

LIFE SCIENCES REPORT

Clinical Research Labour Market Trends

June 2021

FOREWORD



The covid-19 pandemic presented unique challenges for the clinical trial community. This has been seen first-hand in both the rapid establishment of covid-19 clinical trials and/or existing non-covid-19 studies being paused completely or a pause in activities alongside in some cases an adaptation of established processes.

Each month Cpl Life Sciences delivers analytics showing the underlying trend in hiring across many core vertical sectors of the biopharma/med tech industry. Focusing this month on clinical research we have seen a monthly average hiring surge by 64% across Europe versus 2020 hiring trends. However, the important comparison would be pre-covid hiring which is still 52% higher than 2019. The greatest spike in talent requirement sits in clinical management vacancies currently trending at a 196% increase versus 2019. In fact, in March this year we saw over 5,000 new vacancies in clinical research which is a record for the industry.

The UK is the leading country for clinical recruitment, accounting for 24% of all vacancies across Europe — up from 22% in 2019. That is an overall 98% increase in activity, which also

constitutes the greatest rise in Europe. Whilst EU members have seen finally, the long-awaited and delayed clinical trial & EU portal getting closer to launch in January 2022, the UK government has been forging ahead with its plan in creating a world leading clinical research environment. Currently the UK accounts for 33% of global advanced therapy trials and leads the way in Phase I/II trials.

In the backdrop of these great increases in opportunity, I see as a leader in life sciences staffing several underlying trends that should concern all UK-based biopharma businesses. Firstly, by 2030 we will require 130,000 new skilled workers in our space. Currently there is a continued slow adoption of the employer-led apprenticeship schemes. The Kent University Apprenticeship Scheme in clinical research has had a poor response from industry, which is hugely disappointing.

Secondly, many employers have expectations of seeing a vast number of CVs for a role and wait around for the perfect candidate. Yet as an industry we are failing to develop the skills in our own workforces that we need, so be prepared to take candidates with the majority of the skills required and develop them.

Finally, when the perfect candidate is presented to you, it is taking you weeks to respond and book interviews as you like comparisons. There won't be any, it's a candidate skill short market. Processes are long, laborious, slow and do little to engage candidates in many cases. Every employer needs to look at their "time to hire", candidate experience and where the blockers are in your own business. Agility and speed are fundamental to leading a team through times of change, and times have changed, if your processes and market understanding have not, you may wish to review these.

For more details on how the RA apprenticeship scheme works and how it can support your growth, please do not hesitate to contact me on Yvette.cleland@cpl.com for further guidance on how to play your part in making our industry more sustainable.

CONTENTS

Overview

Pharma and CROs

Europe

Top Firms

About Cpl Life Sciences | Vacancysoft

Page 03

Page 04

Page 05

Page 06

Page 07

Overview

03

Clinical research vacancies in the life sciences industry across Europe continue going from strength to strength. This to the backdrop of growth in the global vaccine contract manufacturing market as the world begrudgingly accepts it will have to learn to live with the covid-19 virus. The pandemic has had a significant impact on vaccine development, and a new era of biological drug development has resulted in radical transformations in the vaccine contract manufacturing market.

According to a recent report, to meet the demands of the pandemic, almost three quarters of pharma and biotech companies have entered into mergers and agreements with contract manufacturers to develop covid-19 vaccines. Growing populations, healthcare awareness, demand for newer vaccination products and increasing vaccination coverage are other factors driving growth in the market.

Undoubtedly, this will have a knock-on effect on clinical research recruitment, which is already buoyant. Average monthly hiring levels are up 64% across Europe so far this year compared to 2020 — and up 52% in relation to 2019.

Professional recruitment in March reached record levels, with life sciences firms in Europe recording 5,633 new vacancies. However, such is the surge of overall hiring in the sector that, despite this increase, clinical vacancies constitute 10-15% of all life sciences vacancies in 2021 — down from 15-20% through most of 2020.

A comparison of the sectors within the industry shows that pharma companies are doing the bulk of the hiring for clinical specialists, but their total share is down from 63% in 2019 to 56% this year. Average monthly vacancies for these experts in the pharma sector are currently up 24% year-on-year.

In contrast, average monthly vacancies for clinical specialists in contract research organisations (CROs) are up 67%. This has resulted in this sector's share of overall hiring rising from 27% to 32%. Vacancies in biotech firms have also seen a big increase, up by 55%.

Clinical Vacancies all Europe, 2019 - 2021

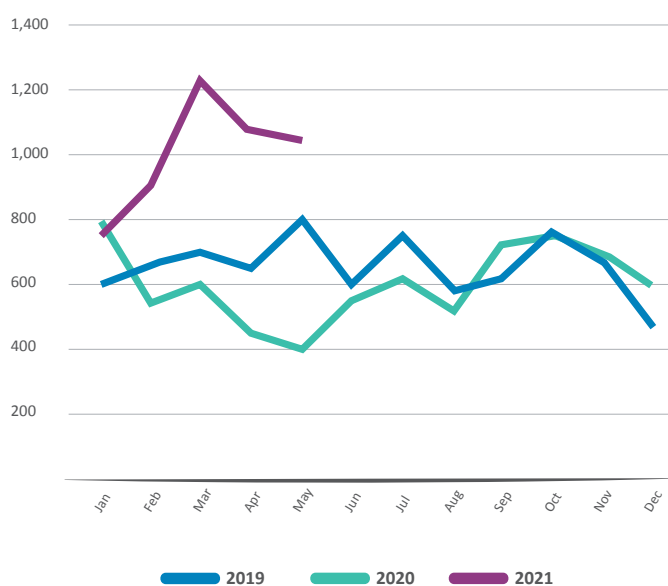


Fig. 01

Clinical Vacancies by Sector 2019-2021

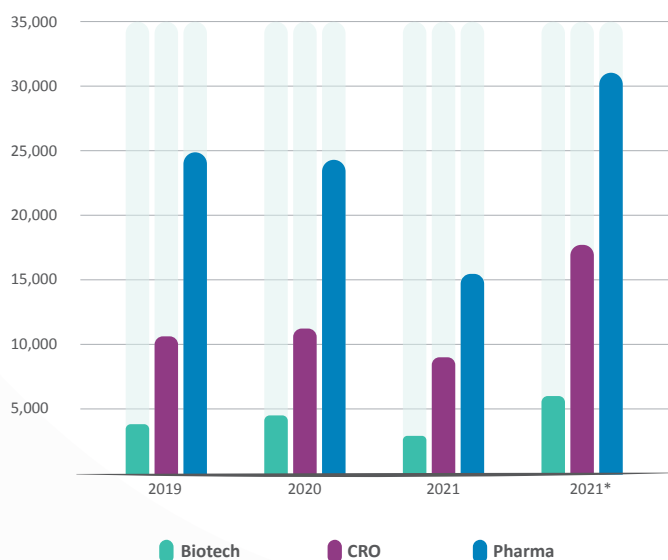
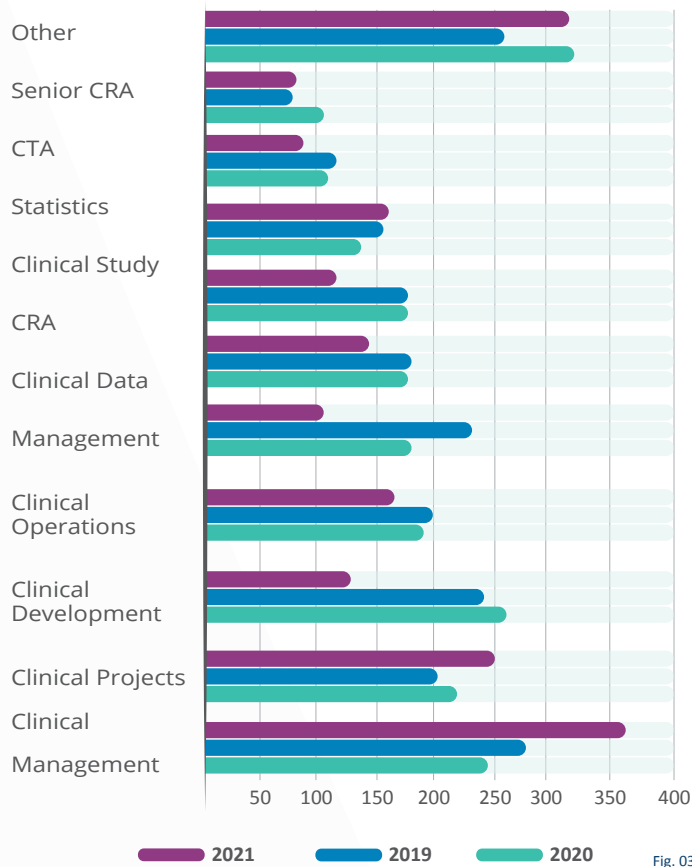


Fig. 02

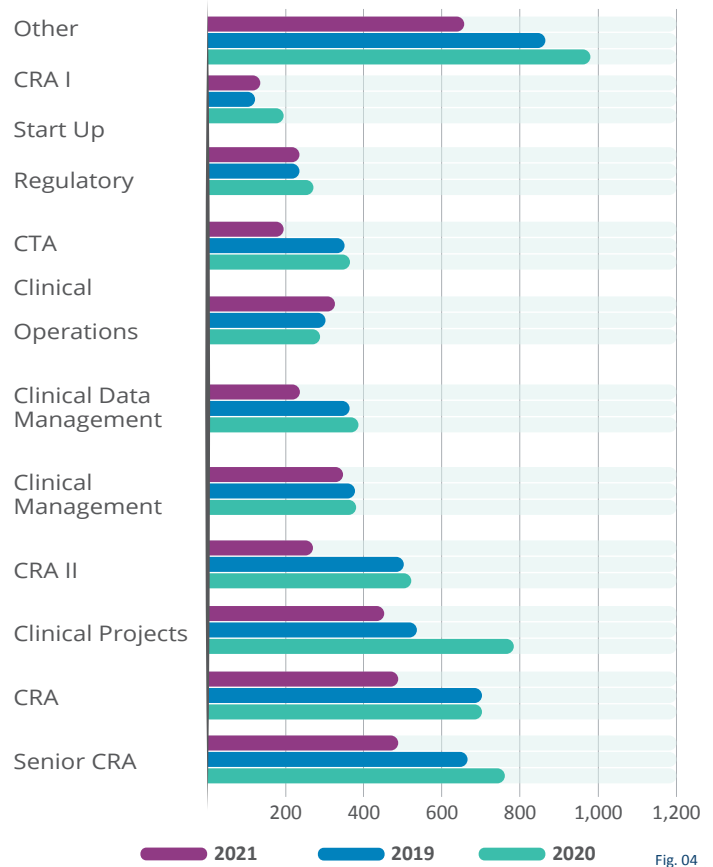
Pharma and CROs

04

Top 10 Clinical Roles in Pharma



Top 10 Clinical Roles in CROs



In June the European Medicines Agency (EMA) announced that its long-delayed clinical trial EU Portal and Database is now finally fully functional. Launching in January 2022, it is a key component of the new Clinical Trial Information System (CTIS). It will be the single EU entry point for clinical trial applications.

In the UK, meanwhile, the government is forging ahead with its own plan to create a world-leading clinical research environment, capitalising on the success of the Oxford/AstraZeneca vaccine. Both initiatives are likely to impose new procedures on different functions in the clinical research profession — and perhaps shift the vacancy shares of particular roles in future.

Within pharmaceuticals, the most noticeable change is in the increase in clinical management vacancies. The share of overall vacancies for these specialists rose from 11% of all clinical recruitment in 2019 to 19% in 2021. Overall average monthly volumes have increased by 196% compared to two years earlier, making this the no.1 hotspot area this year.

Recruitment for clinical projects experts is the second-largest, making up 13% of overall clinical hiring. Average monthly volumes this year are also healthy, up 128% since 2019. One of the few areas to contract in terms of monthly vacancy activity is clinical development, with volumes down 2% compared to 2019.

Clinical research services dominated the CRO market in 2020 and with the number of clinical trials increasing, this is expected to continue. The global CRO market was valued at \$61.1 billion in 2020 and is expected to reach \$99.6 billion by 2026.

Within CROs the most common clinical vacancy is for senior CRAs. Average monthly volumes are up 30% since 2019. The fastest-growing area is for clinical operations experts, with 127% more vacancies per month than two years ago. Vacancies for CRA II specialists have seen the smallest annualised growth, with vacancies only 3% up on 2019.

The UK is the leading country for clinical recruitment, accounting for 24% of all vacancies across Europe — up from 22% in 2019. That's an overall 98% increase in activity, which also constitutes the greatest rise in Europe.

In June, the UK government announced it would provide £64 million towards a plan to strengthen clinical research delivery. The Department for Health and Social Care hopes that it will, among others, make UK clinical research delivery easier through more rapid ethics reviews and faster approval processes.

Other than the UK, the largest growth in clinical vacancies has been in Russia, with 87% more vacancies in 2021 compared to 2019. As a result, it has entered the top ten countries by vacancy volume. Recent reports, however, suggest that the country's domestic drug makers are facing massive price rises for active ingredients.

With 75% of all drugs its pharmaceutical industry produces relying on foreign APIs, local manufacturers say that the production of some drugs is unprofitable. The smallest growth has been in Switzerland, with hiring levels for clinical specialists in 2021 up only 21% in relation to 2019.

When analysing the proportion of scientific vacancies that are clinical, Poland leads with 44% (although the share is down two percentage points compared to 2019). The country's capital, Warsaw, recently opened what is being dubbed as Central Europe's first Medical Valley.

The Warsaw Health Innovation Hub is a joint initiative between the Medical Research Agency, EIT Health and key global industry players including AstraZeneca, Microsoft, Polpharma and Roche. The hub will be focused on driving innovation in three key areas: pharmaceuticals, medical devices, and digital health solutions.

In contrast, in Russia, clinical vacancies have risen from 26% to 36% of all scientific vacancies. Spain is the other country with a significant increase proportionately, with clinical making up 37% of scientific vacancies compared to 30% two years earlier.

Top 15 Cities in Europe — Clinical Vacancies

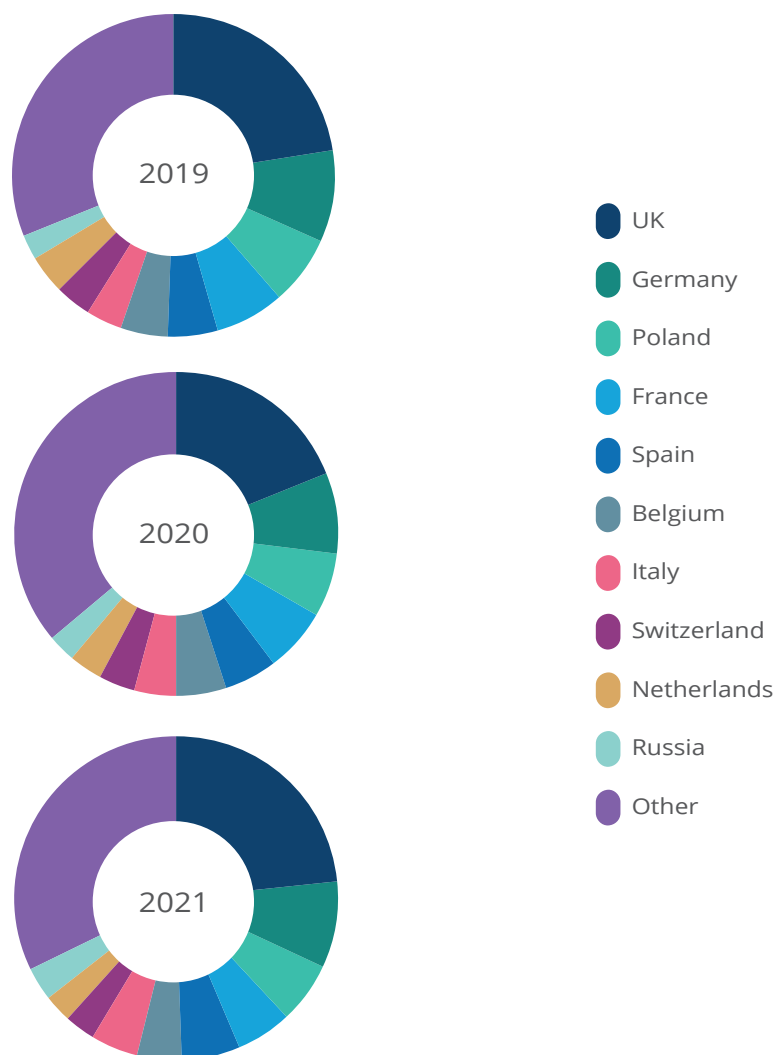


Fig. 05

% of scientific vacancies that were clinical by country

	2019	2020	2021
UK	23,12%	17,83%	21,95%
Germany	11,52%	9,40%	12,52%
Poland	46,66%	38,63%	44,17%
France	15,86%	14,53%	14,17%
Spain	30,63%	31,29%	37,42%
Belgium	19,17%	19,12%	19,98%
Italy	25,45%	27,41%	30,36%
Switzerland	9,66%	9,19%	9,98%
Netherlands	17,50%	13,83%	15,65%
Russia	26,29%	28,61%	36,33%

Fig. 06

Top Firms

06

Nine out of the top 10 firms for clinical specialist vacancies are CROs. Syneos is in first place, its 750 vacancies so far this year, if averaged across the rest of 2021, constituting a 38.6% year-on-year rise. Earlier this year, it acquired Illingworth Research group, a clinical research home health company, to support increasing demand for in-home trials.

Parexel is on course for a 72.7% year-on-year increase, the largest out of the selected firms. The pharmaceuticals company is for sale and has reportedly drawn interest from about 10 parties. It is seeking a value of about \$9 billion, including debt. The company could also opt to proceed with an initial public offering instead.

The leading pharma company for hiring clinical specialists is AstraZeneca, with vacancy volumes up 27% compared to last year. The firm recently announced that it is lining up the finance boss from its new £28 billion subsidiary, Alexion Pharmaceuticals, to take over as CFO later this year. Aradhana Sarin will take over from Marc Dunoyer, who will be appointed as Alexion's new chief executive.

Recruitment at GSK represents the largest year-on-year surge, with professional hiring volumes up 160% compared to 2020. After a decline in profits, GSK's chief executive, Emma Walmsley, is under pressure to improve performance. She is vowing to keep research spending high as the drugmaker splits itself into a consumer health venture and a business bringing together pharmaceuticals, HIV and vaccines next summer.

Vacancies at Merck, meanwhile, are down 44%. In the US, the firm joined with IBM to form the core of a national hiring and training network created by OneTen, a coalition of major American employers that has promised to help hire and promote 1 million Black workers into higher-paying jobs over the next decade.

Company	Sector	2020	2021 YTD	%YOY 21/20
Syneos Health	CRO	1082	750	38.6%
Iqvia	CRO	717	608	69.5%
Covance	CRO	829	381	-8.2%
PRA	CRO	476	564	136%
ICON	CRO	326	267	64%
Parexel	CRO	322	278	72.7%
PSI	CRO	215	504	368%
Astrazeneca	Pharma	321	204	27%
PPD	CRO	196	206	110%
Premier Research International	CRO	96	108	125%
Trial Form Support AB	CRO	113	80	41.5%
Roche	Pharma	92	50	8.6%
J & J	Pharma	141	107	51.7%
Novo Nordisk	Pharma	105	91	73.3%
Cromsource	Pharma	81	78	92.5%
Merck and Co	Pharma	157	54	-31.3%
Novartis	Pharm	62	53	71%
GSK	Pharma	83	108	160%
Worldwide Clinical Trials	CRO	100	28	-44%
Bristol-Myers Squibb Co	Pharma	102	69	35.3%



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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