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Business Intelligence through Vacancy Data

Clinical
PROFESSIONALS

Vacancysoft/Clinical Professionals Pharmaceuticals Report

GERMANY

JUNE 2016

Contents

About Vacancysoft Data

Our data set for this report contains information on 4 300 vacancies. These vacancies were found during normal Vacancysoft operations; duplicates were eliminated and the vacancies were processed according to our proprietary rules.

All of the vacancies in the data set were found between May 2014 and April 2016, and they all came from companies that had posted at least one job before the start of that period. All of the vacancies were based in Germany. Vacancies from some companies were excluded because it was not possible to produce a consistent data set.

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 German recruitment over the last two years, identifying key trends 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

Yvette Cleland
CEO
Clinical Professionals

Overview

Over the 24 months to April 2016 Vacancysoft gathered 4 300 vacancies in the German Pharmaceutical market, across five professional categories. Close to two thirds of these, 61%, were in Scientific roles, followed by Sales (20%), Marketing and PR (11%), Procurement (6%) and Legal (1%).

Apart from a spike in the third quarter of 2015, due to a rise in QA and Medical Affairs roles, the market exhibited a consistent upward trend resulting in a year-on-year growth of 29%. Within this Marketing and PR vacancies saw the strongest growth with a 45% year-on-year increase, followed by Scientific and Sales with 28% and 30% respectively. The weakest performing segment was Procurement.

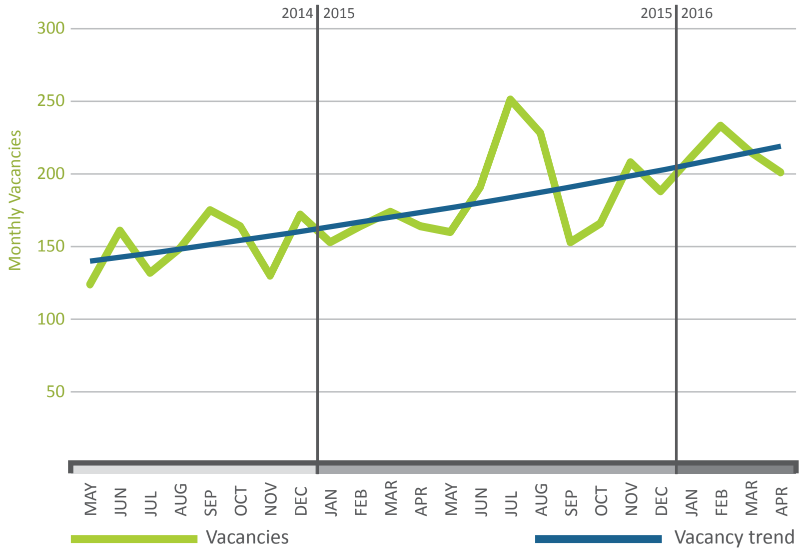
Looking at Scientific vacancies in more detail we see that R&D and Quality Assurance roles represent over half the total with 27% and 26% respectively. The strongest year-on-year growth, however, was seen in Medical Affairs & Medical Information roles, with a 70% increase.

Bavaria, with Munich at its centre, was the largest regional market, with a third of all vacancies. This is followed by Baden-Württemberg with 25%, driven by a rise in activity from Boehringer Ingelheim.

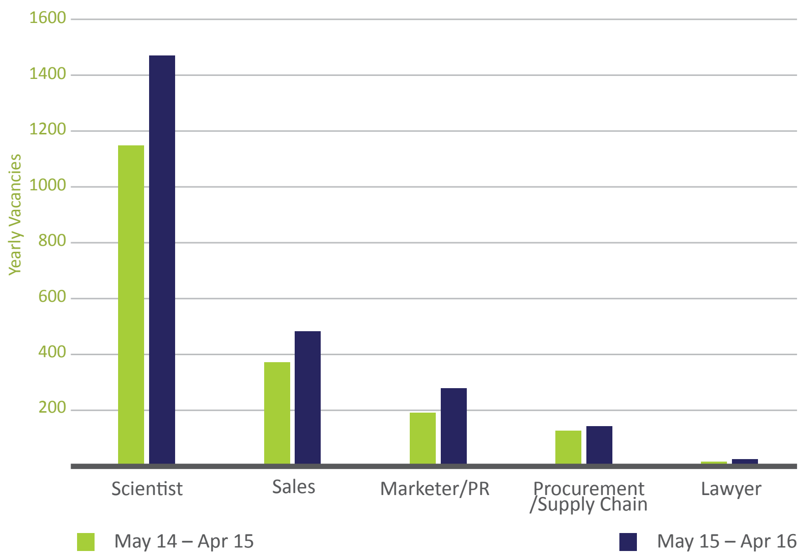
Following a particularly weak 12 months to April, CROs accounted for just 5% of the German market. The vast majority, 94% of all vacancies, were in established Pharmaceutical companies.

It is no surprise that a third of all vacancies are coming from the Bavaria/Munich area. Biotech companies in the Munich Metropolitan Region (EMM) are currently committed to no fewer than 261 collaborative development and distribution agreements. Since 2008, seven companies in the EMM region alone have been taken over by international groups which impacts vacancies. The majority of young biotech companies have evolved here first and 40% of the region's biotechnology firms cooperate with Bavarian research organizations. If you then consider the eight research institutions that lay the scientific foundations, spin off start-ups and invite firms to cooperate with them, you can see why this area offers so many new roles and increased staffing pressures.

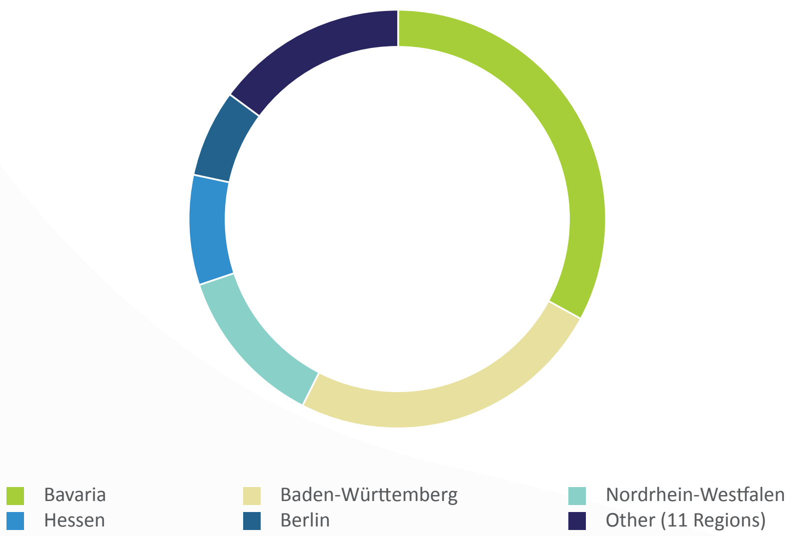
Total Vacancies in German Pharmaceutical Market,
MAY '14 – APRIL '16



Vacancies by Profession,
MAY 2014 – APRIL 2016



Vacancies by Region,
MAY 2014 – APRIL 2016



Geography Analysis

The German Pharmaceutical vacancy market is dominated by five key regions; Bavaria, Baden-Württemberg, Nordrhein-Westfalen, Hessen, and Berlin, which combined account for 85% of all openings.

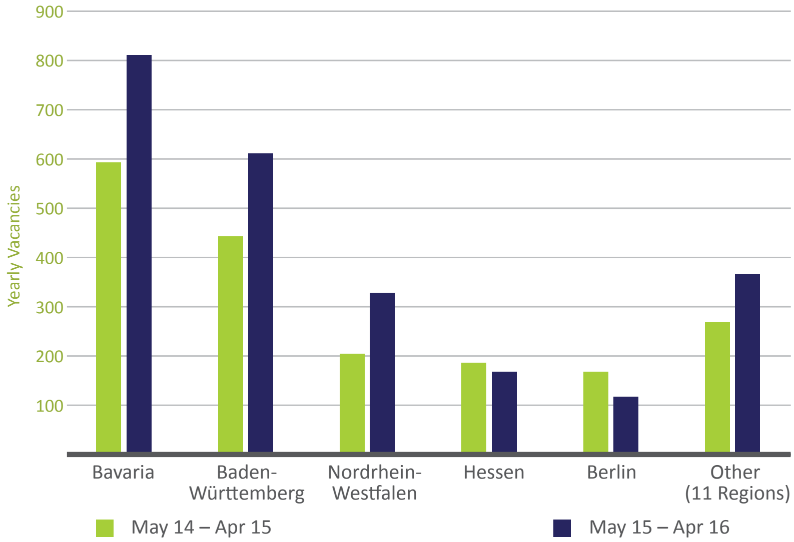
In terms of growth, Bavaria and Baden-Württemberg both outperformed the market with year-on-year growth over 35%. Nordrhein-Westfalen saw the largest gain with an increase of 61% following a surge in activity by Johnson & Johnson and Grunenthal. Hessen and Berlin on the other hand experienced a significant drop in vacancies, with Berlin's volume decreasing by 30%.

Considering the different professional segments across the key regions, we see little variation from the market average. Scientific vacancies account for roughly two thirds of the total, except in Nordrhein-Westfalen and Hessen where there is a slight shift toward Sales roles, which account for 23% and 29% respectively.

At a city level we see some interesting results. Munich, with 12% market share, was one of the strongest performers with year-on-year growth of 74%. Grenzach-Wyhlen, due to Roche activity, and Biberach an der Riss, due to Boehringer Ingelheim activity, also saw significant gains. Of the half of those cities that experienced negligible or negative growth, Berlin saw the biggest drop, followed by Penzberg (-11%) and Mannheim (-9%).

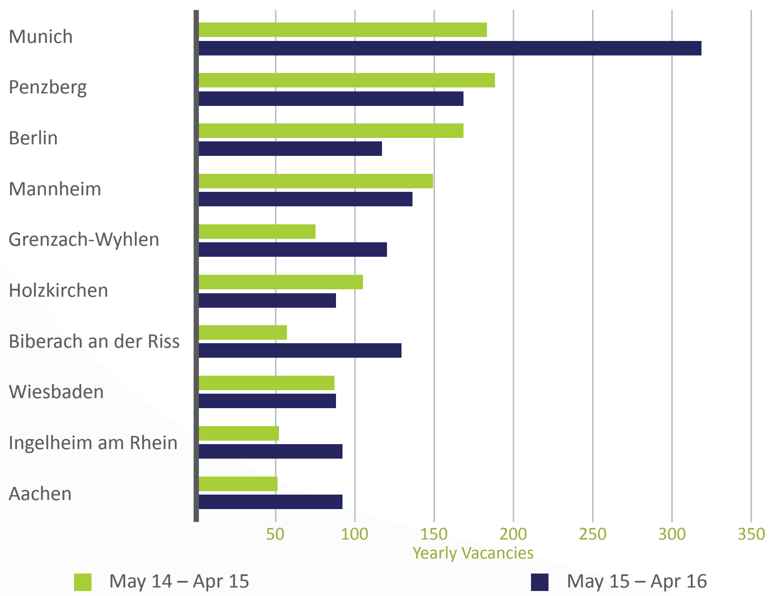
Baden-Württemberg outperformed the market with year-on-year growth over 35%, often referred to as the centre of the German Health Industry. Its three core sectors, biotechnology, medical technology, and pharmaceuticals employ around 86 000 people with a mix of both global pharma (Roche/Boehringer) and SMEs. With R&D to production and sales the result is Baden-Württemberg is the largest pharmaceutical and medical-technology location in Germany. It is expected that there is a consistent steady rise in vacancies particularly when you consider one third of all Med Tech products in Germany are less than three years old. This is a reflection of the industry's innovative strength, illustrated by the fact that 9 % of the industry's turn-over is invested in research and development.

Five Busiest Regions,
MAY 2014 – APRIL 2016



Proportion of Vacancies by Profession in Busiest Regions,
MAY 2014 – APRIL 2016

Ten Busiest Cities,
MAY 2014 – APRIL 2016



Role Analysis

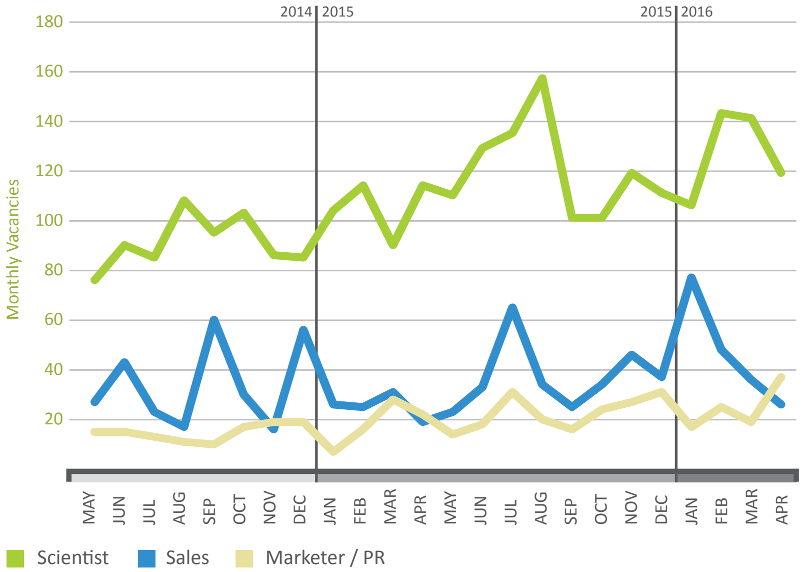
As we've already seen Scientific vacancies make up the bulk of the German Pharmaceutical market. Within this segment the majority of roles were in R&D (27%), Quality Assurance (26%), Medical Affairs (12%) and Clinical (11%). R&D roles saw a modest year-on-year increase of 14% driven by vacancies in Laboratory positions, accounting for 43% of the total, and Bioanalytics, which saw significant growth. QA roles experienced a 33% increase with Compliance and QP positions seeing significant gains. The strongest performance, however, was seen in Medical Affairs roles, with a year-on-year rise of 70% driven by increases in Medical Advisor vacancies.

Sales positions comprise the second largest segment with 20% of all vacancies. Medical Sales positions accounted for the largest proportion of those, with 29% of the total. Following a year-on-year drop of 6%, however, and an impressive increase of 149%, Pharmaceutical Sales positions now represent to largest proportion of Sales vacancies in the 12 months to April. Account Management positions, although seeing zero growth over the period, are the third most common Sales roles, with 19% of those vacancies.

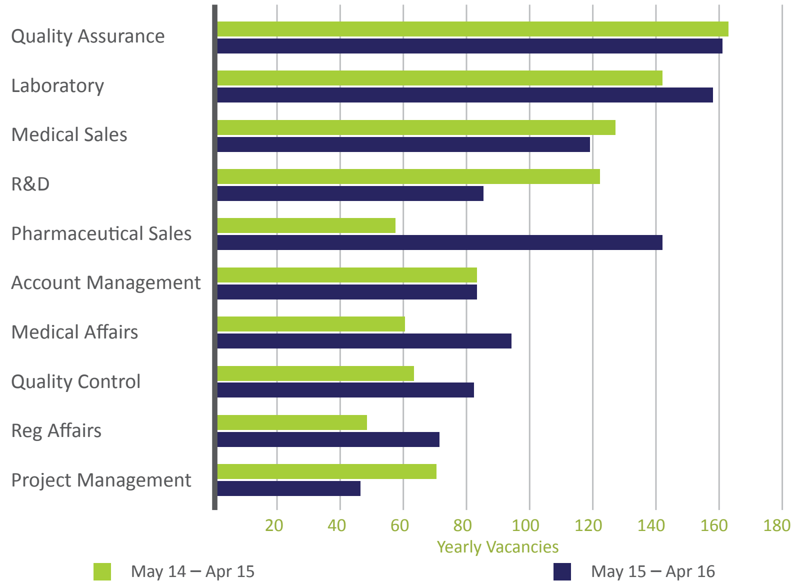
Marketing, despite only accounting for 11% of the market, was the strongest performing profession, with year-on-year growth of 45%. Much of this performance is attributable to a significant increase in Branding vacancies, particularly in Product and Brand Management.

We have identified Baden-Württemberg, Hessen and Bavaria, as well as Berlin, as the areas with the greatest concentration of job activity. Baden-Württemberg & Hessen are home to a number of global pharmaceutical companies and this is partly why the concentration of jobs has been steady, including for physicians. With Bavaria, there is a mix of established global pharmaceutical companies and also innovative pharma companies and biotechs who are expanding rapidly, hence we are seeing a spike of activity in this region. This will continue to be a trend with Bavaria, and Munich in particular, establishing itself as a main hub for pharmaceutical companies.

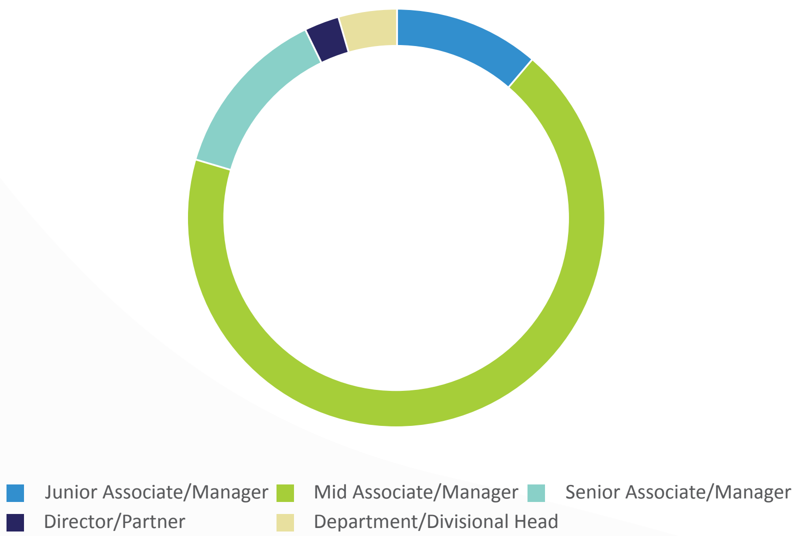
Total Vacancies in Top Professions,
MAY '14 – APRIL '16



Ten Most Common Roles,
MAY '14 – APRIL '16



Vacancies by Seniority,
MAY '14 – APRIL '16



Company Analysis

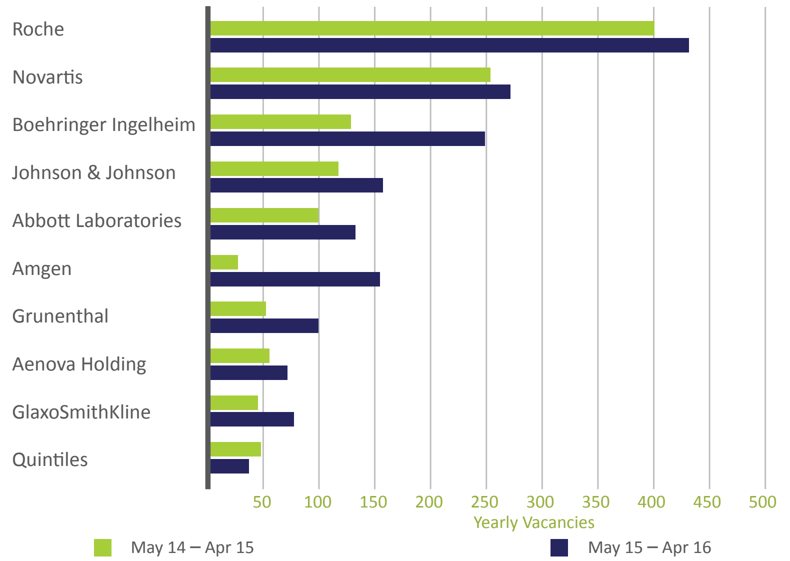
Of the 91 companies for which vacancies were identified, in the 24 months to April 94% were in Pharmaceutical companies, 5% in CROs and 1% in Biotech. Of the 4 300 vacancies, 73% were in large companies with a headcount of 5,000+, 17% in mid- to large-sized companies (501-5,000) and 9% in medium sized companies (51-500). Interestingly it was the mid-sized companies that showed the greatest growth, with a year-on-year increase of 64%.

Looking at the eight CROs making it into the data set we see below average growth of just 10%. The overall trend for the period, however, tells a slightly different story: the sector experienced strong growth in the year to April 2015, followed by a significant decline in the last 12 months. Perhaps this suggests a move away from CRO services within Germany?

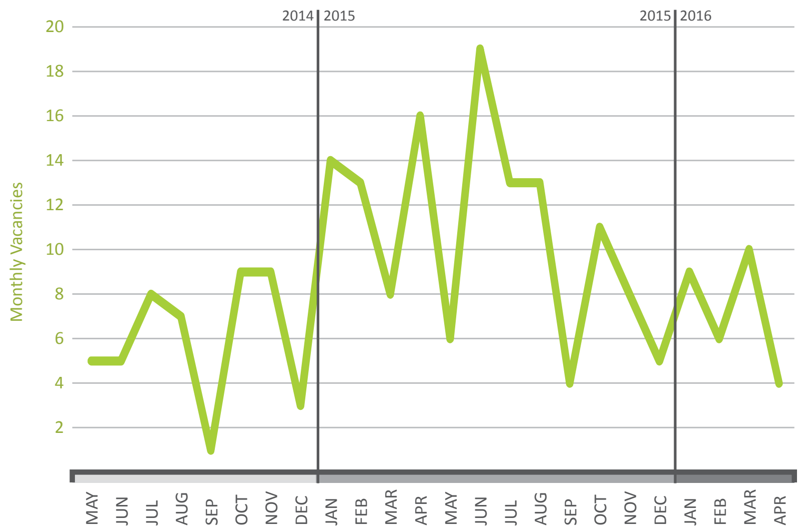
In terms of activity the ten busiest companies accounted for a total of 69% of the market. Topping the list is Roche with 19% of vacancies, Novartis with 12% and Boehringer Ingelheim with 9%. Both Roche and Novartis had below average year-on-year growth of 7-8%. Boehringer Ingelheim on the other hand saw a significant increase of 94%, predominantly in R&D, QA and Clinical roles.

If we isolate the significant decline in CRO vacancies in Germany, this may actually follow a more global pattern. The size of trials handled by CROs showed a steep decline over the last year globally, with a 31% reduction in the overall size of the studies carried out. The results reflect the pharmaceutical industry's change in emphasis, with drug developers attempting to streamline their pipelines away from more speculative early-stage candidates. The focus is turning to a smaller number of later-stage drug candidates in order to maximise return on investment. The pharmaceutical industry is trying to do more with less, and this is a prime example. CROs may be doing fewer trials, but the work they are doing has more depth to it, is more meaningful and more likely to result in effective therapies.

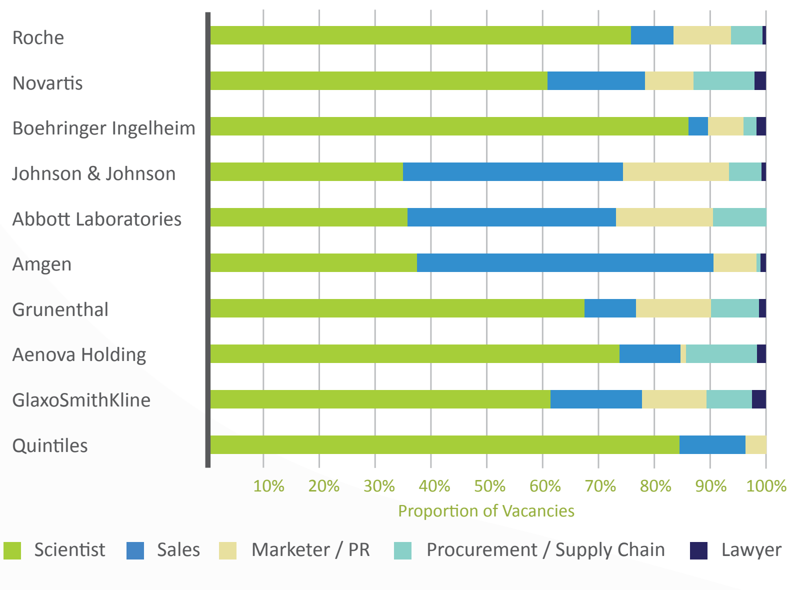
Ten Busiest Companies,
MAY 2014 – APRIL 2016



Total Vacancies in Clinical Research Organisations,
MAY 2014 – APRIL 2016



Relative Proportion of Vacancies by 10 Busiest Companies,
MAY 2014 – APRIL 2016



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.

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Our Service Capabilities across all European Countries include:
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- 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 salarysurvey@clinicalprofessionals.co.uk

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About Us

• Launched in 2006, we provide Business Intelligence through Vacancy Data on subscription.

• We publish vacancy data daily, tailored to your needs, so you can be informed of client activity.

• Primarily used by recruiters, our service enables consultants to have a rapid response when Organizations post jobs thus facilitating Business Development and Client Management.

• Our data sets are also used by Executive Search, Consulting Firms, Business Services and Strategy Managers to facilitate a more client centric approach.

• For more information about us please contact James Chaplin by email: **james.chaplin@vacancysoft.com**

Free Trial

• On a daily basis we monitor over 500,000 companies for change.

• We configure an account for you with filters matching your needs. (So you decide which roles, sectors, locations you want to be kept informed about)

• You start getting daily emails from us with all relevant vacancy data.

• You also get an access to our online database, enabling you to search all activity in the market meeting your needs.

• After you decide which data packages you want our unit based pricing means so you only pay for what you find adds value.

• To set up your free trial today contact:
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