

# Life Sciences

**EEA / UK Life Sciences  
Labour Market Trends**

## INTRODUCTION



Medical affairs, a critical support function of the biopharma sector is also wholly dependent on sectors performance in terms of its own growth. The UK has seen a relatively sharp fall in available jobs within UK medical affairs by over 16% in the first half of 2022. By contrast EEA countries are experiencing 5% growth within medical affair's vacancies in the first half of 2022. So, what's going on?

The fact that the UK approved fewer medicines than the EU and US in 2021 is not positive. Recent analysis shows new drugs approved in the UK were only 35 versus 40 approvals in the EU and 52 in the US. Of increasing concern is the negative knock-on effect for the UK's role in scientific research and development (R&D). Part of the solution here is the need for the regulator to work more closely with the NHS and the National Institute for Health and Care Excellence (NICE).

Interestingly during the Covid19 pandemic, the UK demonstrated how agile the regulator (MHRA) can be with their crucial role in the rapid roll out of the Covid19 Vaccine. The question now must be how we can apply those learns in other areas? It is increasingly important that the UK remains an attractive place for international drug makers to invest in and see the long-term benefit of being in the UK. Pharmaceutical companies must spend more money and face extra paperwork to get new medicines approved in the EU and UK since the European Medicines Agency left the UK. The Brexit effect has created another layer of bureaucracy for drugmakers seeking regulatory consent for new medicines. The question is how the UK adapts and innovates because if the current status prevails, it will be more expensive, time consuming and difficult for drug approval in what is, a smaller market is now. Even though we have a population of 70 million people, it's still a small market in comparison to the EU and the much larger US market. We are in grave danger of becoming an increasingly minor player in the UK.

The real test will be establishing if this current situation is a post Brexit blip or a long-term trend. Currently the UK has a very strong life sciences research sector. If drugmakers become increasingly disinterested in launching drugs in the UK. The sad reality is the potential knock-on effect on Biopharma and MedTech organisation's willingness to invest in R&D in the UK. In the 2021 the UK governments 10-year life sciences strategy placed a great emphasis on the MHRA's ability to "act as an independent, sovereign regulator with great agility and with a focus on getting vaccines, drugs and technologies to patients as safely and quickly as possible". In the time since Brexit the MHRA has introduced new programmes and partnerships, which aim to deliver faster patient access to innovative treatments. However, life science companies still face considerable uncertainty about whether medicines approved by the MHRA will be made available to UK patients.

It is now imperative that all parts of the system work together to ensure NHS patients can get the latest treatments and that we build better certainty that medicines approved by the MHRA will be made available to UK patients.

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**Overview**

With the UK falling behind EEA countries in manufacturing, testing and approving new medicines, life sciences in the UK continue to lose out in terms of competitiveness to countries like Germany and France in attracting investment, thus seeing lower uptake in terms of vacancy volumes. According to the Association of British Pharmaceutical Industry (ABPI), UK’s pharmaceutical exports have been on the decline by over 9% since 2019, while many leading countries in the EEA and the US have all experienced a surge in pharmaceutical exports.

Medical affairs, being a supportive function of and dependent on the pharma sector’s performance, is undergoing a decline in available vacancies within the UK by over 16% in the first half of 2022 (H1), with a total of 421 vacancies compared to 503 vacancies in H1 2021.

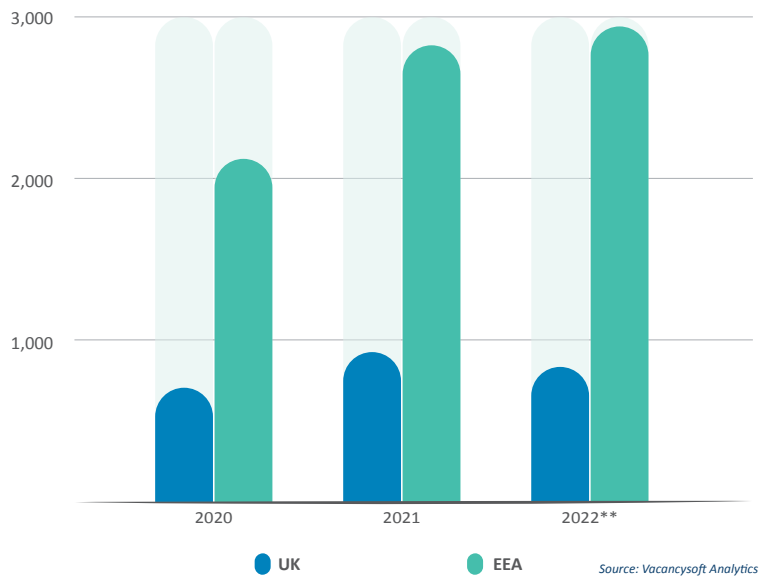
On the other hand, EEA countries are experiencing 5% growth within medical affair vacancies in H1 2022, reaching a total of 1474 vacancies. With trials and drug approvals taking longer in the UK than in EEA countries, coupled with lower uptake than overseas, the decline in medical affairs vacancies in the UK and its rise in EEA comes as no surprise.

Within 2022, March witnessed a peak in vacancies both within the UK and EEA, with 86 and 303 vacancies, respectively. However, vacancies have been on a downward trend reaching the lowest level of vacancies for 2022 in June with medical affairs vacancies in the UK dropping by 17% month-on-month to reach 58 vacancies.

For the EEA, medical affairs vacancies also reached their lowest level in June 2022, plummeting by 25% month-on-month to reach 185 vacancies. Whether this downward trend in medical affairs will be reversed is yet to be seen in H2 2022.

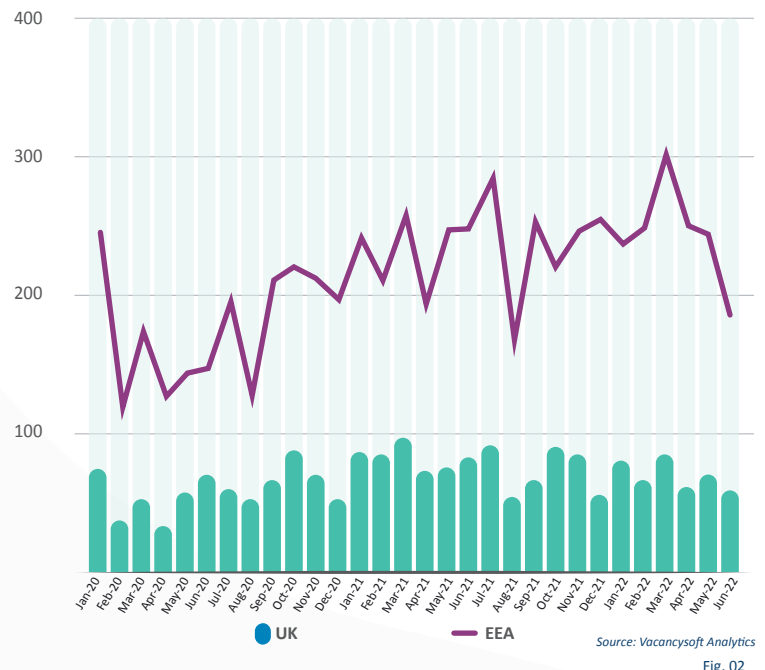
**Annual Totals**

Medical Affairs, UK vs EEA 2020 – 22



**Monthly Totals**

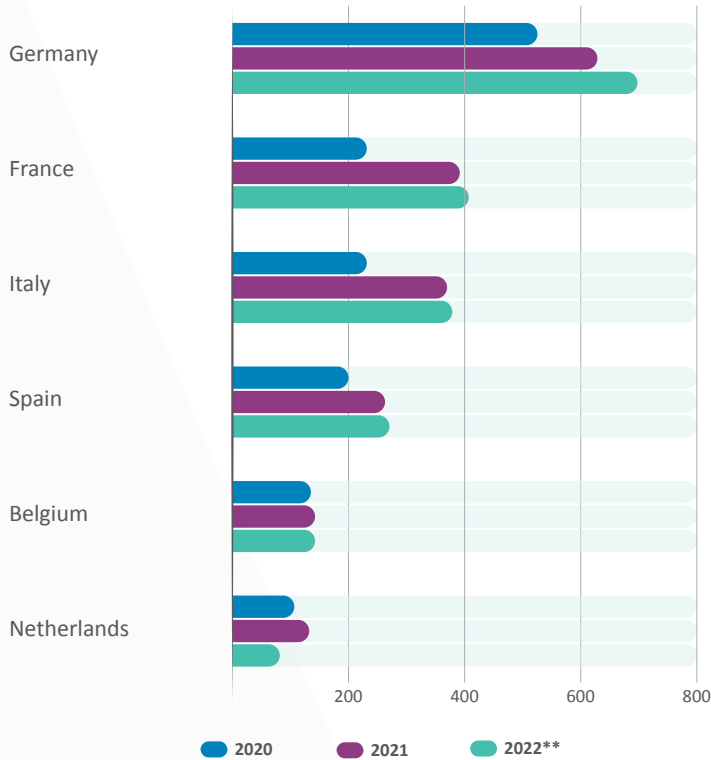
Medical Affairs, UK vs EEA 2020 – 22



## Top 6 EEA Countries

### Top 6 EEA Countries

Medical Affairs, EEA 2020 – 22

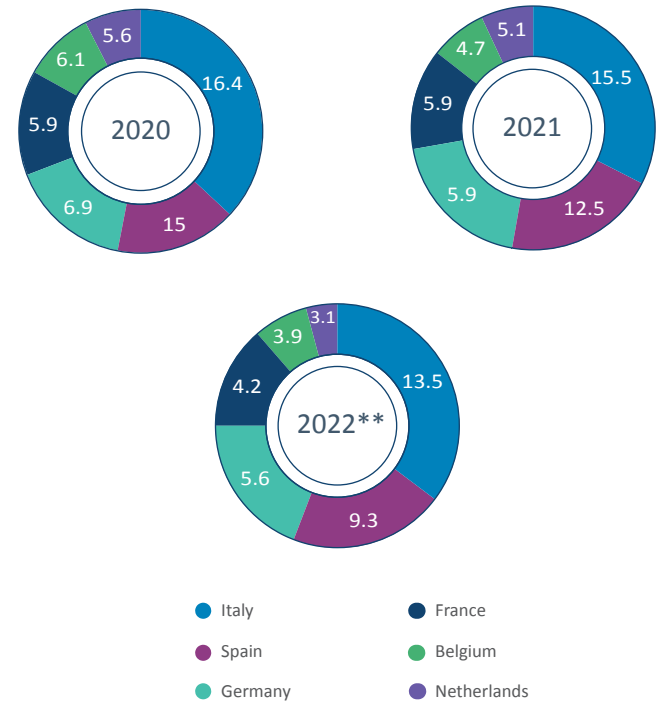


\*\* Forecast 2022

Source: Vacancysoft Analytics  
Fig. 03

### Top 6 Countries

Medical Affairs, as % of all scientific Jobs, EEA 2020 – 22



\*\* Forecast 2022

Source: Vacancysoft Analytics  
Fig. 04

After a new drug passes clinical trials, the review process, and is ready to be sold, the medical affairs role is crucial for the next step of communicating the relevant information to health care practitioners and patients. In Europe, Germany is ahead in approving innovative drugs with an average of 120 days between approval and reimbursement, compared with the UK – in 7th place in Europe – with 335 days.

With Germany ahead of the curve in the speed of approving new drugs, it consequently has higher demand for medical affairs professionals as the next step in the cycle. Halfway through 2022, Germany leads the way with 347 medical affairs vacancies and an average of 11% year-on-year growth, the only country with double-digit growth within the top 6 EEA countries in 2022.

Next in line is France, with 202 vacancies in 2022 and a mere 4% average year-on-year growth. This is a significant slowdown – over 70% – compared with the bullish growth in medical affairs vacancies in 2021.

The Netherlands is the only top 6 EEA country that is experiencing a decline in medical affairs vacancies in 2022 with 40 vacancies, and an almost 40% average year-on-year decline.

Medical affairs vacancies, even though they have been growing in terms of absolutes, are declining as a share of total scientific vacancies within each country in the EEA. Spain has seen the biggest drop with 9.3% in 2022, compared to a 15% share in 2020 indicating other scientific fields have been growing at a faster rate there.

Italy has a 13.5% share of medical affairs vacancies in 2022, the highest share within top 6 EEA countries. Germany has a mere 5.6% share for medical affair vacancies out of the total scientific vacancies.

**Regional Analysis**

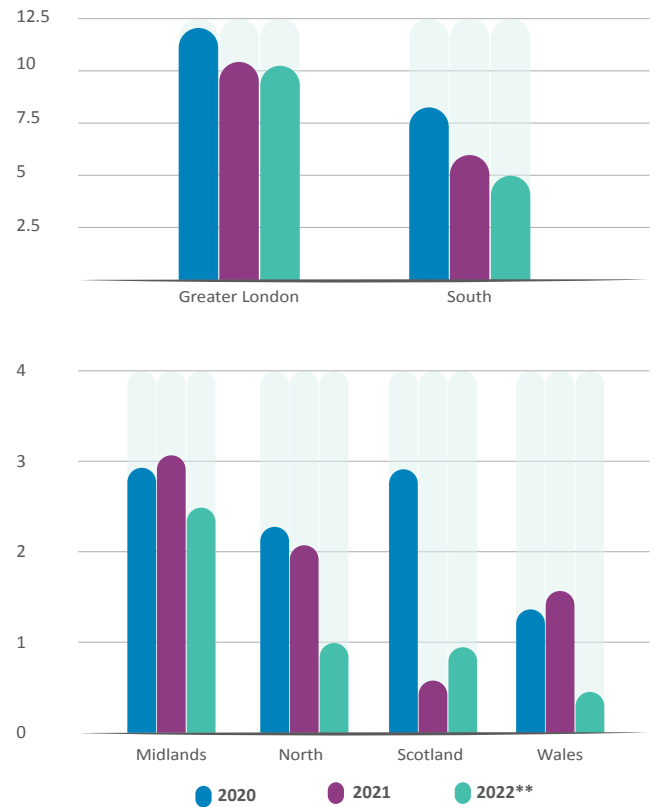
Medical Affairs, Annual Totals, UK 2020 - 22



Source: Vacancysoft Analytics  
Fig. 05

**Regional Analysis**

Medical Affairs as % of all Scientific Jobs UK, 2020 - 22



Source: Vacancysoft Analytics  
Fig. 06

With the UK pharmaceutical exports declining, among other hurdles the industry, it comes as no surprise that vacancies are dropping in most regions. The South has the highest demand for medical affairs vacancies with 223 vacancies in H1 2022 though down by an average of 16% year-on-year. Vacancies in the South are estimated to reach 446 vacancies by the year end down from 530 vacancies in 2021.

Second in line is Greater London, with 174 medical affairs vacancies in H1 2022. Moreover, it is the only significant region, in terms of the number of available medical affairs vacancies, that is experiencing growth, even if it is only a 2.7% increase.

Medical affairs vacancies appear to be heavily concentrated within the South and Greater London, together encompassing 94% of medical affairs vacancies with 397, out of a total of 421 vacancies in the UK in H1 2022.

Scotland, despite accounting for a low number of vacancies, is only the second region to have a growth thus far in 2022 up by 33%.

In terms of share of medical affairs vacancies out of total scientific vacancies, Greater London has 10% so far in 2022, down from 12% in 2020. The South also witnessed a decline in medical affairs vacancies, with 5% to date in 2022, down from 8% in 2020. This is in line with the trend observed on the EEA country level mentioned above. It seems, overall, that vacancies in other scientific fields are seeing more bullish growth when compared to medical affairs.

Perhaps with the regulatory environment getting more and more complex, it is becoming increasingly essential to invest in and automate the medical affairs process to keep up with the pace of changing requirements in an attempt to mitigate legal risk moving forward.

Starting with volumes in the EEA, Astrazeneca is the largest medical-related recruiter in the region, with volumes up 19%, with 153 vacancies in H1 2022, and 258 total in 2021. Pfizer’s volumes, however, are growing fastest with 55% compared with 2021’s 115 vacancies, having posted 89 so far this year.

IQVIA and Johnson & Johnson are showing some growth in volumes, with 12% and 61 vacancies so far in 2022, and 109 total in 2021 for the former, and 10%, with 79 vacancies in H1 and 144 over 2021 for the latter.

GSK, Merck and Novartis are showing a slump in hiring so far in 2022 compared with the previous year, with declines of 9%, 20% and 21% respectively. GSK has opened 79 positions so far in H1 2021, compared with 174 total over 2021. Merck hired 137 people in 2021, and have posted 55 vacancies so far this year. Novartis hired 119 people in 2021, and have posted 47 vacancies in H1 2022.

Speaking of the UK, Astrazeneca leads here, too, with 20% growth and 76 positions to fill in H1 2022, with 127 across the whole of 2021.

GSK has seen the biggest increase in volumes so far in 2022, with 54 vacancies – compared with 61 vacancies over the whole of 2021.

PPD, Bristol-Myers Squibb and IQVIA have shown the biggest decline in volumes, with 73%, 68% and 49%, respectively. PPD has posted 4 positions this year, and posted 30 vacancies over the whole of 2021. Bristol-Myers Squibb opened 31 vacancies in 2021, having posted 5 in H1 2021. Interestingly, despite showing growth in volumes across the EEA, IQVIA’s pace has decreased significantly in the UK, with 11 vacancies posted so far in 2022, and 43 over the whole of 2021.

## Top 10 Organisations across EEA

2021 vs 2022

Organization	2021	H1 2022	% Change
AstraZeneca	258	153	18.6
IQVIA	109	61	11.9
Johnson & Johnson	144	79	9.7
GSK	174	79	-9.2
Pfizer	115	89	54.8
Merck	137	55	-19.7
Novartis	119	47	-21
AbbVie	118	48	-18.6
Sanofi	105	57	8.6
Biogen	87	21	-51.7

## Organisations across UK

2021 vs 2022

Organization	2021	H1 2022	% Change
AstraZeneca	127	76	19.7
GSK	61	54	77
IQVIA	43	11	-48.8
AbbVie	36	14	-22.2
Syneos Health	29	17	17.2
Johnson & Johnson	29	10	-31
Sanofi	28	8	-42.9
Merck	22	6	-45.5
Bristol-Myers Squibb	31	5	-67.7
PPD	30	4	-73.3



**Cpl Life Sciences have an international presence, recruiting across Europe, supplying Pharmaceutical, Biotechnology and Clinical Services industries with the talent they require for success.**

Cpl UK is a group of specialist talent businesses which service the Science, Technology, Engineering, Mathematics (STEM), Professional Services and Healthcare sectors across the UK.

Together we form the UK footprint for **Cpl Resources Plc** which is one of the largest staffing companies in Europe. As a group we've been powering businesses by providing transformational talent solutions for over 30 years and have been listed on the London Stock Exchange since 1999.

Our mission is to be the UK's best transformational talent partner across all our core markets and add meaningful value to lives of our clients, candidates and colleagues.

### **What we do:**

Our Service Capabilities across all European Countries include:

- Contingency permanent recruitment
- Contract recruitment – freelance and PAYE via Cpl UK
- Search and selection permanent recruitment
- Specialist 'project-based' interims via Cpl UK
- FSP outsourced teams across Europe
- European Salary Survey to determine the salary and benefits for each sector of the UK Life Science industry.

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### **How we gather data**

The data contained within this report is gathered solely and specifically from the career centres of company websites, not job boards.

Before publication, job postings are de-duplicated and verified as unique. Every vacancy is assigned up to 20 data points through Vacancysoft's proprietary algorithm, which is double-checked for validity by a data quality control team.

The data showcased here is available within the Vacancy Analytics platform, where users can create and customise their own reports. To find out more please contact a member of the team or email [support@vacancysoft.com](mailto:support@vacancysoft.com).

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