

Monthly Market Update

October 2024

Trend Summary

August job ads were +3.7% up compared to Aug 2023 according to Zenkyukyo, reflecting a continued hiring demand, especially technical/specialist hiring needs.

To secure talents, various measures are being taken and more companies are improving post-retirement employee conditions, the government plans to ease corporate burdens by revising work-hour management rules to promote Fukugyo/side work by simplifying the integration of work hours from multiple employers and a new freelance act will be effective from November to improve work conditions of freelancers.

Highlights Overview

Market Data

1. HRog reports: monthly salary & vacancies on increase.
2. Persol DODA job-to-applicant ratio increased to 2.83.
3. Latest MHLW job-to-applicant ratio 1.23, 0.01pt down MoM, Tokyo 1.76 & Osaka 1.17, full time 1.01, ratio breakdown by job.
4. Zenkyukyo (job ads info) reports number of jobs ads on increase YoY.

Market Trend

1. The gov't plans to ease corporate burdens by revising work-hour management rules.
2. New freelance act effective from November 2024 aiming to improve working conditions & protect the rights of independent contractors in Japan.
3. IT industry is experiencing a surge in demand due to the '2025 Digital Cliff', where many legacy systems will become obsolete.
4. Several companies in Japan are boosting pay & improve conditions for post-retirement employees amid a staffing crunch to retain experienced senior employees.

West Japan Expansion

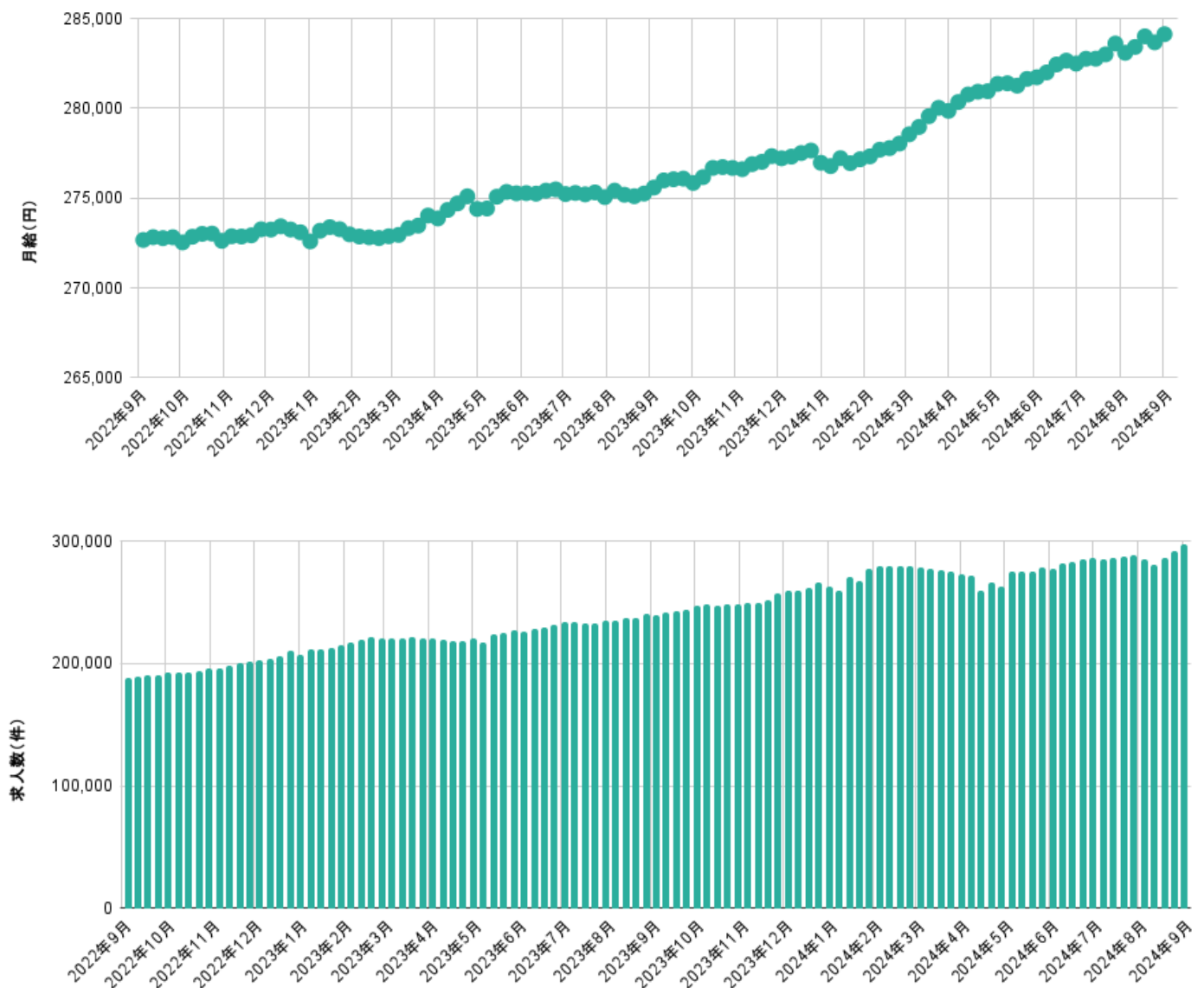
1. Osaka Yumeshima Island integrated report, Japan's first casino resort likely to open in Fall 2030.
2. Employee shortage in Kinki region, TDB's latest data shows 48.2% of companies experience regular employee shortage.
3. Fuji Film will build R&D and production sites within Japan by investing 20 billion yen in their semiconductor material factories in Shizuoka and Oita.
4. The surge in logistics facilities in the Chubu region is driven by increasing demand for relay transportation amid truck driver work hour reform and growing needs for EC & efficient distribution networks.

Market Highlights

October 2024

Market Data

HRog reports September 2024 full-time employee averages salary & vacancies. Average salary is 284,129yen, +0.37% (+1,039yen) MoM, +3.10% (+8,542yen) YoY with 297,404 vacancies which is +4.20% (+11,977 jobs) MoM/ +24.20% (+57,954jobs) YoY.



Market Highlights

October 2024

August Persol DODA Job to Applicant ratio is 2.83, +0.09pt MoM/+0.44pt YoY. Vacancies at 99.7% MoM and 117.5% YoY, job seekers at 96.7% MoM and 99.2% YoY. Both vacancies & job seekers declined and led to an increased job-to-applicant rate. The biggest increase from the previous month is in the consulting and leisure/restaurant sectors. In jobs, admin/assistant, sales/services increased MoM.

doda転職求人倍率・求人数・転職希望者数



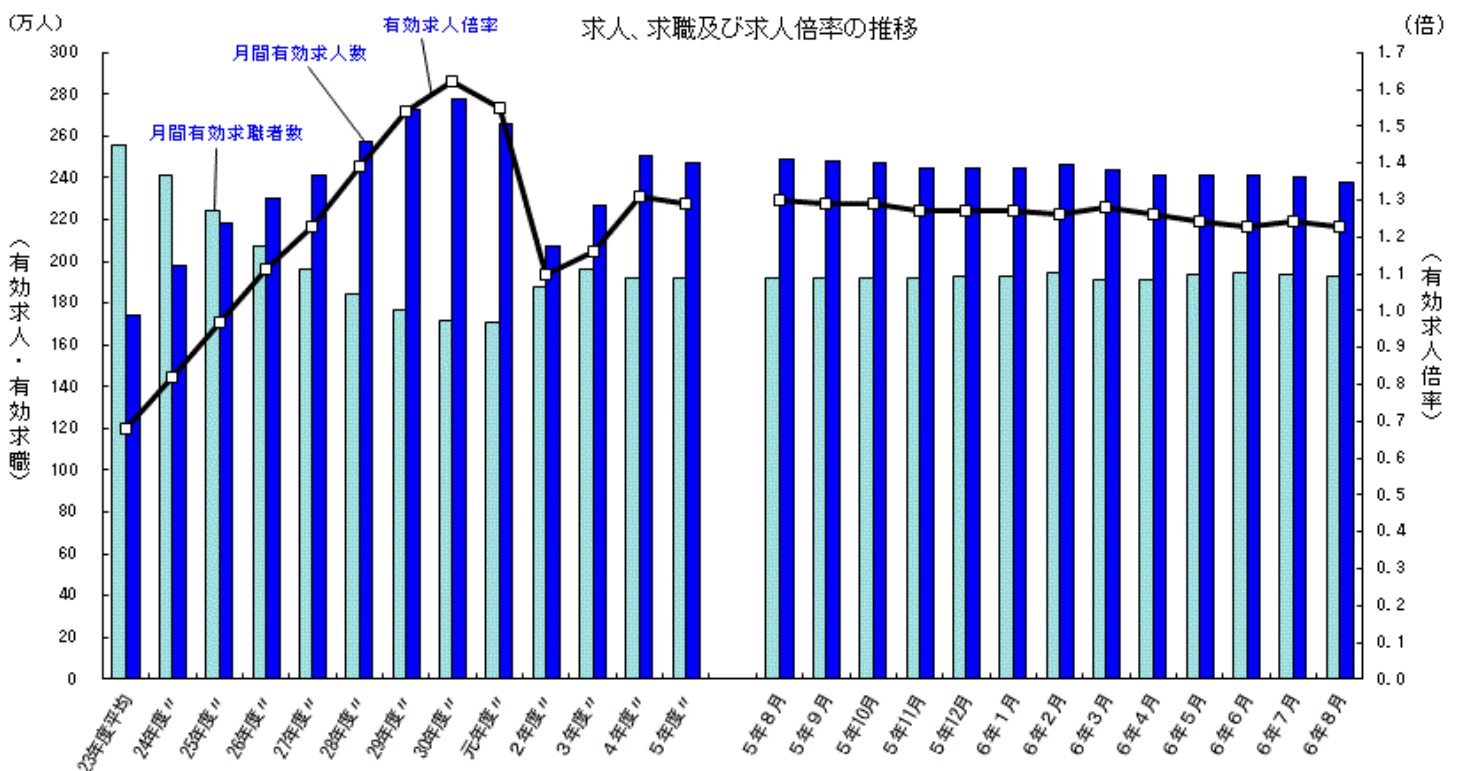
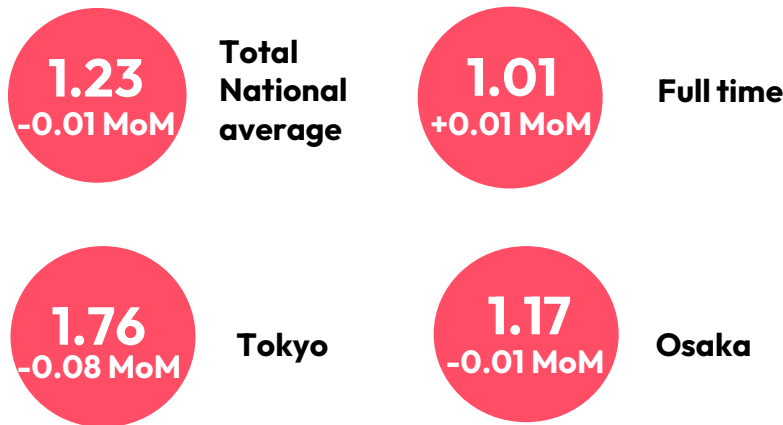
	転職求人倍率	前月差	前年同月差	求人数 前月比	転職希望者数 前月比
全体	2.83	↑0.09	↑0.44	99.7%	96.7%
IT・通信	7.45	↑0.29	↑0.84	99.9%	96.0%
メディア	3.81	↑0.08	↑0.16	98.1%	96.0%
金融	2.80	↑0.21	↑0.62	102.9%	95.0%
メディカル	1.16	↑0.01	↓-0.06	98.4%	97.2%
メーカー	3.37	↑0.17	↑0.60	100.3%	95.4%
商社	1.75	↑0.06	↑0.19	97.8%	94.5%
小売・流通	0.69	↑0.01	↑0.15	99.3%	97.7%
レジャー・外食	0.83	↑0.01	↑0.08	101.5%	99.7%
エネルギー	2.68	↑0.06	↑0.50	101.4%	99.3%
建設・不動産	6.02	↑0.08	↑1.50	99.6%	98.3%
コンサルティング	8.87	↑0.41	↑2.61	98.6%	94.0%
人材サービス	8.49	↑0.44	↑1.74	99.1%	94.0%
その他	0.31	↑0.01	-0.00	101.9%	97.3%

	転職求人倍率	前月差	前年同月差	求人数 前月比	転職希望者数 前月比
全体	2.83	↑0.09	↑0.44	99.7%	96.7%
営業	3.08	↑0.08	↑0.51	98.7%	96.3%
企画・管理	3.64	↑0.17	↑0.26	98.8%	94.2%
エンジニア (IT・通信)	12.41	↑0.48	↑1.96	100.0%	96.1%
エンジニア (機械・電気)	6.53	↑0.38	↑2.04	100.5%	94.6%
専門職 (メディカル)	0.82	↑0.02	↓-0.07	101.3%	99.2%
専門職 (化学・食品)	1.91	↑0.08	↑0.55	101.3%	96.9%
専門職 (建設・不動産)	6.15	↓-0.06	↑1.23	98.5%	99.5%
専門職 (コンサル・金融)	6.81	↑0.28	↓-0.14	99.3%	95.2%
クリエイター	1.29	↓-0.01	↓-0.22	96.8%	97.3%
販売・サービス	0.74	↑0.03	↑0.09	102.1%	98.3%
事務・アシスタント	0.49	↑0.03	↑0.09	102.6%	95.3%
その他	0.05	-0.00	↑0.01	97.4%	97.2%

Market Highlights

October 2024

LATEST MHLW JOB-TO-APPLICANT RATIO – AS OF AUGUST 2024



Market Highlights

October 2024

全国計

実用（除パート） 6年8月

	新規求人	有効求人	新規求職	有効求職	紹介件数	就職件数	新規求人 倍率	有効求人 倍率
職業計	469,174	1,387,800	202,015	1,149,097	169,683	40,944	2.32	1.21
管理的職業従事者	1,706	5,577	932	5,322	1,009	102	1.83	1.05
専門的・技術的職業従事者	123,314	362,785	32,207	183,422	24,748	6,490	3.83	1.98
製造技術者（開発）	4,587	14,157	1,101	6,238	1,011	160	4.17	2.27
製造技術者（開発を除く）	3,661	11,345	2,419	12,924	1,073	221	1.51	0.88
建築・土木・測量技術者	18,722	57,227	1,705	8,629	1,728	464	10.98	6.63
情報処理・通信技術者	16,768	51,759	4,436	31,655	5,250	399	3.78	1.64
その他の技術者	4,453	15,740	260	1,513	460	97	17.13	10.40
医師、歯科医師、獣医師、薬剤師	2,048	6,366	365	2,026	121	50	5.61	3.14
保健師、助産師、看護師	21,414	62,659	6,171	27,548	3,933	1,834	3.47	2.27
医療技術者	9,581	27,525	1,890	8,906	1,056	463	5.07	3.09
その他の保健医療従事者	8,039	19,421	1,383	8,645	827	319	5.81	2.25
社会福祉専門職業従事者	27,735	77,083	4,898	26,200	4,893	1,923	5.66	2.94
美術家、デザイナー、写真家、映像撮影者	1,137	3,477	2,889	22,765	1,710	125	0.39	0.15
その他の専門的職業	5,169	16,026	4,690	26,373	2,686	435	1.10	0.61
事務従事者	46,022	129,995	51,237	313,476	64,800	9,417	0.90	0.41
一般事務従事者	29,731	82,730	41,974	259,525	45,862	6,776	0.71	0.32
会計事務従事者	4,876	14,180	4,063	22,713	7,627	982	1.20	0.62
生産関連事務従事者	3,669	10,848	1,267	6,973	2,911	517	2.90	1.56
営業・販売事務従事者	4,867	14,224	2,649	14,670	6,551	774	1.84	0.97
外勤事務従事者	145	416	27	132	119	19	5.37	3.15
運輸・郵便事務従事者	2,047	5,569	287	1,646	879	238	7.13	3.38
事務用機器操作員	687	2,028	970	7,817	851	111	0.71	0.26
販売従事者	49,975	143,251	12,081	65,909	11,931	2,308	4.14	2.17
商品販売従事者	23,337	61,663	5,432	30,685	3,836	1,032	4.30	2.01
販売類似職業従事者	1,197	4,024	280	1,493	318	78	4.28	2.70
営業職業従事者	25,441	77,564	6,369	33,731	7,777	1,198	3.99	2.30
サービス職業従事者	85,064	246,364	17,932	91,984	15,406	5,779	4.74	2.68
家庭生活支援サービス職業従事者	58	137	30	160	17	2	1.93	0.86
介護サービス職業従事者	39,261	110,532	6,272	30,969	5,058	2,538	6.26	3.57
保健医療サービス職業従事者	5,259	15,801	1,066	4,963	2,010	758	4.93	3.18
生活衛生サービス職業従事者	7,451	21,423	1,128	7,030	504	174	6.61	3.05
飲食物調理従事者	17,161	52,592	3,977	20,302	2,952	1,190	4.32	2.59
接客・給仕職業従事者（金属製品）	10,682	30,683	3,015	15,317	2,077	530	3.54	2.00
居住施設・ビル等管理人	1,139	3,286	866	4,468	1,346	221	1.32	0.74
その他のサービス職業従事者	4,053	11,910	1,578	8,775	1,442	366	2.57	1.36
保安職業従事者	17,506	53,779	1,582	7,595	2,622	1,000	11.07	7.08
農林漁業従事者	3,183	9,566	1,466	8,321	1,307	514	2.17	1.15
生産工程従事者	51,521	157,497	18,674	97,039	20,787	6,267	2.76	1.62
生産設備制御・監視従事者（金属製品）	1,053	3,209	686	3,090	448	115	1.53	1.04
生産設備制御・監視従事者（金属製品を除く）	2,016	5,781	601	2,769	1,115	272	3.35	2.09
機械組立設備制御・監視従事者	494	1,710	400	2,019	269	66	1.24	0.85
製品製造・加工処理従事者（金属製品）	11,505	35,198	3,330	15,644	4,177	1,368	3.45	2.25
製品製造・加工処理従事者（金属製品を除く）	13,392	39,197	4,497	23,836	7,408	2,435	2.98	1.64
機械組立従事者	5,051	16,225	4,386	23,117	2,407	662	1.15	0.70
機械整備・修理従事者	11,308	35,483	1,541	7,710	1,871	573	7.34	4.60
製品検査従事者（金属製品）	862	2,640	430	2,249	548	134	2.00	1.17
製品検査従事者（金属製品を除く）	1,214	3,388	417	1,984	765	202	2.91	1.71
機械検査従事者	719	2,365	403	2,047	389	98	1.78	1.16
生産関連・生産類似作業従事者	3,907	12,301	1,983	12,574	1,390	342	1.97	0.98
輸送・機械運転従事者	33,745	102,029	9,825	44,195	10,067	3,749	3.43	2.31
鉄道運転従事者	57	125	34	140	20	3	1.68	0.89
自動車運転従事者	26,049	79,265	6,835	28,845	7,171	2,960	3.81	2.75
船舶・航空機運転従事者	22	81	33	125	5	2	0.67	0.65
その他の輸送従事者	1,766	5,299	1,373	6,892	1,002	282	1.29	0.77
定置・建設機械運転従事者	5,851	17,259	1,550	8,193	1,869	502	3.77	2.11
建設・採掘従事者	33,655	108,525	3,838	18,987	3,672	1,591	8.77	5.72
建設躯体工事従事者	6,046	19,312	440	2,049	392	169	13.74	9.43
建設従事者（建設躯体工事従事者を除く）	8,710	29,012	1,106	5,632	1,036	415	7.88	5.15
電気工事従事者	5,991	19,232	897	5,261	899	295	6.68	3.66
土木作業従事者	12,773	40,640	1,377	5,984	1,320	706	9.28	6.79
採掘従事者	135	329	18	61	25	6	7.50	5.39
運搬・清掃・包装等従事者	23,483	68,432	15,687	102,830	13,334	3,727	1.50	0.67
運搬従事者	12,679	36,709	6,931	34,550	7,231	1,898	1.83	1.06
清掃従事者	5,311	15,217	1,958	14,233	2,596	849	2.71	1.07
包装従事者	910	2,636	401	2,307	583	191	2.27	1.14
その他の運搬・清掃・包装等従事者	4,583	13,870	6,397	51,740	2,924	789	0.72	0.27
分類不詳の職業	-	-	36,554	210,017	-	-	0.00	0.00

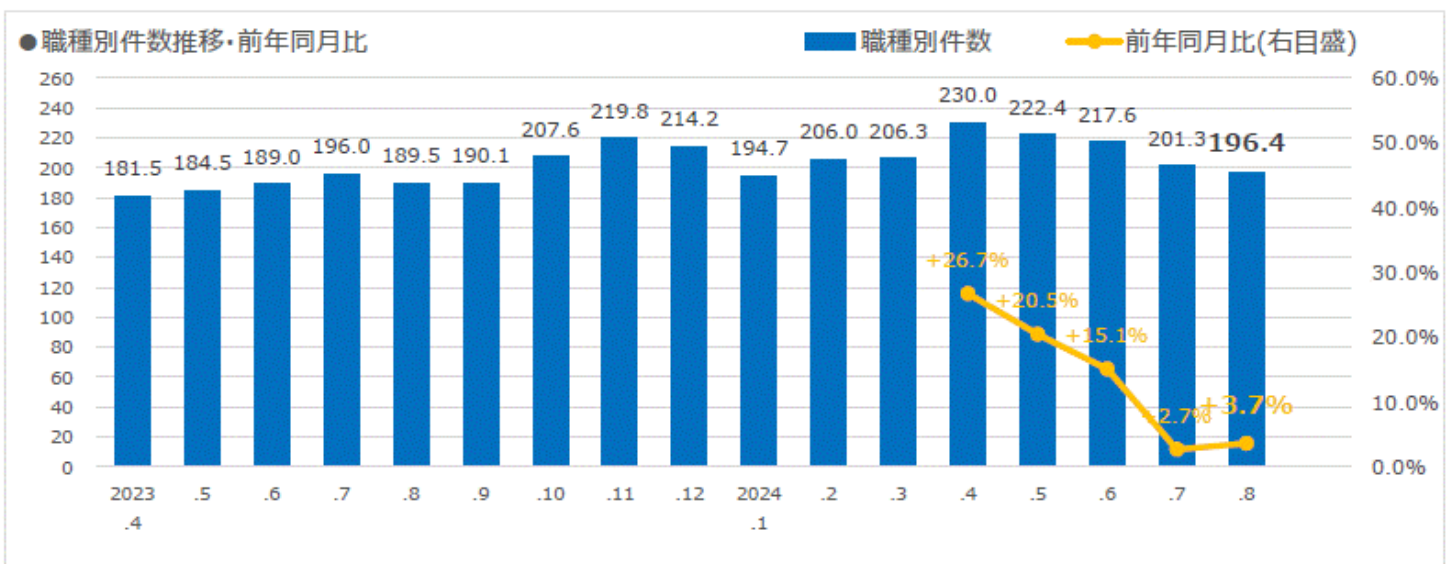
(注) 上記の数値は、平成21年12月改定の「日本標準職業分類」に基づく区分である。

Market Highlights

October 2024

Zenkyukyo (Association of Job Information of Japan) has renewed its monthly stats on job advertisements. Number of job ads and average salaries shown on ads are gathered. 3.7% increase in job ads in August compared to the previous year, reflecting a continued hiring demand, especially technical/specialist hiring needs.

The number of August job ads was 1.96 million and perm job ads was 1.12 million.



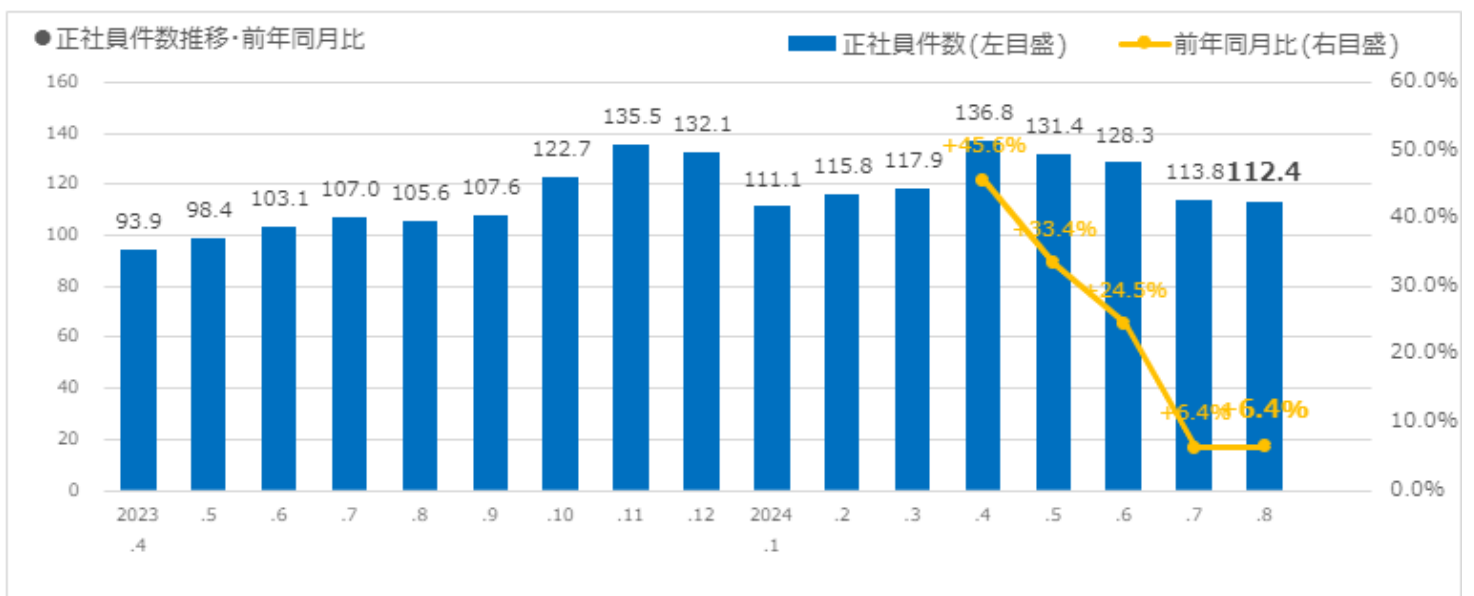
●職種別件数 (占有率TOP10)

	件数	前月比	前年同月比
全体計	1,963,882	-2.4%	+3.7%
事務	293,924	-2.9%	+13.6%
販売 (販売)	248,194	-4.7%	-0.7%
専門 (IT技術者)	193,402	-2.8%	+30.8%
販売 (営業)	137,500	-1.0%	-2.0%
サービス (給仕)	126,982	-1.2%	+5.8%
運搬・清掃・包装等	116,645	-6.2%	+0.7%
生産工程	116,371	-3.3%	-24.2%
専門 (医療・福祉専門職)	114,044	+0.3%	-11.8%
輸送・機械運転	107,158	-2.5%	+17.0%
サービス (調理)	95,356	-1.0%	+12.3%

From top: total, admin, shop sales, IT tech, sales, services (serving), transport/cleaning/packing, production process, medical/welfare, transport/machine operation, service (cooking).

Market Highlights

October 2024



● 職種別×雇用形態別件数 (占有率TOP10)

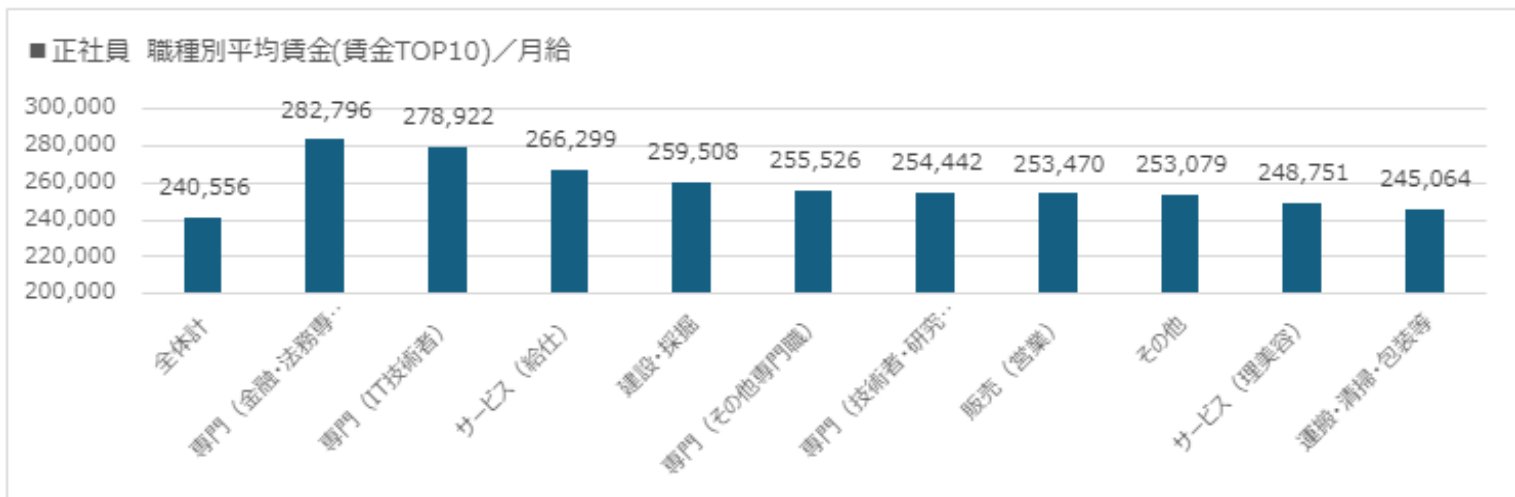
職種	件数	前月比	前年同月比
正社員			
全体計	1,123,508	-1.2%	+6.4%
事務	232,672	-2.9%	+18.9%
専門 (IT技術者)	181,739	-2.6%	+31.0%
販売 (営業)	117,772	-0.4%	-2.2%
販売 (販売)	97,553	-0.2%	+1.5%
専門 (技術者・研究者)	76,422	-1.1%	+31.3%
輸送・機械運転	67,337	-1.9%	+10.8%
専門 (医療・福祉専門職)	66,594	+1.3%	-18.5%
建設・採掘	59,331	-0.4%	-8.5%
生産工程	58,339	-1.7%	-30.6%
サービス (給仕)	35,488	+0.6%	+13.7%

From top: total, admin, IT tech, sales, shop sales, technical expert/researcher, transport/machine operation, medical/welfare, construction, production process, services (serving).

Market Highlights

October 2024

The average salary on job ads in 2024 Q2 by job types



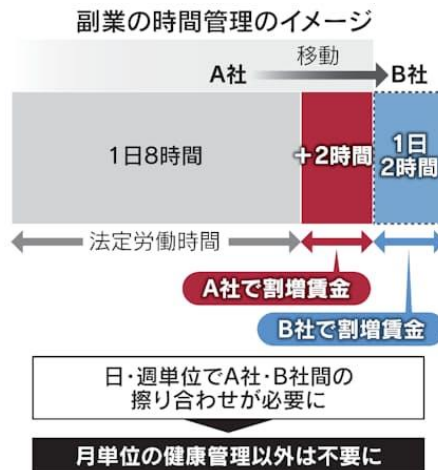
From left: Total, FS/legal, IT tech, Services (serving), Construction, other specialist, technical expert/researcher, sales, others, services (hairdressing), transport/cleaning/packing.

Market Highlights

October 2024

Market trend

The gov't plans to ease corporate burdens by revising work-hour management rules, promoting fukugyo/side jobs, by simplifying the integration of work hours from multiple employers.



副業促進へ企業負担軽く 労働時間の管理ルール見直し - 日本経済新聞 (nikkei.com)⁵

The new freelance act effective in November 2024 aims to improve working conditions & protect the rights of independent contractors in Japan. The law was enacted in April 2023 and be enforced starting November 1, 2024. The act includes ensuring fair transactions & timely payments, measures to prevent unfair practices by companies such as sudden cancellations or changes in terms, companies must provide written contracts or emails detailing the work & payment terms, and freelancers must be paid within 60 days of completing the work.

List of key elements of the new Freelance Act

フリーランス法の主な内容	
取引の適正化	業務内容や報酬を書面などで明示
	業務終了から60日以内に報酬支払い
	仕事の成果物に対する理由のない受領拒否や報酬削減、返品などの禁止
	買ったたきの禁止
就業環境の整備	理由のないやり直しの禁止
	虚偽の募集広告の禁止
	育児や介護との両立への配慮義務
	パワハラ、セクハラ、マタハラ対策の措置義務
	中途での契約解除の場合、30日前までに予告

法はフリーランスを守るか 11月に新法、実効性に懸念 - 日本経済新聞 (nikkei.com)⁶

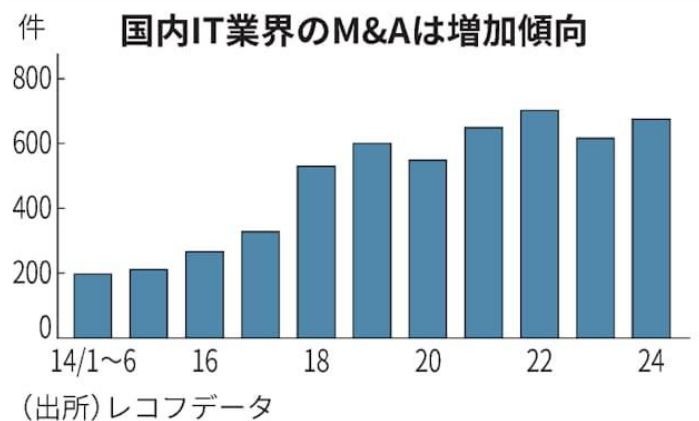
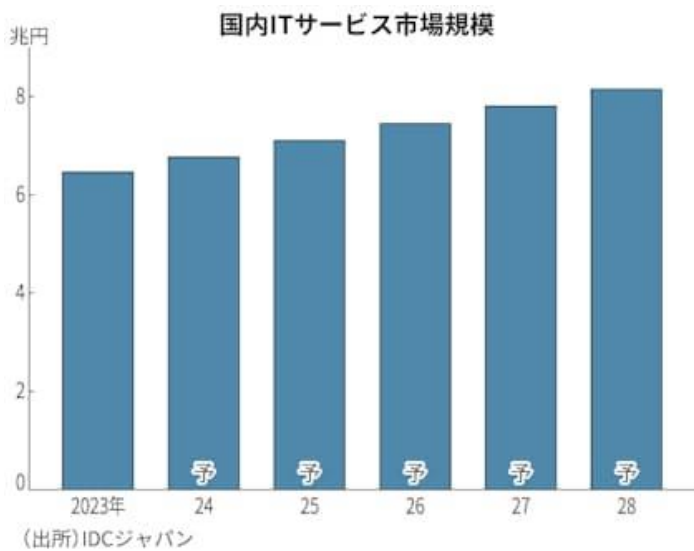
Employment 2024 - Japan | Global Practice Guides | Chambers and Partners⁷

Market Highlights

October 2024

IT industry is experiencing a surge in demand due to the ‘2025 Digital Cliff’, where many legacy systems will become obsolete, increasing maintenance costs and operational risks. There is a growing market for computer language conversion services as companies upgrade their systems to avoid the digital cliff. The demand for IT talent is rising and the inability to upgrade legacy systems could result in substantial economic losses, potentially up to 12 trillion yen annually. The IT talent shortage is driving increased M&As within the domestic IT industry. M&As have tripled in the past 10 years.

IT業界で「25年の壁」特需 言語変換など拡販 - 日本経済新聞 (nikkei.com)⁸



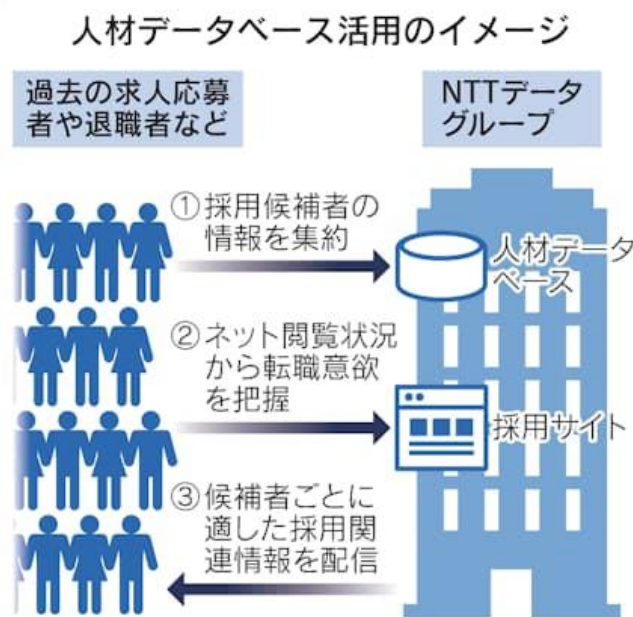
DXレポート ～ITシステム「2025年の崖」克服とDXの本格的な展開～ (METI/経済産業省)⁹

国内ITのM&A、10年で3倍 人員増で「25年の崖」に備え - 日本経済新聞 (nikkei.com)¹⁰

Market Highlights

October 2024

To tackle with IT talent shortage, companies build their own IT talent database which includes not only referrals or leavers but also candidates who declined job offers or were rejected in the past. NTT Data group is building up the database which is one of the largest databases in Japan with about 12,600 registrants and aims to mitigate the risks associated with the anticipated IT talent shortage. According to TalentX which provide hiring market automation services, there are about 1,000 clients building such databases and NTT Data's database is one of the largest size.



[NTTデータG、転職志望者増へIT人材データベース- 日本経済新聞 \(nikkei.com\)](#)¹⁾

Market Highlights

October 2024

Several companies in Japan are boosting pay & improve conditions for post-retirement employees amid a staffing crunch to retain experienced senior employees. JAL is boosting pay for post-post-retirement workers, top earners, could be over 10 million. Similar steps are taken by companies like Sumitomo Chemical, which is gradually raising the retirement age to 65 from the current 60 with full pay. Nitori is to raise the retirement age to 70 with a 90% salary level, and SMBC is to abolish the seniority-based system which will stop automatic salary cuts for senior staff and enable employees in their 20s to reach 20 million annual salaries. Nojima, an electronics store chain, allows workers to stay until they turn 80, currently employing about 30 workers aged 70 or older. Toyota also raised max. retirement age to 70 and YKK Group, a global No. 1 zipper maker, has removed the retirement age limit.

JAL、再雇用シニアの年収維持 高評価者は1000万円超 - 日本経済新聞 (nikkei.com)¹²

Toyota to Raise Maximum Retirement Age to 70; Aims to Retain Expertise, Reduce Burden on Factory Floor - The Japan News (yomiuri.co.jp)¹³

80歳を超えての雇用延長事例4例目誕生 ～年齢に関係なく活躍の場を提供～ 株式会社ノジマ (nojima.co.jp)¹⁴

ニトリホールディングス、70歳まで再雇用延長 報酬水準は現役の9割に¹⁵

60代社員を現役並み処遇、住友化学は給与倍増人材を確保 - 日本経済新聞 (nikkei.com)¹⁶

三井住友銀、年功序列を廃止銀行で異例、26年メドシニア層の一律減給も撤廃¹⁷

シニア処遇改善の主な取り組み

住友化学

定年を65歳に引き上げ、給与水準を59歳末時点とほぼ同水準に

JX金属

定年を65歳に引き上げ、給与水準を維持

村田製作所

60～64歳の定年を選択制に

TOWA

60歳以降の再雇用後も正社員並みの待遇

ロイヤルHD

60～65歳の再雇用のシニア従業員の年収を標準モデルで1割賃上げ

トリドールHD(丸亀製麺)

アルバイトの採用年齢上限を65歳から70歳に

日本ケンタッキー・フライド・チキン

店長職の年齢上限を65歳まで5年延長

リンガーハット

正社員の定年廃止を検討

Market Highlights

October 2024

West Japan Expansion

Osaka Yumeshima Island integrated report, Japan’s first casino resort likely to open in Fall 2030. Osaka moves forward with plans to establish IR, and the operator, Osaka IR KK, waives the right to withdraw. US casino operator MGM Resorts International and local partner Orix Corp are major investors each owning a 40% stake.

Osaka Casino Resort on Track for 2030 Launch After Operator Waives Right to Withdraw | JAPAN Forward (japan-forward.com)¹⁸

Employee shortage in Kinki region, TDB’s latest data shows 48.2% of companies experience regular employee shortage, +2.4% from the last year while 27.4% of companies feel a shortage of non-regular staff -0.9%. Especially construction and service industries, and within services especially the hospitality sector. Osaka preparing for the EXPO records the highest shortage for both regular & non-regular employees.

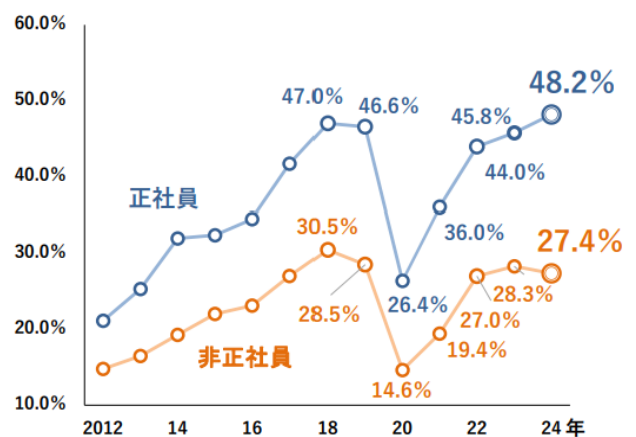
人手不足に対する近畿企業の動向調査 (2024年7月) | 株式会社 帝国データバンク[TDB]¹⁹

正社員・非正社員の過不足感

	「不足」計	適正	「過剰」計	
正社員	2022年7月	44.0%	46.1%	9.9%
	2023年7月	45.8%	44.8%	9.4%
	2024年7月	48.2%	42.7%	9.1%
非正社員	2022年7月	27.0%	63.2%	9.8%
	2023年7月	28.3%	62.2%	9.5%
	2024年7月	27.4%	64.3%	8.3%

注1：「不足」計は、「非常に不足」「不足」「やや不足」の合計
注2：「過剰」計は、「非常に過剰」「過剰」「やや過剰」の合計

■ 正社員・非正社員の不足割合 (7月の年次推移)



Market Highlights

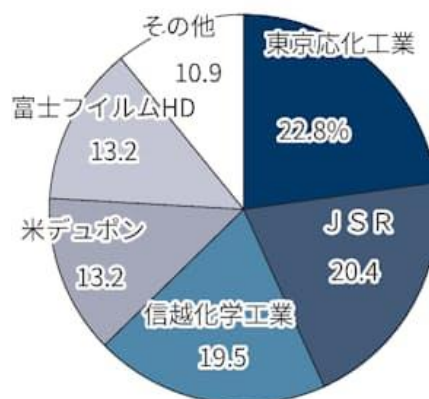
October 2024

Fuji Film will build R&D and production sites within Japan by investing 20 billion yen in their semiconductor material factories in Shizuoka and Oita. Establishing new facilities to be operational from Autumn 2025 and Spring 2026, respectively. Amid world-leading semiconductor companies are preparing for mass production of 1-nanometer semiconductors, Fuji Film to prepare supply for growing demands for materials. In the photoresist market, four out of the global top five rankings are held by Japanese companies.

富士フイルム、「1ナノ台」半導体材料向け新工場棟 - 日本経済新聞 (nikkei.com)²⁰

(From top clockwise: TOK, JSR, Shin-Etsu Chemical, Dupont (USA), Fuji Film and others.)

フォトレジストの世界シェア



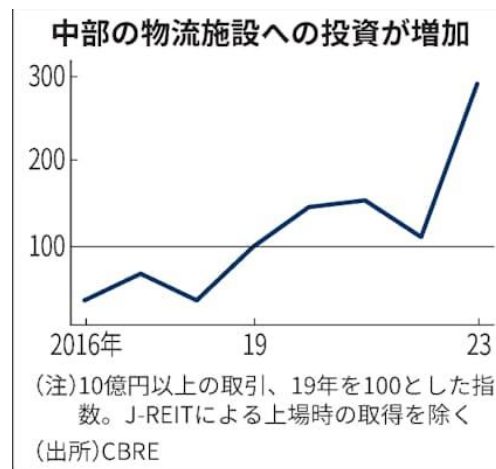
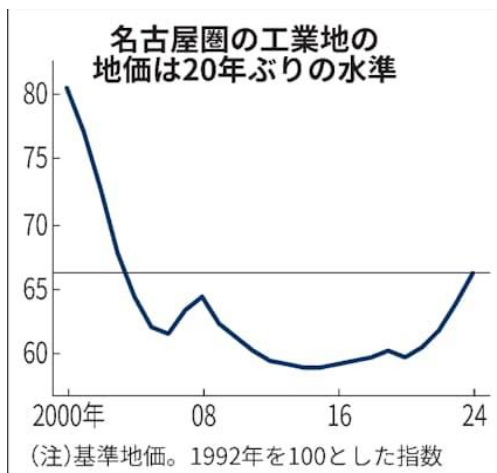
(出所) QYリサーチ

Market Highlights

October 2024

The surge in logistics facilities in the Chubu region is driven by increasing demand for relay transportation amid truck driver work hour reform and growing needs for EC & efficient distribution networks. Huge investments were poured into the logistics facilities in the region which caused significant price increases of land with some areas seeing double-digit growth rates. Supply is not catching up with demand and some expect further room for developments.

中部で物流施設続々、地価20年ぶり水準中継需要にらみ - 日本経済新聞 (nikkei.com)²¹



最近の主な物流施設開発



Market Highlights

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