales and Marketing

Since 2017 the greatest needs have been within the digital marketing space, a trend which has continued post-COVID and has largely been driven by the boom in e-commerce. Additionally, this has led to fresh needs for skilled business development professionals with relevant industry experience. Within business planning, demands have increased as many Japanese firms seek to revise their strategies in line with the changing market conditions. For sales roles, demand remains for director level professionals who have the ability to scale overseas business operations.



Skills and experiences in high demand

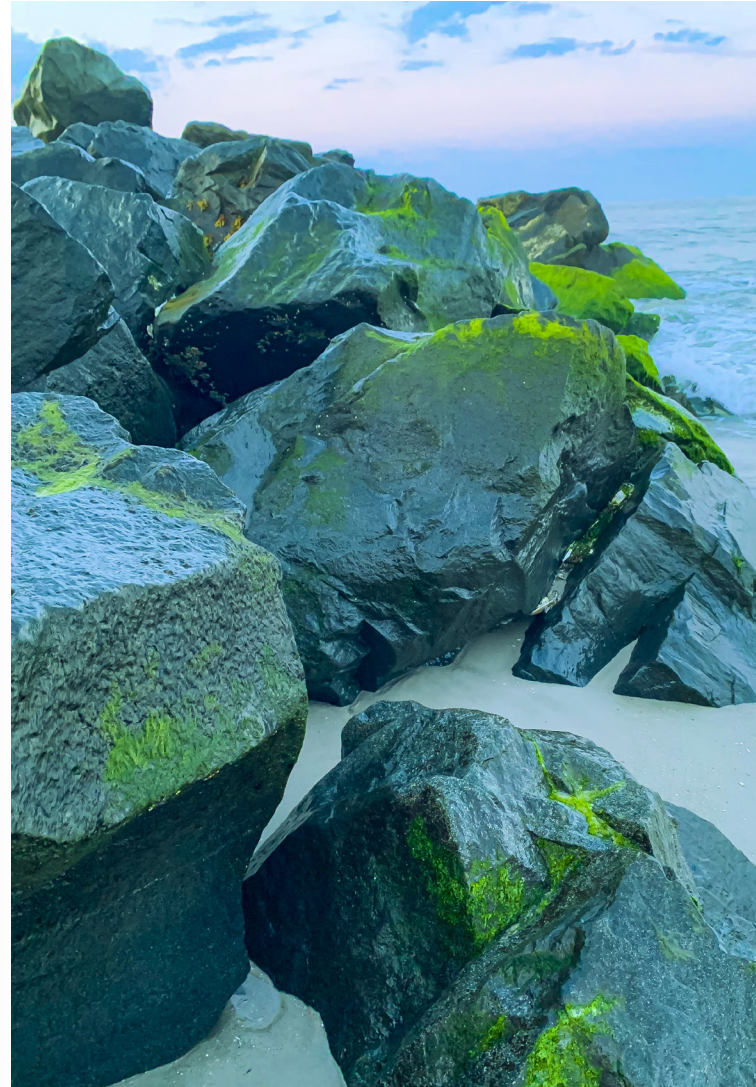
- Product development and brand strategy
- E-commerce industry experience
- Digital marketing know-how



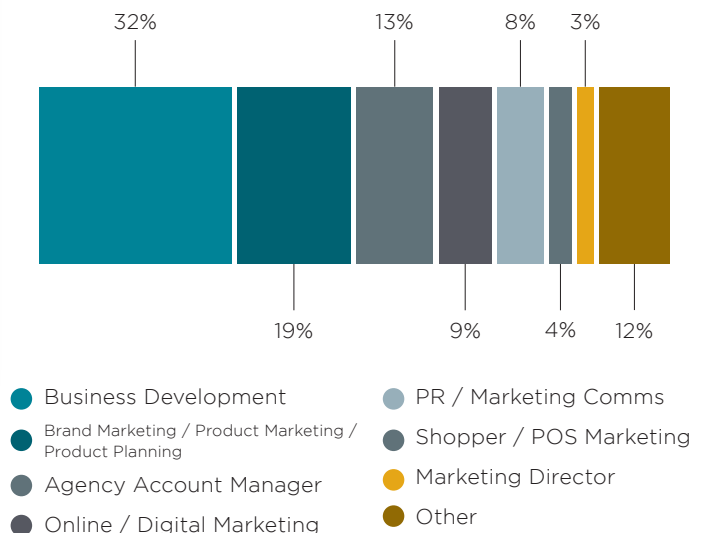
Candidate priorities

- Companies with market leading products
- Attractive compensation and benefits
- Agile working environment

S&M professionals place the greatest emphasis on companies with strong and successful product lines



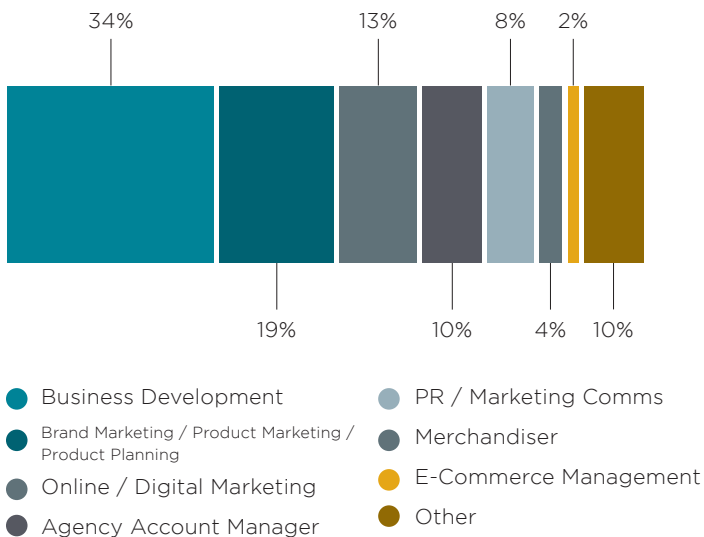
BRS Registered Candidates Ratio



Salary Table/Forecast

Roles	Salary (Million Yen)		
	Low	Middle	High
Agency Account Manager	8	10	14
Brand Marketing / Product Marketing / Product Planning	7	11	14
Business Development	8	10	14
Country Manager / Representative	18	25	35
Data Analyst / Sales Analyst / Sales Planning	6	8	10
E-Commerce Management	7	10	14
Market Research	5	7	10
Marketing Director	14	16	20
Media planning	6	7.5	9
Merchandiser	5	9	13
Online Marketing / Digital Marketing	6	9	12
PR / Marketing Communications	7	10	14
Retail Management	6	9	12
Sales Director	15	20	27
Shopper Marketing / POS Marketing	6	8	10
Trade Marketing	7	8.5	11
Wholesales / Field Sales	6	7	10

BRS Job Opening Ratio



As demand and competition is high for marketing and digital marketing professionals, we advise to show more flexibility regarding candidate requirements. For example, by considering not only those who are an exact match in terms of product or industry, as well as those who are outside the ideal age and salary ranges, the available talent pool will greatly increase.

Supply Chain Management

Influenced by the continuous trade friction between US and China and the COVID-19 pandemic, companies are continuing to seek business efficiency and cost reductions, a trend that is also becoming of key importance within the supply chain area. Therefore needs within demand and supply planning, distribution optimization and inventory control are high. Also, with the increasing demands brought by the growth of e-commerce, many companies are placing greater importance on optimization and warehouse management, therefore competition is high for those who can lead digital transformation and automation.



Skills and experiences in high demand

- Data-driven decision making
- Cost reduction
- Introducing advanced systems

For cost reduction, wide knowledge, strategic know-how as well as execution skills are particularly sought after.



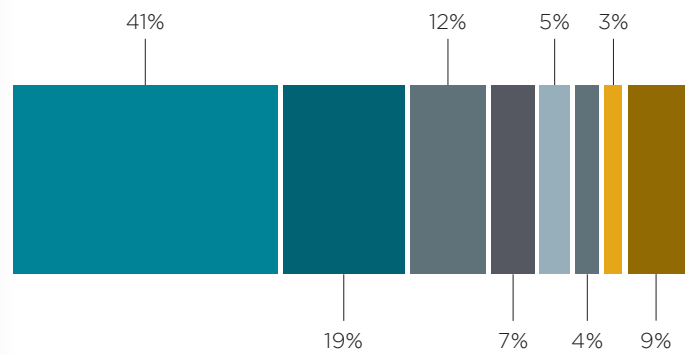
Candidate priorities

- Job security
- Scope of responsibility
- Compensation and benefits

Firms offering greater responsibilities and career advancement remain the most attractive



BRS Registered Candidates Ratio

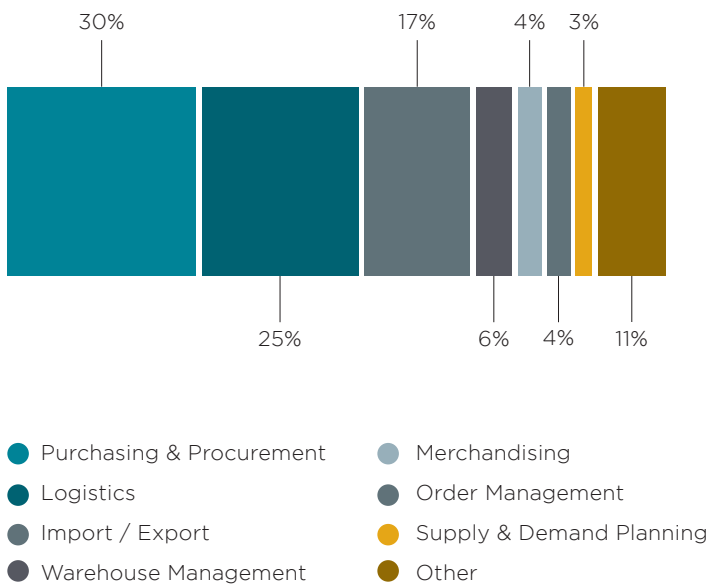


- Purchasing & Procurement
- Logistics
- Import / Export
- Supply & Demand Planning
- Order Management
- Warehouse Management
- Production Control
- Other

Salary Table/Forecast

Roles	Salary (Million Yen)		
	Low	Middle	High
4PL	5	7	10
Customer Service	5	7	9
Distribution	5	7	9
Import / Export	5	6	8
Inventory Control	5	7	8
Kaizen, Six Sigma and BPR	7	9	13
Logistics	6	9	12
Merchandising	5	7	8
Order Management	5	7	8
Production Control	5	7	10
Purchasing & Procurement	6	8	13
Supply & Demand Planning	6	9	13
Warehouse Management	6	8	11

BRS Job Opening Ratio



As efficiency and cost reduction are key topics and common problems amongst many companies, competition for professionals who can lead digital transformation and can excel at using advance analytic tools is high. This trend is expected to continue in 2021 and beyond. Although many companies tend to show caution when hiring it is important to increase the interview process speed to avoid potentially losing the limited number of qualified professionals. It is also important to recognize that there are many successful cases whereby companies have successfully filled positions by hiring professionals who were older than their initial preferences.

Technology



Satoshi Nakano
Director

While many sectors felt the negative effects from the COVID-19 pandemic and the subsequent reduction in people's mobility and personal spending, technology was not only immune to it but thrived from it. We witnessed active hiring throughout 2020 with the demand for engineers far outweighing the available talent pool. It appears that this imbalance in the supply and demand relationship within the technology sector was not an anomaly, with some models showing Japan will require an extra 500,000+ IT professionals to meet demand by 2030.

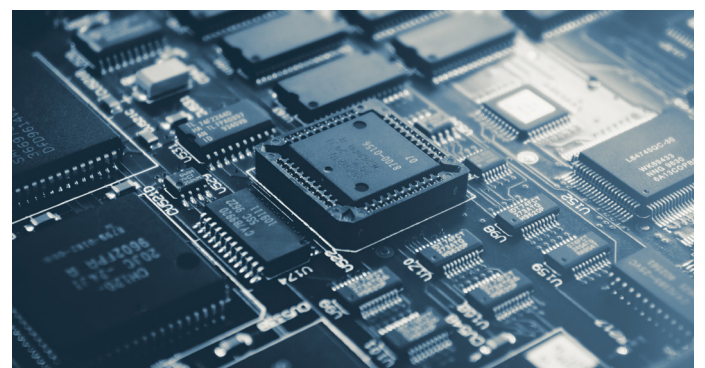
The main challenges that technology is facing in Japan is the digital cliff of 2025. Highlighted in the Ministry of Economy, Trade and Industry's DX report, it clearly outlines that Japanese legacy systems are unnecessarily complex and outdated. Therefore, major changes are required if Japan is to remain competitive on the global stage. Furthermore, there is also the "SAP 2025" issue facing many firms' Information System departments. With the existing SAP ERP's support system due to end in 2027, there is currently a lack of qualified professionals with the skills needed to migrate to new systems. Although these challenges are widely understood, only a few companies have been taking progressive actions to meet and solve them.

Although COVID-19 has had a major impact on society and of course the recruitment market, demand has remained strong for qualified IT professionals. Luckily, as the technology sector was the pioneer years ago in setting up remote work systems for their employees, the shift to total remote work due to COVID-19 was seamless. There was considerable demand with cloud services and online tools to combat the imminent challenges outlined within the government's DX report.

Furthermore, with the entire country shifting towards remote work, there is a dramatic increase in demand for security along with SaaS. Simply put, the "2025 Digital Cliff" and "SAP 2025" cannot be put on hold due to the virus, therefore many firms have continued to upgrade, as required.

Another trend to emerge through COVID-19, has been increased flexibility within many of our clients to hire regardless of location. We have seen Kansai-based companies successfully hire engineers in the Kanto region, only requiring them to visit the HQ on business trips. This flexibility in work location allowed companies based outside of the greater Tokyo metropolitan area to tap into a previously unavailable candidate pool. We foresee this trend continuing and even accelerating, providing these companies are able to offer competitive salaries and benefits.

Regarding the venture technology sector, the travel restrictions and closing of borders has directly affected the inward investment, which has drastically slowed the number of new startups from entering the market. A significant





amount of seed and early stage investment activity has paused, coinciding with the concentration of hiring in big tech and mature business models at the growth stage. Video communications, e-commerce, mobile gaming and delivery platforms showed an increase in demand, which will continue into early 2021.

Our advice would be to increase the utilization of non-Japanese, senior workers, and freelancers in your workforce

We expect a rebound in technology services and platforms related to hospitality quickly after borders reopen and confidence returns; two factors candidates are waiting on before making any serious job changing decisions.

What should companies do in 2021 to overcome the shortage of IT professionals?

The demand for IT professionals who can lead DX-related projects or drive the SAP shift is extremely high, and thus creating an extremely competitive market. Compounding this competition is the fact that companies that formerly had no needs in these areas are now looking to hire. One example would be with home electronics having more cloud-based components, forcing hardware companies to employ web-

engineers; or automotive companies needing to hire mobile engineers.

This increased overall candidate demand is far outstripping supply, and although many companies are discussing this as an issue, there are many companies unable to adapt their hiring strategies sufficiently enough to secure the required IT talent. Within the current market dynamics, some companies may need to consider shifting their requirement focus solely towards experience and knowledge, possibly ignoring or reducing the importance on preferred age and number of job changes. As there are critical positions open in the market, at all times, where the candidate may only be needed for a short number of years, relaxing the preference on age would extend that candidate pool to the older experienced engineers; thus increasing the odds to fill that role.

Depending on company goals, it may better to consider older and more experienced engineers who have extensive knowledge and expertise in legacy systems. In this candidate short market, it will also become increasingly necessary to consider non-Japanese speaking IT professionals who can bring the required skill sets. Companies who have successfully hired experienced and in-demand IT talent all have very clear goals in their hiring plans and ensure that they have the budgetary flexibility needed, as well as attractive working conditions.

The competition to hire IT professionals will continue to increase through 2021 and our advice would be to increase the utilization of non-Japanese, senior workers, and freelancers in your workforce. By accepting and embracing this new diversity, you will be able to meet both your hiring and business goals.

Digital / Online

Hiring activities in digital / online space has been very active as the COVID-19 increased the importance of DX even further. In the B to B area, the better adoption of remote work is leading the active use of online / cloud service and meeting tools. Additionally, people staying home increased the use of B to C services including e-commerce, online media, social media and games. Only a limited number of companies are able to fulfill their hiring demand due to the shortage of engineers and product managers.



Skills and experiences in high demand

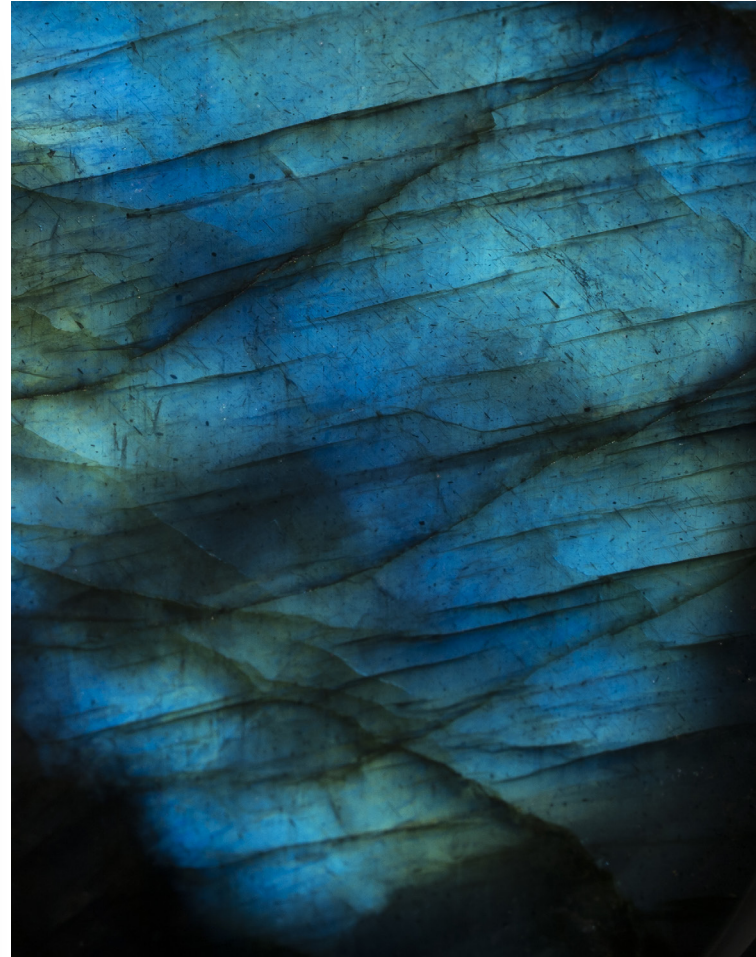
- Developing in modern programming language (Go, Scala, Python)
- Cloud technology (AWS, Azure)
- Product management / scrum master



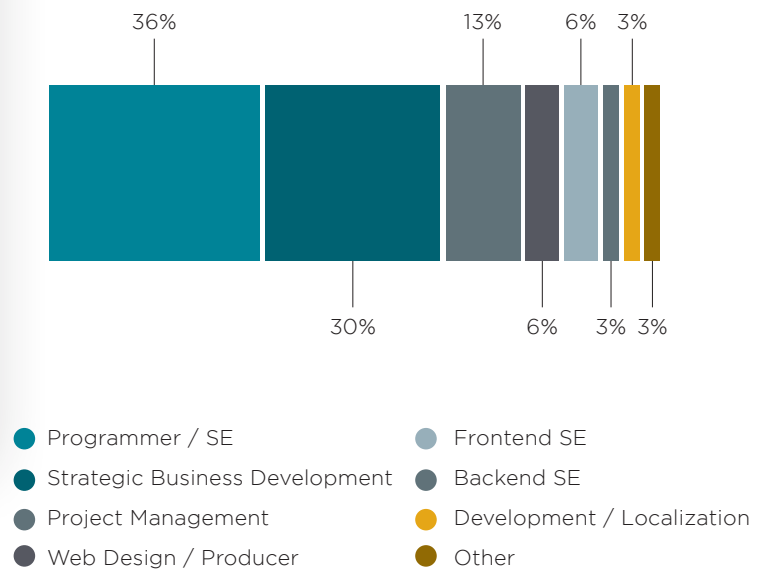
Candidate priorities

- Stock options
- Modern programming environment
- Innovative new products

Opportunity to work with cutting-edge technology in order to provide innovative services



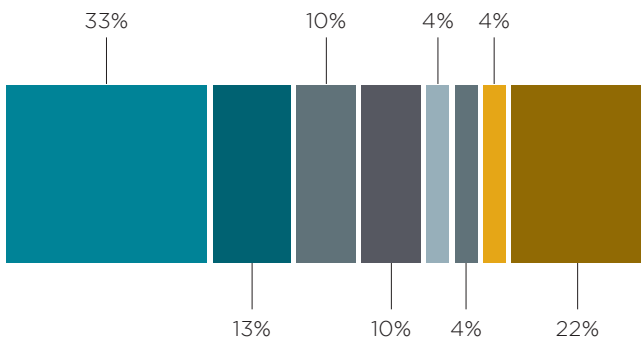
BRS Registered Candidates Ratio



Salary Table/Forecast

Roles	Salary (Million Yen)		
	Low	Middle	High
Android Software Engineer	6	9	12
Backend Software Engineer	6	9	12
Data Engineer / Data Analyst	7	10	15
Development / Localization	6	9	10
Frontend Software Engineer	6	9	12
Full Stack Software Engineer	7	10	15
iOS Software Engineer	6	9	12
Product Manager	7	10	15
Programmer / Software Engineer	6	9	12
Project Management	7	10	15
QA / Testing	6	8	10
Scrum Master	7	10	15
Site Reliability Engineer	7	10	15
Strategic Business Development	8	10	15
Web Design / Producer	6	8	10

BRS Job Opening Ratio



- Programmer / SE
- Backend SE
- Strategic Business Development
- Development / Localization
- Frontend SE
- Web Design / Producer
- Project Management
- Other



The shortage of professionals in digital / online area continues and we expect fiercer competition. It is essential to expand the candidate pool by including foreigners, seniors and freelancers. In addition, the flexibility of conditions and creating an attractive work environment, including a fully remote work environment, is critical to hiring top-tier talent.

Hardware

The demanded skills and experiences is changing in the hardware industry due to the expansion of the IoT market. Instead of engineers with only hardware development skills, those who understand both hardware and network or engineers who have development skills on both hardware and web are in high demand. Hiring activity is also active amongst IoT venture companies. For sales roles, the demand is increasing for sales professionals who can sell solutions combining the hardware into services.



Skills and experiences in high demand

- Web and embedded development (C/C++ Python, C#)
- Network planning and construction (Virtualization and mobility)
- Cloud and IoT related solution sales



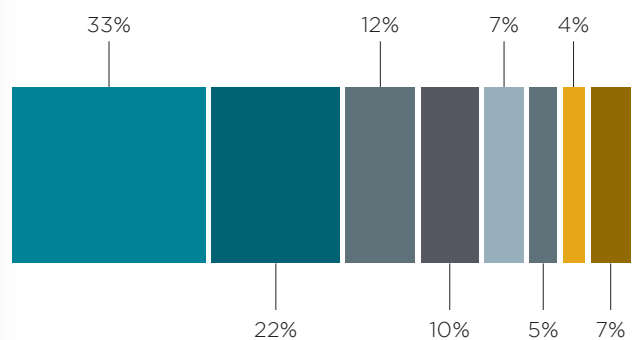
Candidate priorities

- Sufficient budget for technology
- Investment in Japan
- High incentive based compensation

Preference to work for companies that invest in the Japan market, technology and their employees



BRS Registered Candidates Ratio

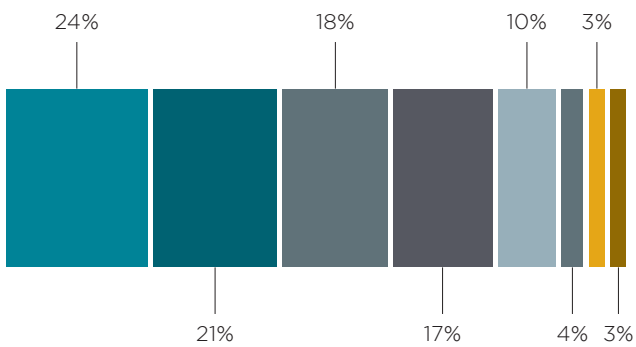


- Business Development
- Project Management
- Network Engineer
- Network Administrator
- System Administrator
- Pre Sales / Post Sales
- Database Administrator
- Other

Salary Table/Forecast

Roles	Salary (Million Yen)		
	Low	Middle	High
Business Development	7	10	15
Database Administrator	6	9	12
Embedded Engineer	6	9	12
Network Administrator	6	9	12
Network Engineer	6	9	12
Pre Sales / Post Sales	6	9	12
Project Management	8	10	15
Sales Director	12	16	25
Sales Manager	8	10	15
System Administrator	6	8	12

BRS Job Opening Ratio



- System Administrator
- Business Development
- Project Management
- Network Engineer
- Network Administrator
- Database Administrator
- Sales Director
- Other



We expect the hiring for hardware industry to continue growing due to the shortage of IT professionals as well as the increase in IT demand caused by COVID-19 pandemic. Companies are struggling to fulfill the high demand for solution sales professionals and expanding the hiring method from the traditional contingency search to retainer and referrals.

Inhouse

Hiring activity is active for inhouse IT professionals with an increasing demand for those who have knowledge and expertise in digital utilization. This is due to the increasing trend of DX as well as the enhanced new norm, including remote working style, triggered by COVID-19 pandemic. The hiring demand for professionals with qualified skills in cloud technology and security area is also increasing. We see a trend in companies expanding the hiring method or target candidate pool due to the shortage of IT professionals.



Skills and experiences in high demand

- Digital transformation (IoT, AI, Blockchain)
- Cloud technology (AWS, Azure)
- Security software & appliances (Cloud and network security)



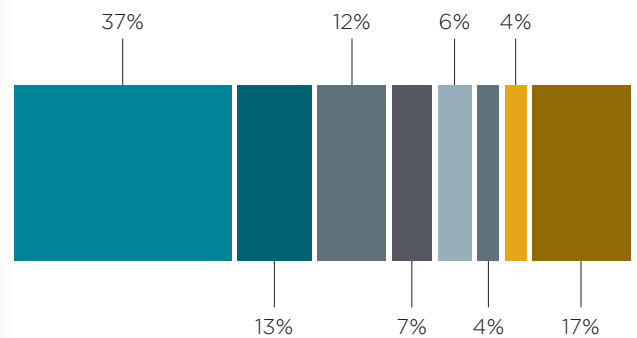
Candidate priorities

- Sufficient budget for technology
- Career advancement opportunities
- Global projects

Candidates are attracted to companies that are expanding globally and investing into technology, as it creates career opportunities.



BRS Registered Candidates Ratio

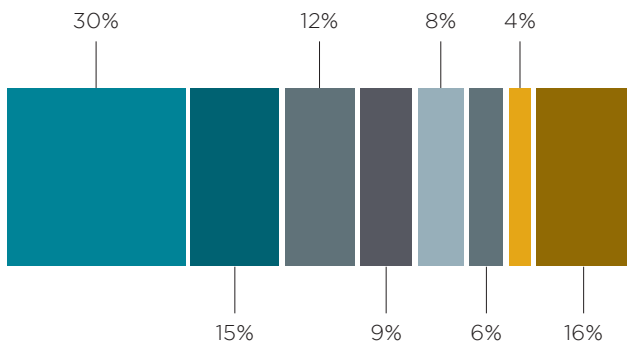


- Programmer / SE
- Project Management
- IT Management
- Network Engineer
- Web Design / Producer
- Business / Systems Analyst
- Helpdesk Engineer
- Other

Salary Table/Forecast

Roles	Salary (Million Yen)		
	Low	Middle	High
Architecture	8	10	15
BI / Data Warehouse	7	10	14
Business / Systems Analyst	7	10	13
Cloud Engineer	7	10	15
DBA / Database Engineer	6	9	12
Helpdesk Engineer	5	7	9
IT Management	8	10	15
IT Planning / DX Planning	7	10	15
IT Security & Audit	7	9	12
Network Engineer	6	9	12
Programmer / Software Engineer	6	9	12
Project Management	8	10	15
QA / Testing	6	8	10
System Administrator	6	8	10
Web Design / Producer	6	8	10

BRS Job Opening Ratio



- Programmer / SE
- Business / Systems Analyst
- System Administrator
- Project Management
- Network Engineer
- IT Management
- Helpdesk Engineer
- Other



The overall demand for Inhouse IT is increasing across different industries and all company sizes due to the move towards the reform of working practices and the COVID-19 pandemic. DX trend is shifting companies from outsourcing the system to self-maintenance, which increases the demand for inhouse engineers. This trend is expected to continue in 2021.

Software

The software industry has been active especially given the increase of the importance on DX triggered by the COVID-19 pandemic. As more companies are using SaaS services and online meeting tools for remote work, the companies that used to provide on-premise package services are starting to adapt and provide SaaS services also. Many companies are struggling to fulfill their hiring demand in this area due to the supply shortage and demand increase.



Skills and experiences in high demand

- SaaS development (SAP cloud platform, Salesforce)
- Product management / scrum master experience
- PaaS & SaaS solution sales

Engineers who have skills in SaaS service development are in high demand



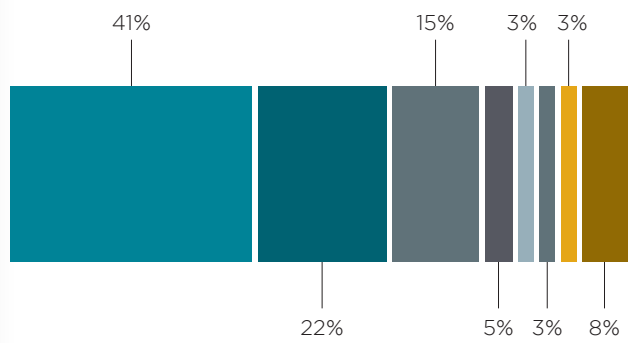
Candidate priorities

- Highly ranked technology companies
- Product potentials
- Engagement in global projects

To work for organizations that provide state-of-the-art products and services



BRS Registered Candidates Ratio

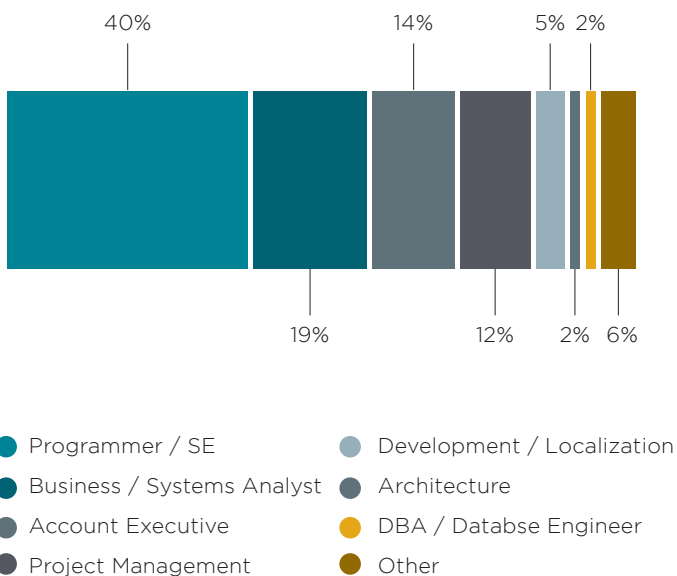


- Programmer / SE
- Account Executive
- Project Management
- Business / Systems Analyst
- Pre Sales / Post Sales
- Development / Localization
- Customer Success
- Other

Salary Table/Forecast

Roles	Salary (Million Yen)		
	Low	Middle	High
Account Executive	7	10	15
Architecture	8	10	15
BI / Data Warehouse	7	10	14
Business / Systems Analyst	7	10	13
Customer Success	6	9	12
DBA / Database Engineer	6	9	12
Development / Localization	6	9	12
Embedded Engineer	6	9	12
Pre Sales / Post Sales	6	9	12
Programmer / Software Engineer	6	9	12
Project Management	7	10	15
QA / Testing	6	8	10

BRS Job Opening Ratio



We expect the hiring for the software industry to remain active in 2021. Solution sales professionals are in high demand and companies are trying different hiring methods such as retainer and campaigning higher fee referrals, on top of the traditional contingency search. Also, the trend of hiring regardless of location is expected to increase by providing a fully remote work environment.

System Integration

Companies in the system integration industry are innovating their business model to meet the changing demands and expanding from solely developing proprietary products from scratch. This has led to the diversification in the hiring demand. In addition to the traditional system development engineers, consulting professionals who can lead projects to solve business challenges or engineers who can develop in-house products with cloud integration expertise are also in demand.



Skills and experiences in high demand

Migration of legacy systems to cloud-based systems

Technical architects with experience in cloud and AI

Digital transformation project

Project managers who have experiences in large-scale projects are also in high demand



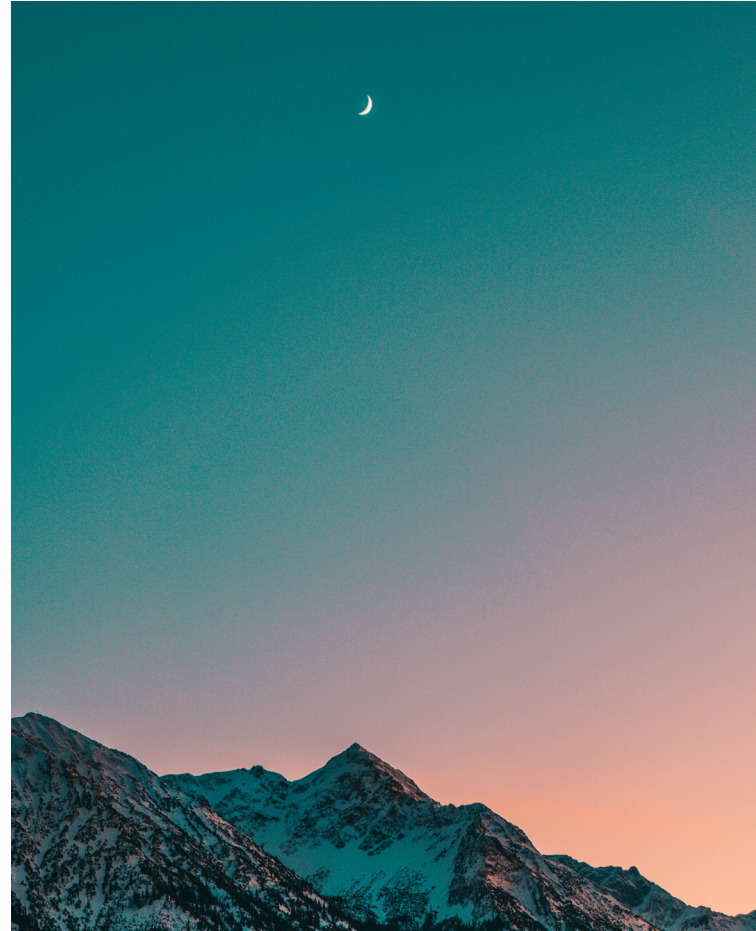
Candidate priorities

Engagement in global projects

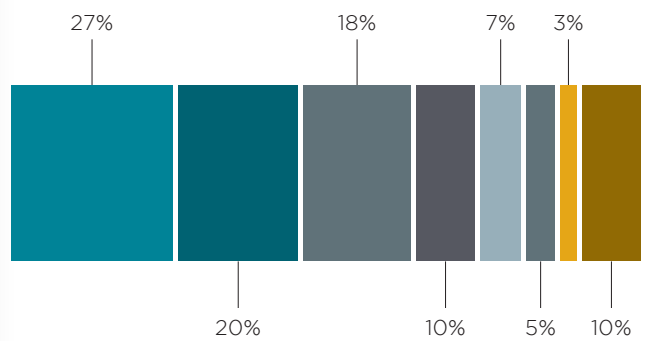
COVID-19 response

Challenging projects

Opportunity to work on challenging cross-border projects in an environment that offers remote working conditions



BRS Registered Candidates Ratio

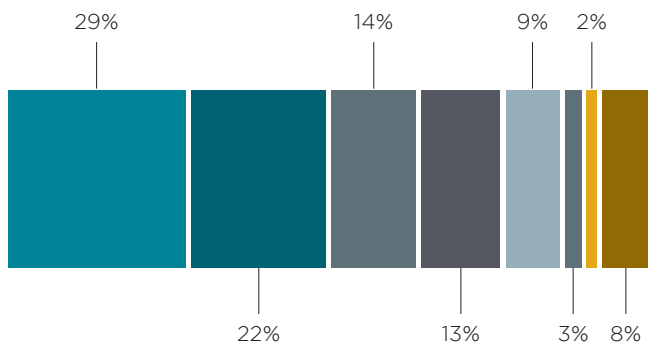


- IT Consultant
- Project Management
- IT Management
- Network Engineer
- Business / Systems Analyst
- Pre Sales / Post Sales
- BI / Data Warehouse
- Other

Salary Table/Forecast

Roles	Salary (Million Yen)		
	Low	Middle	High
Architecture	7	10	15
BI / Data Warehouse	7	10	15
Business / Systems Analyst	7	10	15
Cloud Engineer	7	10	15
DBA / Database Engineer	6	9	12
Embedded Engineer	6	9	12
IT Consultant	7	10	15
IT Management	7	10	15
Network Engineer	6	9	12
Pre Sales / Post Sales	6	9	12
Project Management	7	10	15
QA / Testing	6	8	10

BRS Job Opening Ratio



- IT Consultant
- Business / Systems Analyst
- Project Management
- Network Engineer
- IT Management
- Cloud Engineer
- Architecture
- Other



With the shortage of engineering resources in Japan, the demand for bridge engineers who can lead development using overseas resources is increasing. Also, the "digital cliff of 2025" is expected to increase the demand for professionals who can still understand the legacy systems, in addition to those who can understand new technologies.

About BRS

BRS provides recruitment services to international companies in search of bilingual and multilingual professionals.

License Number

Worker dispatching undertakings
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