

SALARY SURVEY 2019

JAPAN



“

PEOPLE ARE AT THE HEART OF EVERYTHING WE DO. OUR CANDIDATES AND CLIENTS SEE US AS A TRUSTED ADVISOR, HELPING THEM TO FULFIL CAREER ASPIRATIONS AND BUILD EXCEPTIONAL TEAMS OVER THE LONG-TERM.

”

WELCOME TO ROBERT WALTERS

SPECIALIST PROFESSIONAL RECRUITMENT



**ROBERT WALTERS,
CHIEF EXECUTIVE OFFICER**

“As a market-leading global recruitment group our purpose is clear - we power people and organisations to fulfil their unique potential - and that’s what we’ve been doing for over 33 years.

People are at the heart of everything we do from the job seeker, to the hiring manager, to those who bring them together. Our candidates and clients see us as a trusted advisor, helping them to fulfil career aspirations and build exceptional teams over the long-term.

We do this through our collaborative culture and non-commission model which ensures that candidate and client needs are front and centre.

Our candidates know that we’ll take the time to listen and advise them on the next step in their career. It’s these relationships that enable us to offer our clients the best talent on the market and that’s why they return to us again and again. We’re also experts in the disciplines we recruit for enabling us to provide insight into hiring and salary trends.

While our reach is global, we remain committed to providing our clients with local market insight. We look to hire the best local talent to ensure we can offer a deep understanding of the local culture and market conditions. This sets us apart from the competition and helps us remain a trusted recruitment partner to the world’s leading businesses.”

Robert Walters
CEO
Robert Walters plc

69%

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

GLOBAL REACH, LOCAL EXPERTISE

 Countries we operate in



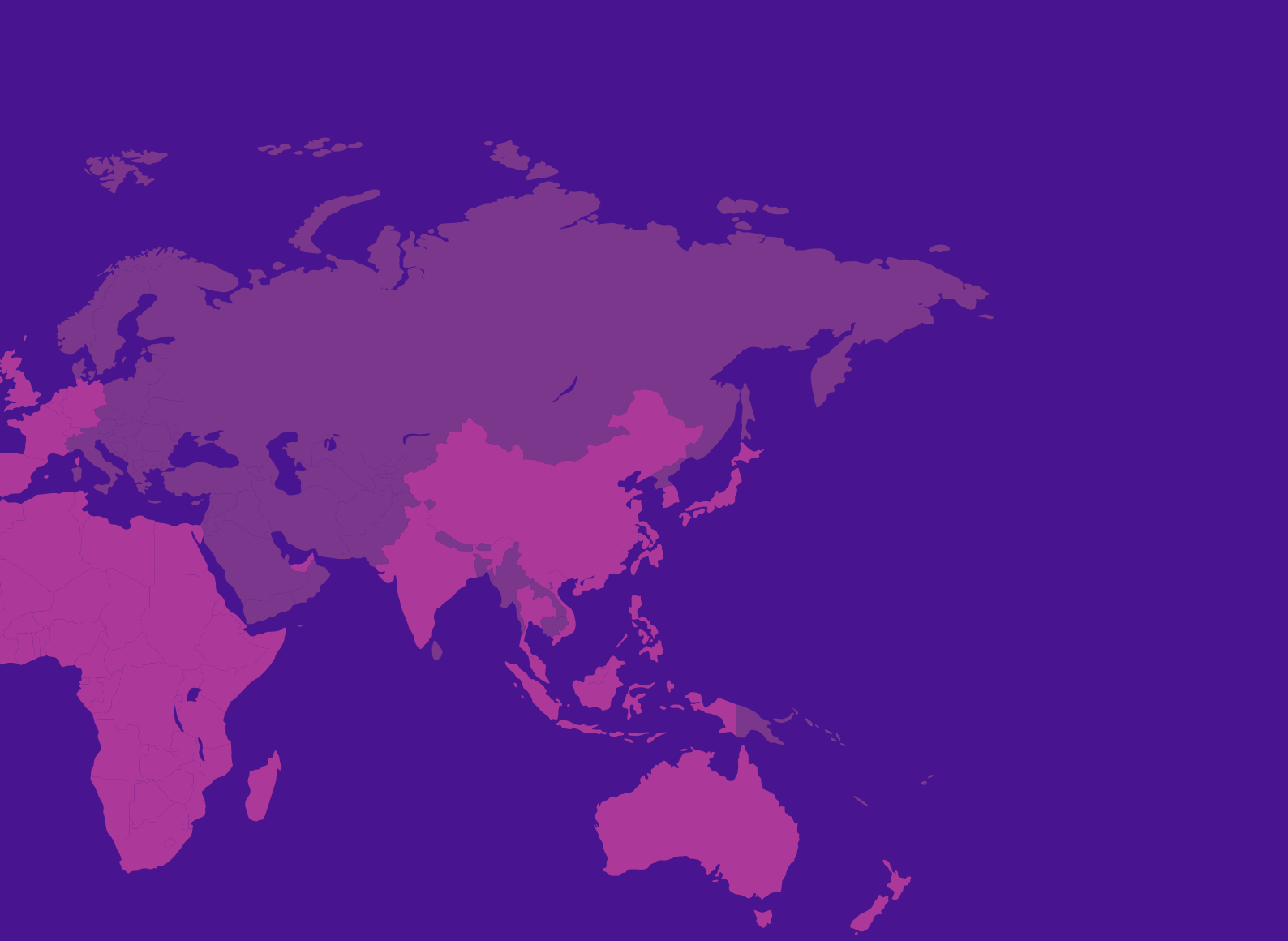
29

WE RECRUIT
ACROSS 29
COUNTRIES
GLOBALLY

AUSTRALIA
BELGIUM
BRAZIL
CANADA
CHILE
CHINA
FRANCE
GERMANY
HONG KONG
INDIA

INDONESIA
IRELAND
JAPAN
LUXEMBOURG
MALAYSIA
NETHERLANDS
NEW ZEALAND
PHILIPPINES
PORTUGAL
SINGAPORE

SOUTH AFRICA
SOUTH KOREA
SPAIN
SWITZERLAND
TAIWAN
THAILAND
UAE
UK
USA
VIETNAM



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- Australia & New Zealand
- Brazil
- Canada
- Europe
- Greater China & South East Asia
- United Kingdom
- Middle East & Africa
- South Korea

Download your copy today by visiting
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OUR SERVICE

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

OUR CORE DISCIPLINES INCLUDE:

- Accounting & Finance
- Banking & Financial Services
- Engineering
- Human Resources
- Legal
- Marketing
- Sales
- Secretarial & Support
- Supply Chain & Procurement
- Technology

WHAT MAKES US DIFFERENT?

Bespoke, consultative service

1. Commitment to quality

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

2. Specialists

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

“ Robert Walters has found us some great people. They're fast, friendly and very well connected. I've worked with many recruiters over the years but the Robert Walters team are without doubt my favourite.

Michael Acton Smith,
Co-founder & CEO,
Calm, USA

”

“ I have found Robert Walters to be professional, thorough and responsive. They've introduced us to quality candidates who closely match our requirements and as a result we have made successful hires.

Henry Loo, VP Data
Management and
Analytics, DBS Bank,
Hong Kong

”

“ We had a dedicated team from Robert Walters who provided consistency and a great level of expertise in their relevant disciplines. The team clearly communicated the recruitment process to us and provided sound advice around the market, candidate experience and expectations.

Sam Reynolds, Senior HR
Advisor, ARTC, Australia

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3. No individual commission

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

4. Our people and culture

We promote long-term, international careers helping us to retain our top people which provides continuity for our clients. We're proud to say our senior management team is home-grown with an average tenure of 17 years.

5. Innovation culture


We were the first recruiter to launch a recruitment process outsourcing business and we continue to lead the way with industry-first sponsorships and brand development such as our sponsorship of the British and Irish Lions.

6. Long-term business focus

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

7. End-to-end recruitment service

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



**“ WELCOME TO THE 20TH
EDITION OF THE GLOBAL
SALARY SURVEY PROVIDING
CREDIBLE INSIGHT INTO
HIRING AND SALARY TRENDS
WORLDWIDE. ”**

ABOUT THE SALARY SURVEY

Welcome to the 20th edition of the Robert Walters annual Salary Survey.

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

Our Salary Survey is based on the analysis of permanent, interim and contract placements made across each of our geographies and recruitment disciplines during 2018, and our predictions for the year ahead.

GET IN TOUCH

If you would like to find out more about salaries and recruitment trends in your industry, call one of our specialist consultants today. Contact details can be found on page 51.

GLOBAL TRENDS



**GILES DAUBENY, DEPUTY
CHIEF EXECUTIVE OFFICER**

GLOBAL OVERVIEW

“Overall the global hiring market was buoyant in 2018, with most markets reporting an increase in hiring due to positive economic conditions and employer confidence. Many markets continued to face candidate shortages, especially in relation to bilingual professionals and those with specialist digital skills.

Across Europe, the recruitment market went from strength to strength in 2018. In France, we saw an increase in

investment and hiring across all sectors as the business-friendly government eased employment regulations.

Businesses in Belgium expanded and hiring in Germany and Ireland increased across multiple disciplines. In Spain, we saw greater demand for bilingual candidates, especially for accounting and human resources roles.

The positive economic climate led to a candidate driven market in the Netherlands, with candidate shortages especially acute at the junior to mid-level. Switzerland remained the outlier with only minimal shifts in hiring volumes in 2018.

In the UK, employers faced candidate shortages as professionals proved reluctant to switch roles due to the uncertainty surrounding Brexit. The technology industry continued to grow and hire aggressively.

Across Africa, there was a surge in demand for returning professionals with international experience as businesses sought to implement international best practice and support government nationalisation policies. Businesses in the Middle East also focused on hiring local talent in support of nationalisation

programmes and hiring was up across the region.

South East Asia experienced a buoyant recruitment market in 2018, with rapid growth across Indonesia, Philippines, Thailand and Vietnam. This was driven by foreign direct investment and the continued entry of multinational companies. In comparison, hiring in Singapore and Malaysia was modest and stable as companies sought fewer but better-skilled professionals.

In Japan, local and foreign companies competed for bilingual candidates with international experience, putting pressure on this already scarce talent pool. Overall the market remained candidate driven and this will continue in 2019.

Greater China experienced strong economic growth in 2018, boosting

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With talent shortages set to continue in 2019, we advise companies to streamline their recruitment processes to avoid losing out on top talent.

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employer confidence and hiring activity across the region.

The Australia and New Zealand markets showed steady growth and modest salary increases in 2018, although pressure is growing for a long-awaited uptick in salaries in 2019.

KEY TRENDS

Global shortage of digital skills

The global demand for digital and technology skill sets continued apace and shows no sign of slowing in 2019.

In Australia, digital transformation was prevalent across many industries leading to sustained demand for development and digital specialists. Similarly, in South East Asia, digitalisation remained a key trend with cyber security, big data and AI specialists highly sought after.

In San Francisco, blockchain and cryptocurrency were growth areas, and start-ups utilising machine learning and AI continued to attract talent as candidates sought to be on the cutting edge of technological advancements. In Japan, roles related to data utilisation, AI development/deployment and infrastructure, rapidly increased across all industries.

Across Greater China, demand for top-tier talent experienced in high-tech and digital transformation projects outstripped supply. Candidate shortages were also a concern for the UK's growing technology industry as businesses faced stiff competition for software developers and engineers.

Risk and compliance talent in high demand

While hiring across the banking and financial services sector varied by

region, there was widespread demand for risk, compliance and legal talent.

Regulatory pressure in the UK and Australia led to high demand for compliance and risk professionals and this is set to continue in 2019.

In Germany and Ireland, we expect to see even greater demand for regulatory professionals across risk, audit, compliance and legal, as the UK is scheduled to exit the EU in 2019.

Advice to employers

With talent shortages set to continue in 2019, we advise companies to streamline their recruitment processes

to avoid losing out on top talent. Hiring managers should also clearly articulate the company's mission, strategy and values at interview stage to differentiate themselves from the competition. In addition, for scarce skill sets, employers are advised to hire ambitious, fast learners, even if they are not an exact fit for the job description.

Retaining staff will remain a top priority in 2019 so, on top of paying competitive salaries, employers should continue to invest in learning and development, benefits packages, flexible working and employer branding.”



THE GLOBAL DEMAND FOR DIGITAL AND TECHNOLOGY SKILL SETS CONTINUED APACE AND SHOWS NO SIGN OF SLOWING IN 2019.



JAPAN

With offices in Tokyo and Osaka, Robert Walters Japan specialises in permanent and contract recruitment solutions across all industries including financial services, real estate, manufacturing, automotive, energy, chemical, information technology, online, retail, healthcare and supply chain. We have been a driving force in the Japanese bilingual recruitment market for over 18 years providing high quality candidates for our clients and access to the best jobs.

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The demand for human resources is high with regard to jobs for which expert knowledge and experience are key, as well as jobs where the human element can add value.

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JEREMY SAMPSON MANAGING DIRECTOR, ROBERT WALTERS JAPAN

The job openings-to-applicants ratio continues to rise, and it reached 1.6 in 2018 which marks a 44-year high.

As the vision for a smart society has gradually been spreading with the concept of Society 5.0, job openings related to data utilisation, AI development/deployment and infrastructure (e.g. cloud computing) rapidly increased across all industries in 2018. Driven by the development and deployment of IoT technologies such as autonomous driving, smart supply chain and Industry 4.0, there were also an increasing number of job openings concerning the realisation of 5G, the key to developing future communications infrastructure.

Along with the spread of automation through the deployment of cutting-edge technologies such as RPA, robots and machine learning, some companies in 2018 such as large financial institutions started to reduce the number of clerical positions within their organisations in a phased manner. Meanwhile, most companies strived to increase business competitiveness while improving the work-life balance of their employees by improving efficiency in conventional jobs through automation, creating an environment where employees can focus on tasks that are directly linked to profits. In addition,

many jobs have been created to take on the development, deployment and management of technologies related to automation, and the demand for human resources is higher than ever with regard to jobs related to building strategies based on data and information—for which expert knowledge and experience are key—as well as jobs where the human element can add value.

In 2018, changes in the industrial structure became evident, as can be seen, for example, from the emergence of the fintech sector. Fintech companies recruited a significant number of former bank employees and application developers that are familiar with cryptocurrency, funds and other finance-related businesses. Many of these companies also increased the number of employees in charge of audits, internal control and compliance in response to cyberattack incidents in the cryptocurrency business. In addition, demand is on the rise for professionals responsible for security or the sale of security products in response to the GDPR.

Regardless of the industry, a rapidly increasing number of companies have been showing interest in securing and utilising data scientists to increase competitiveness in the market. Furthermore, the enactment of work-style reform legislation has been serving as a catalyst to accelerate the use of RPA, robots and machine learning technology to boost productivity. As a result, the demand for engineers, consultants and sales staff who work with these cutting-edge technologies has been increasing. Following such trends, the market pay level for professionals with expertise has continued to rise, and the growth rate is expected to reach a record-high level in 2019.

With the 2020 Olympics approaching, the demand for sales and marketing staff has been increasing in consumer goods and service industries in response to the robust increase in international tourists across Japan. The gap between the supply and demand of Japanese-English bilingual specialists in the hospitality industry has also continued to expand. The implementation of development plans for casino and entertainment facilities as well as their surrounding accommodations, MICE and commercial facilities in response to the enactment

of the Integrated Resort Implementation Bill (the “casino bill”) will eventually lead to large-scale activities to recruit bilingual hospitality staff to serve international customers. The increase in demand with regard to other positions, such as sales, marketing and general managers, is expected to result in an intense competition for talent if companies new to the market engage in recruitment activities at the same time.

In addition to the technological innovations mentioned above, there has been an accelerating trend towards globalisation, as can be seen from the expansion of overseas business and the bolstering of overseas offices by Japanese companies, new market entrants, business expansion of foreign companies in Japan and an increase in cross-border M&A. Given such an environment, many companies in a wide range of fields regardless of industry were willing to recruit professionals who are familiar with global business customs and proficient in both English and Japanese. Demand is especially high for such professionals with expert knowledge/skills and experience in a certain industry or job, and as seen in previous years, supply will continue to fall short of demand. Due to the increase in foreign students studying in Japan as well as the improvements to their Japanese language proficiency and academic knowledge, there has been a moderate increase in the recruitment of non-Japanese professionals across a broad range of industry.

Nevertheless, there is still a substantial lack of supply of professionals with an understanding of or experienced in global business, and this has continually been on the rise due to confidence in the market and globalisation. Accordingly, strong candidates are expected to have more opportunity and leverage in the job market in 2019. In order to recruit talented professionals, it will become even more important to not only offer competitive compensation to candidates but also to passionately detail the company’s vision and growth potential, the investment in technological innovation, the potential career path within the company, the opportunities to learn and the appeal of the work during the interview and selection process.

OVERVIEW



69%

PLAN TO CHANGE JOBS
WITHIN THE NEXT 12 MONTHS

ACCOUNTING & FINANCE

FINANCIAL SERVICES

2018 saw a surge in hiring by a number of fintech companies, and many former bank employees successfully made career moves to the fintech area thanks to their expertise related to traditional financial businesses. Given the turmoil resulting from cyberattacks that illicitly transferred virtual currencies from crypto exchanges, the Japan Financial Services Agency is expected to impose more

stringent regulations on these businesses, which will cause them to further expand the scope of their compliance and internal control functions. Major cryptocurrency exchanges are also hiring large numbers of audit professionals and internal controllers, and we expect this trend to continue in 2019. Companies in this growing sector are seeking experienced, knowledgeable candidates from whom they can immediately benefit. Age preferences are often stated due to relatively young management within these businesses, and there is often a preference for technological proficiency. There have often been limited budgets when compared to those of major traditional financial institutions, and more than a few junior- to mid-level professionals are making career moves to this area for its potential and appeal.

In 2018, the majority of searches for accounting and finance-related positions among financial institutions were conducted on a replacement basis. Some foreign-affiliated investment banks downsized, with the only roles open on a replacement basis and usually requiring proficiency in both English and Japanese as these jobs often involved communication with the Japan Financial Services Agency. At the same time, they sought to move other functions such as data reporting to low-cost offshore or near shore locations. With increased awareness about boosting productivity, an increasing number of accounting and financial companies made preparations to deploy cutting-edge technologies such as RPA for faster

business operations. In need of specialists with expertise on data and technology for this purpose, companies in 2018 actively hired data analysts for individual projects such as financial and audit projects. Many project management offices (PMO) were also seeking financial specialists.

2018 saw companies in non-insurance sectors of the financial services industry entering the insurance market, and major insurance companies embarked on streamlining and promoting efficiency using technology. This led to a constant demand for financial, accounting and audit professionals with practical experience in the insurance sector, and we expect brisk recruitment in this area to continue in 2019.

Although demand is high for young Japanese-English bilingual certified accountants, the pool of such accountants is small, causing demand to significantly exceed supply. Whereas there are a relatively large number of candidates for more senior-level positions such as section chief or higher, there are few young bilingual accountants available for junior positions. Since accountants are needed in all industries, not only in financial services, competition is intensifying for the best candidates. For instance, there have been occasions where particularly strong candidates obtained offers from three or more companies. Industries which have competed effectively against financial institutions include IT and pharmaceutical businesses, many of which provide salaries that are comparable to

those offered by financial companies, leading to heated competition for skilled bilingual accountants. In addition, many companies have started to offer higher bonuses to their best performing employees while maintaining competitive base salary levels.

Since younger candidates are more inclined to choose companies that not only offer competitive pay but where the nature of the business is new and exciting, the task of appealing to this group is increasingly challenging. Some prospective employees of lean traditional financial institutions often perceive a limited corporate ladder, and it is imperative to counter this impression by reviewing and upgrading benefits for outstanding employees.

COMMERCE AND INDUSTRY

Companies in 2018 continued to hire high numbers of personnel, mainly for FP&A positions. Owing to robust business results, an increasing number of companies sought to hire new FP&A personnel capable of offering detailed analysis and predictions on day-to-day performance while also involving themselves in business planning. We also observed an increase in the number of junior and senior analysts. When recruiting for FP&A personnel, companies placed greater importance on soft skills in addition to general mathematical abilities and qualifications such as Certified Public Accountant (CPA and USCPA) and MBA. Foreign-affiliated companies favoured bicultural and extroverted individuals, with an increased tendency to highly value a candidate's ability to act as a negotiator with people working in business (including sales and marketing). Other characteristics that have gained increasing appeal include the ability to think strategically and proactively so as to present solutions to business challenges on the basis of facts and figures.

Apart from accounting managers and analysts, the majority of accounting personnel have been outsourced to offshore locations. In 2018, companies mainly hired personnel on a replacement basis, and both the number of job offers and successfully

hired employees fell below the previous year's figures. Companies hired a certain number of accounting managers and senior management positions (e.g. controllers, financial directors and CFOs) to replace previous employees. Although accounting managers tend to supervise relatively small teams within Japan, they are required to possess soft skills such as in leadership and communication in order to collaborate with offshore locations. In addition to qualifications such as first (or second) grade bookkeeping, accounting positions require candidates who have careful and attentive dispositions. Although preferential treatment is given to professionals with experience in the same industry, few companies considered such experience to be a mandatory requirement for hiring. However, some companies in the manufacturing and healthcare industries often seek candidates who are looking to change their job from within the same industry or from an industry with similar conventions, as it takes a significant amount of time for the uninitiated to acquire a deeper understanding of products and product cycles. With regard to the aforementioned senior management positions, candidates with CPA and MBA qualifications receive favourable treatment in the recruitment process.

An increasing number of professionals with advanced mathematical abilities coming from the financial industry have moved to jobs in other industries such as manufacturing, healthcare, consumer goods or retail. In 2018, quite a large number of people changed their jobs to join the fields of digital and IT, and an increasing number were also found to change to jobs in the medical, pharmaceutical and healthcare industries, which are considered stable markets due to the ageing population in Japan. The average salary in these industries is lower than in the financial industry, and in many cases annual income decreases after the job change. Nevertheless, many candidates sought to shift to a business with high growth potential from the viewpoint of future career prospects, and candidates favouring a good work-life balance were generally successful in their job changes. In recent years, an increasing number of

candidates no longer view salary as their primary motivation, and instead focus on the work to be performed as well as the growth potential, brand and contributions to society as key factors in the decision-making process when changing jobs. Traditionally, it has always been more difficult for start-up firms to attract applicants compared to big businesses. However, start-up companies that feature prominent business growth potential, such as in the fields of digital and IT, have garnered an increasing number of applicants for job offers and have gained greater public favour.

The average salary offered at the time of hiring has risen compared to several years ago, owing to the imbalance between the supply and demand of talent. An increasing number of companies have started favouring candidates who have worked for multiple companies rather than those who have worked for a single company for a long period of time. In this way, more companies have tended to value adaptability and flexibility toward diverse workplace environments, corporate cultures and values. Such companies aggressively hire external talent in order to deliver new ideas and produce added value for their business. In light of the slow rate of wage increases in Japan, an increasing number of professionals have noticed this change in attitude among companies and regard the shortfall in human resources and the recent state of the job market as a chance to consider changing jobs. The old concept of lifetime employment is being abandoned, and we estimate that employees will generally start to consider changing jobs when their length of service at their current company reaches around five years (for senior management positions) or three years (for more junior personnel).

Demand for FP&A hires continues to remain high in the Kansai region as well. Companies expect these hires to not only submit financial figures, but also propose measures for increasing profits and achieving growth. Simply possessing analytical skills is not enough to meet these requirements, and candidates must also be able to take strategic approaches and have advanced English proficiency.

CONTRACT

Temp-to-perm positions in finance/accounting departments are increasing. One reason for this is that more companies are now considering promoting employees to permanent positions after evaluating their suitability over a certain period based on factors such as performance and compatibility with company culture. In addition, companies are always looking to increase their chances of retaining high-performing employees, and hiring on a temp-to-perm basis is an effective way of doing so.

FINANCIAL SERVICES

Financial institutions and companies related to banking, asset management, securities and insurance are actively hiring employees to replace departed entry-level and mid-tier personnel in both front office and operations roles. Many companies are making particular efforts to acquire talent at an early stage in their careers to serve as candidates for the next generation of company managers. There is also a notable trend of companies selectively choosing not to replace senior-level employees as part of headcount reduction measures in an attempt to rejuvenate their organisations.

General consulting firms also made an

increased number of entry-level and mid-career hires in 2018, as workstyle reform and recent financial conditions encouraged more companies to outsource tasks related to RPA deployment, business improvements and enhancements in productivity to consulting firms. Additionally, the recent financial climate has promoted an increase in M&A across the board, including cross-border deals, factors which have contributed to an increased demand for talent. Consequently, while people coming from consulting firms are in a good position to change jobs, there are also ample opportunities for people at entry-level or mid-tier positions if they have three to six years' experience working in business planning or general planning functions at commercial companies. There are an increasing number of cases where companies successfully hired employees by offering favourable conditions for work-life balance in addition to a competitive salary.

Meanwhile, wages offered by financial institutions for professionals changing jobs have shown little growth, with a growth rate similar to that of 2017. However, when individuals with backgrounds in other industries change jobs to enter a financial institution, improvements in salaries are often observed. Many candidates also have a preference to avoid future risk when deciding to change

their job. Individuals working within operations departments are particularly concerned about the stability of their future careers as they perceive threats from new technologies. In order to alleviate these concerns, companies have been offering salary increases of 10% or more for people willing to move between these functions. These salary increases have often been combined with perceived improvements in work-life balance to secure the best candidates.

A slow increase has been observed in the hiring of non-Japanese talent in the financial sector, which stems from expanding numbers of international students, as well as rising levels of Japanese proficiency and general academic ability among non-Japanese students. Some consulting firms have a number of trilingual employees, including those born in Asia who are hired after graduating from prominent Japanese universities. Consulting firms have also externally hired some senior-level talent who do not possess native-level Japanese proficiency.

CONTRACT

As increasing numbers of start-ups have entered the fintech business, the competition for human resources in the financial services industry, including temporary and contract employees, is intensifying. In 2018, many

WHAT ARE THE MOST DECISIVE FACTORS THAT YOU TAKE INTO CONSIDERATION WHEN CHANGING YOUR JOB?



Job content



Salary



Work location

fintech-related companies hired candidates with work experience in banks and brokerage firms for operations tasks under term-limited contracts. Although there are elements of uncertainty in terms of stability regarding start-ups, they are popular among candidates due to technological and growth factors. These companies are also able to offer competitive hourly wages, which has led to an increase in hires.

Professionals seeking contract employment are becoming increasingly aware of the sellers' market conditions caused by current labour shortages and they now have higher expectations in terms of wages. More companies are beginning to understand this and they are raising hourly wages accordingly. For example, the hourly wages of KYC analysis are higher than last year. Companies are also offering more direct contract opportunities to candidates instead of hiring them on a temporary basis as a way to gain an advantage over rival companies.

The recruitment process in the financial services industry is becoming increasingly complex and rigorous, and many companies are now spending a greater amount of time on recruiting. As a result, requests are concentrated on staffing companies that are familiar with staffing practices among financial services firms and have a successful track record with temporary and contract recruitment.

Operations, risk and compliance departments are suffering from a serious shortage of candidates for temporary/contract positions. This is in part due to companies' tendencies to seek out professionals in their 30s or younger even though the majority of the temporary/contract labour force is in their 50s. More companies are now aware of the current personnel shortages and recruitment of non-Japanese professionals with Japanese language proficiency is increasing.

Companies in the financial services industry with open administrative positions are now asking for not only experience in similar roles, but also wider skill sets, which include, among others, interpretation and translation, research,

and client services.

HUMAN RESOURCES

With an increase in globalisation and the evolution of technology, we saw an even greater demand for speed in business in 2018, resulting in many job postings for HR departments throughout the year. Actions to secure and develop human resources have become a key to business success, and systems for recruiting talent throughout the year have become a hot topic. In light of this, the workload at HR departments has grown ever larger to include the design of remote work systems and other work reform measures, as well as projects to improve employee engagement and initiatives in diversity management among other tasks. Additionally, companies strived to increase the percentage of people with disabilities in their workforces and implemented measures to conform to revisions that were made to laws regarding temporary work and employment contracts. As a result, 2018 saw a trend of companies bolstering the structures of their HR departments.

The Japanese offices of foreign-affiliated companies have been seen to make movements to strengthen the recruiting of top-tier HR positions such as HR Director or HR Business Partner (HRBP) in order to accommodate business expansion. There was a particularly sharp increase in job postings for HRBPs, as businesses sought to solve challenges found in management. Conditions continued to be favourable in 2018 for start-ups to gain funding, which resulted in many such companies newly appointing HR Directors to manage organisational planning in order to prepare for business expansion. This trend brought about excellent opportunities for ambitious and highly experienced HR professionals to change jobs. Consequently, we assisted with the hiring of an increasing number of HR Directors and HRBPs.

In addition to the requisite levels of HR experience and knowledge, taking on the role of HRBP requires a strong sense for business and the ability to define and propose solutions

to management challenges from an HR perspective. The ability to act as a negotiator is also highly valued, as close communication is needed with both management and the workplace. Additionally, advanced English proficiency is highly sought after in foreign-affiliated companies, since this function also involves serving as a liaison between Japan and overseas headquarters. For these reasons, the main age bracket for HRBP hires is generally in the 40s as with HR Directors, though some cases were seen in 2018 of age preferences being more relaxed and people in their 50s being hired for these roles.

2018 also saw increasing demands on HR with regard to M&As. Apart from HR tasks related to operations, particular care is required after an M&A in achieving integration among people on the floor who are engaged in business, so as to align with upcoming changes in corporate culture and principles. This led to an increase in job postings for HR Directors and HRBPs. It is common in M&As for people leading the integration to be intentionally hired from outside of the company—as opposed to from within the HR departments of the acquiring and acquired companies—in order to gain talented individuals who can bring about transformation in the company.

With regard to other positions, candidates have had a preference for roles related to talent management, learning & development (L&D) and organisation development (OD). Meanwhile, positions in talent acquisition, HR operations and compensation & benefits were less-favoured by job seekers as talented individuals have been attracted to HRBP positions. We expect these trends to continue in 2019.

The average salary for bilingual HR specialists continues to rise every year, owing to the imbalance between supply and demand in recent years. Many managerial challenges are related to HR issues, and in light of this, there is an upward trend for companies to increase their hiring budget by 10-20% over the original budget when recruiting. We expect the imbalance between supply and demand to be further exacerbated going forward, resulting in

a continued increase in salaries in 2019. It is also likely that counter-offers will become more common. We predict that it will become even more important during the recruiting process to clearly convey the opportunities offered for building a career in order to acquire talent, including both opportunities for advancement within the company and the potential of being relocated abroad in addition to matters regarding compensation.

The demand for HRBP positions continues to remain high in the Kansai region as well.

BUSINESS SUPPORT

Recruitment of secretaries had been mainly on a contract or temporary basis in the immediate aftermath of the financial crisis following the Lehman Brothers bankruptcy, but recruitment of regular employees has increased and the ratio to all recruits is approaching levels seen prior to the financial crisis.

While the supply of bilingual talent with 15–20 years of secretarial experience is considered to be high, an increasing number of companies wish to fill vacancies with young talent who have potential when such experienced secretaries leave. For this reason, job openings for and the recruitment of experienced secretaries remains low, while the demand is high for strongly motivated applicants with two to three years of secretarial experience. As executive secretaries are often responsible for supporting executives from companies' global headquarters when they visit Japan, younger, less experienced talent are sometimes considered unqualified for the job. However, a growing number of companies have come to the conclusion that excellent English proficiency can compensate for a lack of experience. Although many secretaries to non-Japanese executives are competent enough to take charge of interpretation/translation duties and are paid fairly well, an increasing number of companies tend to lower the requirements with regard to experience and skills so that they can search for and hire applicants to whom a lower pay range would apply.

With regard to interpretation/translation jobs,

the recruitment of regular employees has been on the rise. An increasing number of growing businesses are recruiting in-house interpreters/translators, especially among fintech companies. They consider it more cost-efficient to hire in-house interpreters/translators who are familiar with internal company and technical industry terms as a result of having to review outsourced translations. Many professionals who work for or are registered with external interpretation/translation vendor companies wish to pursue a career as an in-house interpreter/translator. Subsequently, candidates moving in-house tend to accept offers with a salary equivalent to that of their previous job.

General administrators are hired predominantly to fill vacancies, and most of them maintain their annual income levels after changing jobs. Although it is becoming necessary to work with business process outsourcing (BPO) companies as the scale of business expands, few companies are increasing the number of general administrators within their organisation. Meanwhile, the jobs at listed companies in Japan require a wide range of skills and experience, such as the ability to manage shareholder meetings.

CONTRACT

The majority of openings for secretarial and office management contract positions are due to the need to cover for employees taking maternity/childcare leave. Temporary employment has usually been the primary type of contract employment for these positions, but we have observed a dramatic shift towards temp-to-perm and direct contract employment types. Previously, translation and interpretation positions were commonly filled on a temporary basis. However, given the current sellers' market conditions for bilingual talent, many candidates for these positions have been successfully securing regular permanent positions from employers.

IT

VENDOR & CONSULTING

The need for more staff working at IT vendors and consulting firms has led to a rise in

the number of available jobs. As progress was made in the application of advanced technologies in every industry, there was a significant growth in demand in 2018, particularly for projects related to AI and big data as well as for opportunities in digital transformation.

Although AI and big data have been hot topics for several years, there had been hardly any available positions or hired candidates when these topics were still new. In contrast, 2018 saw a rapid increase in job listings for engineers in positions involving AI and automation, in response to a more clearly expressed demand in these areas from a business standpoint. Hiring is also becoming more active by the day as the role of IT has shifted from its former position of serving as a means to an end in supporting daily operations to become the driving force of business. Automobile and pharmaceutical manufacturers have also made progress in implementing AI technology and other forms of IT with an aim to provide added value to conventional production methods. This desire of adding value to conventional products and forms of business has promoted competition between many companies. Seeing that AI, big data and cloud technology are essential for achieving this goal, the competition to acquire highly talented individuals has grown ever fiercer.

There has been a notable surge in IT vendors specialising in RPA that have newly joined the market. Among these vendors, multiple foreign-affiliated corporations that specialise in RPA for Japanese companies have been offering positions in various areas, including project management, engineering, consulting and presales. For RPA that does not require AI technology solutions, the bar to entry is relatively low in terms of the requirements for experience and skill sets. As a result, the number of recruited engineers has grown, especially those proficient in Java or C++, and the 2019 job market is expected to remain highly active.

Although many candidates in the technology talent pool say that salary is not the sole deciding factor when changing jobs, there

has been a significant rise in salary standards, and 2018 saw an increase in cases in which candidates and companies agreed to dramatic pay rises when changing jobs or hiring. There has been a growing trend of accurately evaluating the value of candidates based on their skills and experience, rather than simply determining the salary based on the compensation that they received at their prior positions. The median increase in salary following a job change has typically been 10-15% compared to the candidate's previous job. However, there were cases in 2018 of annual salaries increasing by 40% or more after changing jobs.

Prime candidates in the fields of AI, big data and cloud computing tend to receive an average of three to five tentative offers when seeking to change their job. There has been an increase in job offers for machine learning engineers from other fields such as manufacturing (automobiles and other products) or finance. As there has been intense competition for quality talent in these areas, the need for swift evaluation and hiring processes is likely to become more important than ever in 2019. Furthermore, many candidates in the IT sector appreciate flexible working conditions so as to maintain a healthy work-life balance. They also focus on whether they will be able to fully participate in new technologies through their work and whether there is an environment available for them to improve. Accordingly, companies that can thoroughly promote their management strategy and the details of their projects and training to candidates tend to have the upper hand in hiring activities when compared to companies that conduct interviews in a more conventional style.

FINANCE

Recruitment for IT staff at financial institutions remains active, and the increase in the number of companies participating in the cryptocurrency business in 2018 led corporations to search for new kinds of candidates. Excluding the insurance industry, there were more foreign individuals being recruited, especially those in developer roles. There was also a notable increase in

professionals being hired for their technical prowess, even if their Japanese proficiency was not yet sufficient for conducting business. Increased focus has been observed towards fintech business, including cryptocurrencies and block chain technology, and the finance industry has also begun to change its market structure. There has been a change in the demand for talent as well. In 2018, demand increased in particular for developers working on applications and other software, as well as data scientists, cloud platform engineers and DevOps. There has also been a marked rise in the wages agreed on when recruiting bilingual engineers from another company. This is especially true for talented candidates with expertise in data science, due to the recent balance between supply and demand.

Active recruitment of IT staff has also been observed within investment banks and securities firms. Some corporations which had consolidated some of their regional functions in Hong Kong or Singapore a few years ago have been returning some functions and personnel to Japan in order to alleviate lease fees and other business costs, as well as to lessen the feeling amongst employees of being distanced from the main site of business operations.

Along with the progress made in digitalising processes for requesting insurance claims and

fees in the insurance sector, job openings have also been increasing in the web and mobile areas. The demand for skilled workers has been rising, together with the need for talented individuals such as web engineers and mobile engineers who are capable of developing applications, as well as cloud platform engineers who can transform workflows previously handled through paperwork into digital processes that can even be carried out on mobile devices. Additionally, 2018 saw a scramble to secure quality candidates with skills and experience for positions that utilise big data as sources of information within marketing and strategic departments. Such candidates were offered unprecedentedly high salaries.

The majority of IT job openings from fintech companies are for developer positions. There is a tendency to favour individuals with a background in finance, as these companies engage in financial activities and the management consists mostly of persons with backgrounds in banking or securities. At the same time, because application developers are in an important position in that they hold the key to business success, companies want to secure prime candidates who are well-versed in technology before they are snatched up by industry competitors. However, because the salary rate in major financial institutions



2018 SAW A RAPID INCREASE IN JOB LISTINGS FOR ENGINEERS IN POSITIONS INVOLVING AI AND AUTOMATION.



AREAS SEEING THE HIGHEST DEMAND FOR TALENT



Industry 4.0



Big Data



Fintech



Consumer

is significantly higher in comparison to other industries, there has been some doubt regarding whether hiring companies have the capacity to offer wages that can rival financial institutions. Many hiring companies do not put weight on candidates' level of English proficiency, as most are Japanese start-up companies. However, developers actively working on industry frontlines inside Japan are often globally-versed individuals who have learned development and statistics at overseas universities, which means that the bar for recruiting is still set high, even in cases where English proficiency is not essential for the position.

The concept of web engineers with advanced web development skills is still a relatively new one. Standard Japanese hiring conditions that call for ten or more years of experience for upper-tier positions such as directors are not suitable for this new area of work. The core age group in this pool of talent falls in the 20s to late 30s, and adding the criteria of being an English-Japanese bilingual shrinks the pool of acceptable candidates even further. For this reason, hiring requirements have continued to be relaxed for development positions with regard to applicants' command of Japanese, leading to an increase in foreign staff who are not skilled in the language.

Salary standards agreed upon when changing jobs saw their highest rise ever in 2018. Reasons for this increase include changes in the roles of IT staff, which had conventionally been focused on services and operations, as well as an influx of talent from other industries and an increase in the scarcity of these individuals. Some candidates who transferred into the financial sector from the gaming or online industries saw an increase in salary of 40% compared to the annual salary in their previous jobs, and those changing jobs from Japanese to foreign-affiliated securities firms also saw a significant rise in their salaries. Candidates who successfully changed jobs in 2018 mostly saw a 10-40% increase in their wages, and when looking at only banks and securities firms, the rate of increase was 25-40%. Due to the scarcity of talent, more companies have also started to give counter-offers. These offers may diminish the necessity felt by employees to migrate to a new environment, as counter-offers can often provide significantly improved benefits such as the guarantee of promotions in addition to higher wages than other tentative job offers. Therefore, in order to reliably hire a particularly talented candidate, it may be necessary to provide a wage increase that would not be overshadowed by a counter-offer.

COMMERCE

Work performed in companies' IT departments has been shifting from a focus on conventional operations toward projects that serve as the driving force for business. This trend is expected to be increasingly popular in 2019 with the growing rise of initiatives to consolidate, analyse, use and apply data. Along with this trend, the demand for data science, digital transformation, e-commerce and cyber security will also increase, as will the demand for talented professionals who can use these technologies. Job openings for conventional positions such as help desk staff and infrastructure engineers will also call for experience in digital transformation, and we have also seen a notable trend of companies establishing new positions such as digital managers and digital analysts. Demand has continued to remain high for data scientists as well as e-commerce managers and

specialists. In 2018, awareness of the dangers of data breaches heightened throughout B2C businesses, particularly in the retail sector. There was a surge in demand for talent within the field of cyber security and other areas in the information security sector. Although B2C businesses were slow to implement security measures when compared with more strictly-regulated industries such as finance and pharmaceuticals, B2C businesses retain similar volumes of personal information, which appears to have spurred them towards reinforcing their security systems.

Job openings in IT used to be focused primarily on daily support and maintenance, with the majority of postings being for help desk or infrastructure engineering. However, in recent years, job offers have become scarce for candidates who only possess skills and experience in support and maintenance. As work responsibilities in the IT sector gradually shift to include tasks that call for analysis, an increasing number of candidates have made efforts to study areas that are not directly related to their current roles, such as data science, digital transformation, digital marketing and e-commerce.

We anticipate that data scientists and digital managers will see the most demand in 2019. The supply of talented individuals who are capable of using technology to promote business is scarce, and bilingual candidates with a command of both Japanese and English are even more of a rarity. The demand for digitally-savvy talent within B2C businesses and retail trade in particular is expected to remain high, as new types of consumer behaviour such as ROPO (research online, purchase offline) are becoming increasingly popular.

Prime candidates often receive four to five job offers at once, and companies who wish to set themselves apart from the crowd can go a step beyond simply offering competitive salary rates by displaying a flexible stance for negotiating working conditions. Another way companies can work to stand out from the rest include clearly expressing the company's potential for growth, the appeal of the position in question, the potential for skills that can

be acquired through the job and the career paths that candidates can take. With regard to working conditions, flexitime systems tend to be popular, such as allowing employees to arrive late on the day after a late-night phone conference.

Salary standards have also been going up, and there are many cases of candidates being presented with salary offers that are 10-15% higher than their current jobs. Some candidates have been offered extremely high wages from companies in a bid to secure high-quality talent. While IT once served as a means to an end in operations, it has shifted to become a factor that contributes toward management by functioning as the driving force of business alongside manufacturing and sales. All companies are taking great steps towards securing and implementing cutting-edge technology to enhance their competitive strength. As a result, the salary rate for talented professionals in specialised positions is expected to grow in 2019 at a rate previously unseen.

In the Kansai region, data scientists and data analysts who handle big data are also in high demand, with an increasing number of companies bolstering their efforts to hire data specialists, regardless of the industry.

ONLINE

In 2018, the boom in the online industry encouraged both major corporations and start-ups to actively hire professionals in this area. Jobs for all types of positions were offered, from younger professionals to senior executives, and in the e-commerce industry in particular, the number of job offers far exceeded that of normal years. Companies especially hired many specialists in big data and natural language processing.

E-commerce is gaining momentum as the term “e-tail” is derived from “retail.” The traditional shopping practice of merchandise distributed from manufacturers to customers through brick-and-mortar stores has transformed with the rapid increase of consumers purchasing directly from manufacturers and distributors on e-commerce platforms. In response to

a positive business outlook, many digital technology companies are aggressively investing in strengthening their organisations and launching new businesses to facilitate business expansion.

In particular, many companies wish to strengthen the areas of AI, machine learning, big data and data analysis, and the number of jobs in these areas increased sharply in 2018. However, due to the lack of supply in comparison to the demand for talent, we expect continued difficulties in filling all available jobs in 2019.

The number of open jobs for open source developers, mobile developers, and full stack/front-end engineers continues to be high, and recruitment is active in these areas. However, more companies are now seeking higher levels of experience and skills from these professionals than before. The demand for professionals who proactively improve their development skills, such as those who engage in individual projects outside of work and publish them as open source, is particularly high, and these professionals typically receive better job offers.

Demand for English-Japanese bilingual professionals amongst companies in the online industry has been increasing every year, and we expect the demand for bilingual engineers to remain high in 2019. We anticipate the number of job offers for younger and mid-level professionals—who will assume a vital role going forward—to stay the same as or possibly exceed 2018 levels. On the other hand, companies have become much more flexible with regard to hiring top talent with lower Japanese proficiency, especially for developers. By prioritising technological skill over language ability, companies in this industry are now hiring more non-Japanese professionals regardless of their Japanese ability.

A growing number of companies now require more experience and skills than ever before in specialised fields. Some professionals pursue personal projects on their own time and publicise their work as open source software, which serves to proactively polish their

development skills. Such professionals are in particularly high demand, and companies give them preferential treatment when hiring.

AI and data talent is rare, and the lack of specialists in the online industry contributes to the persistence of an overwhelming sellers' market. Candidates came to recognise their own specialised skills and were remarkably aggressive in job searches in 2018, and this resulted in companies offering competitive salaries. When hiring specialists that were in high demand, companies that offered salaries commensurate with candidates' skills and experience were more successful in the competition for talent than companies that offered salaries based upon candidates' annual earnings. In addition, companies with a flexible approach to work styles tended to be more popular among candidates, as benefits such as flexitime, telecommuting and working from home helped attract the talent they sought.

CONTRACT: INFRA & SERVICES

Both foreign-based companies and Japanese companies that are expanding globally are hiring high numbers of contract and temporary employees. We observed strong demand for highly skilled talent with fluency in both Japanese and English, and cloud areas in particular showed a steady increase in the hiring of bilingual engineers. Japanese start-up firms chiefly hire bilingual employees who are able to bridge the local business in Japan with offshore technology teams, and some firms aggressively hire younger bilingual talent as candidates to become permanent employees, as these individuals are considered to play a vital role in securing a future for their business. In 2018, many companies increased their recruitment budgets and proactively invested in human resources, owing to strong business results in the previous year.

Demand for IT systems integration has increased due to business integration (i.e. M&A) in each company. More companies experienced difficulty in hiring enough engineers to carry out IT system integration projects as a result of the fierce competition for talent, and the imbalance between the supply

and demand of talent resulted in a rapid increase in hourly wages. With regard to the recruiting of employees in 2018 for working on specific projects, the hourly wages for some positions rose by as much as 10-15% compared to the previous year. Furthermore, in response to the amendments made to the Worker Dispatch Act that placed a 3-year term limit on employees in temporary positions at a single organisation, an increasing number of companies hired high-performing temporary employees on a direct contract basis in order to retain them for a longer period of time.

Companies from all industries have been introducing cutting-edge technologies to drive business growth. These companies went through a preliminary phase between 2016 and 2018, and shifted to a phase of making use of these technologies in 2018. The insurance industry, for instance, launched an unprecedented number of products and services in 2018 that incorporate IT. IoT-related business involving smartphones and tablets also spread within other industries. Given the increasingly fierce competition for talent and the relatively low number of job seekers, more companies in 2018 were flexible during the hiring process in letting job seekers choose their preferred option from temporary employment, fixed-term contract employment or subcontracting in order to ensure sufficient numbers of skilled personnel could be hired. This trend encouraged the mobility of human resources, leading to a surge in recruitment.

Going forward, we expect companies to

hire more cloud infrastructure engineers with knowledge of specific products. This trend will stem from companies' desire to improve the degree to which cutting-edge technologies are implemented, so as to meet the standards seen at offshore locations and the group headquarters. Accordingly, the demand for talent in this area is likely to further increase in 2019. The popularisation of next-generation security infrastructure technologies will prompt companies to move as quickly as possible in hiring bilingual engineers possessing knowledge of network security products. As a result, we expect that the imbalance between supply and demand will lead to even greater intensity in the competition to acquire talent.

Along with the increase in momentum towards the protection of personal information in response to GDPR, cutting-edge technologies are being introduced at an accelerated pace in anticipation of the 2020 Olympics to be held in Japan. In light of these trends, we expect the demand for bilingual network security specialists and information security specialists to continue to increase in 2019.

In order to hire more exceptional talent, an increasing number of companies took a positive attitude towards expanding their recruitment budgets. More companies have recently started to make use of senior talent in their 50s, seeing value in the deep insights that they can provide by drawing upon a wealth of experience. We predict that similar tactics and shifts in perspective will continue to spread among companies in 2019.

CONTRACT: BUSINESS SOLUTIONS

Demand continues to increase for talent employed on a per-project basis, mainly among start-up firms and other small and medium-sized businesses. Many job postings seek workers with knowledge of niche technologies, and the majority of successful hires are made under a temp-to-perm arrangement, which can be convenient for both employers and candidates. Since temp-to-perm agreements allow all parties to consider the worker's compatibility with the workplace environment, corporate culture, workflow and corporate values before commencing permanent employment, such agreements are favoured by employers as well as workers in the field of IT.

2018 saw rises in hourly wages in addition to surges in recruiting activities. In some cases, hourly wages rose by 20% compared to the previous year, and even by as much as 40% in exceptional cases. This trend is a result of the imbalance between supply and demand, whereby the number of job seekers was extremely low in comparison to the number of available jobs. Given the particular strain on the supply of talent with skills and experience in specific areas, some companies decided to make bold moves to increase their recruitment budget in order to avoid falling behind competitors in the race to acquire exceptionally talented individuals.

Demand has soared for professionals in the areas of machine learning and big data, and we expect this trend will continue to increase in 2019. In the past, Japanese proficiency was a strict requirement for the majority of jobs. However, in a bid to secure expert talent, many companies offering jobs in these fields hired non-Japanese professionals regardless of their Japanese ability.

We expect that the demand for Japanese-English bilingual developers will increase across the board in 2019. In the domestic IT and online industry, we observed a plateau in the demand for developers with native-level Japanese coupled with English proficiency at business-level fluency or above. Nevertheless, when making the decision to employ



candidates, companies gave more preference to technological capability over Japanese proficiency in comparison to previous years. As a result, an increasing number of companies directed their attention to talent residing outside of Japan and have worked diligently to hire such individuals.

LEGAL, COMPLIANCE AND RISK

Hiring is increasing for compliance officers centered on the three areas of finance, healthcare and IT amidst the steady progression of stricter regulations, and this hiring trend is expected to continue growing in 2019.

Furthermore, we have observed increased hiring demand for our clients' internal legal departments. In addition to companies strengthening their legal department staffing levels, we have seen some replacement level searches for head of department roles, including some CLO (Chief Legal Officer) positions. Amidst accelerating globalisation and technological innovation, we can see a trend in every industry for strengthening legal structures to accompany the increase in data utilisation and the surge in cross-border business. Active participation is needed for management from specialised points of view in all aspects for handling internal matters related to compliance with the European Union's new General Data Protection Regulation (GDPR), M&A, intellectual property protection and amendments to dispatch worker laws and the Labour Contracts Act. As a result, demand is growing for professionals with advanced English proficiency and industry knowledge in addition to legal qualifications and experience in specialised areas.

Additionally, we have seen strong levels of hiring demand related to the expansion of client-oriented legal and regulatory compliance services at consulting firms. Such professionals are relatively rare, and appropriate junior and mid-level individuals are receiving job offers from several consulting companies at the same time.

For compliance specialists, as companies in

the same industry share common regulators, there is a trend companies to seek candidates with relevant industry-specific experience. In the finance sector, an area which has particularly high hiring demand, structural strengthening stands out at not only large traditional financial institutions, but also at start-up cryptocurrency businesses. Therefore, companies that can shorten their hiring decision-making processes are emerging as victors in the competition for talent acquisition. The most successful organisations not only assess prospective employees during interviews but also actively promote their post-employment growth and promotion opportunities.

Most companies are offering candidates a 10-15% higher salary compared to their current jobs when hiring. For those who change from a law office to a corporate legal department, while the annual income may decline, many candidates decide to prioritise the improved work-life balance that is a product of shorter working hours over annual income.

MANUFACTURING AUTOMOTIVE

Companies in the automotive sector, where advances in autonomous driving and connected car technologies are accelerating, are recruiting an increasing number of software and electrical engineers responsible for components and testing. This led us to handle a record-high number of job offers and successful job applications for these positions. Many automotive-related manufacturers in 2018 started hiring in-house development representatives, while at the same time an increasing number of suppliers began stationing on-site engineers at finished-automobile manufacturers. Moreover, as leading manufacturers reviewed their relationships with suppliers, primary suppliers intensified their sales activities and hired more specialists in both sales and business development.

In recent years, many companies in the automotive sector have restructured by merging or offloading unprofitable businesses,

causing some professionals to change their jobs. In 2018, China and Europe implemented policies to expand the use of electric vehicles (EV), and Japan's Ministry of Economy, Trade and Industry also started promoting EVs. This widespread promotion of EVs has driven growth in the employment of engineers. In addition to electrical and software engineers, companies were also recruiting an increasing number of materials engineers responsible for developing lithium-ion batteries.

Although the pool of bilingual engineers in Japan is very small, we are witnessing a growing trend in which companies are seeking candidates with in-depth expertise and a wealth of experience in each newly emerging specialised field. Recognising the current shortage in the supply of talented professionals in Japan, more companies in 2018 softened their initial preference for proficiency in Japanese and hired more non-Japanese candidates.

For mid-career engineers in the automotive sector, in addition to gaining exposure to new technologies, another key deciding factor when changing jobs is the possibility of engaging in research and development. The average salary offered for a new job in 2018 increased by approximately 5% compared to 2017, and many candidates who wanted to change their job tended to make a decision after being offered a salary increase of 5-15% or more. This is a trend we expect to continue in 2019. In fact, some companies have even started to differentiate their payment systems by offering sign-on bonuses to overcome competition for particularly strong candidates.

GENERAL MANUFACTURING

With a boost in business confidence and advances in technology, demand is increasing for engineers, project managers and sales & marketing representatives across the entire manufacturing sector, especially in the industrial equipment, analytical & measuring instrument and semiconductor areas. The manufacturing sector is seeing the accelerated deployment of next-generation technologies such as industrial IoT, AI and robots, resulting in increased demand for multi-skilled

engineers. In particular, major manufacturers are showing an eagerness to hire engineers with experience in sensor technologies, connectivity, robots and software to adopt industrial IoT and factory automation (FA). We expect this trend, which grew throughout 2018, to continue in 2019.

Some foreign-affiliated manufacturers that entered the Japanese market several years ago are advantageously carrying out sales activities and increasing revenue from after-sales services by recruiting more field service engineers. This has led to a growing demand for young, Japanese-English bilingual junior- to mid-level field service (maintenance) engineers and sales specialists.

Although most positions require skills and experience in a specialised field as well as English proficiency, an increasing number of manufacturers are prioritizing the former and are showing a willingness to hire non-Japanese candidates with lower Japanese proficiency. Due to the talent shortage, some companies are making special efforts to recruit candidates, such as softening their Japanese language requirement to a conversational level (e.g. JLPT N3) and building an environment where new employees can learn Japanese on the job and through training. By contrast, requirements for English proficiency are increasing each year. Sales positions require English skills in order to act as a liaison with the overseas headquarters of foreign-affiliated companies on the basis of customer feedback. As for technical professionals, there are an increasing number of positions that require active engagement in service proposals, such as project and application engineers. These positions require more complex skill sets than conventional positions, such as the ability to make proposals and skills for dealing with customers, as well as more advanced English proficiency. At the same time, facing the difficulty of the talent shortage, companies have begun to be more flexible about hiring candidates whose skill set does not perfectly match the job as long as they can be trained to have useful skills. We expect this trend to continue to grow in 2019.

As the shortage of technical and global

candidates escalates, companies are diligently attempting to secure strong candidates by offering them higher annual salaries than they currently earn, as well as high incentive bonuses to senior-level professionals. Competition is intensifying, especially over young engineers who are small in number due to the declining population and fewer students in the science and engineering majors. For these reasons, the average candidate is offered a 15-25% higher annual salary compared to their current compensation when changing jobs.

In the Kansai region, as movements toward Industry 4.0 and IoT are also advancing, companies are in a race to proactively secure experienced professionals to achieve their goals of implementing the latest technologies in their products and services. In addition, there are consistent numbers of candidates who are attracted by the growth factors in these fields and seek these positions as a chance to gain new skills.

In sales and engineering positions, candidates with expertise and skills in machines and electronics were especially popular. In addition, as more companies begin to understand the talent shortage, they've increasingly begun setting their sights not only on skilled and experienced senior hires, but also on young hires with a strong potential for growth, even if they do not meet the conditions in terms of skills or experience.

Due to the imbalance in supply and demand for human resources, many companies are securing higher hiring budgets in an effort to compete for acquiring skilled professionals by outbidding competitors with higher salary offers.

CHEMICAL

With the robust domestic economy and the worldwide growth of the manufacturing sector, chemical manufacturers operating in Japan are generally doing well. This has contributed to a steady increase in demand for bilingual candidates. Many foreign-affiliated companies have created additional positions, and Japanese companies have been focusing on

recruiting bilingual, global candidates, thereby causing demand to exceed supply and the market to continue to be favourable for job seekers.

In Japan, a leader in the automotive sector, recruitment activities in the areas of EV batteries and EV charging stations were especially active throughout 2018. In addition to sales and marketing personnel, we observed strong demand for technical service personnel (i.e. engineers who also make proposals and engage in negotiations) and we expect this trend to continue in 2019.

There has also been a strong, ongoing demand for candidates in the cosmetic, dietary supplement and functional food industries. As the Japanese market is highly health- and beauty-conscious due to an ageing society, we observed robust performance in companies in these areas. A high demand for natural materials, such as organic produce, led to an increase in positions, especially those related to application development (product development).

In addition, 2018 saw an increasing number of Japanese and foreign-affiliated companies creating positions in their Tokyo offices that supervise Asia or the Asia-Pacific region with discretion to not only make decisions regarding business in Japan, but also to make decisions regarding business in the entire region. These positions are particularly appealing to candidates, partly because many companies do 'spec-in' work for the entire region with reference to Japan, resulting in relatively seamless recruitment activities. In addition, there was robust and consistent demand for young bilingual sales and marketing personnel with knowledge in technical areas. We expect this demand to continue growing in 2019.

Recently, the market has been abuzz with the term "material informatics" (MI), which refers to applying AI technologies to material research and development. As major Japanese companies face new challenges of hiring professionals in the digital area such as MI specialists, we anticipate an increase in demand for these professionals starting in

2019.

As the demand for bilingual scientific/engineering professionals exceeds supply, we are witnessing progress in the hiring of more female candidates among companies, especially US-based chemical manufacturers. Meanwhile, some companies have begun employing non-Japanese candidates for technical jobs such as R&D and engineering, provided they can speak at least business-level Japanese, which is required as the official internal language. On the other hand, we have observed few companies hiring non-Japanese candidates for sales and marketing jobs because of the belief that these jobs require advanced Japanese proficiency to engage in negotiations with customers, as well as a deep understanding of Japanese business practices and culture.

Making quick decisions and offering competitive salaries are required in order to secure strong candidates. As the average salary in Asia is increasing, it is imperative to consider paying for positions that supervise the entire Asia region. For instance, there were occasions in 2018 where sales and technical candidates in the chemical field were offered 15-30% higher salaries compared to their former jobs. Not only pay, but also potential and stability as well as business and research activities are key decision making factors when changing jobs. In particular, the promise of high-end domains, such as the areas of EV batteries and engineering plastic, are gaining popularity.

ENERGY

The contracts under which households have sold surplus solar electricity to the grid since the policy was launched in 2009 will draw to a close at the end of fiscal year 2019. This signals a shift in the demand for talent in the energy sector towards conventional energy, renewable energy and energy storage professionals.

Now that renewable energy is shaping up to be an important energy source, an increasing number of foreign companies in offshore wind power generation are entering the Japanese

market. Since alliances between Japanese and foreign-affiliated companies are looming on the horizon, recruitment is likely to accelerate in 2019 for specialists in the Japanese market, particularly in the area of offshore wind power generation. While the majority of mid-career recruitment in the energy sector in 2018 was comprised of engineers, 2019 will see more of a focus on commercial experts as more foreign firms enter the fray.

As for the fields of hydrogen fuel, electric vehicle charging and electricity retailing, we anticipate that the demand for talented professionals will continue growing in 2019. There will be incremental recruitment activities for engineers engaged in projects to store surplus renewable energy or convert it into hydrogen, as well as sales and marketing professionals needed for reaching new customers and promoting sales.

In addition to the aforementioned area of offshore wind power generation, we are seeing many foreign-affiliated companies enter other areas of the renewable energy market. This has led companies to seek mid- to senior-level professionals with a wealth of experience, resulting in an increase in the number of job offers for both business development specialists engaged in business expansion and engineers responsible for operating and maintaining generation facilities. In this light, we expect to observe robust and consistent demand for electrical engineers with bilingual proficiency in Japanese and English. In

When will you next change your job?

51%

WHENEVER THE OPPORTUNITY ARISES

- 51% Whenever the opportunity arises
- 5% Within the next three months
- 5% Within the next three to six months
- 8% Within the next six to 12 months
- 19% More than 12 months into the future
- 12% I have no plans to change employment

particular, we anticipate that companies will make strong bids for bilingual candidates possessing second-grade chief electrical engineer certificates (or higher) and practical experience in the energy sector, including solar power generation.

In this market environment, offering competitive pay and bonuses is increasingly important in order to attract talented candidates. In fact, many companies offer better pay to new business development and sales personnel than their former employers. For instance, in 2018 we saw experienced managers being offered salary increases of 30% or more when changing jobs. In addition, candidates have emphasised the possibility of engaging in projects featuring offshore locations, exposure to state-of-the-art technology and the opportunity to gain experience in new industries as key deciding factors when changing jobs.

SALES & MARKETING

MEDICAL DEVICES

In 2018, companies actively hired CEOs and division presidents stemming from expanding numbers of Western medical device manufacturers that previously did not have Japanese branches and only recently entered the Japanese market. In addition to newcomers to the market, foreign-affiliated companies integrated their operations one after another, boosting competition in the market regardless of the scale of the

company. Many companies embarked on recruiting executives with the aim of raising competitiveness by reforming Japanese executive teams.

We expect medical device manufacturers to hire an increasing number of experienced professionals in 2019. In addition to a further increase in the demand for executives mentioned above, we expect to see an increase in the hiring of managers who lead groups of specialists. Foreign-affiliated companies usually have an organisation in place for gathering specialists. However, even though they can hire specialists, many medical device manufacturers, especially small and medium-sized enterprises (SMEs), are unable to hire mid- to senior-level managers capable of supervising professionals, such as those in pharmaceuticals, quality assurance and marketing, due to a significant depletion of the talent pool. As a result, we anticipate that companies will make strong bids for English-Japanese bilinguals with experience in executive positions, as well as managerial candidates with experience in marketing or quality assurance.

Following the trends in the pharmaceutical industry, the health care industry is focusing on improving the efficiency of sales activities, and we expect that companies will restructure their sales organisations over the next one or two years. However, companies will certainly strive

to maintain their competitiveness by hiring excellent talent on an ongoing basis. Since there are few fears concerning growth and stability of the market because of the ageing population, we anticipate that the number of medical device manufacturers that are actively hiring will not decline too significantly, and the demand for human resources will be steady regardless of external factors such as price revisions by the Ministry of Health, Labour and Welfare (MHLW).

Many professionals who wanted to change jobs and were hired by medical device manufacturers through Robert Walters Japan in 2018 were provisionally offered salaries that were 10-20% higher compared to their current job. It is conceivable that companies are proposing such salaries that reflect highly rated experience and skills to show their intent to beat the competition, and we expect this trend to continue in 2019.

PHARMACEUTICAL

Just as in the medical device industry, the hiring demand for executive positions in the pharmaceutical industry has increased as a result of globalisation.

Many companies are attempting to improve the efficiency of their organisations to achieve a lean structure that is prepared for fluctuations in profit caused by external factors such as drug price revisions by the Ministry

of Health, Labour and Welfare and off-patent medicines. Since medical representatives (MR) and clinical development positions have continued to be outsourced, contract research organisations (CRO) hired a large number of clinical research associates (CRA) in 2018. Pharmaceutical companies have hired more medical science liaisons (MSL) and medical affairs professionals—positions that are typically not outsourced—as well as experienced talent capable of managing subcontractors, such as managing CROs as clinical development managers.

A growing number of companies are hiring medical doctors to compete effectively. Over the last few years, companies in the industry have started assigning doctors to handle three functions: medical affairs, clinical development/clinical trials and safety information. Job offers mentioned above showed a new trend corroborating that companies throughout the industry have gradually adopted such assignments. However, while many of the doctors who were hired did not have any corporate experience working in a pharmaceutical company, those who assume senior management positions or carry out important responsibilities and act as counterparts to overseas locations were required to speak English fluently

A majority of companies are offering salaries that are 10-15% higher than candidates' current positions. In 2018, there was a sudden surge in cases where human resources departments in the APAC region worked directly with recruiters rather than Japanese HR departments to primarily hire for important positions such as managers and executives. These companies seemed to want to experience the actual conditions of the Japanese pharmaceutical market and various labour issues such as labour shortages and hiring difficulties. Speed was also a factor, and hiring decisions were accelerated by APAC HR departments assuming direct responsibility for hiring. In many other industries, companies are allowing APAC locations such as Singapore to hire personnel simultaneously even when domestic locations have recruitment functions. This can also be viewed as a growing trend in



40%
MOST WISH TO SEE
IMPROVEMENTS IN SALARY

the pharmaceutical industry.

In the Kansai region in 2018, there were also many specialist hires in all areas of healthcare, including drug manufacturers, medical equipment makers and life science companies. The number of MSL hires among drug manufacturers was especially high, as the lack of talent has established a sellers' market where candidates enjoy advantages. Most companies are increasing the number of personnel for MSL positions in place of MR positions, but for generic drug manufacturers, the number of hires is decreasing. The demand for doctors has remained high, and as a continuing trend from 2017, the number of hires for professionals capable of handling tasks involving regulatory compliance, such as in regulatory affairs, safety information and pharmacovigilance, increased. English proficiency is needed due to the rapid globalisation of regulations, and for foreign-affiliated CROs, the demand for CRAs has continued to remain high. Professionals changing jobs within the Kansai region are receiving annual salary offers that are about 10% higher than that of their current positions.

CONSUMER

Owing to robust sales within convenience stores and drug stores, companies in the FMCG industry hoping to achieve further growth bolstered their sales, trade marketing and shopper marketing departments in 2018. Many people expect a further increase in tourism spending leading up to the fall 2019 world rugby tournament and the 2020 Olympics, both to be held in Japan. We predict that companies in the consumer goods industry will hire more employees for these three types of sales and marketing departments in 2019 to increase the revenue of convenience stores and drug stores.

In 2018, consumer electronics companies were seen to hire account managers in remarkable numbers. Although this role involves conventional sales activities for consumer electronics shops, this surge in recruitment is indicative of how companies within this industry have been in fierce competition to obtain, maintain and utilise

sales channels by increasing or upgrading their specialists, with growing expectations regarding tourism spending. These companies have also made similar tactical movements in terms of marketing by newly appointing product managers or replacing existing managers in order to compete with rival brands. In a similar vein to the FMCG industry, companies in the consumer electronics industry have started to shift from a conventional marketing mix strategy to an approach that attaches greater importance to brick-and-mortar shops. We expect that companies in 2019 will continue to focus on hiring personnel for positions that are directly involved in this shop-oriented approach.

The fast food industry saw several major foreign companies enter the fray a few years ago, and many of these new entries have made bold moves in strengthening their organisations following favourable results since joining the market. In 2018, these companies hired more personnel for sales, marketing and senior management positions.

Although the Japanese market has been saturated, many people anticipate growth as a result of an increase in the number of foreign nationals arriving in the country, and competition has emerged between companies fighting for a greater market share. We expect that the demand for specialists with industry experience will further increase in 2019. Although there is an imbalance between the supply and demand of talent, we have not observed a large fluctuation in the average salary offered for recruitment by corporate offices in the consumer goods and services industries. Nevertheless, offering competitive salaries is a necessity for companies wishing to hire excellent candidates with ample experience and high linguistic ability. Each year has seen an increasing need for swiftness in companies' evaluation and hiring processes.

Companies throughout the industry have made strong bids for entry-level employees with two to five years of experience and entry-level/mid-tier employees with five to ten years of experience. Marketing positions now also require a higher level of English proficiency. An increasing number of companies have

come to favour Japanese-English bilinguals with a fluent or native-level command of both languages, deeming the conventional standard of business-level fluency to be insufficient.

RETAIL

The retail business continues to be promising in Japan as it enjoys a surge of overseas visitors ahead of the 2020 Olympics. There has been a succession of new store and branch store openings in metropolitan areas all over the country, and the hiring of sales staff has been especially brisk.

Hiring for positions in corporate offices have mainly been to fill vacancies. However, the demand for experienced professionals with a good command of English remains strong, and the market is progressively becoming one that has job seekers in an advantageous position. Although many companies are looking for candidates who are capable of working on the frontlines in the fashion, sports, beauty and jewellery industries, the demand for English-speaking staff is stronger than ever before. Despite this, the human resources market in Japan for bilingual workers is becoming increasingly tight. Therefore, some companies that are eager to reinforce internal structures or expand domestic businesses have been attempting to secure experienced professionals from across retail industries, such as jewellery to fashion and fashion to sports/beauty.

Furthermore, digitalisation in the market has also accelerated, and the presence of digital and social media in marketing continues to grow stronger every year. For this reason, many companies are looking for candidates with experience in and knowledge of essential consumer engagement through digital media when hiring PR/marketing specialists. There has also been an increase in the hiring of CRM specialists due to the expansion of e-commerce and to bolster clienteling. We expect further growth in this trend going forward.

If passage of the Integrated Resorts Promotion Act (the "casino bill") results in the future development of IR and neighbouring



IF PASSAGE OF THE CASINO BILL RESULTS IN THE FUTURE DEVELOPMENT OF IR, IT MAY FURTHER INCREASE THE DEMAND FOR BILINGUAL STAFF.

commercial facilities, there may eventually be an increase in the demand for bilingual staff that can assist overseas customers.

Highly qualified candidates are typically presented with salary offers that are 10-15% more than their current salaries. Although many companies have been conducting steady expansion/store openings within Japan, many companies have also been experiencing sluggish results in other countries, which affect their corporate group results. Therefore, while the job market in Japan has been a sellers' market, the average salary rate in retail sales has remained flat since 2017. Women's participation in retail sales has also been evolving, and there has been an increase in companies advocating a proper work-life balance, something that has become an important factor candidates consider when deciding to change jobs.

Although there were many job openings in 2018 for luxury brand sales staff, the severely tight supply and demand balance for bilingual human resources in Kyoto and Osaka left many companies short on personnel. We expect that demand will remain high in 2019 and hiring will continue to be difficult.

HOSPITALITY

As the 2020 Olympics approach, inbound tourism is on the rise and more hotels are opening, accelerating business expansion within Japan's hospitality industry.

With the enactment of the law allowing integrated resorts and the advancements in development plans for casinos and entertainment facilities as well as surrounding lodging, MICE and commercial facilities, we expect large-scale recruitment of bilingual hospitality staff capable of welcoming overseas guests to begin. Furthermore, human resource needs for sales, marketing and general manager positions will grow, and with the timing overlap of the recruitment activities of up-and-coming companies, we expect fierce competition in securing human resources in these areas.

One characteristic of the hospitality industry is that there are many cases where professionals working in businesses such as hotels or airlines change jobs to work at competitors in the same field. In the hotel business, there are many hotel groups undergoing significant business expansion in preparation for the Olympics, leading to intense competition for a scarce pool of talent. As the supply and demand for bilingual talent with experience in the hospitality industry become ever more stringent, world fair invitations and the opening of IR facilities will result in companies facing difficulties in securing human resources unless they become more flexible in accepting talent from other industries, including professionals from outside of Japan.

Early in 2018, we began seeing more flexibility in hiring conditions. For sales and

upper management roles, professionals who changed jobs tended to do so within the same industry, but for those in junior- or mid-level sales positions, there were many cases where people with B2B sales experience in other industries were hired. In the marketing profession, we have seen many people change jobs from other industries, including fashion, cosmetics and jewellery. The hiring of professionals from outside of Japan, which was once usually reserved for upper-level management, has started to expand to a wider range of positions.

As is typically the case, professionals seeking positions in the hospitality industry look for high pay and brand recognition. Salaries presented as hiring offers start at an average of about 10-15% higher than the annual salary of a candidate's current position. Due to the imbalance between the supply and demand for human resources, we anticipate that the further advancement of the sellers' market that favours candidates will lead to an increase in pay scales in 2019 and beyond.

Inbound travel in Kansai has also shown favourable trends, with an increasing demand for human resources in a wide range of occupations for the hotel, entertainment and airline industries. In the Kansai region, the tight supply and demand balance for Japanese-English bilinguals in the hospitality field is especially severe. Furthermore, there are significant staffing shortages for HR positions that are tasked with hiring. This is impacting the speed of the hiring process for professionals that need to be deployed to the front lines. In 2018, these circumstances led to many cases in which companies missed the chance to hire highly skilled talent during the review and screening processes. Job openings are expected to continue increasing in 2019, so we anticipate a growing need for shoring up support for training hiring managers to help secure talented professionals with the experience required to be immediate assets to companies.

ONLINE & DIGITAL

Demand is growing for professionals in the digital area. In addition to existing companies

expanding their digital businesses, the presence of many new market entrants has resulted in high demand for such professionals and a constant shortage of talent. As competition over experienced professionals intensified, many companies in 2018 secured such professionals by raising pay standards or hiring candidates whose experience did not meet requirements and then training them on the job and through training programmes.

In the retail and consumer goods sectors, many companies have hired more personnel in conjunction with the development of e-commerce business and proceeded with enhancing digital marketing capabilities throughout 2018. This resulted in companies making strong bids for candidates with experience in this area, and demand for professionals with expertise and experience far exceed supply. Until 2017, the recruitment of digital marketing personnel was focused on filling a certain number of positions, and the majority of such personnel were assigned to junior-level roles. In 2018, more companies hired senior-level digital marketers in order to strengthen both structures and strategies, a trend we expect to continue in 2019.

There is also a large digital advertising market in Japan and the demand for candidates is high among adtech companies. As digital advertisements that utilise user information with advanced technologies such as AI are becoming more popular, an increasing number of adtech companies are developing and offering new optimisation-related advertisement products. This creates greater demand for sales representatives and consultants that are well versed in the latest digital advertising techniques.

Along with the attention being paid to the new European General Data Protection Regulation (GDPR), there was a growing awareness in 2018 of compliance with the Personal Information Protection Law and the Copyright Act, and we saw many companies decide to hire trainers with expertise in compliance training. In addition, 2018 saw more companies assign project managers in digital marketing departments in order to establish business strategies for new services, products

and campaigns and the implementation of marketing measures according to the overall business calendar. We expect this trend to continue in 2019, as well.

As demand increases for professionals in the digital area, pay standards are also rising in order to balance supply and demand. The majority of candidates we assisted in 2018 who received job offers were offered 20-30% higher annual salaries compared to their current earnings.

IT SOFTWARE

The demand for software sales staff remains high due to robust cloud and IoT businesses, along with the actual demand for RPA, big data and AI-related businesses throughout 2018.

There has been an especially strong surge in sales staff capable of handling solutions selling with a focus on cloud technology. There has also been a shift in client requirements, which now call for a certain number of products to be deployed towards detecting business issues and issues caused by current software/system operations and resolving them with multiple services. As a result, quality sales professionals with a wealth of expertise in various products, good consultation skills and the ability to identify and resolve software/system issues are necessary.

Cutting-edge technology such as cloud computing, IoT, edge computing, advanced data analysis and machine learning has been developed and deployed in various sectors including autonomous driving technologies, factory automation and supply chains. These needs have seen a major increase of manpower sought after by both established companies and start-ups, especially in the cloud, RPA, IoT, big data and AI categories, causing an urgent demand for human resources. In this high-demand environment, there is a surprising lack of bilingual talent capable of both handling English correspondence with overseas headquarters to gather information and carrying out solutions selling to domestic clients.

Many companies have shown to be

flexible towards hiring experienced, skilled professionals, and many candidates are being offered salaries that are 20-30% higher than their current job. Candidates who focus not only on salary but also on corporate culture, executive policies and personalities when contemplating job changes are also becoming more prominent, especially among younger age groups. We anticipate that job-seeking will continue to be a sellers' market after 2019, so shortening and streamlining the recruitment process will become increasingly more important to secure talented professionals.

IT INFRA & SERVICES

In the IT infrastructure services field, there is a growing trend toward relaxing the requirement for IT industry experience, and a large portion of positions are now being filled by junior-level talent with strong prospects for growth when given the right training.

Telecommunications companies are planning to expand their services and content businesses in 2019 and 2020. We expect this trend to attract young talent with software experience, leading to advantageous hiring gains. This also signals intensified competition for young sales specialists working in the traditional IT hardware and IT software fields. With the growth of mobile technologies, companies are making stronger bids for sales specialists with experience in the mobile broadband field. Meanwhile, due to increasing turnover among sales professionals in the telecommunications industry to the software field, telecommunications companies are raising the pay scale presented as hiring offers in an attempt to secure talented candidates.

Employment for sales professionals in the information and market data services field is also growing. Client companies who are data users require increasingly accurate data, and many leading companies and start-ups are investing more in research and development. As data collection and usage advance in all industries, the demand for data centres and data storage systems that can protect all data including customer information and performance records from various risks are expected to continue growing in 2019. As a

result, we expect to see a rise in demand for solution sales specialists in the data center and data storage fields.

With the enactment of GDPR, there is a heightened awareness of issues surrounding personal information protection, which has led to stronger security requirements for carriers. We therefore expect to see growing demand in 2019 for senior-level sales specialists with experience in security sales and extensive client networks. With regard to leading-edge cyber attack protection, the needs are increasing on a daily basis, with strong bids being made for candidates with sales experience, not just by companies, but also by public institutions such as government agencies, administrative offices and municipalities. We expect a continuing rise in demand for experienced sales specialists in the telecommunications industry who can build a market for network solutions for companies in a wide range of industries to prepare for the deployment of IoT technology.

Salaries presented as hiring offers start at an average of about 15% higher than candidates' current salaries as companies across the board try to appeal to young, solutions-oriented sales professionals. This has led to a trend where young candidates with IT sales experience and business-level English proficiency are receiving numerous offers while seeking employment regardless of the product they specialise in.

CONTRACT

There has been a trend toward a deeper understanding of flexible work styles among both employers and employees, and in 2018, the numbers of offers for temporary and contract employees continued to increase. This was followed by a stronger push to hire women, which led to an increasing need to fill positions vacated due to maternity and childcare leave.

Regarding job offers for project coordinators, in-house interpreters/translators and project assistants in the digital and online fields, an increasing number of professionals are being hired as temporary or contract employees at the start of new projects or undertakings, and once the project or undertaking is set to continue, they are being promoted to permanent positions.

SUPPLY CHAIN

In 2018, companies hired many professionals in the areas of product management, EHS (Environment, Health & Safety), plant management and QA/QC. Procurement professionals also received job offers at approximately the same level as the previous year, and we expect an increase in offers in 2019.

The rising average age of employees in the transportation and distribution industry is perceived to be an issue, and many companies are attempting to lower it through

hiring. This situation makes it difficult for professionals in their 50s to change jobs, even though they may have excellent skills and a wealth of experience. Conversely, requirements for the skill set and experience of candidates in their 20s and 30s are not extremely high in comparison to previous years. We are seeing a trend in which excellent candidates in their 20s and 30s are receiving job offers from multiple companies after starting their job hunting, and some companies have even taken on the risk of hiring new graduates.

Managers tend to choose candidates who have a clear outlook for their future career, and they view communication and career management skills as important criteria for selection. In 2018, we saw a trend in which companies carefully selected candidates. However, since young bilingual candidates are very popular, especially among foreign-affiliated companies, we expect more companies will attempt to win the competition for the limited number of candidates, prompting the screening and hiring processes to accelerate in 2019.

The number of talented bilingual professionals with experience in the supply chain sector is much lower than the number of available jobs, leading to an overwhelming sellers' market where qualified candidates have many choices. There are many factors that influence the decision to change jobs other than the corporate brand, including competitive salaries, growth potential at the company, a corporate culture with good communication, transparent career steps and a workplace environment where employees can work comfortably. Even companies with a strong brand will have difficulty hiring employees unless they are able to sell themselves to candidates in job interviews.

In 2018, we saw progress in the hiring of non-Japanese professionals in the supply chain sector. The value companies place on skills and experience has opened the door to talented non-Japanese professionals, and we expect this trend to continue in 2019.

Recent financial conditions have boosted the demand for talent, and candidates



are becoming more aggressive due to the imbalance between supply and demand. As a result, the average salary offered for new jobs has gradually increased. For instance, exceptionally strong candidates are being offered an annual salary that is 12-15% higher than that of their current job, which is another trend we expect to continue in 2019.

With the yearly increase in activity in the field of international logistics, there continues to be many job openings at freight forwarders for sales and operations positions in the Kansai region as well. For temporary and contract employees, openings for trade administration positions and overseas sales assistants are increasing, and this trend is expected to continue in 2019. In particular, job openings for temporary employees with experience in trade administration tasks are expected to increase.

In the Kansai region as well, supply chain optimisation for procurement, distribution and sales is being widely implemented based on Industry 4.0 technologies. In line with this, procurement and distribution management specialists such as supply chain planners, supply chain analysts and procurement managers capable of utilising data to set estimates are in high demand.

CONTRACT

In supply chain departments, there has been a trend toward a deeper understanding of flexible work styles among both employers and employees, and the numbers of offers for temporary and contract employees are continuing to increase. Companies that hire these employees tend to seek talented candidates who can handle specific systems or have technical expertise. However, there are significantly more job vacancies than there are professionals with relevant expertise, making hiring quite difficult.

With the yearly increase in activity in the field of international logistics, there continues to be many job openings at freight forwarders for sales and operations positions in the Kansai region as well. For temporary and contract employees, openings for trade administration

positions and overseas sales assistants are increasing, and this trend is expected to continue in 2019. In particular, job openings for temporary employees with experience in trade administration tasks are expected to increase.

GENERAL CONTRACT EMPLOYMENT

Demand has been on a continuous rise, especially in 2018, as the enactment of the amended Worker Dispatch Act led to a rapid increase in companies which hire temporary employees as direct contract or permanent employees. We expect this trend to continue growing in 2019.

In 2018, more companies advanced their hiring efforts in ways that gave them a greater advantage over their competitors than in previous years by promoting outstanding temporary and contract employees to permanent positions, or by explaining such promotion schemes beforehand. The impact of the amended Worker Dispatch Act also drove this trend of promoting staff to permanent positions. In addition, instead of hiring permanent employees with an evaluation period, more companies hired temporary workers with the opportunity to move into permanent positions in the future. It is not uncommon for new graduates who left their first company for another or for new graduates looking to change jobs after one or two years to have advanced English proficiency but lack specialised skills and experience. In the case of these job seekers, we have found that many companies hire them as temporary employees and promote them to permanent positions after six months.

Every year, an increasing number of companies expect their temporary and contract employees to take a more active approach and display a high enough level of autonomy to take initiative similar to permanent employees. It is also increasingly common for job seekers with advanced English proficiency to receive multiple temporary or contract job offers. As a result of the increasingly severe labour shortage, the

hiring of part-time workers, women and non-Japanese individuals increased more in 2018 than in previous years, with a growing number of companies taking a more flexible approach toward work styles and the use of labour. In addition, efforts made toward achieving equal pay for equal work are becoming more prevalent. However, the differences in how temporary employees are treated with regard to access privileges to crucial resources and work involvement with permanent employees have hardly changed. We expect that improvements in these areas would bring favourable outcomes in securing human resources.

In 2019, we anticipate the most competitive hires being young, bilingual individuals who are content with remaining in assistant-level positions. Even for temporary or contract employees, most young people with a bright future ahead of them prefer environments in which they can see career opportunities. Most companies that want to proceed seamlessly to acquire human resources are proactively offering promotions to permanent positions to attract talented candidates.

As a result of the increased hourly wages caused by the talent shortage, the average hourly wages of temporary and contract employees that we managed in 2018 increased 5-10% compared to the previous year. We expect this trend to continue in 2019.

The salaries and hourly wages of temporary employees have been sustained at high levels across a wide range of occupations in the Kansai region as well. As a result, there was a growing trend throughout 2018 toward hourly wages that were not fixed, but were adjustable depending on the candidate's experience and skills. As an example of measures to secure talented human resources, there have been an increasing number of cases in which temporary staff have been directly hired (either as contract or permanent employees) based on their performance. By observing how these companies have been able to secure hires relatively seamlessly, we believe it is crucial for companies that promote flexibility in their workplace to highlight this point to candidates during the hiring process.

TOKYO

ACCOUNTING & FINANCE FINANCIAL SERVICES

ROLE	SALARY PER ANNUM JPY (¥)					
	0 - 4 YRS' EXP		4 - 8 YRS' EXP		8 + YRS' EXP	
	2018	2019	2018	2019	2018	2019
Investment Banking/Securities						
Product Control	6 - 9m	6 - 9m	9 - 13m	9 - 13m	13 - 30m	13 - 30m
Internal Audit	6 - 10m	6 - 10m	10 - 15m	10 - 15m	15 - 25m	15 - 25m
Financial/Mgt Accounting	6 - 9m	6 - 9m	9 - 13m	9 - 13m	13 - 40m	13 - 40m
Tax	6 - 9m	6 - 9m	9 - 13m	9 - 13m	13 - 25m	13 - 25m

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

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ACCOUNTING & FINANCE COMMERCE & INDUSTRY

ROLE	PERMANENT		CONTRACT	
	SALARY PER ANNUM JPY (¥)		RATE PER HOUR JPY (¥)	
	2018	2019	2018	2019
Large Organisation				
Chief Financial Officer	25 - 50m	25 - 50m		
Financial Controller	15 - 21m	15 - 21m	5000 - 9000	5000 - 9000
SME				
Chief Financial Officer	15 - 25m	15 - 25m	6000 - 10000	6000 - 10000
Financial Controller	11 - 16m	11 - 16m	4000 - 8000	4000 - 8000
Accounting				
Internal Audit Manager	11 - 16m	11 - 16m		
Tax Manager	12 - 16m	12 - 16m		
Financial Accounting Manager	10 - 15m	10 - 15m	4000 - 8000	4000 - 8000
Treasury Manager	8 - 12m	8 - 12m		
Credit Manager	8 - 12m	8 - 12m		
Senior Financial Accountant	7 - 10m	7 - 10m	4100 - 7600	4100 - 7600
Tax Accountant	7 - 11m	7 - 11m		
Internal Auditor	8 - 12m	8 - 12m		
Cost Accountant	7 - 10m	7 - 10m		
Financial Accountant	6 - 9m	6 - 9m	2800 - 3600	2800 - 3600
Treasury Accountant	5 - 9m	5 - 9m		
AP/AR Staff	4 - 6m	4 - 6m	2600 - 3300	2700 - 3300
Financial Planning & Analysis				
Financial Planning Manager	12 - 16m	12 - 16m		
Business Controller	10 - 14m	10 - 14m		
Senior Financial Analyst	10 - 13m	10 - 13m		
Financial Analyst	7 - 10m	7 - 10m	2800 - 5200	3000 - 5500

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FINANCIAL SERVICES

PERMANENT

ROLE	SALARY PER ANNUM JPY (¥)					
	0 - 4 YRS' EXP		4 - 8 YRS' EXP		8 + YRS' EXP	
	2018	2019	2018	2019	2018	2019
Sales	7.5 - 10m	7.5 - 10m	8.5 - 15m	8.5 - 15m	10 - 20m	10 - 20m
Product Management	7.5 - 10m	7.5 - 10m	8.5 - 12m	8.5 - 12m	10 - 18m	12 - 25m
Trade/Sales Support	6.5 - 9m	6.5 - 9m	8.5 - 12m	8.5 - 12m	10 - 15m	10 - 15m
Settlements	6.5 - 9m	6.5 - 9m	8.5 - 12m	8.5 - 12m	10 - 15m	10 - 15m
Consulting	6 - 9m	6 - 9m	8 - 15m	8 - 15m	10 - 20m	10 - 20m
Real Estate Asset Management	6.5 - 8.5m	6.5 - 8.5m	8.5 - 11m	8.5 - 11m	11 - 16m	11 - 16m

CONTRACT

ROLE	RATE PER HOUR JPY (¥)					
	0 - 4 YRS' EXP		4 - 8 YRS' EXP		8 + YRS' EXP	
	2018	2019	2018	2019	2018	2019
Project Management	3200 - 5300	3200 - 5300	5200 - 13100	5200 - 13100	3500 - 13100	3500 - 13100
Middle Office	2800 - 3700	3000 - 3700	3300 - 6700	3300 - 6700	5000 - 10200	5000 - 10200
Settlements	2800 - 3200	3000 - 3200	2900 - 6700	3000 - 6700	5000 - 10200	5000 - 10200

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

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GENERAL AFFAIRS & ADMINISTRATION

ROLE	PERMANENT		CONTRACT	
	SALARY PER ANNUM JPY (¥)		RATE PER HOUR JPY (¥)	
	2018	2019	2018	2019
Financial Services				
Administration Manager	8 - 11m	8 - 11m		
Executive Secretary	6 - 9m	6 - 9m	3200 - 5000	3200 - 5000
Translator/Interpreter	5.5 - 9.5m	5.5 - 9.5m	3500 - 11000	3500 - 11000
General Affairs Administrator	5 - 7.5m	5 - 7.5m	2900 - 4500	3000 - 4500
Office Administrator	5 - 7.5m	5 - 7.5m	2800 - 4000	2900 - 4000
Group Secretary	5 - 8m	5 - 8m	3000 - 4700	3000 - 4700
Receptionist	3.5 - 5.5m	3.5 - 5.5m	2600 - 3500	2800 - 3500
Commerce & Industry				
General Affairs Manager	7.5 - 14.5m	7.5 - 14.5m		
General Affairs Administrator	4 - 7m	4 - 7m	2700 - 4000	2700 - 4000
Office Manager	7 - 11m	7 - 11m	3100 - 4000	3100 - 4000
Administration Manager	6 - 10m	6 - 10m		
Administrative Assistant	4.5 - 7m	4.5 - 7m	2700 - 3500	2700 - 3500
Executive Secretary	5.5 - 9.5m	5.5 - 9.5m	2700 - 4000	2700 - 4000
Translator/Interpreter	5 - 10m	5 - 10m	3000 - 7000	3000 - 7000

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HUMAN RESOURCES

ROLE	PERMANENT		CONTRACT	
	SALARY PER ANNUM JPY (¥)		RATE PER HOUR JPY (¥)	
	2018	2019	2018	2019
Financial Services				
HR Director	18.5 - 35.5m	18.5 - 35.5m		
HR Manager/Generalist (6+ yrs' exp)	8 - 21m	8 - 21m	4000 - 7000	4000 - 7000
HR Business Partner	10 - 21m	10 - 21m		
HR Generalist (0 - 6 yrs' exp)	5.5 - 9.5m	5.5 - 9.5m	3000 - 4200	3000 - 4200
Recruitment				
Recruitment/Staffing Manager	12 - 22m	12 - 22m	4000 - 7000	4000 - 7000
Recruitment/Staffing Coordinator	5.5 - 10m	5.5 - 10m	2900 - 4500	3000 - 4500
Learning & Development				
Learning & Development Head	14 - 20m	14 - 20m	3000 - 5000	3000 - 5000
Training Specialist	5 - 16.5m	5 - 16.5m	2800 - 4100	2800 - 4100
Compensation & Benefits/Payroll				
Compensation & Benefits Mgr/Dir	12.5 - 22m	12.5 - 22m		
Compensation & Benefits Specialist	6 - 13m	6 - 13m	3500 - 4500	3500 - 4500
Payroll Specialist	5 - 8m	5 - 8m	3000 - 4000	3000 - 4000
Commerce & Industry				
HR Director/Head	13.5 - 35m	13.5 - 35m		
Head of Training/L&D/OD	10 - 22m	10 - 22m		
HR Manager	10 - 16.5m	10 - 16.5m	4000 - 7000	4000 - 7000
Recruitment/Staffing Manager	10 - 15.5m	10 - 15.5m	3000 - 5000	3000 - 5000
Compensation & Benefits Manager	9.5 - 16m	9.5 - 16m		
HR Generalist	6.5 - 13.5m	6.5 - 13.5m	3000 - 4200	3000 - 4200
HR Specialist	5.5 - 10m	5.5 - 10m	3000 - 4200	3000 - 4200
HR Administrator	5 - 9m	5 - 9m	2700 - 3500	2700 - 3500

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

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INFORMATION TECHNOLOGY FINANCE

BANKING

ROLE	PERMANENT		CONTRACT	
	SALARY PER ANNUM JPY (¥)		RATE PER HOUR JPY (¥)	
	2018	2019	2018	2019
Chief Information Officer	30 - 50m	30 - 50m		
Head of Development/Support	22 - 30m	22 - 30m		
Head of Infrastructure	20 - 25m	20 - 25m	9000 - 10000	9000 - 10000
UNIX Manager	15 - 20m	15 - 20m	8000 - 9000	8000 - 9000
Project Manager	10 - 16m	10 - 16m	8000 - 9000	8000 - 9000
Information Security Officer	15 - 20m	15 - 20m	7600 - 8600	7600 - 8600
Business Analyst	10 - 16m	10 - 16m	5000 - 9000	5000 - 9000
Developer	8 - 25m	8 - 25m	7000 - 20000	7000 - 20000
Database Administrator	8 - 12m	8 - 12m	7500 - 8500	7500 - 8500
Systems Administrator	8 - 15m	8 - 15m	7000 - 10000	7000 - 10000
Applications Support	8 - 15m	8 - 15m	6500 - 7500	6500 - 7500
Network Engineer	8 - 16m	8 - 16m	5500 - 7800	7000 - 10000
Incident Manager	8 - 14m	8 - 14m	7000 - 10000	7000 - 10000

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

TOKYO

INFORMATION TECHNOLOGY FINANCE

NON-BANKING

ROLE	PERMANENT		CONTRACT	
	SALARY PER ANNUM JPY (¥)		RATE PER HOUR JPY (¥)	
	2018	2019	2018	2019
Chief Information Officer	20 - 30m	20 - 30m	10000 - 12000	10000 - 12000
Head of Development	15 - 18m	15 - 18m		
BPR	8 - 12m	8 - 12m		
Infrastructure Manager	8 - 12m	8 - 12m	6500 - 8000	6500 - 8000
UNIX Systems Administrator	6 - 10m	6 - 10m	7300 - 8250	7300 - 8250
Business Analyst	6 - 10m	6 - 10m	4150 - 7250	4150 - 7250
Database Administrator	6 - 8m	6 - 8m	7500 - 8500	7500 - 8500
Systems Analyst	6 - 9m	6 - 9m	7500 - 8500	7500 - 8500
Wintel Systems Administrator	5 - 8m	5 - 8m	7500 - 8500	7500 - 8500
Application Support	5 - 7m	5 - 8m	4000 - 8000	4000 - 9000
Project/Program Manager	8 - 16m	8 - 16m	5000 - 14000	5000 - 14000
Information Security	6 - 16m	6 - 16m	5000 - 14000	5000 - 14000
Developer	6 - 10m	6 - 10m	5000 - 9000	5000 - 9000
PMO	6 - 10m	6 - 10m	5000 - 9000	5000 - 9000
Architect	8 - 16m	8 - 16m	6500 - 20000	6500 - 20000
Data Analyst/Scientist	8 - 14m	8 - 14m	5000 - 9000	5000 - 9000
Web Developer	6 - 10m	6 - 10m	4000 - 9000	4000 - 9000
UI/UX Designer	6 - 10m	6 - 10m	4000 - 12000	4000 - 12000
Cloud/DevOps	6 - 14m	6 - 14m	5000 - 14000	5000 - 14000

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

TOKYO

INFORMATION TECHNOLOGY COMMERCE

ROLE	PERMANENT		CONTRACT	
	SALARY PER ANNUM JPY (¥)		RATE PER HOUR JPY (¥)	
	2018	2019	2018	2019
IT Director	15 - 20m	15 - 20m	7200 - 10500	7200 - 10500
Business Partner	10 - 15m	10 - 15m		
Service Delivery Manager	10 - 15m	10 - 15m	7000 - 8250	7000 - 8250
IT Manager	10 - 15m	10 - 15m	7150 - 8300	7150 - 8300
Application Manager	8 - 15m	8 - 15m		
Infrastructure Manager	8 - 12m	8 - 12m	7000 - 8200	7000 - 8200
Project Manager	8 - 12m	8 - 12m	7000 - 8000	7000 - 8000
Business Analyst	7 - 9m	7 - 9m	6000 - 12000	6000 - 12000
ERP Engineer	6 - 10m	6 - 10m	3500 - 6250	3500 - 6250
Data Analyst/Scientist	6 - 15m	6 - 15m	5500 - 14000	5500 - 14000
CRM Engineer	6 - 10m	6 - 10m	4000 - 6450	4000 - 6450
Database Administrator			6100 - 6650	6100 - 6650
Network Engineer	5 - 8m	5 - 8m	6100 - 6650	6100 - 6650
Infrastructure Engineer	5 - 8m	5 - 8m	6000 - 7250	6000 - 7250
Systems Engineer	5 - 8m	5 - 8m	6000 - 6950	6000 - 6950
Systems Administrator	4 - 6m	4 - 6m	5350 - 7250	5350 - 7250
POS Engineer	4 - 8m	4 - 8m	3125 - 4650	3125 - 4650
End User Support	4 - 7m	4 - 7m	4000 - 9000	4000 - 9000
E-commerce Engineer	6 - 10m	6 - 10m		

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

TOKYO

INFORMATION TECHNOLOGY ONLINE

ROLE	PERMANENT		CONTRACT	
	SALARY PER ANNUM JPY (¥)		RATE PER HOUR JPY (¥)	
	2018	2019	2018	2019
Product Manager	8 - 12m	8 - 12m	6100 - 9000	6100 - 9000
Project Manager	9 - 14m	9 - 14m	7000 - 7500	7000 - 7500
Network Engineer	6 - 8m	6 - 8m		
Web Producer	5 - 8m	5 - 8m	3500 - 6700	3500 - 6700
Web Developer	5 - 10m	5 - 10m	3200 - 6500	3200 - 6500
Web Director	5 - 8m	5 - 8m	3350 - 6000	3350 - 6000
Web Designer	5 - 9m	5 - 9m	2850 - 5650	2850 - 5650
Front-End Developer	4 - 8m	4 - 8m	4000 - 7000	4000 - 7000
Back End/Server Side Developer	5 - 10m	5 - 10m	5000 - 8000	5000 - 8000
Game Producer	5 - 18m	5 - 18m	3000 - 9000	3000 - 9000
Graphic Designer	4 - 6m	4 - 6m	3500 - 6500	3500 - 6500
UI/UX Designer	4 - 6m	4 - 6m	3200 - 6150	3200 - 6150
iOS Developer	6 - 10m	6 - 10m	5000 - 8500	5000 - 8500
Android Developer	6 - 10m	6 - 10m	5000 - 8500	5000 - 8500
Web Application Developer	5.5 - 10m	5.5 - 10m	4000 - 9000	4000 - 9000
Data Analyst/Scientist	8 - 15m	8 - 15m	5000 - 14000	5000 - 14000
Machine Learning Engineer	6 - 15m	6 - 15m	6000 - 14000	6000 - 14000
Technical Consultant	6 - 10m	6 - 10m	6000 - 10000	6000 - 10000
SRE/QA Specialist	6 - 12m	6 - 12m	4000 - 10000	4000 - 10000
DevOps	7 - 12m	7 - 12m	6000 - 10500	6000 - 10500

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TOKYO

INFORMATION TECHNOLOGY VENDOR & CONSULTING

ROLE	PERMANENT		CONTRACT	
	SALARY PER ANNUM JPY (¥)		RATE PER HOUR JPY (¥)	
	2018	2019	2018	2019
Solution Architect	12 - 18m	12 - 18m		
Service Delivery Director	16 - 22m	16 - 22m		
Program Manager	10 - 16m	13 - 17m	9000 - 10000	9000 - 10000
Project Manager	10 - 16m	10 - 16m	7000 - 7500	7000 - 7500
IT Consultant	9 - 14m	9 - 14m		
Pre-sales Engineer	9 - 17m	9 - 17m	6500 - 8300	6500 - 8300
Field Application Engineer	9 - 13m	9 - 13m	6500 - 9000	6500 - 9000
ERP Consultant	7 - 10m	7 - 10m	6500 - 7000	6500 - 7000
Telephony Engineer	8 - 10m	8 - 10m	4500 - 6200	4500 - 6200
Network Engineer	7 - 14m	7 - 14m	4500 - 6650	4500 - 6650
System Engineer	6 - 10m	6 - 10m	4500 - 6000	4500 - 6000
Software Developer	6 - 12m	6 - 12m	6500 - 11000	6500 - 11000
Embedded Developer	6 - 11m	6 - 11m	6000 - 8000	6000 - 8000
Post-sales Engineer	5 - 14m	5 - 14m	4300 - 7950	4300 - 7950
Technical Support Engineer	5 - 13m	5 - 13m	3350 - 4350	3350 - 4350
Quality Assurance Engineer	5 - 8m	5 - 8m	5500 - 8250	5500 - 8250
Localisation Engineer	5 - 8m	5 - 8m	4750 - 7050	4750 - 7050
Project Coordinator	5 - 7m	5 - 7m	4000 - 5000	4000 - 5000
Security Engineer	8 - 17m	8 - 17m	6000 - 6550	6000 - 6550
Datacenter Engineer			3400 - 4950	3400 - 4950
Customer Success Manager	8 - 18m	8 - 18m	7000 - 16000	7000 - 16000
Data Analyst/Scientist	8 - 15m	8 - 15m	5000 - 9000	5000 - 9000
Machine Learning Engineer	6 - 15m	6 - 15m	6000 - 14000	6000 - 14000
IoT Consultant	7 - 15m	7 - 15m	7000 - 14000	7000 - 14000
RPA Consultant	7 - 16m	7 - 16m	7500 - 14000	7500 - 14000

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TOKYO

LEGAL, COMPLIANCE & RISK

ROLE	PERMANENT SALARY PER ANNUM JPY (¥)					
	0 - 3 YRS' EXP		4 - 7 YRS' EXP		7+YRS' EXP	
	2018	2019	2018	2019	2018	2019
Private Practice						
Qualified Lawyer	10 - 22m	10 - 22m	12 - 23m	12 - 23m	22 - 35m	22 - 35m
Paralegal	4.5 - 6m	4.5 - 6m	5 - 7m	5 - 7m	7 - 10m	7 - 10m
Financial Services						
Legal Counsel	11 - 17m	11 - 17m	15 - 22m	15 - 22m	20 - 28m	20 - 28m
Compliance Manager	8 - 12m	8 - 12m	10 - 18m	10 - 18m	19 - 23m	19 - 23m
Commerce & Industry						
Lawyer	9 - 15m	9 - 15m	11 - 20m	11 - 20m	21 - 28m	21 - 28m
Legal Counsel	7 - 15m	7 - 15m	8 - 16m	8 - 16m	14 - 25m	14 - 25m
Contract Manager	4 - 7m	4 - 7m	8 - 16m	8 - 16m	11 - 13m	11 - 13m
Legal Staff	4 - 6m	4 - 6m	7 - 9m	7 - 9m	9 - 10m	9 - 10m
Legal Secretary	4 - 7m	4 - 7m	5 - 8m	5 - 8m	7 - 8m	7 - 8m
Risk						
Credit Risk Manager	9 - 12m	9 - 12m	13 - 18m	13 - 18m	19 - 22m	19 - 22m
Credit Risk Specialist	7 - 12m	7 - 12m	11 - 19m	11 - 19m	19 - 22m	19 - 22m
Market Risk Specialist	8 - 12m	8 - 12m	13 - 20m	13 - 20m	20 - 24m	20 - 24m
Quantitative Analyst	7 - 10m	7 - 10m	10 - 19m	10 - 19m	19 - 24m	19 - 24m

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

TOKYO

MANUFACTURING

ROLE	PERMANENT SALARY PER ANNUM JPY (¥)	
	2018	2019
Industrial		
President/CEO	17 - 35m	20 - 35m
Sales Director	12 - 19m	14 - 19m
Sales Manager	9 - 15m	10 - 15m
Marketing Manager	8 - 12.5m	10 - 14m
Sales & Marketing Executive	5.5 - 7.5m	6.5 - 8m
Sales Engineer	6.5 - 12.5m	6.5 - 12.5m
Project/Program Manager	9 - 15m	10 - 15m
Application/Design Engineer	6.5 - 12.5m	6.5 - 12.5m
Process/Industrial Engineer	6 - 9.5m	7 - 10m
Field Service Engineer	5.5 - 8.5m	7 - 9m
Chemical		
President/CEO	15 - 30m	18 - 35m
Sales & Marketing Director	12 - 20m	12 - 20m
Sales & Marketing Manager	8 - 15m	8 - 15m
Sales & Marketing Executive	6 - 13m	6 - 13m
Project Manager	10 - 16m	10 - 16m
Product Manager	7 - 14m	7 - 14m
Marketing Communications Manager	8 - 14m	8 - 14m
Business Development Manager	8 - 15m	12 - 18m
Application Manager	8 - 15m	8 - 15m
Application Engineer	6 - 13m	6 - 13m
R&D Director	12 - 18m	12 - 18m
R&D Manager	8 - 15m	8 - 15m
Technical Sales Manager	8 - 15m	8 - 15m
Technical Services	5 - 10m	5 - 10m

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

TOKYO

MANUFACTURING

ROLE	PERMANENT SALARY PER ANNUM JPY (¥)	
	2018	2019
Energy & Infrastructure		
President/CEO	18 - 30m	18 - 35m
Marketing Director	12 - 20m	12 - 20m
Marketing Manager	8 - 15m	8 - 15m
Sales Director	13 - 20m	13 - 20m
Project Manager	9 - 16m	10 - 16m
Field Service Engineer	5 - 9m	5 - 9m
Business Development Manager	10 - 15.5m	12 - 18m
Automotive		
Country Manager/Managing Director	16 - 30m	16 - 30m
Sales Director/Engineering Director	13 - 18m	13 - 20m
Sales Manager/Engineering Manager	8 - 13.5m	8 - 14m
Account Manager/Sales Engineer	6.5 - 11m	7 - 12m
Project Manager/Program Manager	8 - 12m	8 - 14m
Application Engineer/Design Engineer	6.5 - 10m	6.5 - 10m

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TOKYO

SALES & MARKETING

ROLE	PERMANENT SALARY PER ANNUM JPY (¥)	
	2018	2019
Medical		
President/Country Manager	18 - 30m	20 - 32m
Business Unit Head	18 - 25m	18 - 25m
Sales Manager/Director	10 - 22m	10 - 22m
Marketing Manager/Director	10 - 22m	10 - 22m
RA/QA Head	12 - 20m	12 - 20m
RA/QA Manager	10 - 15m	10 - 15m
Product Manager	7 - 10m	7 - 10m
Field Service Engineer/Manager	7 - 15m	7 - 15m
Pharmaceutical		
President/Country Manager	16 - 30m	20 - 32m
Business Unit Head	18 - 25m	18 - 25m
Marketing Manager/Director	13 - 22m	13 - 22m
Medical Affairs Manager/Director	12 - 22m	12 - 22m
Clinical Research Manager/Director	10 - 18m	10 - 18m
Business Development Manager/Director	12 - 18m	12 - 18m
Clinical Research Associate	6 - 9m	6 - 9m
Product Manager	7 - 12m	7 - 12m
Consumer/FMCG		
President/Country Manager	20 - 35m	20 - 35m
Sales Manager/Director	10 - 20m	10 - 20m
Marketing Manager/Director	12 - 20m	12 - 20m
Commercial Manager/Director	10 - 20m	10 - 20m
Brand/Product Manager	7 - 12m	7 - 12m
Market Research Manager	8 - 12m	8 - 12m

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

TOKYO

SALES & MARKETING

ROLE	PERMANENT		CONTRACT	
	SALARY PER ANNUM JPY (¥)		RATE PER HOUR JPY (¥)	
	2018	2019	2018	2019
Retail				
General Manager	15 - 30m	15 - 30m		
Retail Manager/Director	9 - 20m	9 - 20m		
Merchandising Manager/Director	8 - 17m	8 - 17m	4000 - 6000	4000 - 6000
Communications Manager/Director	7 - 13m	7 - 13m	4000 - 12000	4000 - 12000
Communications Specialist			3000 - 5000	3000 - 5000
Store Manager	6 - 10m	6 - 10m		
Visual Merchandising Manager	7 - 12m	7 - 12m	3500 - 6000	3500 - 6000
Visual Merchandising Specialist			3000 - 5000	3000 - 5000
Hospitality				
Country Manager	15 - 20m	15 - 25m		
Sales Director	10 - 16m	12 - 18m		
Sales Manager	7 - 10m	7 - 12m		
Front Desk Staff	5 - 7m	5 - 7m		
Concierge	5 - 7m	5 - 7m		
Digital & Online				
Country Manager	18 - 32m	20 - 35m		
E-commerce Manager/Director	8 - 18m	8 - 18m	4000 - 12000	4000 - 12000
E-commerce Specialist	5 - 8m	5 - 8m	3000 - 5000	3000 - 5000
Online Marketing Manager/Director	8 - 18m	8 - 18m	4000 - 12000	4000 - 12000
Online Marketing Specialist	5 - 8m	5 - 8m	3000 - 10000	3000 - 10000
Digital/Adtech Sales Manager	8 - 14m	8 - 14m	4000 - 12000	4000 - 12000
Web Director	6 - 9m	6 - 9m		
IT Software				
Country Manager	20 - 35m	25 - 45m		
Sales Manager/Director	12 - 25m	15 - 35m	4000 - 12000	4000 - 12000
Marketing Manager/Director	10 - 22m	10 - 22m	4000 - 12000	4000 - 12000
Marketing Specialist			3000 - 6000	3000 - 6000
Channel Sales Manager	10 - 16m	12 - 20m		
Sales Account Manager	8 - 15m	10 - 20m	5000 - 15000	5000 - 15000
IT Infrastructure & Services				
Country Manager	20 - 40m	25 - 40m		
Marketing Manager/Director	10 - 22m	10 - 22m		
Sales Manager/Director	12 - 28m	15 - 35m		
Product Marketing Manager	8 - 15m	8 - 15m		
Sales Account Manager	8 - 16m	10 - 20m		

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TOKYO

SUPPLY CHAIN

ROLE	PERMANENT		CONTRACT	
	SALARY PER ANNUM JPY (¥)		RATE PER HOUR JPY (¥)	
	2018	2019	2018	2019
SCM Director	15 - 30m	15 - 30m		
Operations Director	15 - 25m	15 - 25m		
Procurement Director	15 - 26m	15 - 26m		
EHS Director	15 - 19m	15 - 19m		
Factory/Plant Manager	15 - 25m	15 - 25m	4000 - 10000	4000 - 10000
Supply Chain Manager	10 - 15m	10 - 15m	5000 - 12000	5000 - 12000
Logistics Manager	9 - 14.5m	9 - 14.5m	4000 - 10000	4000 - 10000
Warehouse Manager	8.5 - 11m	8.5 - 11m	4000 - 7000	4000 - 7000
EHS Manager	10 - 14m	10 - 14m		
Procurement Manager	9 - 14m	9 - 14m	5000 - 12000	5000 - 12000
Indirect Procurement Manager	10 - 15m	10 - 15m	4000 - 10000	4000 - 10000
Customer Service Manager	8 - 12m	8 - 12m	4000 - 7000	4000 - 7000
QA/QC Manager	10 - 15m	10 - 15m	4000 - 10000	4000 - 10000
Facilities Manager	9 - 13m	9 - 13m		
Project Manager	9 - 13m	9 - 13m	5000 - 8000	5000 - 8000
Program Manager	9 - 15m	9 - 15m		
Production Control Manager	10 - 14.5m	10 - 14.5m		
EHS Specialist	7 - 9m	7 - 9m		
Supply Chain Staff	5 - 8.5m	5 - 8.5m	2800 - 4000	2800 - 4000
Logistics Staff	4.5 - 7m	4.5 - 7m	2800 - 4000	2800 - 4000
Warehouse Coordinator	4.5 - 7m	4.5 - 7m	2700 - 4000	2700 - 4000
Import/Export Staff	3.5 - 5.5m	3.5 - 5.5m	2700 - 3700	2700 - 3700
Planner	6 - 9m	6 - 9m		
Procurement Staff	5.5 - 8m	5.5 - 8m	2600 - 3800	2600 - 3800
Customer Service Staff	4 - 6m	4 - 6m	2600 - 3500	2600 - 3500
QA/QC Specialist	6 - 9m	6 - 9m	2700 - 3500	2700 - 3500
Facilities Management Staff	4.5 - 6m	4.5 - 6m		
Production Control Staff	5 - 7.5m	5 - 7.5m		
Process Engineer	5.5 - 9m	5.5 - 9m		

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OSAKA

SALARIES

ACCOUNTING & FINANCE

ROLE	PERMANENT		CONTRACT	
	SALARY PER ANNUM JPY (¥)		RATE PER HOUR JPY (¥)	
	2018	2019	2018	2019
Chief Financial Officer	18 - 26m	18 - 26m		
Financial Controller	12 - 18m	12 - 18m		
Finance Manager	8 - 11.5m	8 - 12m		
Financial Analyst	5 - 9.5m	5 - 9.5m	2800 - 5000	2800 - 5000
Senior Accountant	6 - 8.5m	6 - 8.5m	2850 - 5050	2850 - 5050

HUMAN RESOURCES

ROLE	PERMANENT		CONTRACT	
	SALARY PER ANNUM JPY (¥)		RATE PER HOUR JPY (¥)	
	2018	2019	2018	2019
HR Director	12 - 20m	13 - 22m		
HR Manager	8 - 13m	8 - 13m		
Senior HR Generalist	6.5 - 9.5m	6.5 - 9.5m	2000 - 3500	2000 - 3500
Executive Secretary	4 - 7.5m	4 - 7.5m	1550 - 2600	1550 - 2650
HR Generalist/Staff	3.5 - 6.5m	3.5 - 6.5m	1700 - 3550	1700 - 3550
Translator/Interpreter	4 - 6m	4 - 6m	1750 - 3600	1750 - 3600

INFORMATION TECHNOLOGY

ROLE	PERMANENT		CONTRACT	
	SALARY PER ANNUM JPY (¥)		RATE PER HOUR JPY (¥)	
	2018	2019	2018	2019
IT Director	14 - 21m	14 - 21m		
IT Manager	9 - 14m	9 - 14m		
Project Manager	7 - 10m	7 - 10m	2800 - 6500	2800 - 6500
System Engineer	6 - 9.5m	6 - 9.5m	1750 - 4050	1750 - 4050
Network Engineer	6 - 8.5m	6 - 8.5m	1750 - 4050	1750 - 4050

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OSAKA

SALES & MARKETING

ROLE	PERMANENT SALARY PER ANNUM JPY (¥)	
	2018	2019
Industrial & Chemical		
President/CEO	15 - 25m	15 - 25m
General Manager/Divisional Head	12 - 20m	12 - 20m
Sales Director	10 - 15m	10 - 15m
Sales Engineering Manager	8 - 12m	8 - 12m
Business Development Manager	8 - 13m	8 - 13m
Sales Manager	7 - 12m	7 - 12m
Marketing Manager	7 - 11m	7 - 11m
Sales Executive	6 - 8m	6 - 8m
Sales Engineer	5 - 9m	6 - 10m
Design Engineer	5 - 9m	5 - 9m
Chemical Engineer	5 - 8m	5 - 8m
Consumer & Retail		
Marketing Manager	8 - 10m	8 - 10m
Area Manager	5 - 8m	5 - 8m
Store Manager	5 - 7.5m	5 - 7.5m
Visual Merchandise Manager	5 - 6.5m	5 - 6.5m
Marketing Executive	5 - 6.5m	5 - 6.5m
Sales Executive	4 - 7m	4 - 7m
Store Sales Associate	3 - 4.5m	3 - 4.5m

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

OSAKA

SALES & MARKETING

ROLE	PERMANENT SALARY PER ANNUM JPY (¥)	
	2018	2019
Information Technology & Online		
Branch Manager	10 - 15m	10 - 15m
Sales Manager	9 - 12m	9 - 13m
Sales Account Manager	7 - 10m	7 - 11m
Sales Executive	4 - 6m	5 - 7m
Healthcare		
General Manager/Country Manager	15 - 28m	15 - 28m
Marketing Director	12 - 25m	12 - 25m
Sales Manager	8 - 14m	8 - 14m
Clinical Development Manager	8 - 13m	8 - 13m
Regulatory Affairs Manager	8 - 15m	8 - 15m
Marketing/Product Manager	7 - 12m	7 - 12m
Clinical Scientist/Researcher	5 - 8m	5 - 8m
Clinical Research Associate (CRA)	5 - 8m	5 - 8m
Quality Assurance	5 - 8m	5 - 8m

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

OSAKA

SUPPLY CHAIN

ROLE	PERMANENT		CONTRACT	
	SALARY PER ANNUM JPY (¥)		RATE PER HOUR JPY (¥)	
	2018	2019	2018	2019
Operations Director	14 - 22m	14 - 22m		
Factory/Plant Manager	10 - 15m	10 - 15m		
Procurement Manager	8 - 12.5m	8 - 12.5m		
QA/QC Manager	7.5 - 13m	7.5 - 13m		
Supply Chain Manager	7 - 12m	7 - 12m		
Import/Export Staff	3.5 - 5.5m	3.5 - 5.5m	1450 - 2500	1450 - 2500
Supply Chain Staff	3.5 - 5.5m	3.5 - 5.5m	1500 - 2500	1550 - 2550

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