



# 2024 MARKET OVERVIEW REPORT

February 2024

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## **About Market Overview Report**

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

In the 2024 Market Overview Report, we are proud to introduce our newly established BRS RPO services.

The 2024 Market Overview Report is based on BRS data taken from June 2022 to May 2023 and the knowledge and expertise of BRS consultants who have strong client and candidate relationships.



## About BRS

Established in 2012, BRS provides bilingual and multilingual recruitment services and RPO services to global corporations in search of professionals with strong language skills.

### **PERSOL CAREER Head Office**

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Osaka 530-0011 Japan



## BRS RPO service

Since its establishment in 2012 as the bilingual / multilingual specialized business division of PERSOL CAREER, BRS has been dedicated to delivering services tailored for bilingual and multilingual professionals. In addition to our track record of introducing bilingual / multilingual talent, in 2023, we expanded our offerings to include Recruitment Process Outsourcing (RPO). With our new service, “BRS RPO Service,” we provide comprehensive outsourcing solutions for bilingual recruitment, further enhancing our commitment to meeting the evolving needs of our clients in the global talent landscape.

In Japan, the notion of lifelong employment with a single company until retirement has long been considered ideal. Even as societal attitudes toward job changes evolve, a considerable number still harbor reservations about switching careers, and individuals taking proactive ownership of their career paths remain relatively scarce. Moreover, the demand for individuals possessing scarce language proficiency and global experience is on the rise, leading to a growing number of companies seeking such talents. Consequently, the competition to acquire top-tier professionals in the Japanese market has intensified.

In the realm of mid-career recruitment in Japan, many companies have long been relying on agents. However, we see an increasing number of companies today setting the goal of transitioning to in-house recruitment to achieve cost savings. Simultaneously, there is a demand for swiftly securing the necessary workforce to meet business objectives. Both endeavors require expertise in recruitment. The knowledge to discern optimal approaches tailored to specific positions, as well as skills for direct sourcing within the company, are essential. Unfortunately, few companies have amassed such expertise in-house, leading to a rising number of inquiries seeking solutions. Recognizing this need, we have taken the initiative to provide RPO services, aiming to address the challenges associated with mid-career hiring, offering tailored solutions that encompass cost-effectiveness, efficient sourcing, and strategic planning to meet diverse recruitment needs.

PERSOL CAREER stands as a premier provider of a diverse array of recruitment services, encompassing not only career transition assistance through services like “doda” but also job advertisements, new graduate recruitment, and specialized services for freelancers, executives, and various specialists. Within the PERSOL CAREER umbrella, BRS offers RPO services, distinguishing itself by tailoring recruitment methodologies to suit the unique requirements of each job opening, considering factors such as budget constraints and urgency, thereby contributing to an overall optimization of costs.

Furthermore, BRS RPO provides comprehensive consulting and practical support throughout the entire recruitment process, from strategic planning to finalizing job offers. Whether handling the entirety of the recruitment process or collaborating on specific tasks with the client’s team, BRS establishes a flexible framework that contributes to the accumulation of in-house recruitment expertise within client organizations.

In addition to optimizing recruitment costs and shifting towards direct recruiting, we also cater to various needs, such as hiring non-Japanese speakers and facilitating English communication with overseas headquarters or branches. We are committed to addressing your unique requirements. Please feel free to reach out to us for a consultation. We look forward to the opportunity to discuss how our services at BRS can contribute to the success of your recruitment strategies.



**Head of BRS RPO Service:**

**Aiko Tokuhisa**

With a decade of experience at Intelligence, the predecessor of PERSOL CAREER, and another ten years at BRS, Aiko Tokuhisa has been dedicated to talent introduction and career transition support services. She possesses extensive recruitment support experience, ranging from small and medium-sized enterprises to major global corporations. A certified national career consultant.

## **INDUSTRIES**

Automotive	8	Energy	12
Chemical	9	Machinery	13
Consulting	10	Medical Device	14
Electronics	11	Pharmaceutical	15

# AUTOMOTIVE

## Salary Forecast

Roles	Salary (Million yen)		
	Low	Middle	High
Application Engineer / Technical Sales	7	9	11
Electrical Engineer	7	9	12
Embedded Software Engineer	7	10	12
Management	10	14	20
Mechanical Engineer	6	8	10
Product Development	6	8	10
Production Engineer	7	8	10
Project Management	7	10	14
Quality Assurance / Control	6	9	11
Sales	7	9	12
Test Engineer	6	7	8

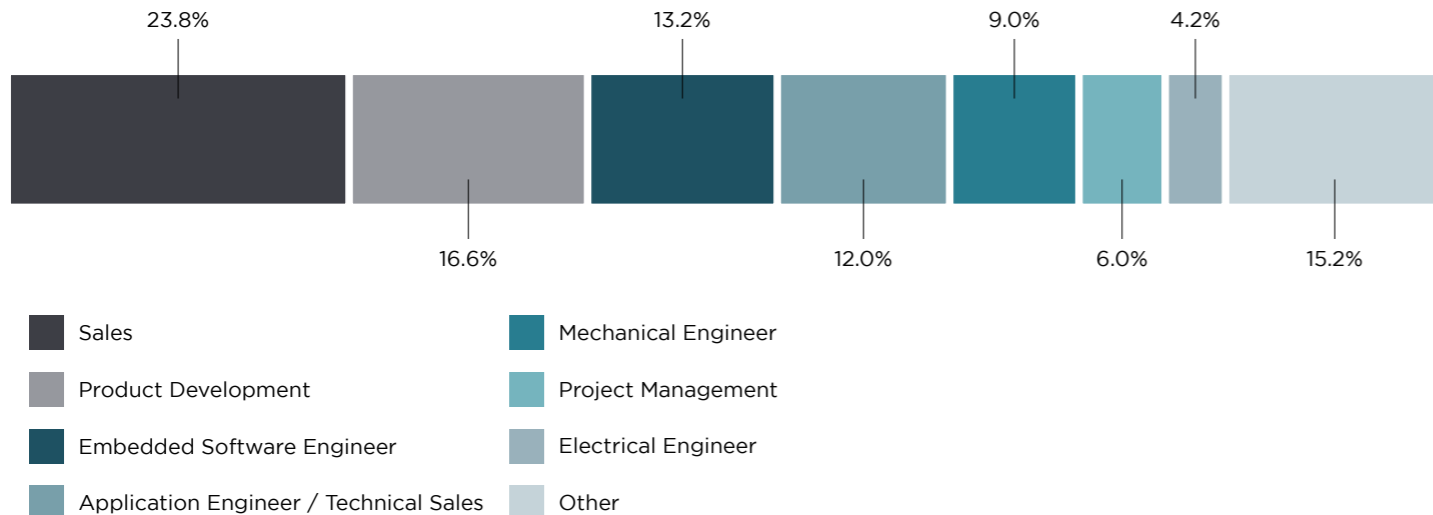
## Industry Trends

Hiring in automotive industry is thriving, with a focus on IoT and embedded systems adoption. Companies continue to actively invest in CASE (Connected, Automated, Shared, Electric) technologies, intensifying the competition for software engineers. Some mechanical firms have ventured into EV development, leading to increased demand for sales positions. While hiring of mechanical engineers for parts design is on the decline, production technology roles remain in demand. The impact of a U.S. auto union strike has slowed recruitment for U.S.-based companies. In upstream development, there's a shift from in-house to collaborative arrangements with major foreign IT firms, especially in AI integration.

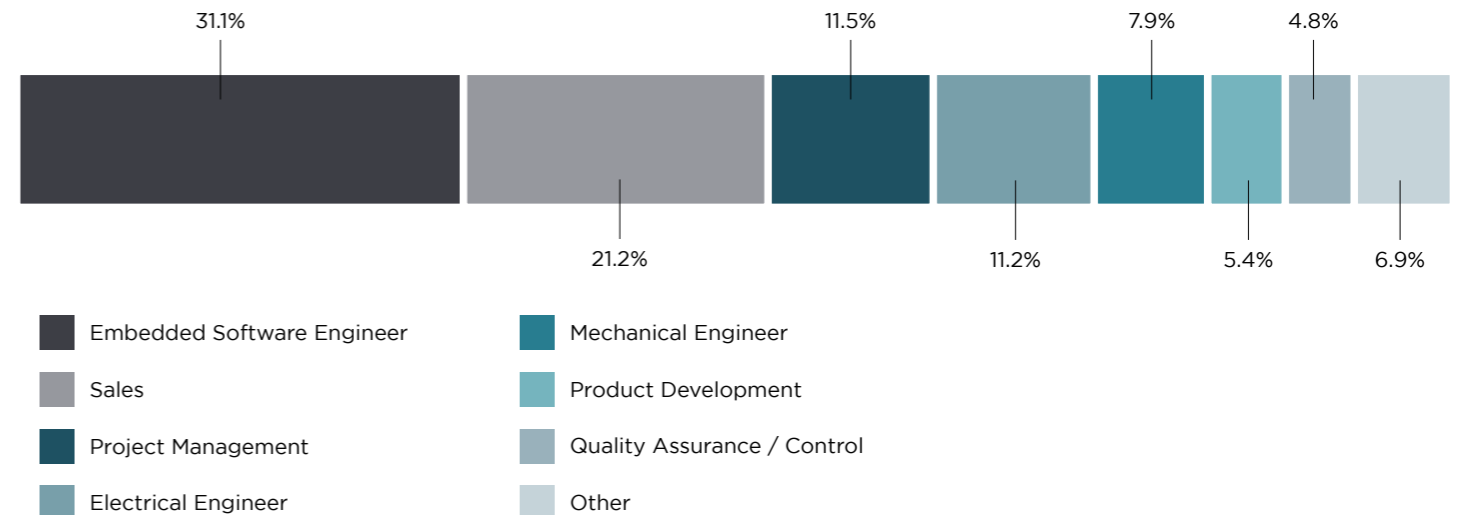
## Outlook and Advice

From 2024 onward, the automotive industry continues to witness a strong demand for software engineers, with a shift from embedded systems to a focus on connected, cloud, and edge computing skills. The trend towards external collaboration, as opposed to in-house development, has resulted in a surge of automotive software experts joining major IT firms, expecting heightened competition for talent acquisition. Alongside attractive compensation packages, effectively communicating a company's mission and goals has become essential. To address talent shortages, there is a growing interest in providing reskilling opportunities for mechanical engineers to acquire expertise in electrical areas. Successfully tackling this challenge requires a multifaceted approach that goes beyond conventional hiring methods.

## BRS Registered Candidates Ratio



## BRS Job Opening Ratio



## Salary Forecast

Roles	Salary (Million yen)		
	Low	Middle	High
EHS	7	9	12
Management	9	12	18
Marketing	7	9	11
Process Engineer	6	8	10
Production Management	6	8	10
Quality Assurance	6	8	10
Regulatory Affairs	6	8	10
Research & Development	7	9	12
Sales	7	9	12
Technical Sales / Application Engineer	7	9	11
Technical Services	6	8	9

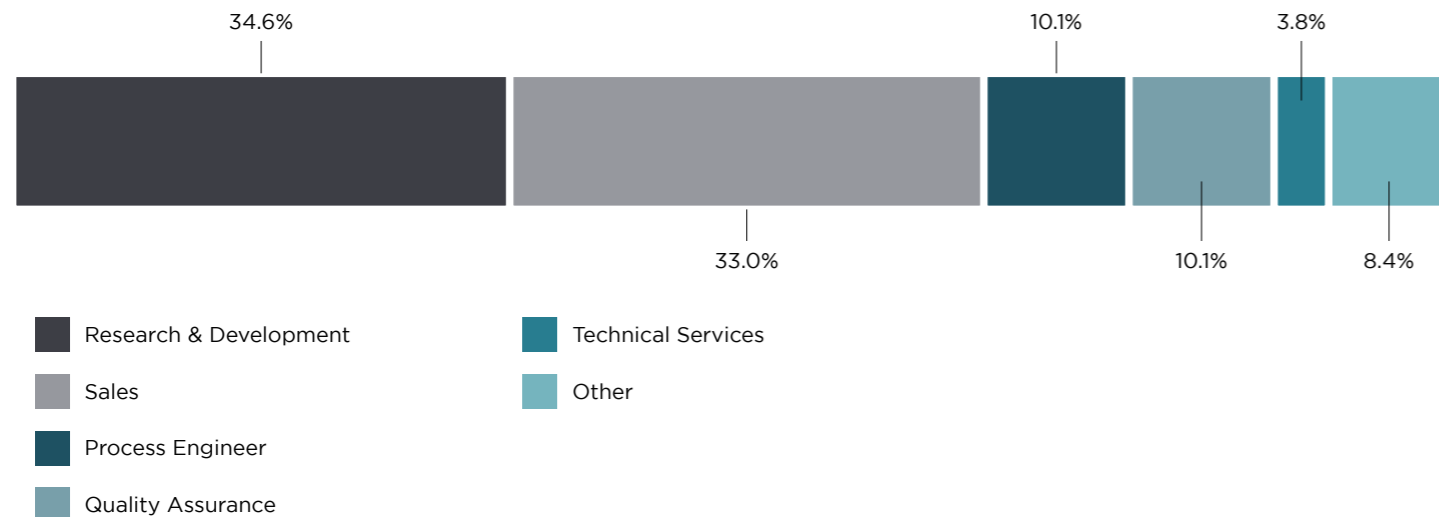
## Industry Trends

The chemical industry's hiring remains robust, with a slight increase in recruitment compared to the previous year. Potential hiring for young talent is limited, while niche hiring needs persist, emphasizing specific field expertise for immediate impact. The resurgence in the semiconductor and automotive sectors drives notable demand for engineers in semiconductor materials, especially related to EV battery components and power devices. Particularly within semiconductors, manufacturers of silicon wafers, gases, chemicals, photoresists, and ultrapure water demonstrate strong hiring trends. Sales roles, especially sales engineers, continue to be in high demand for business expansion, with competition being particularly intense in this category.

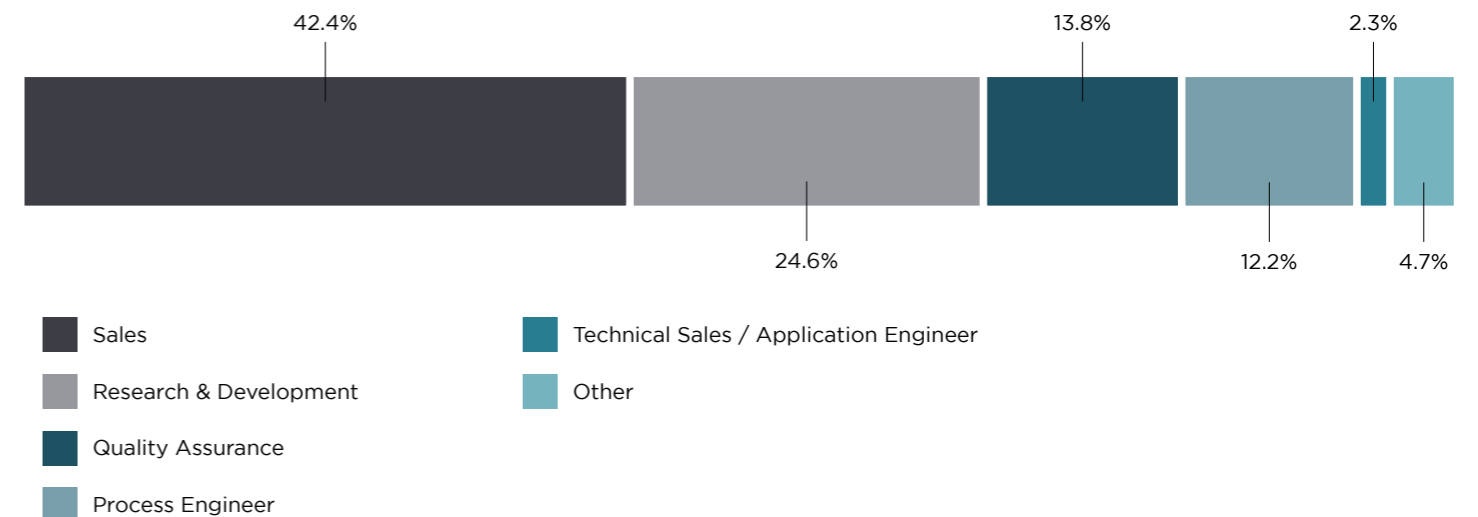
## Outlook and Advice

The chemical industry anticipates sustained demand for engineers in semiconductor, EV battery, and power device-related roles. Japan's manufacturing prowess, especially in globally competitive areas like semiconductor, automotive, and environmental materials, intensifies hiring competition. Notably, China allocates substantial budgets to attract top talent, leading to a continued rise in R&D centers in Japan. Given that niche positions face challenges in recruitment, proactive measures like flexible requirements are essential for hiring success. Companies should strategically adapt to global market dynamics, fostering a flexible and competitive hiring approach.

## BRS Registered Candidates Ratio



## BRS Job Opening Ratio



# CONSULTING

## Salary Forecast

Roles	Salary (Million yen)		
	Low	Middle	High
Advisory	8	12	15
BPR	10	15	20
Business Development	8	12	16
CRM	8	12	15
Corporate Strategy	10	15	20
Development & Training	7	9	12
Financial Advisory	8	12	15
HR Consulting	9	12	15
Industrial Consulting	8	12	15
IT Security & Audit	8	12	16
M&A Advisory	8	12	15
Management Consulting	10	15	18
Partner	25	35	50
Pre Sales / Post Sales	7	9	12
Risk Consulting	8	12	15
Strategy Consultant	12	15	18
Technology Consultant	8	12	15

## Industry Trends

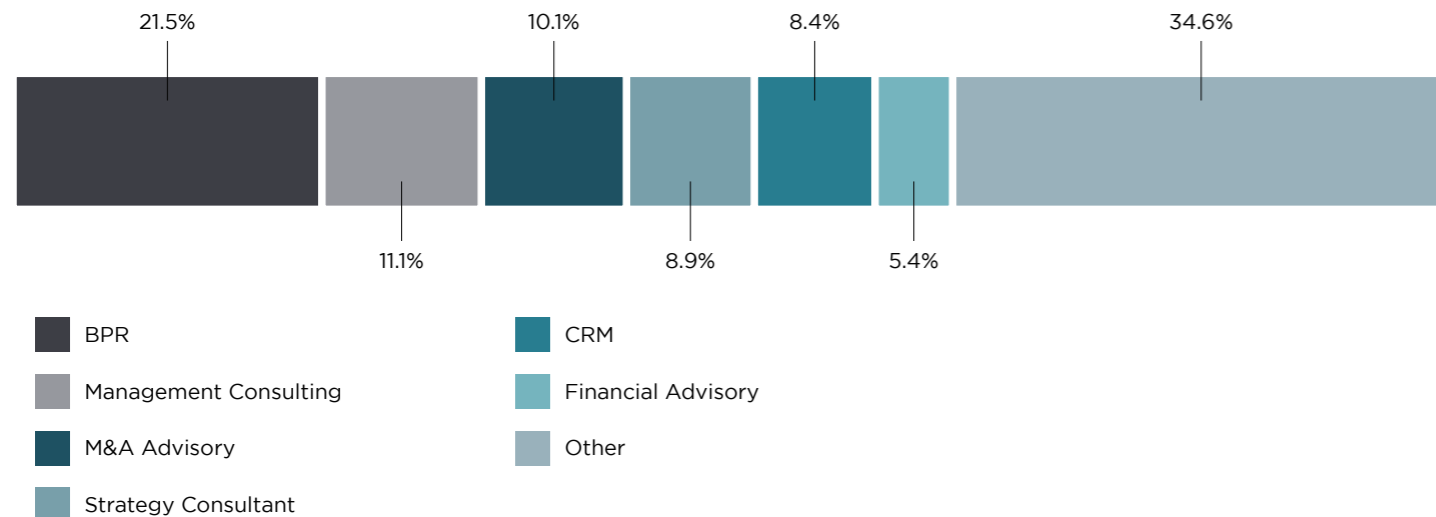
In the consulting industry, sustained demand for business solutions due to shortages in strategic and IT talent is propelling the market to an estimated 1.255 trillion yen by 2025\*. Major consulting firms are shifting focus from hiring young professionals to management roles. With complex managerial challenges diversifying, themes extend beyond traditional areas to include SDG compliance and new business ventures. The surge in digital projects, constituting over 50% of consulting assignments, accompanies the rise of outcome-driven engagements, favoring value-based over fee-based arrangements. Innovative ventures like joint ventures reflect a shift towards collaborative, partnership-based relationships beyond traditional consulting-client dynamics.

\* 5 years Market Growth Forecast: Software Development by xenodata lab

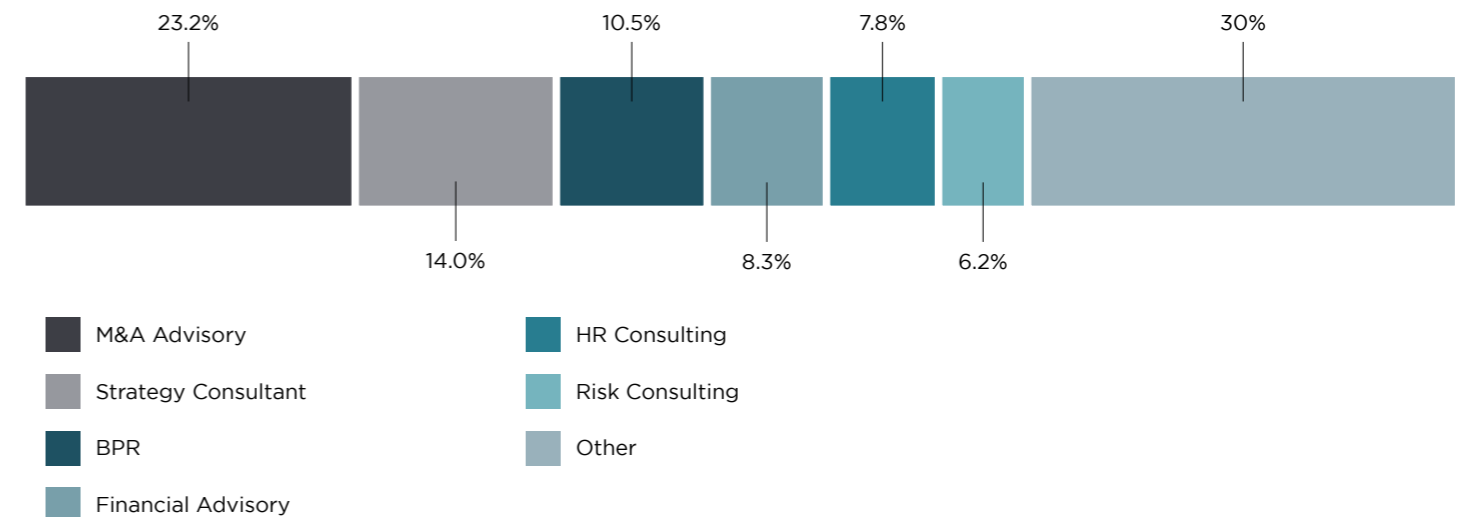
## Outlook and Advice

Escalating hiring needs of consulting firms demand a versatile approach, utilizing a wide variety of recruitment methods like referrals, direct hiring, and job boards. As business challenges diversify, recruiting from unconventional sectors becomes pivotal to cover unmet areas beyond traditional consulting expertise. Addressing the shortage of IT talent for digital projects requires not only hiring but also strategic nurturing initiatives. The emphasis on client implementation underscores the importance of candidates adept at empathetic communication and a relentless commitment to on-the-ground realities. The rising trend of transitioning from online to in-person interviews for evaluating candidates' human qualities is expected to intensify beyond 2024.

## BRS Registered Candidates Ratio



## BRS Job Opening Ratio



# ELECTRONICS

## Salary Forecast

Roles	Salary (Million yen)		
	Low	Middle	High
Application Engineer	7	9	12
EHS / Facility Management	7	9	11
Electrical Engineer	7	9	12
Embedded Engineer	7	10	12
Management	10	13	20
Mechanical Engineer	6	8	10
Plant Manager	8	10	15
Process Engineer	6	9	10
Production Engineer	6	8	10
Project Management	7	10	14
Quality Assurance	6	9	11
R&D / Product Development	7	9	12
Sales	7	9	12

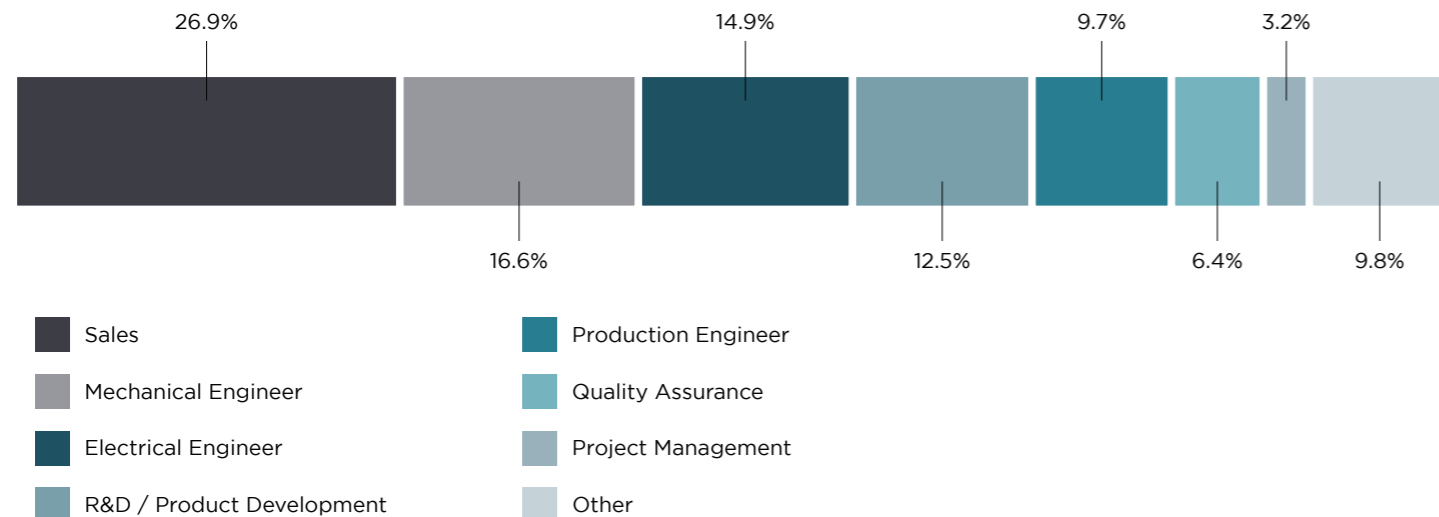
## Industry Trends

In the electronics industry, hiring trends reflect a vibrant demand, particularly in the electronics field influenced by IoT and the automotive industry. The recruitment volume has surged by 120% compared to the previous year. Areas such as electronic devices, industrial machinery, measurement equipment, and medical devices exhibit robust recruitment. There is a notable increase in job opportunities related to FPGA-equipped digital circuits, analog circuits for communication and power systems, extending to both design and sales engineering roles. Mechanical engineers are sought after across diverse sectors. While the semiconductor industry faces stagnation in the memory sector, there is still ongoing demand in power devices.

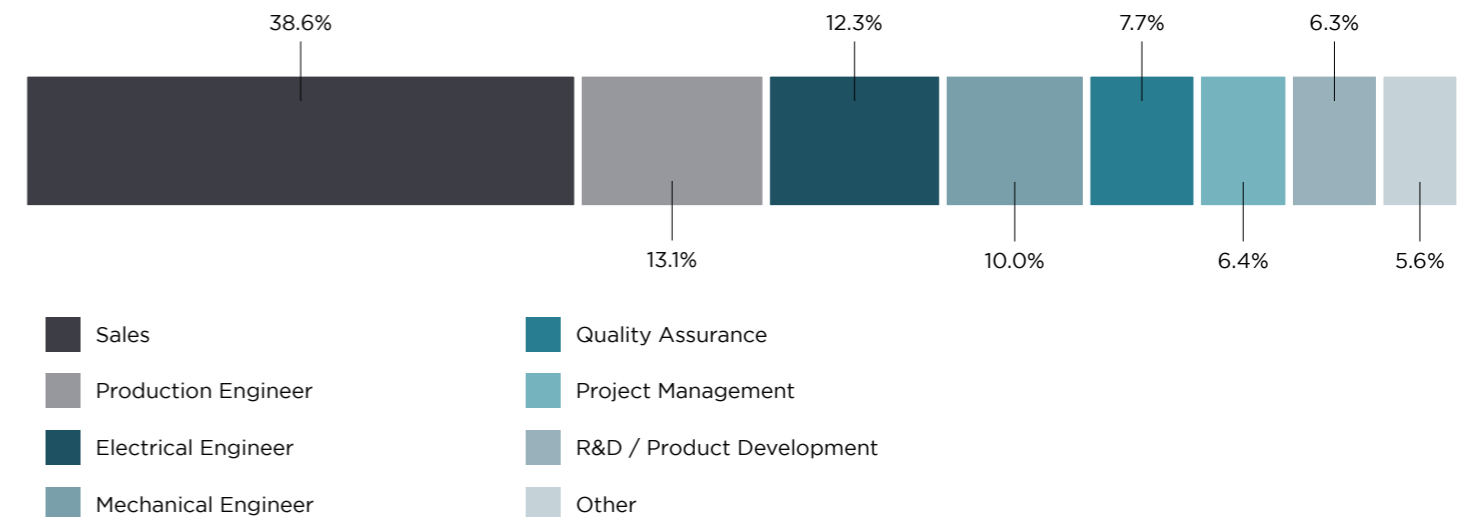
## Outlook and Advice

The Japanese electronics sector is transitioning from traditional assembly to companies leading in revolutionary product development. EDA tool and foundry manufacturers supporting these innovators are thriving, with the trend expected to persist. Anticipated increases in customer satisfaction efforts and a rising demand for quality assurance and after-sales engineers are on the horizon. The sustained demand for AI semiconductors, including edge computing, together with the advantage of Japan's geopolitical situation, suggests a resurgence in Japan's semiconductor industry. With candidates applying to multiple companies simultaneously, timely offers are crucial for success.

## BRS Registered Candidates Ratio



## BRS Job Opening Ratio



## Salary Forecast

Roles	Salary (Million yen)		
	Low	Middle	High
Electrical Engineer	7	9	12
Engineering Manager	9	12	16
EHS	7	10	13
Field Service Engineer	6	8	10
Mechanical Engineer	6	8	9
Plant Manager	9	12	15
Process Engineer	7	9	11
Production Engineer	7	9	11
Project Management	8	11	15
Quality Assurance	7	9	11
Sales	7	9	12
Technical Services	6	7	8

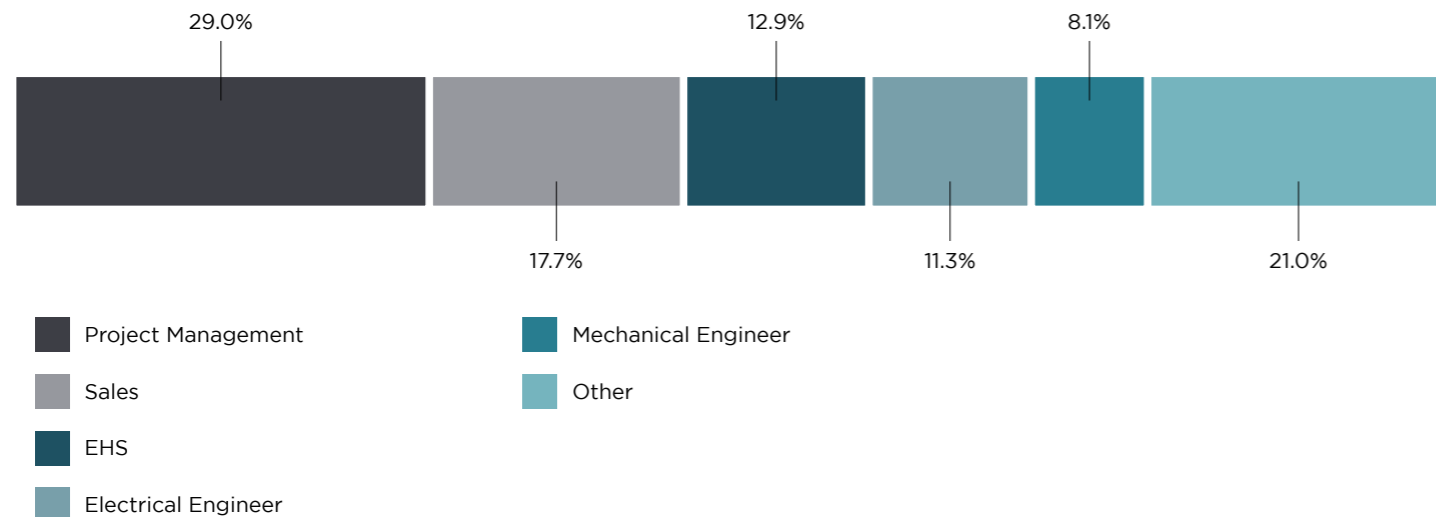
## Industry Trends

The energy industry is experiencing strong hiring trends, encompassing both environmental sectors and traditional energy fields. Active recruitment is observed in Oil & Gas, Renewable Energy, and EPC sectors, particularly for sales and technical roles. There is a significant shortage of managerial talent in construction, including those with architectural experience. Mechanical and electrical engineers are also in high demand. Despite the need for talent to address overseas project demands, a mismatch between corporate requirements and available market skills hinders effective recruitment.

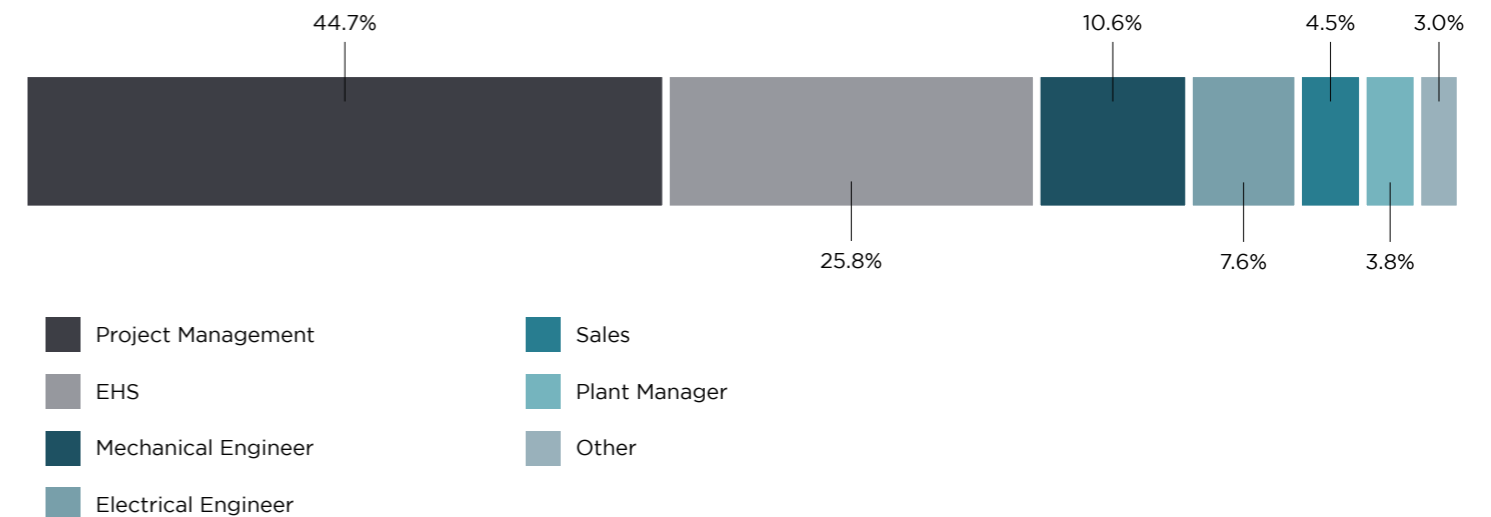
## Outlook and Advice

The outlook for hiring in the energy industry remains positive driven by increasing recruitment in new realms like Smart Cities, incorporating DX, robotics, and sensors, a trend expected to continue. Given generally low job-change motivation in the industry, companies should emphasize their mission during interviews to evoke candidate interest. While simultaneous applications to multiple positions is rare, given the high demand among current employees, conducting interviews online is recommended. Transparency about work environments, especially in reducing overtime, becomes crucial as many seek a healthier work-life balance.

## BRS Registered Candidates Ratio



## BRS Job Opening Ratio



# MACHINERY

## Salary Forecast

Roles	Salary (Million yen)		
	Low	Middle	High
EHS / Facility Management	7	9	12
Electrical Engineer	7	9	11
Embedded Engineer	7	9	11
Management	9	13	20
Mechanical Engineer	6	7	10
Plant Manager	9	11	13
Production Engineer	6	7	9
Project Management	7	9	11
Quality Assurance	6	8	10
R&D / Product Development	6	8	10
Sales	7	9	12
Sales Engineer	7	9	11
Service Engineer / Maintenance	6	7	9

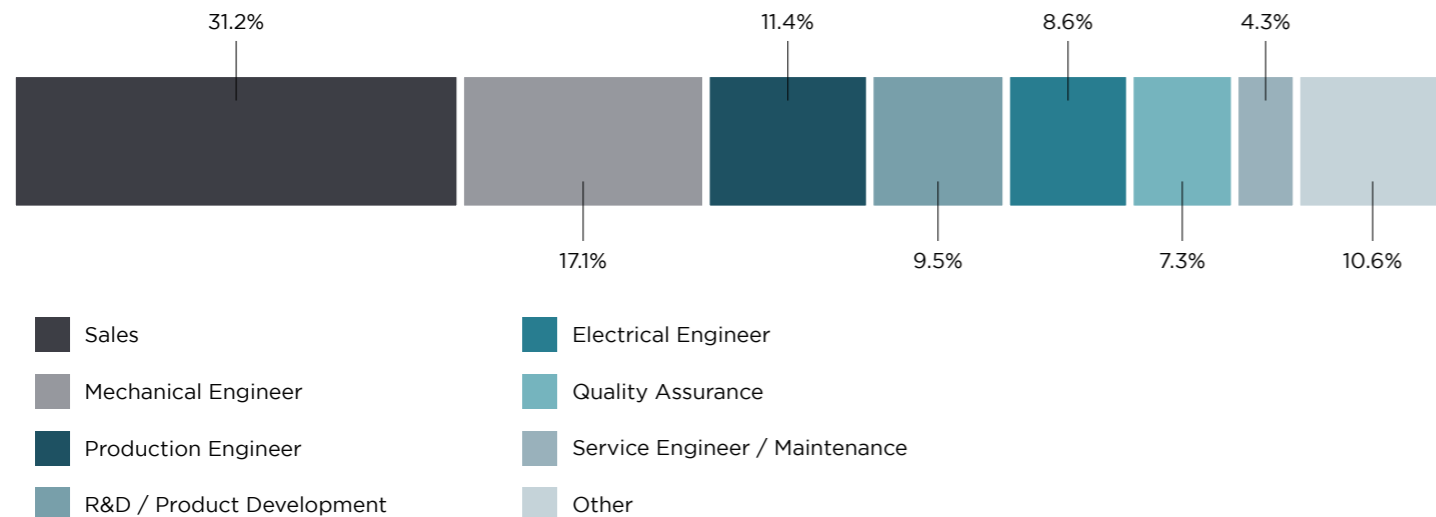
## Industry Trends

The machinery industry is experiencing strong hiring trends with a 115% increase in recruitment volume compared to the previous year. In the electrical domain, there is a growing demand for FPGA-integrated digital circuitry, analog circuit professionals in communication and power systems, extending to a high need for sales engineers. Mechanical engineering roles have expanded, emphasizing experience in closely related fields. However, economic conditions have impacted upper-level positions, with challenges in obtaining international approvals and sudden recruitment freezes due to M&A influences.

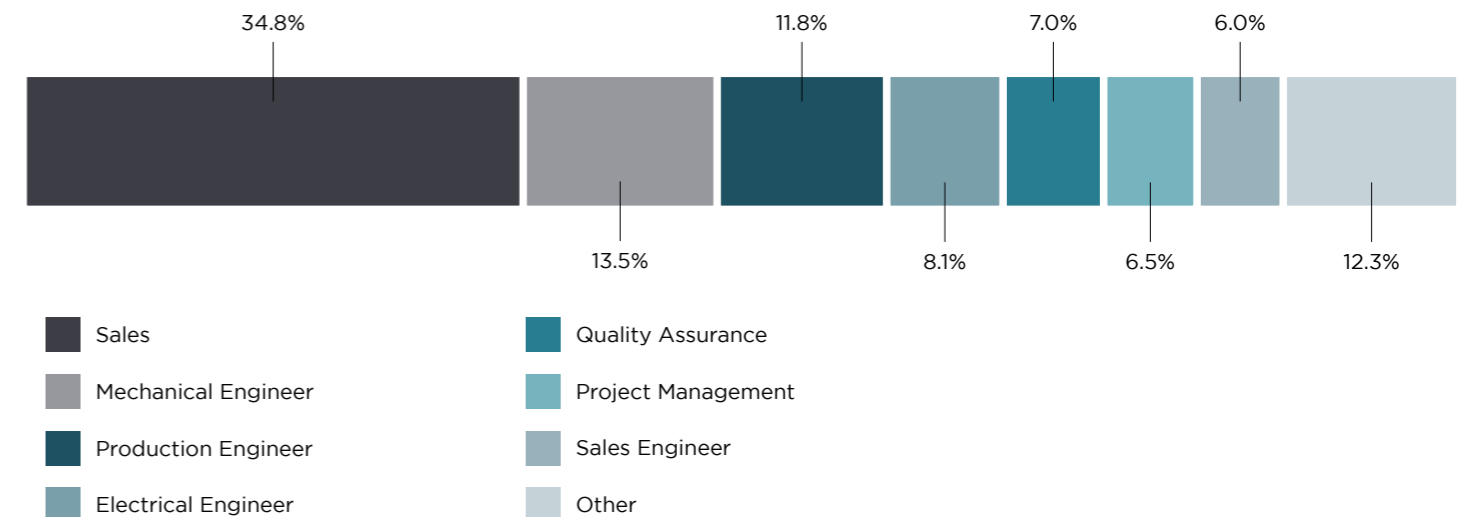
## Outlook and Advice

In the machinery industry, the demand for quality assurance, after-sales, and field service engineers is on the rise to enhance customer satisfaction and sustain continuous aftermarket revenue. Candidates tend to apply to multiple companies during job searches and join where the job offer was extended first. Hence, it is crucial to promptly extend offers to highly valued candidates. Flexibility in salary offerings is vital, as competitive compensation remains a key factor in attracting top talent.

## BRS Registered Candidates Ratio



## BRS Job Opening Ratio



# MEDICAL DEVICE

## Salary Forecast

Roles	Salary (Million yen)		
	Low	Middle	High
Business Development	10	12	18
Clinical Specialist	6	8	11
Marketing Communication	7	9	12
Medical Device Manufacturing	5	7	9
Product Marketing	7	11	15
Quality Assurance	7	9	12
Regulatory Affairs	7	10	14
Research & Development	5	7	9
Sales	6	9	13
Service Engineer	6	7	9
Training & Development	7	9	12

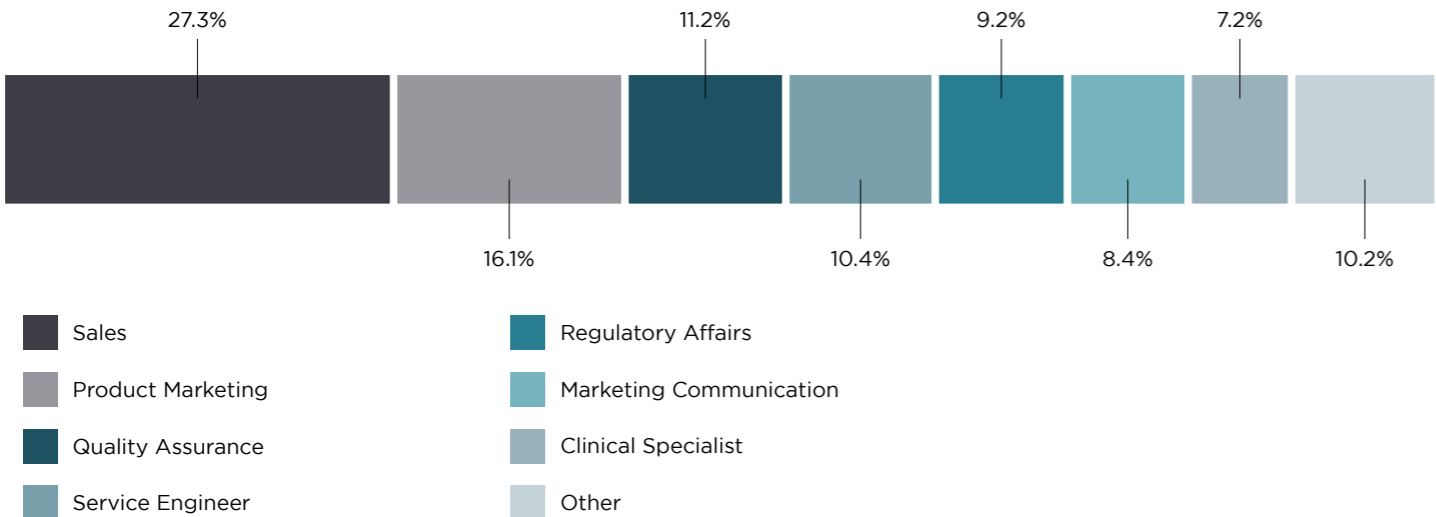
## Industry Trends

In the medical device industry, a headcount freeze in foreign firms in the first half of 2023 has tempered market demand, while the weakened Japanese yen impacts profit and loss. The surgical robotics and structural heart devices market face increased competition with new entrants. The integration of AI in therapeutic approaches persists, driving demand for solution and programming experts, and a novel need arose for health economics and reimbursement specialists. As continuous improvement in supply chain management and quality assurance remains crucial, companies are in demand for professionals capable of addressing and resolving these challenges.

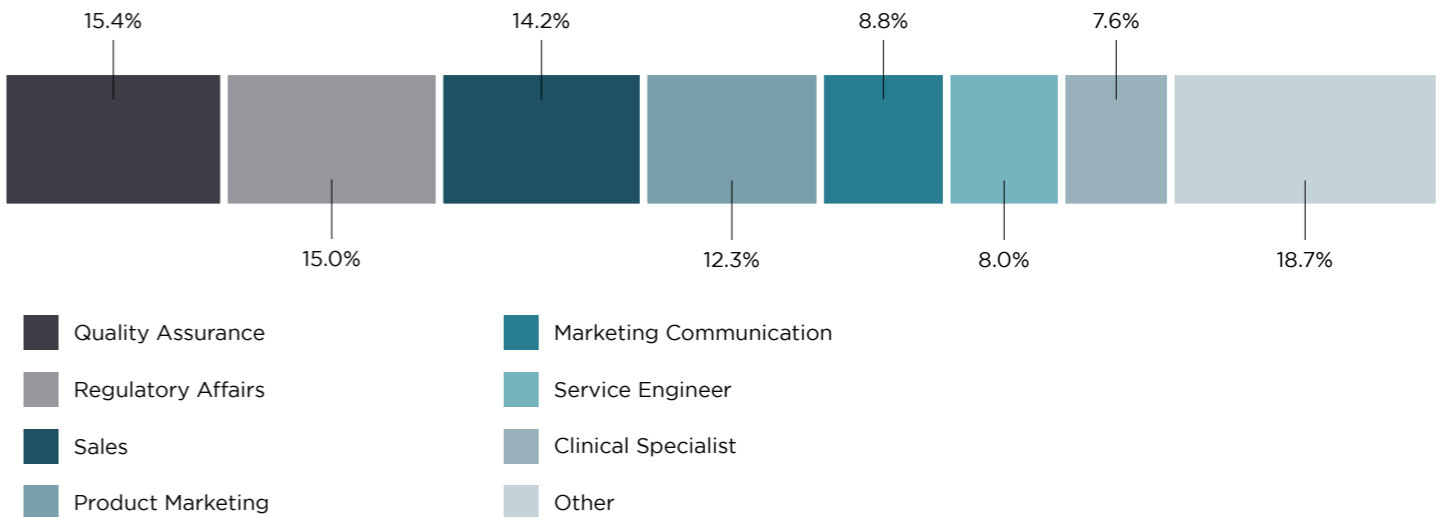
## Outlook and Advice

A surge in companies spearheading new product development and ventures is reshaping the hiring landscape in the Medical Device industry. Positions linked to these pioneering projects hold heightened appeal for candidates, increasing the likelihood of successful recruitment. The reduced number of available positions is intensifying competition, leading to stricter hiring criteria. Essential for success is clear prioritization and flexibility in the recruitment process. Notably, candidates now prioritize benefits over job responsibilities, a preference expected to endure. To attract top talent, companies should allocate flexible budgets, expedite hiring processes, and cultivate a conducive work environment, including remote work options.

## BRS Registered Candidates Ratio



## BRS Job Opening Ratio



# PHARMACEUTICAL

## Salary Forecast

Roles	Salary (Million yen)		
	Low	Middle	High
Alliance Management	8	11	15
Biostatistics	7	9	13
Clinical Trials	7	10	12
Drug Manufacturing	6	8.5	12
Marketing	9	14	18
Medical Affairs	8	11	14
Medical Doctor	14	17	22
Medical Researcher	8	13	16
Nurse	6	6.5	7
Pharmacist	6	6.5	7
Pharmacovigilance	6	9	12
PMS	7	10	12
Pricing	9	12	15
Quality Assurance	6	8	11
Regulatory Affairs	7	10	13
Research & Development	6	9	12
Sales / MR	7	9	13

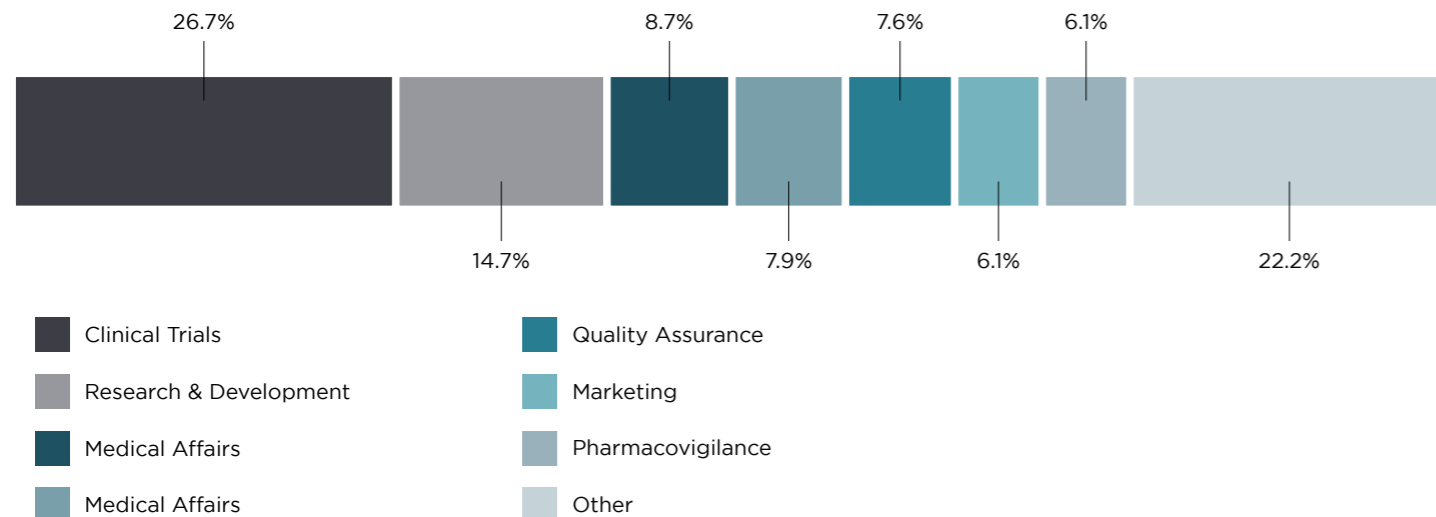
## Industry Trends

In the pharmaceutical industry, some multinational corporations implemented hiring freezes and downsizing in the first half of 2023 leading to increased stringency in hiring requirements and reduction in new hires. The rise in global projects has increased the demand for CRO (clinical research outsourcing) positions, resulting in a shortage of talent relative to project needs and an uptick in salaries for CRO roles. Oncology and biopharma candidates are in high demand. Post-COVID, the industry has shifted to a hybrid work style, with candidates expressing a preference for remote work. Some professionals are even switching jobs due to companies insisting on full in-office attendance citing working conditions.

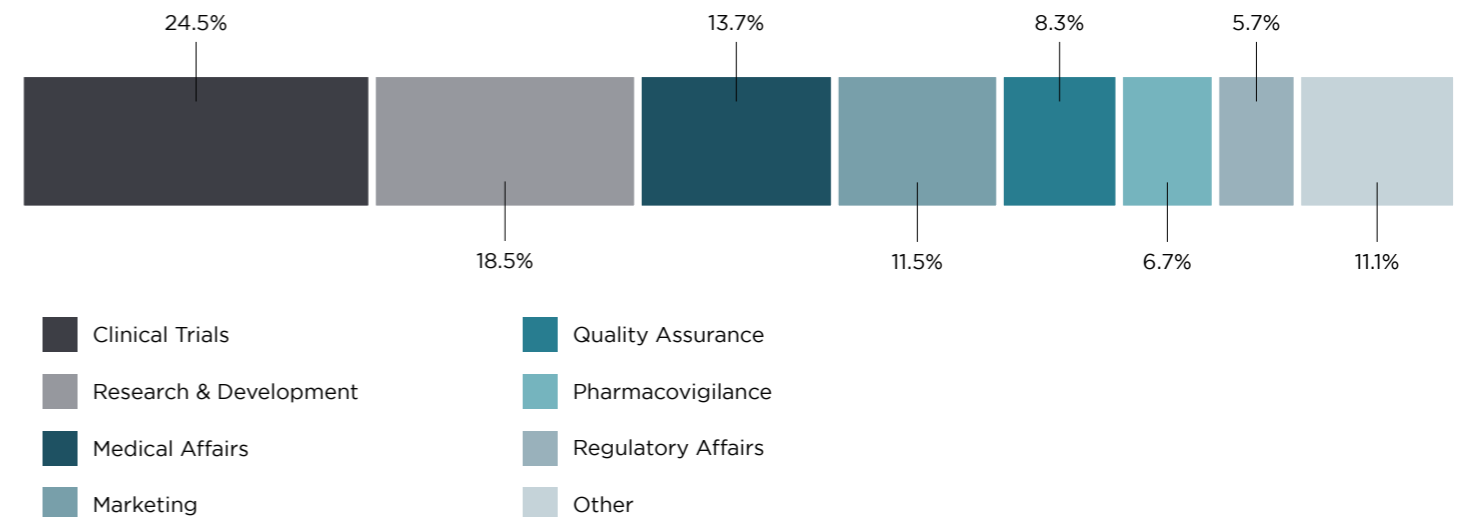
## Outlook and Advice

From 2024 onwards, we anticipate a sustained surge in global projects, perpetuating the heightened demand for CRO professionals in the pharmaceutical industry. The robust need for oncology and biopharma candidates is expected to persist. As the market leans towards being candidate-driven, companies must adapt by offering increased flexibility in compensation and work environments to secure qualified individuals successfully. Given that strong candidates often field multiple offers, expeditious and efficient interview processes are imperative, particularly for roles involving global interviews.

## BRS Registered Candidates Ratio



## BRS Job Opening Ratio



## **FUNCTIONS**

Accounting and Finance	17	Sales and Marketing	21
Legal / IP / Compliance	18	Supply Chain Management	22
Human Resources	19		
Office Support	20		

# ACCOUNTING AND FINANCE

## Salary Forecast

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

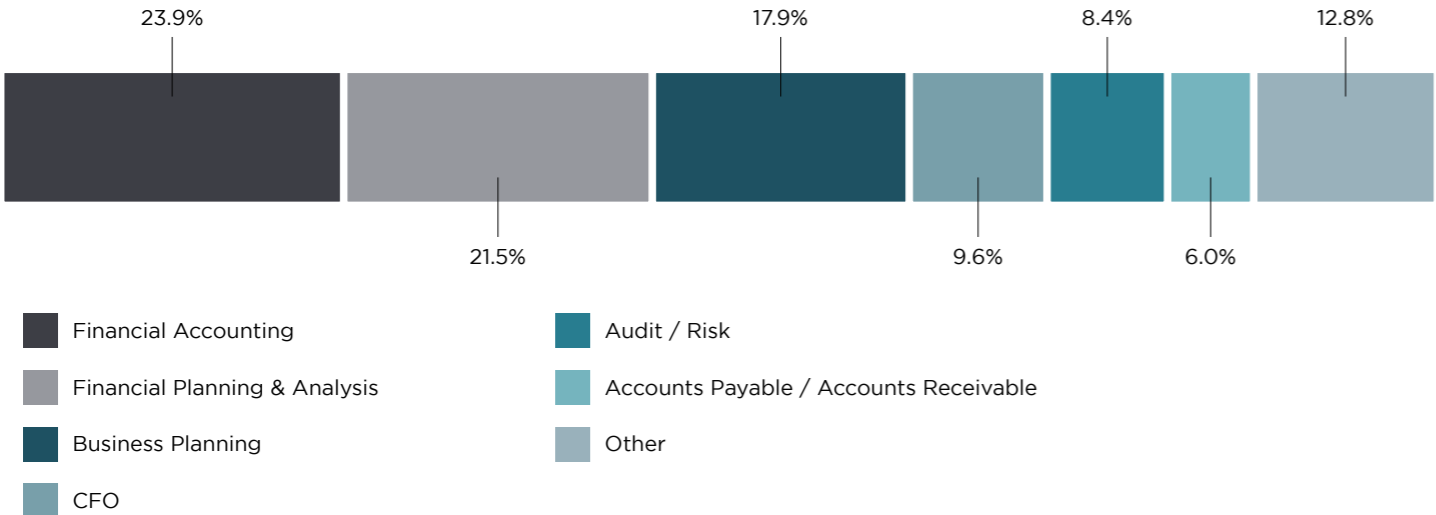
## Industry Trends

The job market is vibrant with replacement hiring being the dominant trend. There is a rising demand for candidates with a managerial perspective in cost accounting. Additionally, as companies undergo system upgrades, bilingual professionals with experience in ERP implementation and project management are highly sought after. While CFO positions for Japanese subsidiaries were traditionally filled internationally, there is a shift towards local hires. The competitive landscape for language-proficient candidates is driving an increase in budgets among companies, contributing to an overall rise in annual salaries.

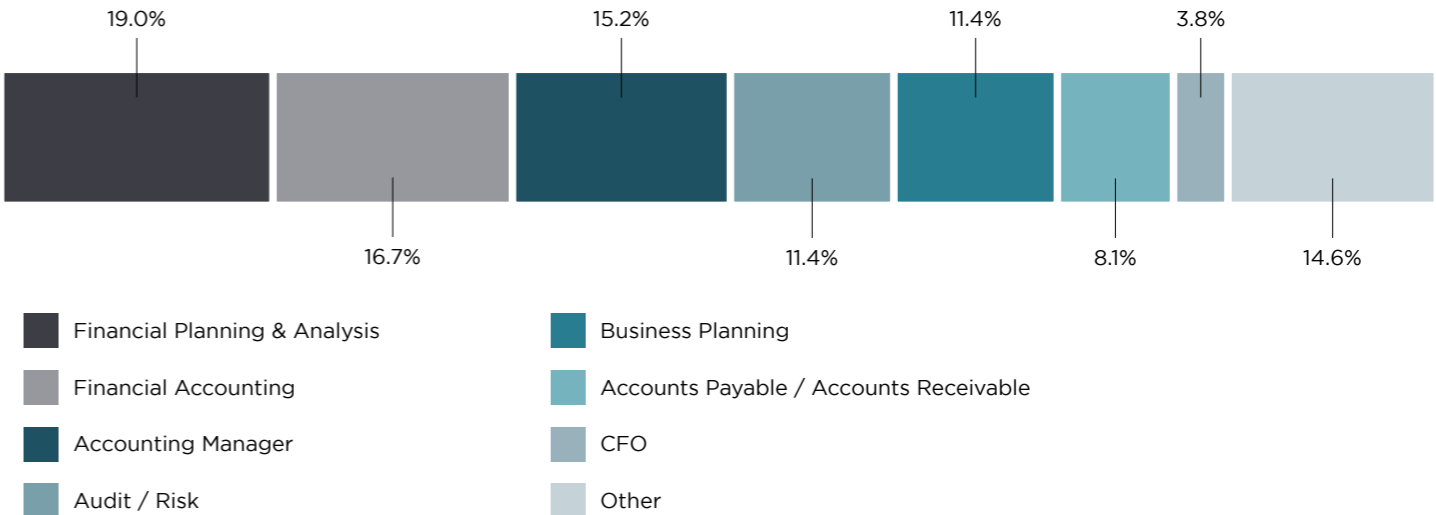
## Outlook and Advice

The competition for securing top-tier candidates is expected to persist beyond 2024. The intense hiring competition, initially focused on FP&A roles, is extending to encompass accounting positions, a trend likely to continue. The demand for managerial accounting positions requiring a strategic business perspective is anticipated to rise. Japanese companies are increasingly demanding international tax experience for their tax strategies, intensifying the competition for a limited pool of candidates. As more firms are increasingly working to improve their employer branding, successful hiring strategies should involve actively sharing the company's mission during the recruitment process and establishing flexible work environments, including hybrid work options.

## BRS Registered Candidates Ratio



## BRS Job Opening Ratio



# LEGAL / IP / COMPLIANCE

## Salary Forecast

Roles	Salary (Million yen)		
	Low	Middle	High
Compliance / Risk	7	10	15
Governmental Affairs	6	8	12
Head of Legal / General Counsel	17	23	35
In-house Lawyer	9	15	25
In-house Legal	6	10	17
Intellectual Property	6	8	12
Legal Counsel	10	15	25
Paralegal	5	6	7
Partner	35	45	60
Private Practice	9	13	30

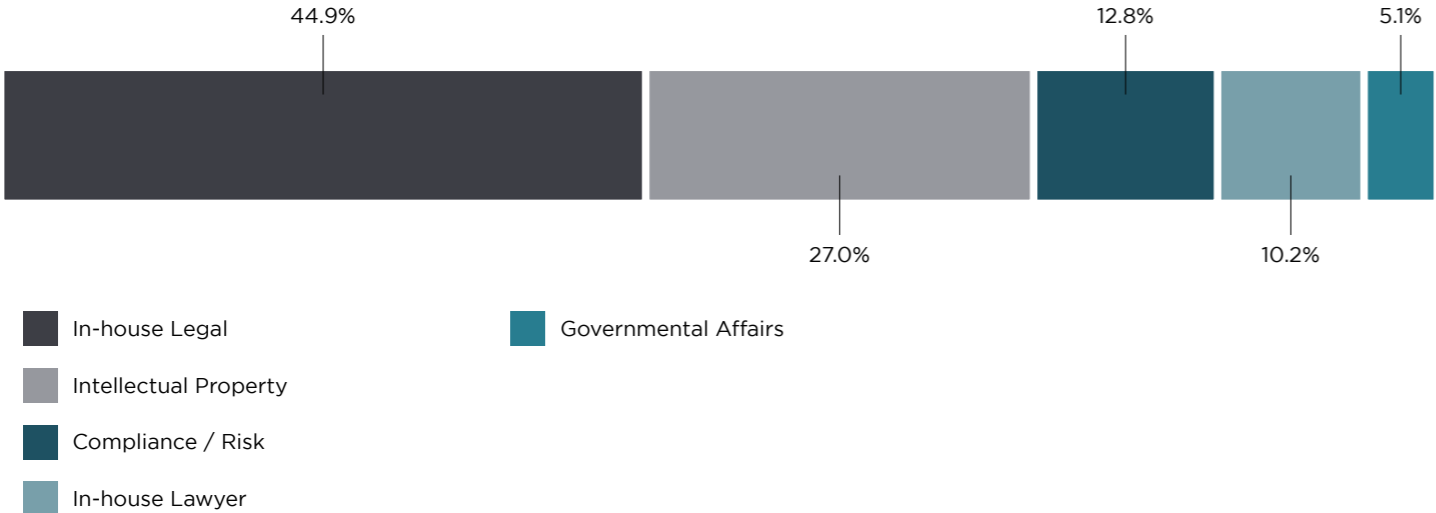
## Industry Trends

The legal job market is seeing a steady influx of positions, spanning from staff to senior manager/director roles. In intellectual property, there is a notable demand at staff and senior staff levels. Compliance witnessed heightened demand for managerial roles, particularly standalone positions. Across industries, legal needs are pervasive, with a pronounced uptick in demand from venture enterprises and firms eyeing IPOs. The escalating demand for qualified candidates has intensified the challenge for companies in securing the right talent, emphasizing a competitive landscape in the legal, IP, and compliance sectors.

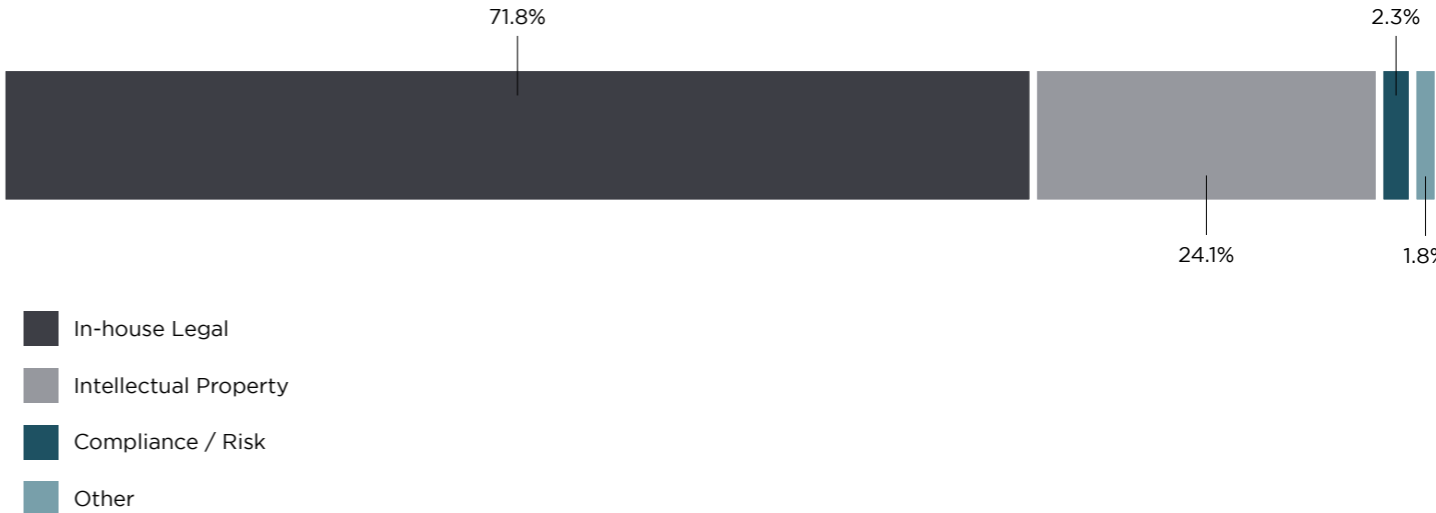
## Outlook and Advice

The forecast for the legal, IP, and compliance job market anticipates sustained candidate shortages, heightening the competition for top talent. Companies must adeptly showcase their strengths during the interview process to stand out. The continued preference for remote work or hybrid setups intensifies the competition, urging companies to offer flexible work styles to attract and retain top-notch candidates. In this dynamic landscape, a strategic and accommodating approach to recruitment is crucial for companies seeking success in hiring legal professionals.

## BRS Registered Candidates Ratio



## BRS Job Opening Ratio



# HUMAN RESOURCES

## Salary Forecast

Roles	Salary (Million yen)		
	Low	Middle	High
Compensation & Benefits	7	12	18
Employee Relations	7	9	13
Global HR	6	8	15
HR Business Partner	8	12	20
HR Director	15	20	35
HR Generalist	7	9	12
HR Manager	8	10	13
HRIS	6	8	12
Learning & Development	6	12	20
Payroll / Social Insurance	6	8	12
Talent Acquisition	6	10	20
Talent Management	8	10	15

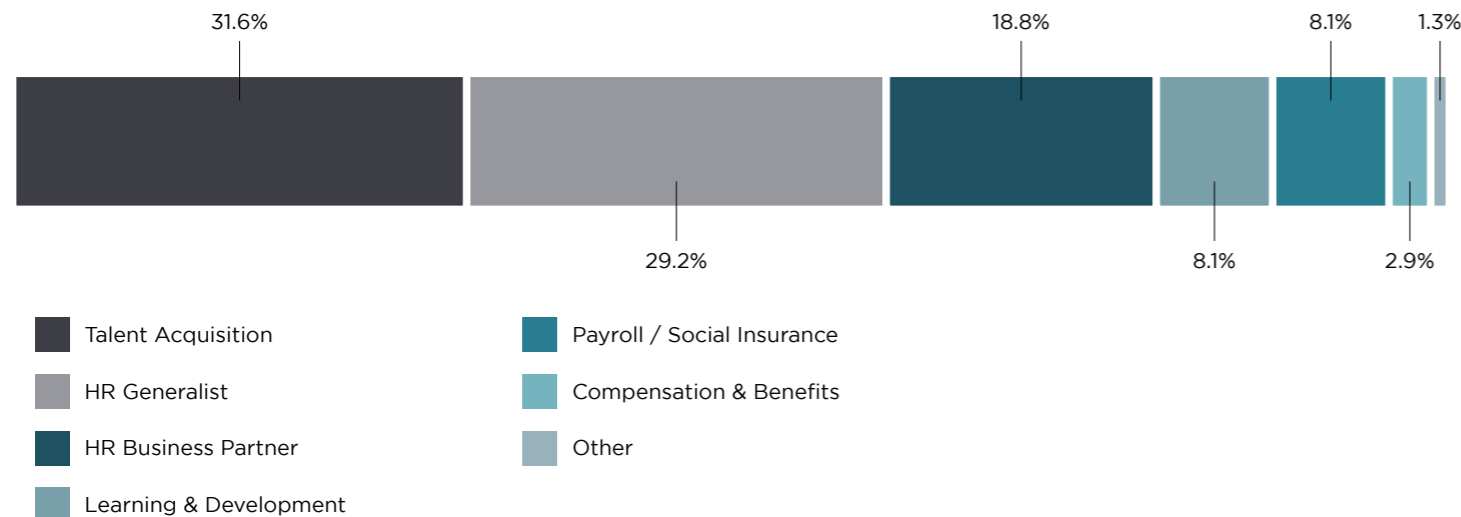
## Industry Trends

In the HR industry, cost-cutting initiatives have propelled a shift toward Centers of Excellence (CoE) and offshoring. Talent management is a top priority as companies enhance retention and attraction strategies. While talent acquisition faced setbacks in the IT sector early in the year, it rebounded for non-IT industries mid-year. Japanese headquarters increasingly tap external HR talent to adopt global best practices. The demand for strategic HR and business partnering skills remains robust. Notably, both multinational corporations and Japanese firms are intensifying their focus on Diversity & Inclusion, including promoting female leaders.

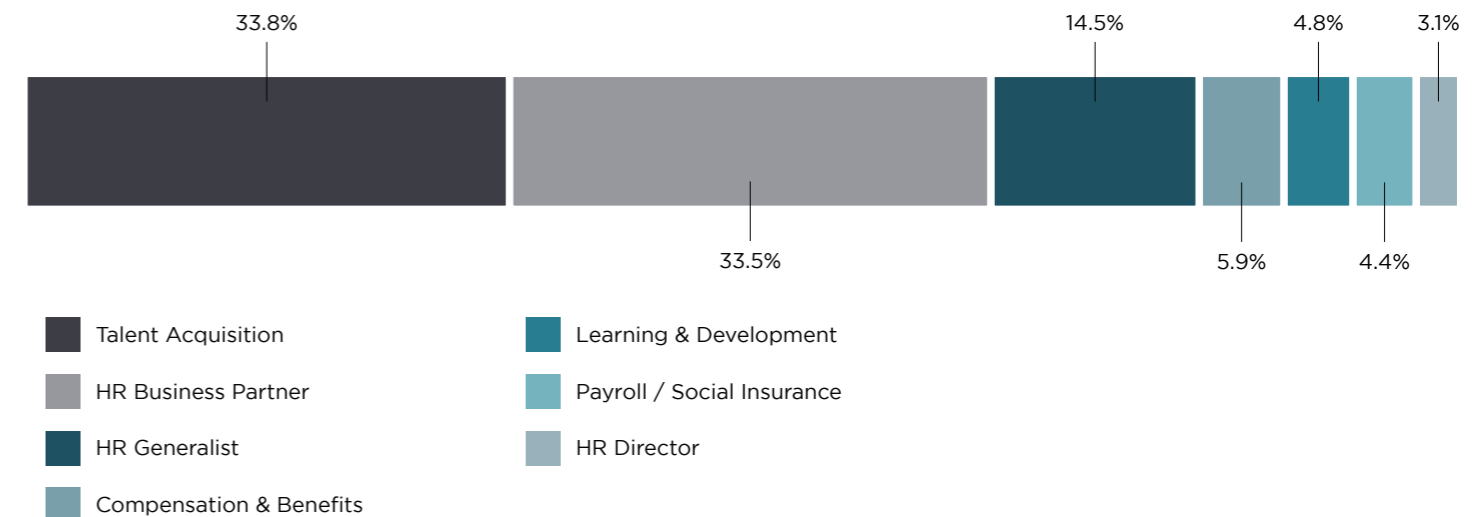
## Outlook and Advice

We foresee the demand for strategic HR and business partnering skills to continue. Additionally, both multinational corporations and Japanese firms will continue emphasizing Diversity and Inclusion. Maintaining flexible work conditions is crucial for attracting HR candidates. Clients are advised to be flexible with compensation, experience, and seniority. Those expediting interview processes stand a better chance of hiring top candidates. Face-to-face interviews foster higher engagement with the local talent pool, contributing to successful and meaningful hires.

## BRS Registered Candidates Ratio



## BRS Job Opening Ratio



# OFFICE SUPPORT

## Salary Forecast

Roles	Salary (Million yen)		
	Low	Middle	High
Accounting Assistant	4	5	6
Call Center	3.5	4.5	8
Executive Assistant	4	7	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	4	5.5	7
Team Assistant	3.5	4.5	6
Translator / Interpreter	6	8	10

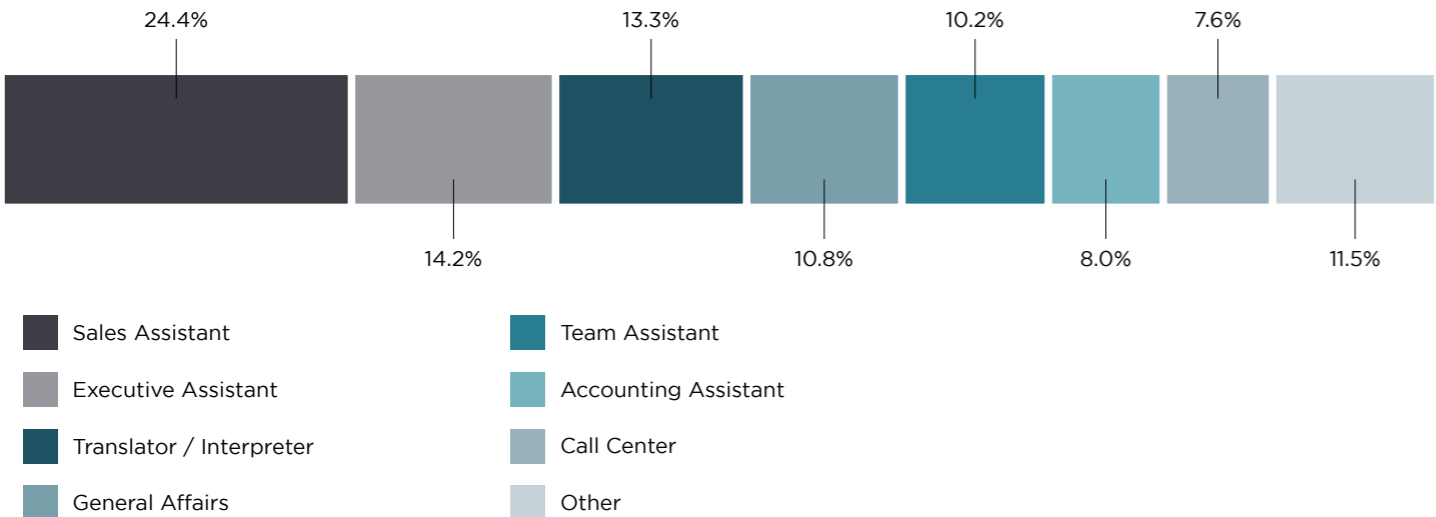
## Industry Trends

The trend in hiring office support professionals includes increased recruitment for secretaries and assistants, driven by both expansion and the creation of new positions. The job market has become more dynamic, leading to heightened activity in job changes and increased backfilling of vacancies. Other observations include transitioning assistants from temporary to full-time roles and expanding the scope of assistant roles to facilitate business growth. Particularly in Japanese companies, a growing number of expatriates and increased international collaboration have elevated the demand for language proficiency, especially in English, making it challenging to acquire high-skilled linguistic talent.

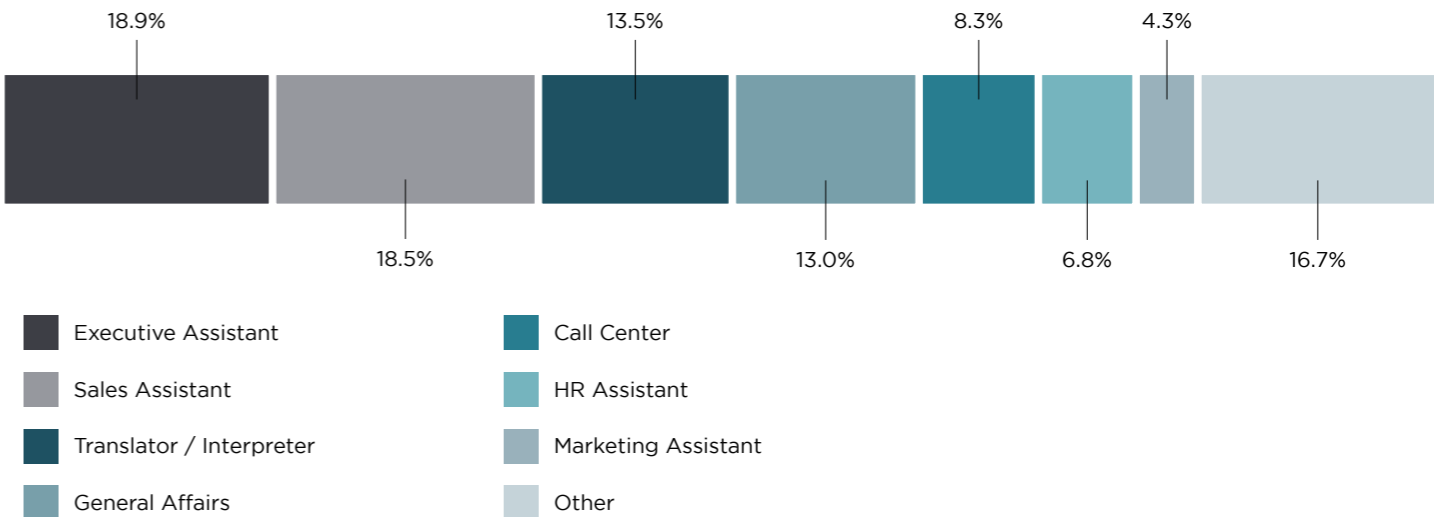
## Outlook and Advice

The competition for hiring office support professionals with strong English skills is intensifying and expected to continue. Given similar hiring criteria among many companies, success lies in relaxing or reconsidering less critical requirements like years of experience or past employment types. With candidates applying to multiple firms, swift decision-making and prompt job offers are key to securing top talent. Sharing information about family-friendly work arrangements such as remote work or flexible hours during interviews has become crucial to enhancing candidates' motivation to join.

## BRS Registered Candidates Ratio



## BRS Job Opening Ratio



# SALES AND MARKETING

## Salary Forecast

Roles	Salary (Million yen)		
	Low	Middle	High
Agency Account Manager	8	10	14
Brand Marketing / Brand Management	7	11	14
Product Marketing	7	12	15
Business Development	8	10	14
Country Manager / Representative	18	25	35
Data Analyst / Sales Planning	6	8	13
E-Commerce Management	7	10	14
Market Research	6	8	15
Marketing Director	15	18	21
Media Planning	6	8	13
Merchandiser	6	9	13
Online Marketing / Digital Marketing	6	11	14
Marketing Communications	8	10	14
PR / Corporate Communications	7	11	17
Retail Management	6	9	13
Sales Director	15	20	30
Trade Marketing	7	8.5	12

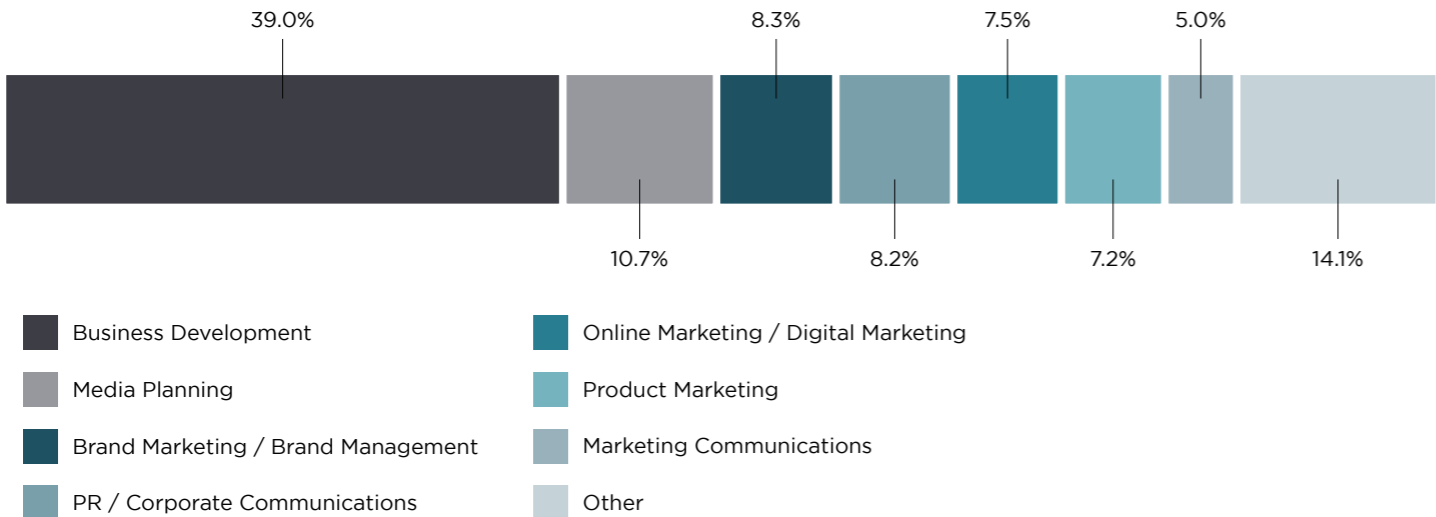
## Industry Trends

The sales and marketing industry is witnessing robust demand, especially for marketing, e-commerce, PR, and brand management roles. The resurgence in hospitality, travel, luxury, fashion, and retail hiring is notable, driven by increased inbound tourism. Despite the considerable demand, the candidate market remains fiercely competitive, with professionals having multiple job opportunities. Post-COVID, companies are showing less flexibility, expecting employees to return, either partially or fully, to the workplace, reflecting a shift in the post-pandemic work landscape.

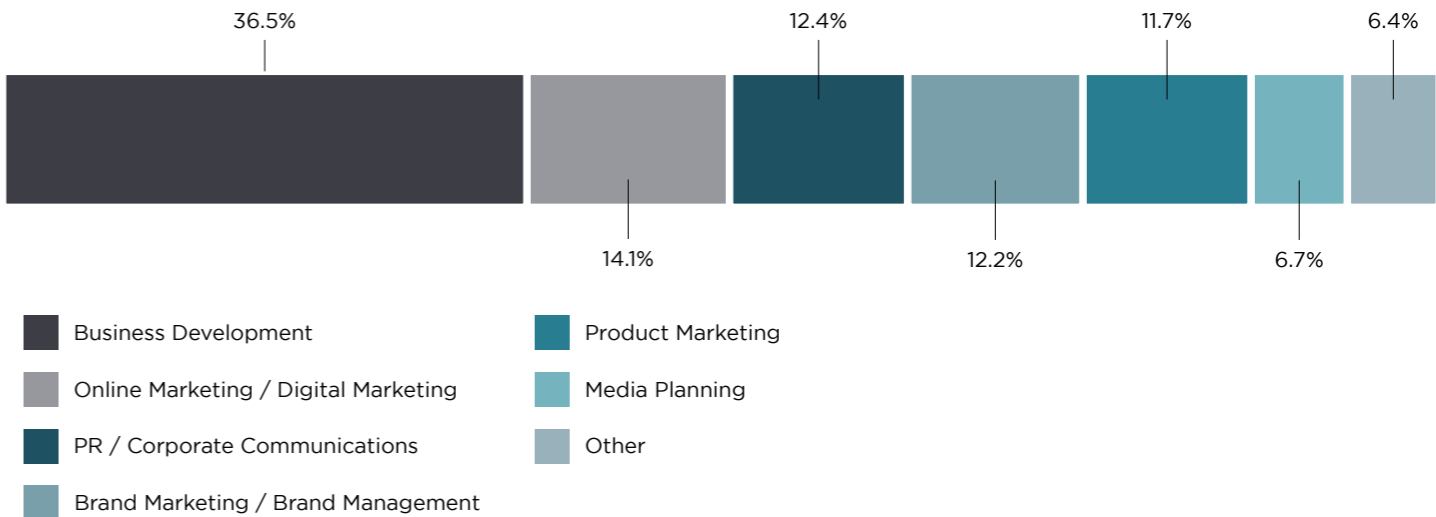
## Outlook and Advice

The outlook for hiring bilingual and multilingual sales and marketing professionals remains strong. Increased demand for digital marketing and PR candidates is evident in both B2C and B2B sectors. As candidates have more options, companies must prioritize quick, efficient interviews to secure talent ahead of competitors. Swift feedback after resume submissions is crucial, aligning with candidates' value for responsiveness. Post-COVID, the preference for remote or hybrid work persists, making flexibility a key factor in attracting top talent. Companies offering adaptable working arrangements will gain a competitive edge in securing skilled professionals.

## BRS Registered Candidates Ratio



## BRS Job Opening Ratio



# SUPPLY CHAIN MANAGEMENT

## Salary Forecast

Roles	Salary (Million yen)		
	Low	Middle	High
4PL	6	8	10
Customer Service	6	7	10
Direct Procurement	6	10	15
Distribution	6	8	12
Import / Export	6	7	8
Indirect Procurement	7	12	18
Inventory Control	6	7	8
Kaizen / Six Sigma / BPR	7	10	14
Logistics	7	12	20
Merchandising	6	7	9
Order Management	6	7	8
Production Control	6	7	10
Supply & Demand Planning	7	10	15
Supply Chain Management	10	15	20
Warehouse Management	6	9	12

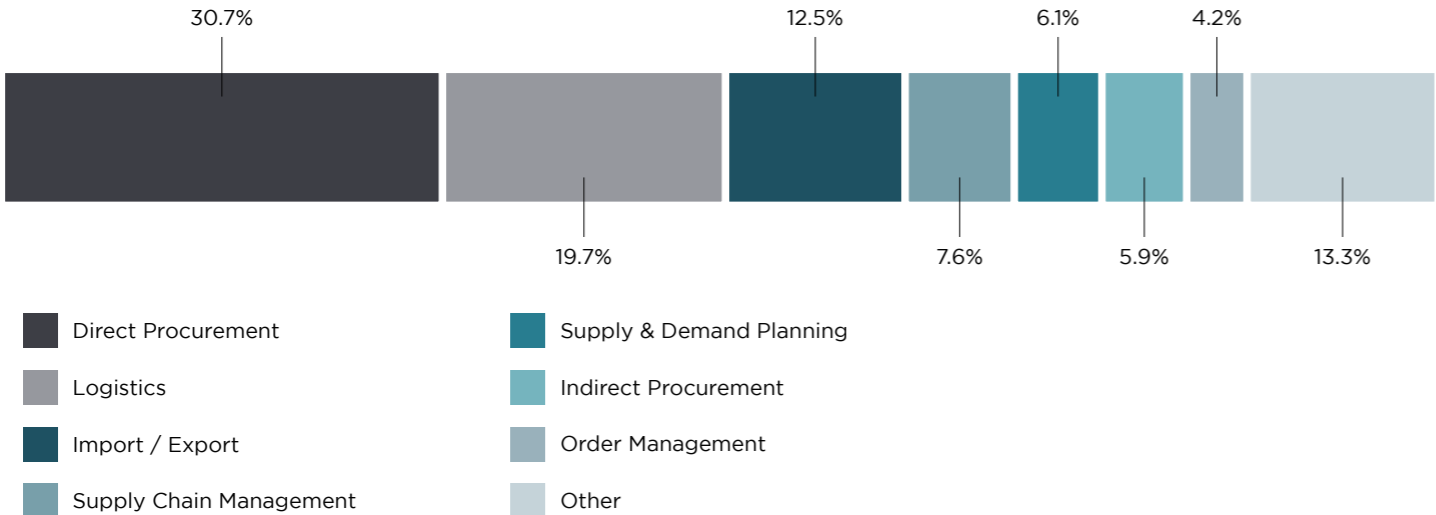
## Industry Trends

In 2023, companies faced numerous challenges such as inflation in the United States, the depreciation of the yen, and geopolitical uncertainties, necessitating a heightened emphasis on agile responses. Within the supply chain management domain, there was a growing demand for professionals with global experience and negotiation skills for cost optimization. Notably, midsize manufacturing companies exhibited a notable need for individuals proficient in both strategic planning and hands-on execution. Moreover, with the widespread adoption of SAP in both Japanese and foreign companies, there is a rising trend in seeking candidates with solid SAP experience, reflecting the evolving landscape of supply chain talent acquisition.

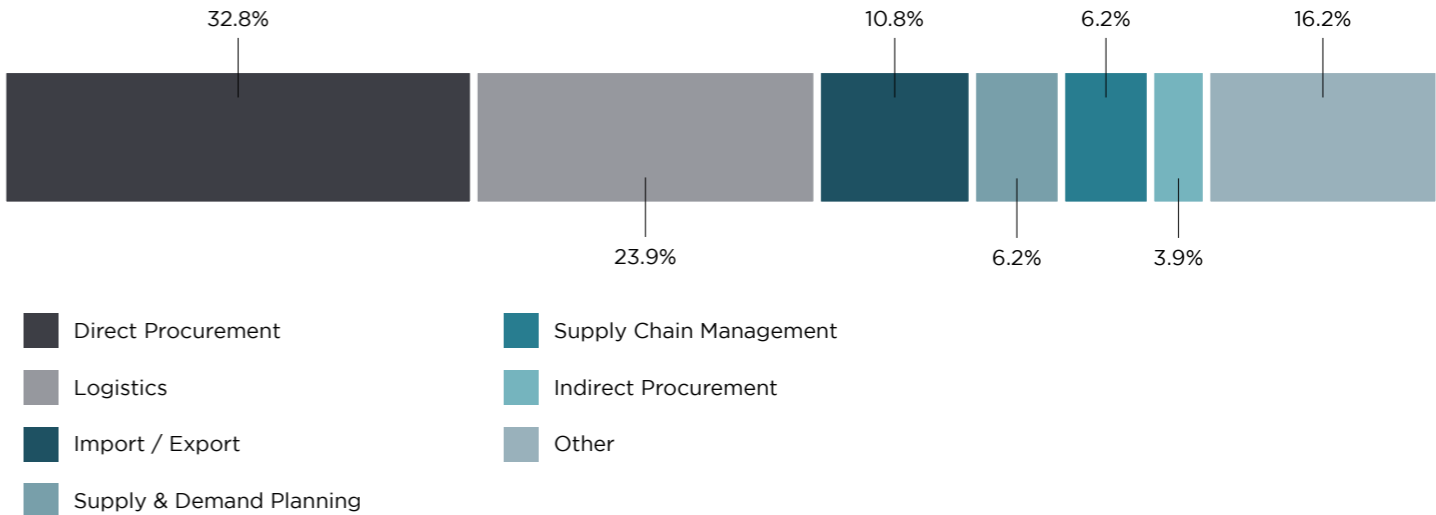
## Outlook and Advice

As companies accelerate their focus on automation, sustainability, digitalization, collaboration, and innovation, the demand for candidates with the expertise to lead in these areas is projected to rise. Given the scarcity of candidates meeting the sought-after criteria, a swift and efficient selection process is crucial amidst fierce competition. Moreover, candidates' emphasis on remote work environments persists post-COVID, favoring companies that maintain flexible work arrangements, including hybrids. While companies often seek perfection in candidates, the scarcity of top talent necessitates a relaxation of requirements to secure the best-suited individuals.

## BRS Registered Candidates Ratio



## BRS Job Opening Ratio



## **IT**

Digital / Online	24	Software	27
Hardware	25	System Integration	28
Inhouse	26		

# DIGITAL / ONLINE

## Salary Forecast

Roles	Salary (Million yen)		
	Low	Middle	High
Android Software Engineer	7	9	12
Backend Software Engineer	8	12	16
CTO	20	30	40
Data Engineer / Data Analyst	8	12	15
Development / Localization	7	9	12
Frontend Software Engineer	7	9	12
Full Stack Software Engineer	8	12	16
iOS Software Engineer	7	9	12
Pre Sales / Post Sales	7	9	12
Product Manager	8	12	16
Programmer / Software Engineer	7	10	12
Project Management	8	12	16
QA / Testing	6	9	12
Sales Manager	10	14	18
Scrum Master	8	12	16
Site Reliability Engineer	8	12	16
Strategic Business Development	8	14	20
Web Design / Producer	7	9	12

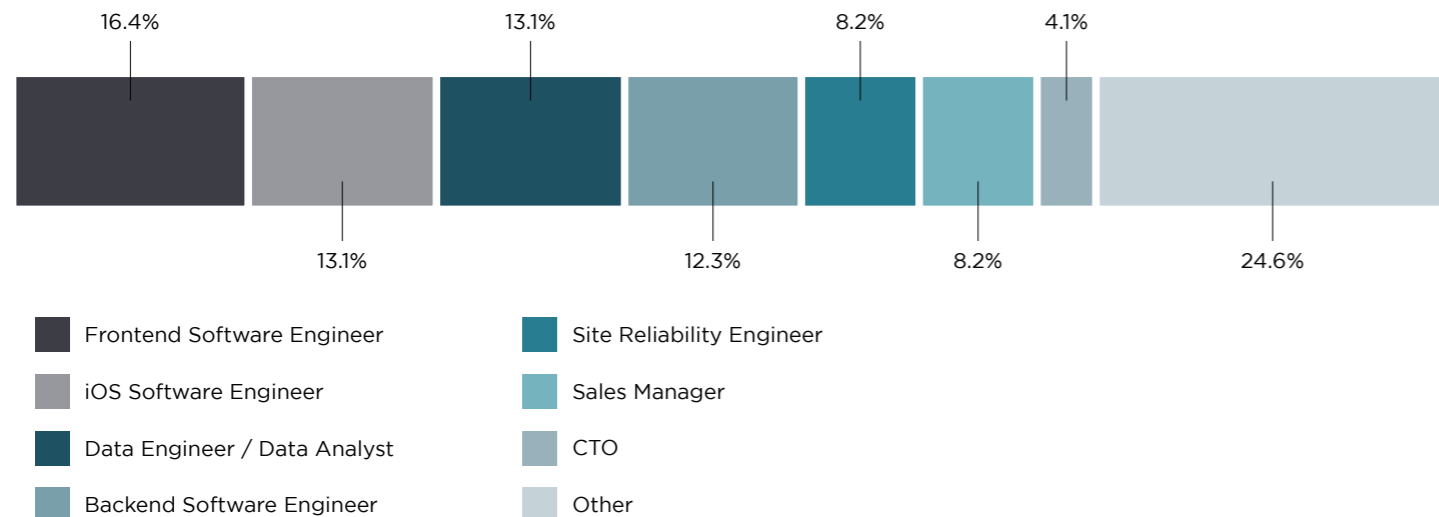
## Industry Trends

The demand for engineers in product development remains robust, with a particular emphasis on DevOps and full-stack engineers to expedite development processes. Professionals in product management, product marketing and project management are also in high demand. Recognizing the value of face-to-face communication for innovation, companies, especially those with foreign capital, are transitioning from fully remote to hybrid work styles. This shift aligns with the industry's goal to accelerate product development speed, reflecting the evolving dynamics and emphasis on effective collaboration in the digital landscape.

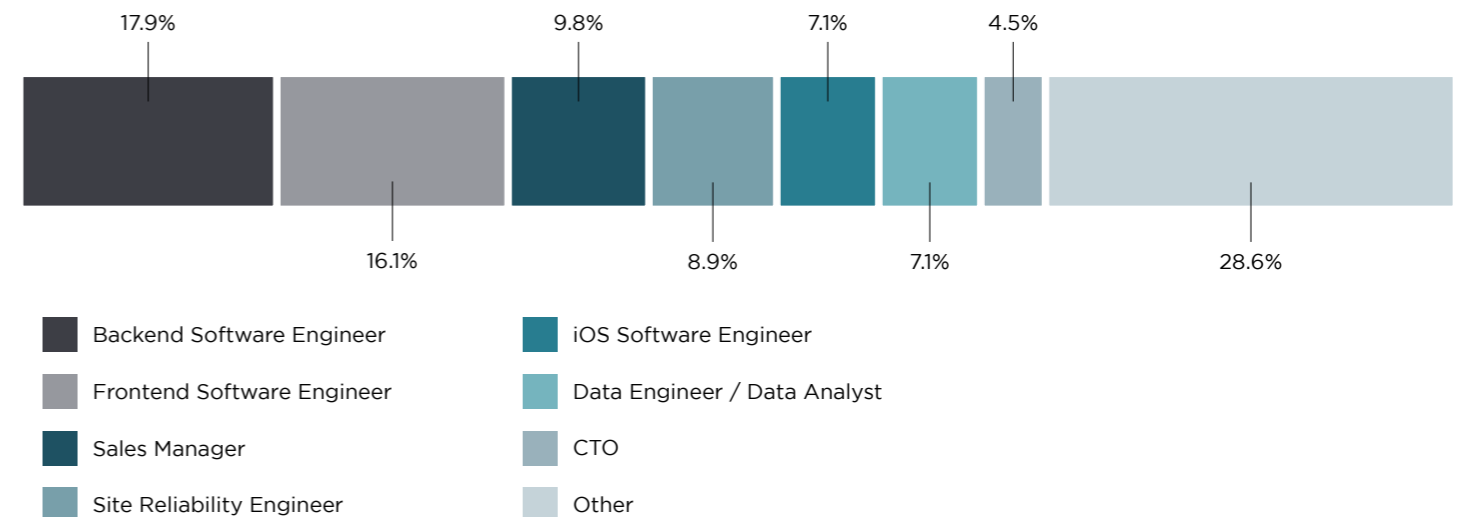
## Outlook and Advice

The persistent challenge of a shortage of qualified engineers in the Japanese market will continue in 2024. To secure such talent, establishing an HR system for non-Japanese speakers is crucial. Non-Japanese speakers tend to prefer flexible work environments that prioritize international skill sets and cultures, increasing the likelihood of attracting desired talent. While post-pandemic, online interviews are common, candidates still value cultural alignment. For hiring top professionals, incorporating in-person elements like offer meetings or office tours remains essential for fostering connections beyond the virtual realm.

## BRS Registered Candidates Ratio



## BRS Job Opening Ratio



# HARDWARE

## Salary Forecast

Roles	Salary (Million yen)		
	Low	Middle	High
Architecture	8	12	16
Business Development	8	12	16
Database Administrator	7	9	12
Embedded Engineer	7	9	12
Helpdesk / Support Engineer	6	8	10
Network Administrator	7	9	12
Network Engineer	7	9	12
Pre Sales / Post Sales	7	9	12
Programmer / Software Engineer	7	9	13
Project Management	8	12	16
Sales Director	18	24	30
Sales Manager	10	14	18
System Administrator	6	9	12

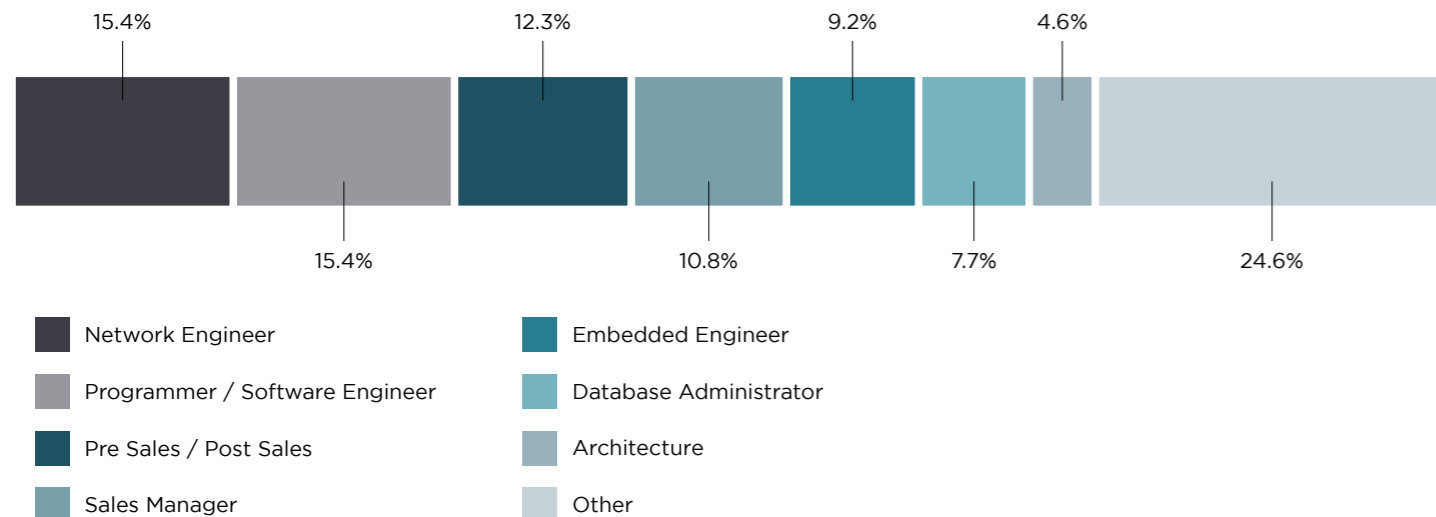
## Industry Trends

In the hardware sector, the widespread impact of 5G on the proliferation of the Internet of Things (IoT) extends beyond consumer devices to encompass IoT infrastructure, including smart payments and meters. The emergence of novel technologies such as Virtual Reality (VR), drones, and touch-panel PCs, along with hybrid products, introduces new market opportunities. As the integration of hardware and software progresses, market dynamism grows, marked by hardware companies acquiring software firms and the merge of startups specializing in IoT products and services.

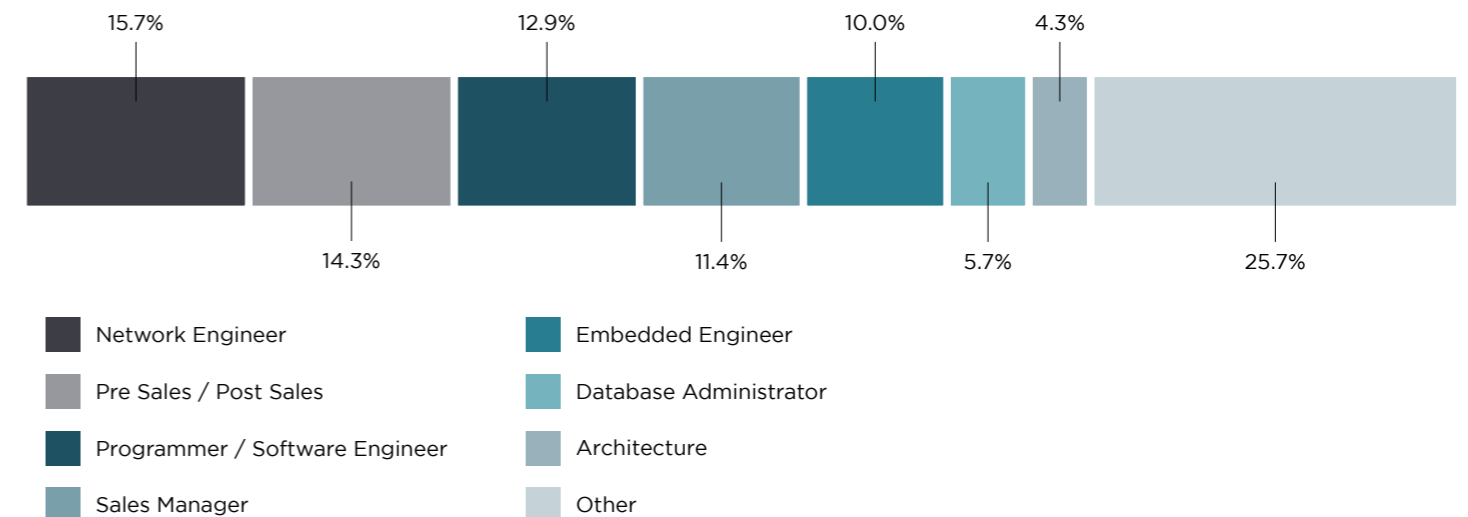
## Outlook and Advice

With AI advancements driving specialized hardware development, there's a growing demand for AI engineers versed in accelerating AI processing and enhancing energy efficiency. The rising significance of cyber-physical systems, particularly in real-time control for sectors like automotive, manufacturing, and medical devices, amplifies the demand for IT professionals understanding both hardware and software. Addressing environmental concerns, the key lies in improving energy efficiency through grid computing, intensifying the recruitment of IT talent by social infrastructure companies. The accelerating development of hardware in sensor technology and control systems, propelled by autonomous driving, foresees heightened demand for IT engineers skilled in software-controlled hardware.

## BRS Registered Candidates Ratio



## BRS Job Opening Ratio



## Salary Forecast

Roles	Salary (Million yen)		
	Low	Middle	High
Architecture	8	12	16
BI / Data Warehouse	8	12	15
Business / Systems Analyst	8	11	14
CIO	20	30	40
Cloud Engineer	8	12	16
DBA / Database Engineer	8	11	14
Helpdesk Engineer	5	7	9
IT Management	9	12	16
IT Planning / DX Planning	8	12	16
IT Security & Audit	8	12	16
Network Engineer	6	8	10
Programmer / Software Engineer	7	10	12
Project Management	8	12	16
QA / Testing	7	9	12
System Administrator	6	8	10
Web Design / Producer	7	9	12

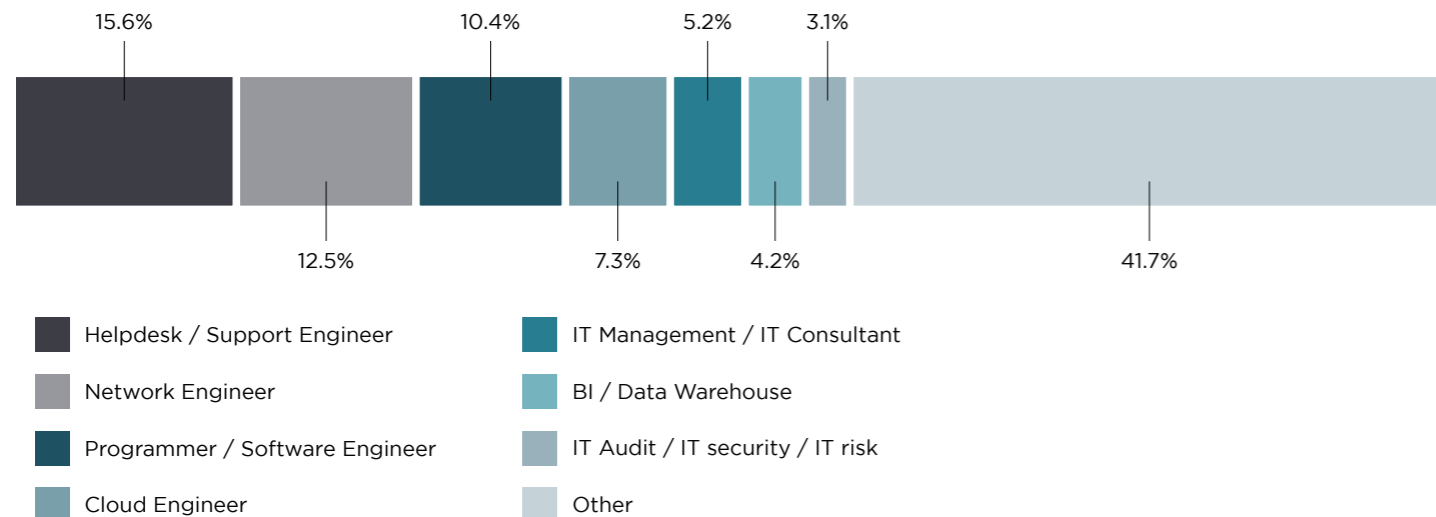
## Industry Trends

Post-pandemic, digital transformation remains a top priority for companies in CRM, SCM, HR, and finance. The shift from developing systems in-house to adopting no-code/low-code is expanding IT professionals' roles beyond traditional IT companies to non-IT sectors. The persistent shortage of IT professionals in the Japanese market poses challenges, especially for non-IT companies seeking to hire DX engineers. High demand and difficulty in hiring are prominent for cloud engineers, IT security professionals, and BI/data warehouse experts. The evolving landscape, influenced by technologies like ChatGPT, underscores the importance of hiring AI-related professionals and strategically implementing AI in company operations.

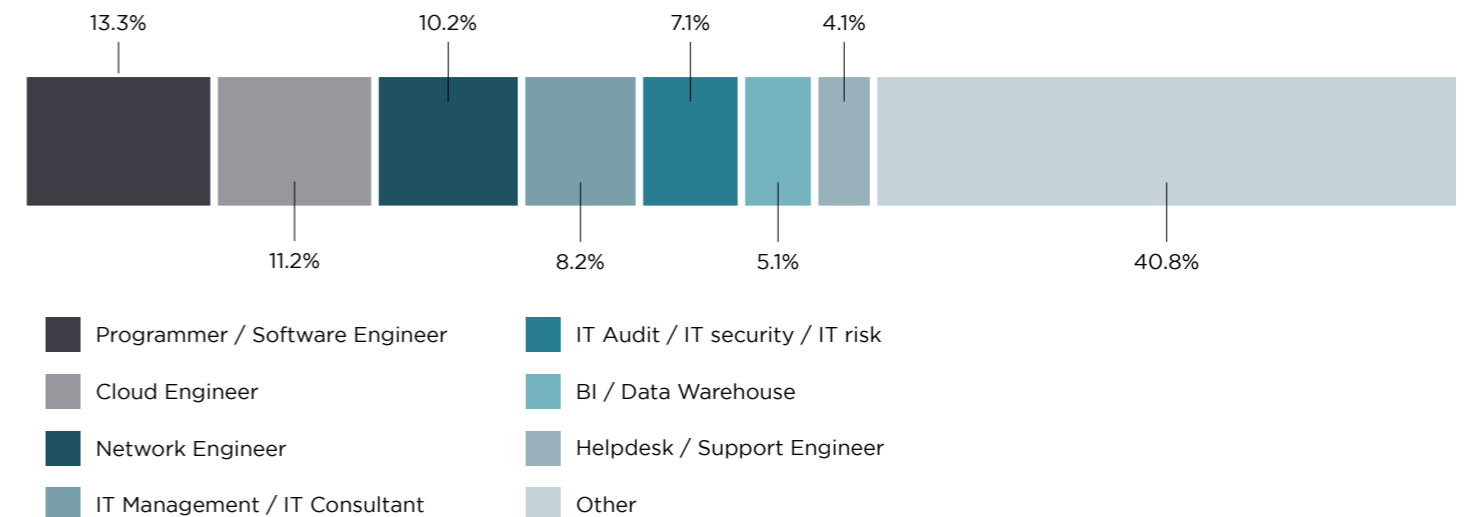
## Outlook and Advice

In the prevalent era of DX, a tailored strategy aligned with company goals becomes pivotal for attracting IT professionals. Due to a shortage of Japanese IT candidates, companies must increasingly consider hiring non-Japanese speakers, necessitating the establishment of HR systems tailored for them. With the likelihood of more joint ventures offering direct IT services, companies creating their own IT subsidiaries should prioritize establishing robust HR systems, emphasizing work style, salary structures, and performance evaluations to effectively attract and retain professionals.

## BRS Registered Candidates Ratio



## BRS Job Opening Ratio



# SOFTWARE

## Salary Forecast

Roles	Salary (Million yen)		
	Low	Middle	High
Account Executive	8	12	15
Architecture	8	12	16
BI / Data Warehouse	8	12	15
Business / Systems Analyst	8	11	14
Customer Success	8	12	16
DBA / Database Engineer	8	11	14
Development / Localization	7	9	12
Embedded Engineer	7	9	13
Network Engineer	7	9	12
Pre Sales / Post Sales	8	10	13
Programmer / Software Engineer	7	9	13
Project Management	8	12	16
QA / Testing	6	9	12

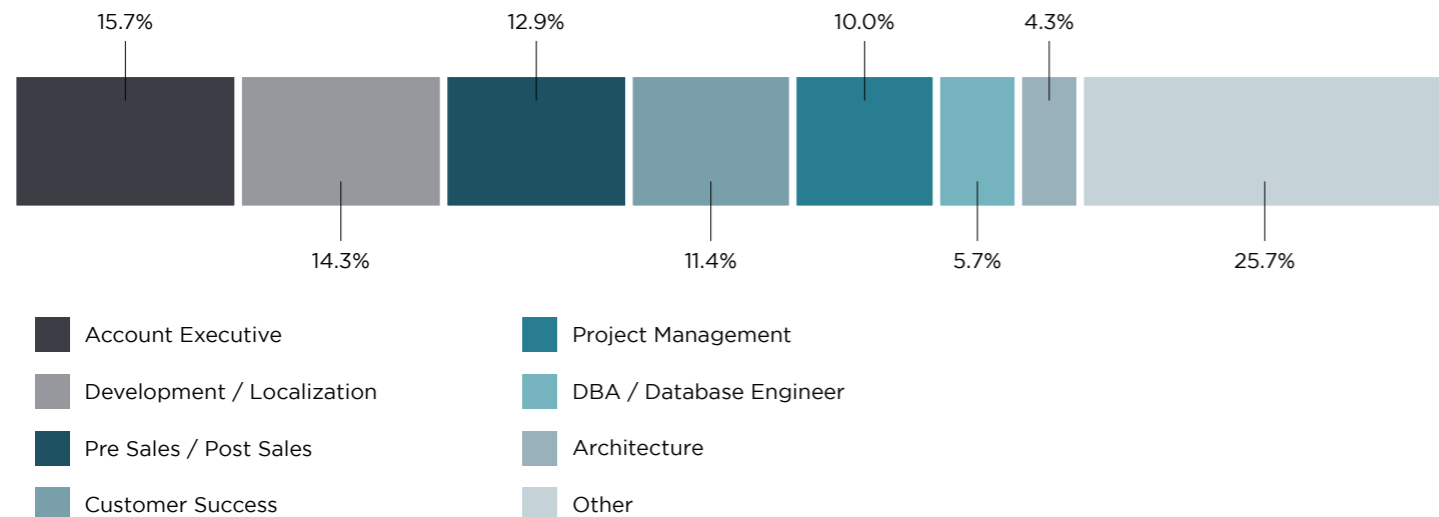
## Industry Trends

In the software industry, short-term impacts from the U.S. economic situation are evident, but the sector exhibits robust growth in response to addressing the “2025 digital cliff” issue and adapting to the New Normal with increasing demand for DX. With the proliferation of IoT and advancements in cloud technology, there is a broadening need for talent in software companies, encompassing individuals with hardware understanding and expertise in AI. Notably, M&A activities aimed at acquiring IT engineers and technicians have significantly surged in recent years.

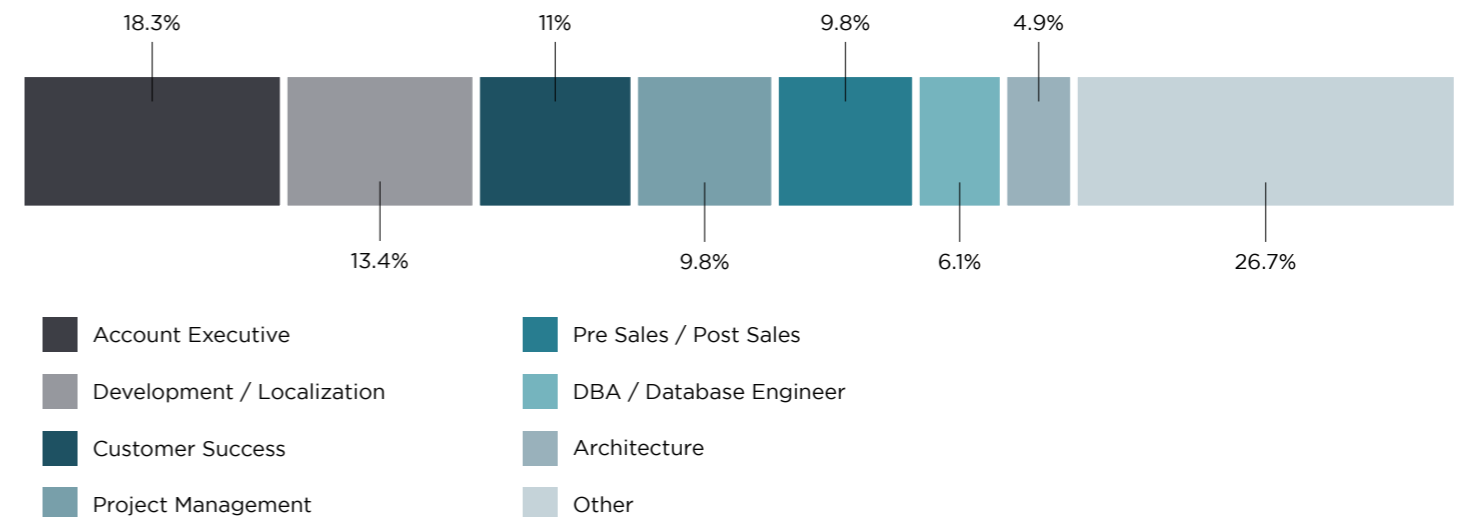
## Outlook and Advice

IoT proliferation drives increased demand for engineers versed in both software and hardware, essential for smart homes, cities, and industries. Cloud technology expertise, particularly in AWS/Azure/GCP, is crucial as software transitions to cloud platforms, elevating demand for cloud engineers with dual roles in development and operations. Simultaneously, the rising importance of cybersecurity heightens the need for security specialists. The prevalence of low-code/no-code platforms amplifies demand for engineers, specifically customer success-focused ones, skilled in communicating and supporting users in utilizing these applications effectively.

## BRS Registered Candidates Ratio



## BRS Job Opening Ratio



# SYSTEM INTEGRATION

## Salary Forecast

Roles	Salary (Million yen)		
	Low	Middle	High
Architecture	8	12	16
BI / Data Warehouse	8	12	15
Business / Systems Analyst	8	11	14
Cloud Engineer	8	12	16
DBA / Database Engineer	8	11	14
Embedded Engineer	7	9	12
IT Consultant	8	12	16
IT Management	8	12	15
Network Engineer	7	9	12
Pre Sales / Post Sales	8	10	12
Project Management	8	12	18
QA / Testing	6	9	12

## Industry Trends

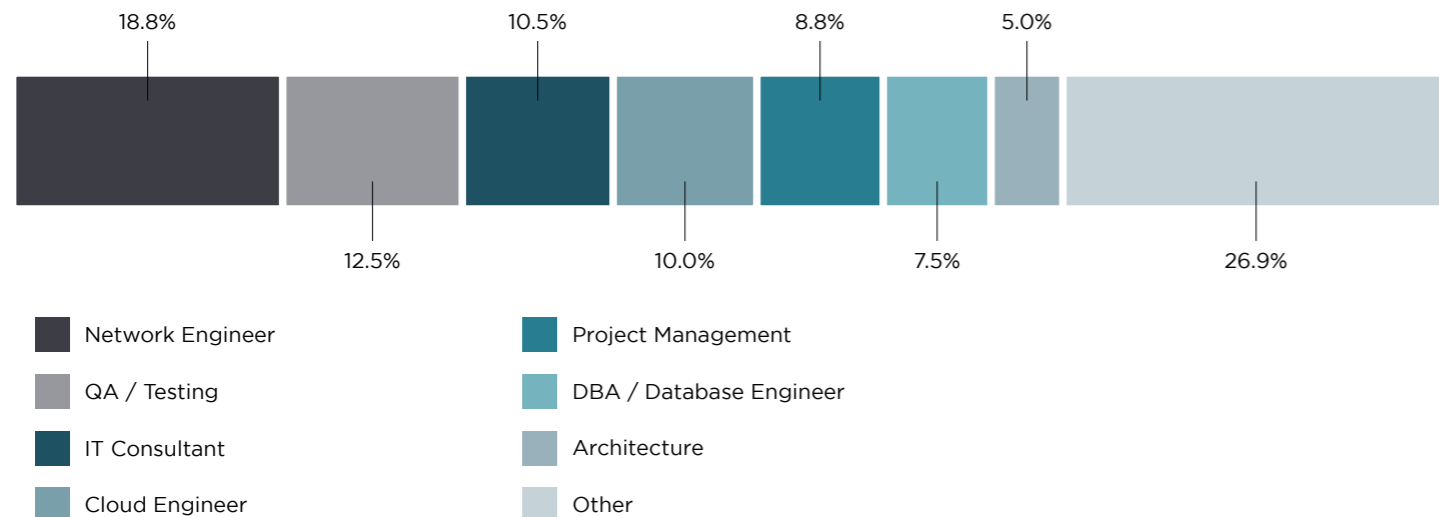
The global System Integration (SI) market reached 303.2 billion USD in 2020 and is predicted to grow at a substantial rate by 2026. With the widespread adoption of cloud services and the increase in companies integrating cutting-edge technologies like Big Data and SaaS, the demand for SI for streamlining processes is rising. The potential expansion of projects due to the “2025 digital cliff” amplifies SI project requests. The shift towards agile development is accelerating, not only for traditional business system development but also for the increased demand in consumer-facing web services and application development.

## Outlook and Advice

The expanding reach of cloud computing, digitalization, heightened security, and the drive for AI and automation diversify the demand for IT talents. To attract exceptional IT professionals, robust recruitment branding focused on advanced projects is crucial. With a shortage of Agile development experienced individuals, strategies encompassing nurturing and reskilling existing engineers are vital. Anticipating a potential shortage of up to 790,000 IT talents by 2030\*, considering global IT talent acquisition becomes imperative due to the absolute scarcity of IT professionals in Japan.

\* Research related to supply and demand for IT professionals by Ministry of Economy, Trade and Industry

## BRS Registered Candidates Ratio



## BRS Job Opening Ratio

