

# Industry Analytics Report



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## R&D ROLES IN EUROPEAN PHARMA IN 2015 WINTER 2015/2016



We are delighted to be partnering with Vacancysoft to provide insight on recruitment activity in the Pharmaceuticals sector.

For this report we have been analysing activity in R&D roles identifying key hotspots of activity we are witnessing.

I hope you find it interesting and should you like to know more about current market activity please do contact me on [yvette.cleland@clinicalprofessionals.eu](mailto:yvette.cleland@clinicalprofessionals.eu)

Yvette Cleland  
CEO  
Clinical Professionals

Pharma R&D vacancies across Europe are dominated by two countries: the UK and Germany. While the UK advertised slightly more vacancies than Germany, 29% of the total versus 25%, the two are far larger than the third placed country, and between them they are responsible for just over half of all vacancies.

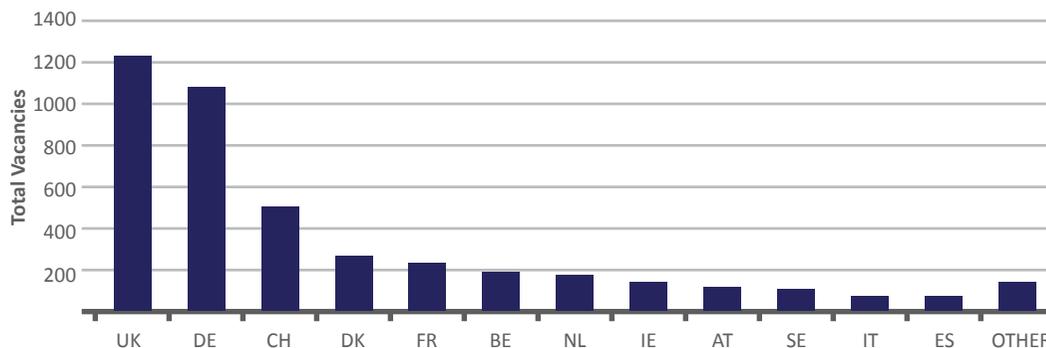
Switzerland is next in vacancies advertised. It occupies an unusual spot: less than half the size of the giants, but still nearly twice the size of the next largest country. With 12% of all vacancies in 2015, Switzerland is the last country to advertise more than 10% of all vacancies.

After Switzerland, the tail begins. Denmark, France, and Belgium all accounted for more than 4% of all vacancies, with at least 180 positions offered. The Netherlands, Ireland, Austria, and Sweden accounted for at least 2% of all vacancies each.

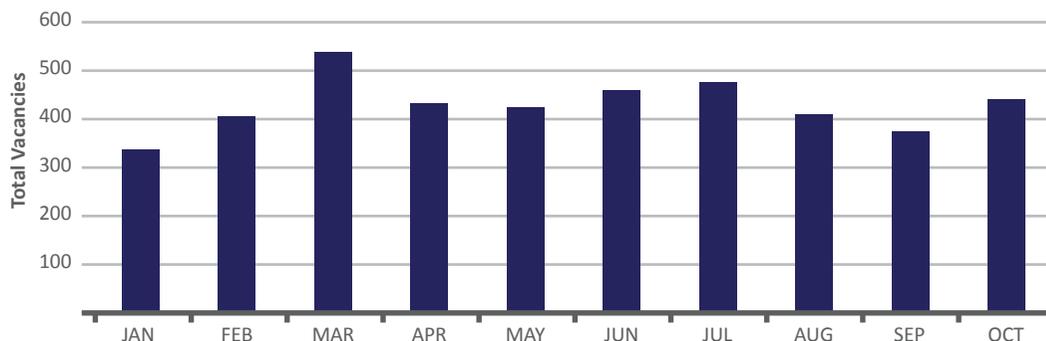
After these countries came 15 more. Italy was the largest of them, but in total they accounted for less than 9% of all vacancies.

Over the course of the year to date, the market as a whole has been fairly flat – although there was a distinct peak in March – but some countries have shown significant growth between the first and second halves of 2015. Germany and the UK are both on course to create at least 6% more vacancies in the second half of the year than in the first.

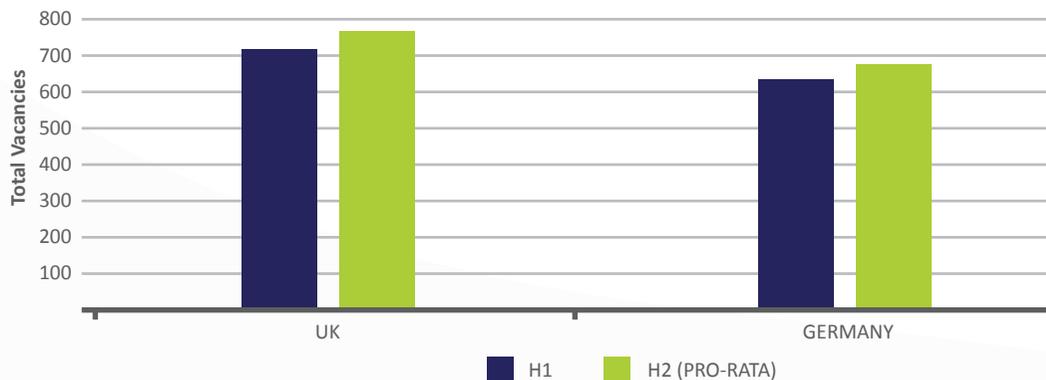
2015 Vacancies by Country



2015 Monthly Vacancy Volumes



2015 Growth in the Largest Countries for R&D Recruitment



We divide the broad pharmaceutical market into three sub-sectors: traditional pharmaceutical companies, biotechnology companies, and clinical research organisations. Of these three, traditional pharmaceutical companies are by far the most important, as they have advertised nearly 80% of all vacancies so far this year.

When we compare the size of a company to its sub-sector, a very clear size trend emerges: vacancies from CROs tend to be from the largest companies (5000+ staff), while vacancies in biotech companies tend to be from much smaller companies.

For biotech vacancies, the most common company headcount was 51-500, the second smallest size in our data. Just over 60% of vacancies were from companies with 500 or fewer staff, while at the other end of the scale only 13% of vacancies were from companies with over 5000 staff.

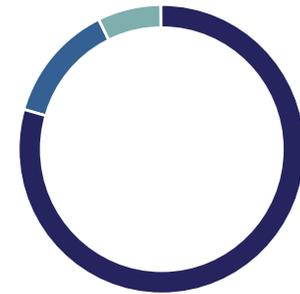
CROs, by contrast, had almost all of their vacancies come from companies of over 5000 staff – 81% in total. Perhaps CROs depend on scale to keep a stable project pipeline, while biotech firms tend to be focused on a small number of key technologies or patents.

Traditional pharma companies occupy a middle ground between the extremes of CROs and biotech companies. As with CROs, in traditional pharma companies of 5000+ staff are still the biggest hirers. However, smaller companies advertise a much more significant section of the vacancies for traditional pharma than they do for CROs.

All R&D Vacancies by Company Size



Vacancies by Sub-Sector



Biotechnology Vacancies by Company Size



Clinical Research Organisation Vacancies by Company Size



Pharmaceutical Vacancies by Company Size

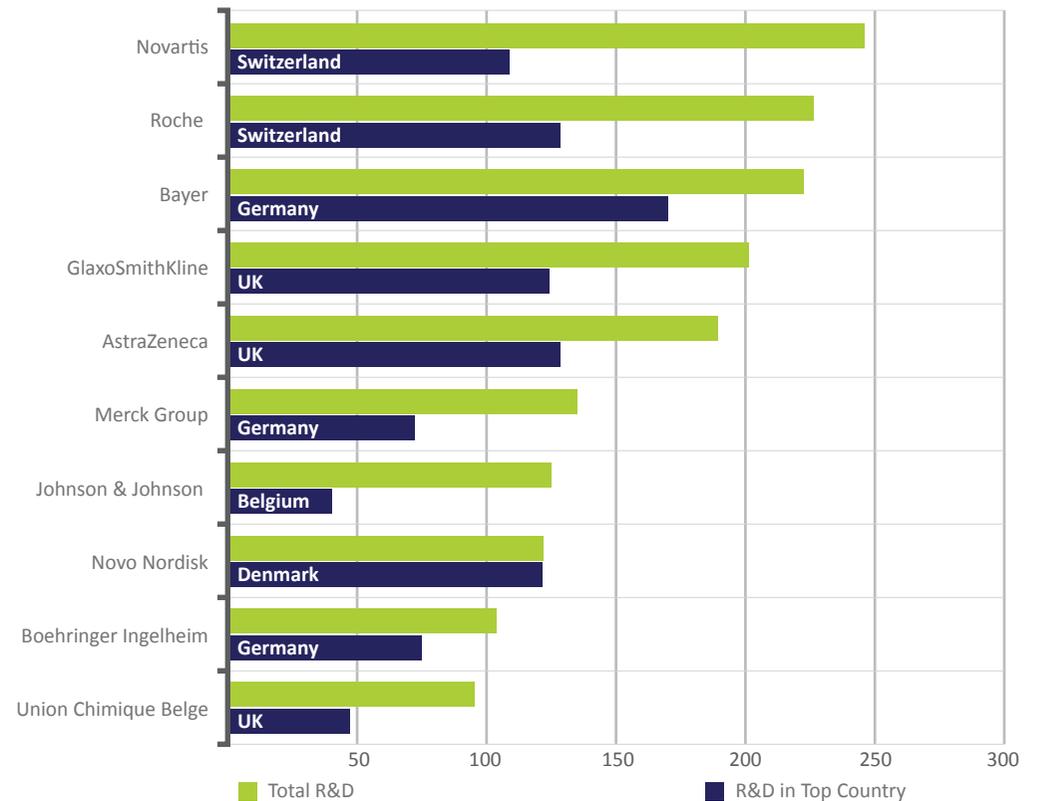


Novartis, Roche and Bayer were the main drivers in European R&D. Notably, Novartis and Roche together accounted for 48% of the R&D market in Switzerland. These two companies actively recruited in other countries as well, as Swiss vacancies accounted for only about 50% of their R&D activity.

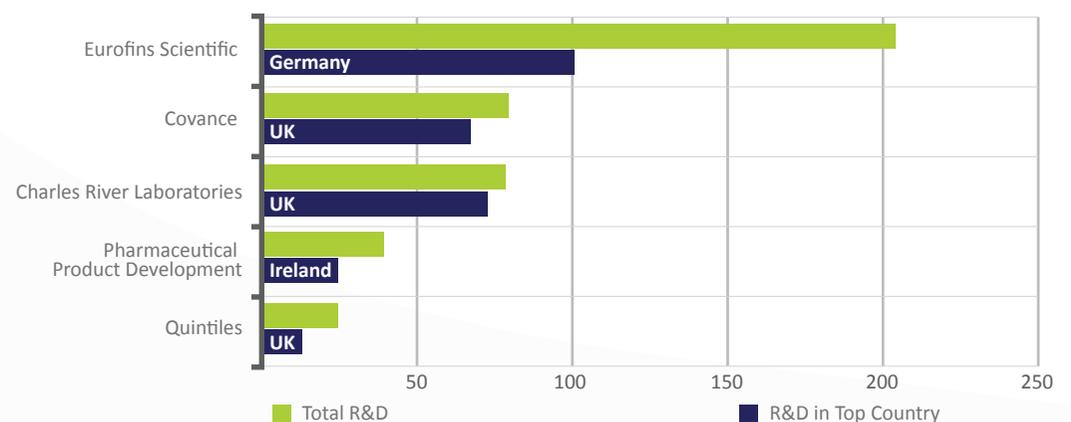
Within the Pharma top ten, Bayer, Novo Nordisk and Boehringer Ingelheim all showed activity focusing in one specific country, where each published over 70% of its total vacancies. Novo Nordisk was the only company that limited its entire R&D activity to one country: Denmark. Interestingly J&J had a unique spread of vacancies across multiple countries, with only a third (32%) of them published in the top country, Belgium.

The top ten companies in traditional pharma have mostly focussed their recruitment in the Nordic and Germanic territories. The top five CROs, however, were mostly focused in the British Isles. Only Eurofins Scientific countered this trend. Eurofins is the most active recruiter among CROs by a large margin, and just under half of its vacancies this year have been in Germany.

### Top Ten Traditional Pharma Companies by R&D Vacancies



### Top Five CROs by R&D vacancies



An analysis of R&D roles across Europe overall reveals that the most common role types in 2015 were generalist R&D and Laboratory, which accounted for 28% and 25% of all vacancies. More specialised areas had much smaller slices of the market, with Bioanalytics and non-development Research the largest of them, each corresponding to 8% of all roles.

In the UK market, vacancies have roughly followed European averages, although the proportion of Laboratory roles is clearly lower, at only 17% of vacancies. Immunology also replaces Biostatistics as the fifth most common role type.

Germany advertises a disproportionately large number of Laboratory roles: they are 39% of all German R&D roles, and looking across all of Europe, Germany was responsible for 40% of all advertised Laboratory roles. Germany and the UK both have 15% or more of their vacancies advertised by biotechnology companies or clinical research organisations.

Conversely in Switzerland, general R&D roles accounted for 45% of all vacancies, compared to the European average of 28%. Drug Formulation is also important here, representing 6% of Swiss vacancies. Of course, Swiss pharmaceutical hiring is done in large part by traditional pharma giants, and the biotechnology and clinical research companies advertise less than 3% of all Swiss vacancies.

R&D Role Types  
All Countries



■ General R&D ■ Laboratory ■ Bioanalytics ■ Research ■ OTHERS

R&D Role Types  
UK Roles



■ General R&D ■ Laboratory ■ Bioanalytics ■ Research

R&D Role Types  
German Roles



■ Biostatician ■ Immunology ■ Drug Formulation & Development ■ OTHERS

R&D Role Types  
Swiss Roles



## Clinical Professionals

Clinical Professionals is Europe's leading life science staffing business offering outsourced solutions via Functional Service Provision (FSP) and traditional, high quality staffing solutions. Detailed market research carried out in early 2013 found that 95% of hiring managers rate Clinical Professionals as consistently superior in quality, speed of response, staff retention and communication. In addition to this, nine out of ten customers rate the company as their most trusted partner.

Clinical Professionals have developed a highly comprehensive understanding of a broad range of specialist functional disciplines within the pharmaceutical industry. Our knowledge-base has its foundations in an unrivalled blend of industry experience combined with a commitment to investing in training and development. We have specialist teams dedicated to recruiting within the various pharmaceutical sectors for permanent, contract, interim, FSP and freelance vacancies. Clinical Professionals offer a variety of services for both candidates and clients, including our CP FSP model, offering clients the opportunity to outsource the recruitment of a whole team whilst retaining control of the monitoring function in-house.

## What we do:

Our Service Capabilities across all European Countries include:

- Contingency permanent recruitment
- Contract recruitment – freelance and PAYE via Clinical Professionals/Only Medics
- Search and selection permanent recruitment
- Specialist 'project-based' interims via Clinical Professionals/Only Medics
- FSP outsourced teams across Europe

Clinical Professionals has launched their **2016 European Salary Survey** to determine the salary and benefits for each sector of the UK Life Science industry.

The Survey will analyse salary and benefits for each sector of the European Life Science industry, and follows on from the success of our previous pharmaceutical salary surveys.

Contact us for more information on [salariesurvey@clinicalprofessionals.co.uk](mailto:salariesurvey@clinicalprofessionals.co.uk)

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