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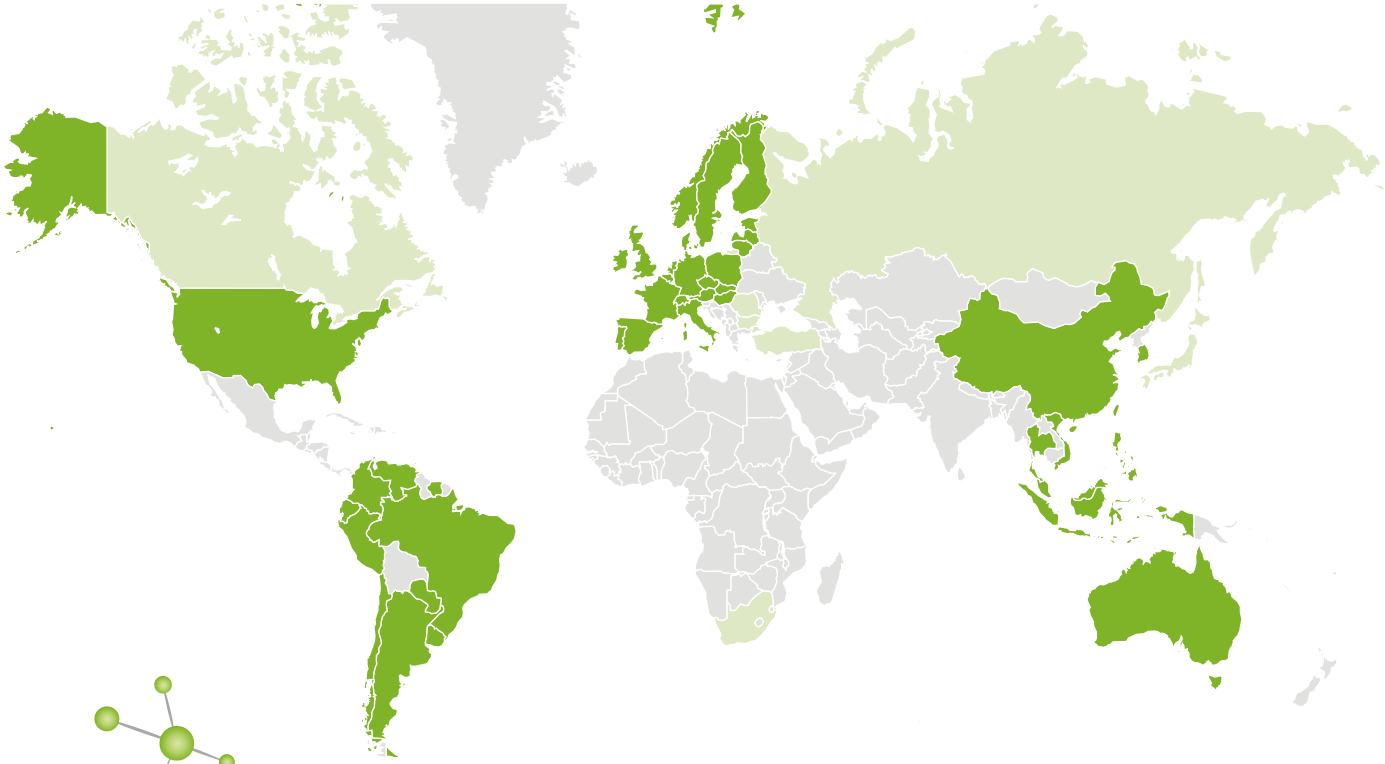
International Network of
Recruitment Agencies in Life Sciences

INRALS Intel - Life Sciences Market Intelligence



Focus on…

All 2020 issues of our Life Sciences Market Intelligence knowledge sharing series 'Focus on...', featuring contributions by our Members from France, Belgium, The Netherlands, Switzerland, Sweden, United Kingdom, Ireland, Germany and Spain.

Preface

Dear reader,

In 2020, as a global network of recruitment agencies in Life Sciences, INRALS started a knowledge sharing series 'Focus on….'. In this series, our Members share their expertise about the Life Sciences market in their respective countries. Valuable market intelligence, for anyone active in this sector.

In each 'Focus on…' issue, you will find a quick overview of the key facts and figures, trends, nice and need to know information, shared with pride and pleasure, by each of the Members involved. Just click on one of the issues presented in the Contents section below and you will be up to date in no time.

Our French member CDG Conseil, who took the initiative for this series, kicks off this compilation of 2020 and eight other INRALS Members present their local market intelligence. The series will continue, so keep following INRALS (www.inrals.com) to stay informed on Life Sciences on a global scale. INRALS, local expertise, global reach.

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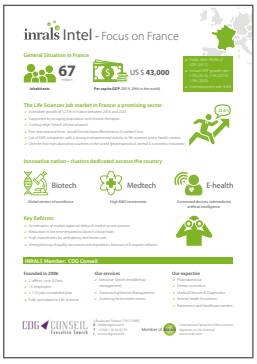
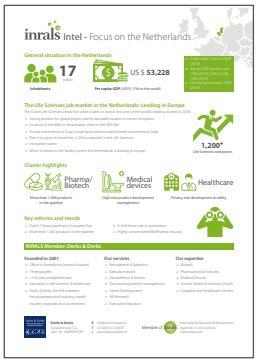


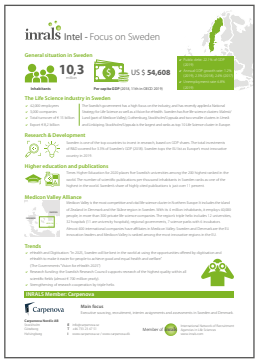
Focus on France by CDG Conseil

Focus on Belgium by CDG Conseil and Derks & Derks

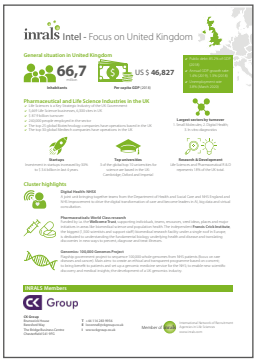


Focus on The Netherlands by Derks & Derks

Focus on Switzerland by Hölzle, Buri & Partner Consulting



Focus on Sweden by Carpenova



Focus on United Kingdom by CK Group

Focus on Ireland by CareerWise Recruitment

Focus on Germany by ageneo Life Science Experts

Focus on Spain by LIM Global

inrals Intel - Focus on France

General Situation in France

67 million

Inhabitants

US $ **43,000**

Per capita GDP (2019, 29th in the world)

- Public debt: 98.4% of GDP (2017)
- Annual GDP growth rate: 1.7% (2018), 1.3% (2019), 1.3% (2020)
- Unemployment rate: 8.4%

The Life Sciences job market in France: a promising sector

- Estimated growth of 12.5% in France between 2018 and 2023
- Supported by an aging population and chronic therapies
- Cutting-edge French clinical research
- Few international firms: Sanofi/Servier/Ipsen/Biomérieux /Guerbet/Ceva
- Lot of SME companies with a strong entrepreneurial activity in life sciences and e-health sectors
- One the first manufacturing countries in the world (pharmaceutical, animal & cosmetics industries)

Innovative nation - clusters dedicated accross the country

Biotech

Global centers of excellence

Medtech

High R&D investments

E-health

Connected devices, telemedicine, artificial intelligence

Key Reforms

- Acceleration of market approval delays & market access process
- Reduction in the time required to launch clinical trials
- High investments for ambulatory and home care
- Strengthening of quality assurance and regulations because of European reforms

INRALS Member: CDG Conseil

Founded in 2006

- 2 offices: Lyon & Paris
- 15 employees
- > 110 jobs completed/year
- Fully specialized in Life Sciences

Our services

- Executive Search (middle/top management)
- Outsourcing/Interim Management
- Coaching/Assessment center

Our expertise

- Pharmaceutical
- Dermo-cosmetics
- Medical Devices & Diagnostics
- Animal health & nutrition
- Retirement and Healthcare centers

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Published January 2020

inrals Intel - Focus on Belgium

General Situation in Belgium

11,4 million

Inhabitants

US $ **46,683**

Per capita GDP (2019, 17th in the world)

- Public dept: 104.7% of GDP (2019)
- Annual growth rate: 1.5% (2018), 1.5% (2019), 1.6% (2020)
- Unemployment rate: 5.6%

Life Sciences market in Belgium

- The growing life sciences sector comprises 8 main Belgian universities, 19 research parks and 23 incubators, research institutes, academic hospitals and clinical research organizations
- Biotech companies have access to +500,000 square feet of highly flexible infrastructure
- Investments in research since 2014 +40%
- Turnover Medical device industry € 3.5 billion; 20,000 people employed
- Sales revenue pharmaceuticals: upward trend in the last 5 years, continuation predicted
- Evolution since 2014: increase in jobs in pharmaceuticals +10%

Majority of companies related to healthcare

Biotech

300 companies

Medtech

Annual turnover € 2.4 billion; 16,820 FTEs

Strong representation in agricultural biotech

Innovation trends/evolutions

- Implementation of the hospital networks
- Implementation of Low Variable care
- Regionalization of healthcare policies
- Digitalization of health
- Shift of care outside the hospitals, closer to the patient's home setting

Top 10 priorities indicated most

- Simplification of the reimbursement system
- Faster reimbursement for innovative products
- Transversal approach and value-based procurement
- Improved dialogue from authorities with the sector
- Clear roadmap and policy for digital health
- More attention for SMEs, driven by innovation
- Faster consolidation of hospitals to free up budgets
- Introduction of transparent reimbursement system for IVD
- Focus on extra- & transmural care
- Investments to make Belgium an attractive med tech country

INRALS Members: CDG Conseil and Derks & Derks

Flemish Belgium

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Published February 2020

inrals Intel - Focus on the Netherlands

General situation in the Netherlands

17 million

Inhabitants

US $ **53,228**

Per capita GDP (2019, 17th in the world)

- Public debt: 52.6% of GDP (2018)
- Annual GDP growth rate: 2.9% (2017), 2.6% (2018), 1.8% (2019)
- Unemployment rate: 3.9% (2018)

The Life Sciences job market in the Netherlands: Leading in Europe

The Dutch Life Sciences sector has what it takes to evolve into one of the world's leading clusters in 2030:

- Strong position for global players due to favorable location in terms of logistics
- Location of the EMA in Amsterdam, close to 'the (RA) fire'
- Private investments in Dutch small and medium-sized enterprises extremely high
- Plan is to grow to more than 1,200 companies in the Life Sciences
- Innovative nation
- When it comes to the health system the Netherlands is leading in Europe

1,200+
Life Sciences companies

Cluster highlights

Pharma/ Biotech

More than 1,000 products in the pipeline

Medical devices

High end product development management

Healthcare

Privacy and development & safety

Key reforms and trends

- Dutch Clinical pipeline in European Top
- More than 1,000 products in the pipeline
- A shift from cure to prevention
- Highly concentrated BioPharma Industry

INRALS Member: Derks & Derks

Founded in 2001

- Office in Amersfoort (central location)
- 19 employees
- >100 jobs completed/year
- Specialist in Life Sciences & Healthcare
- Derks & Derks: the link between the pharmaceutical industry, health insurers, hospitals and government.

Our services

- Recruitment & Selection
- Executive search
- Secondment & Interim
- Outsourcing/interim management
- Talent Development
- HR Research
- Executive Education

Our expertise

- Biotech
- Pharmaceutical industry
- Medical Devices
- Animal Health & Nutrition (Food)
- Hospitals and Healthcare Centers

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Published April 2020

inrals Intel - Focus on Switzerland

General situation in Switzerland

8,6 million

Inhabitants

US $ **82,797**

Per capita GDP (2018)

- Public debt 29.6% of GDP
- Annual GDP growth rate 2.8% (2018)
- Unemployment rate 2.3% (2019)

The life science industry is the leading industry in Switzerland and a global leader

- Exports in 2019 Pharma, Life Science, Chemistry: $ 114,5 billion, representing 47% of total exports
- Export surplus $ 41 billion

Cluster highlights Pharma/Biotech/Chemistry

Total 278,000 FTE jobs (74,000 direct + 204,000 indirect)

HQ for EMEA/global of most pharma / biotech companies

Leading country in R&D spending per capita fosters innovation

Cluster highlights Medtech

58,000 FTE jobs direct / indirect

1,400 companies (manufacturers, suppliers, traders, service providers)

$ 15,8 billion sales; exports $ 11,3 billion ($ 5,9 billion surplus)

Key trends

- Overall the market will grow and have a great need for top qualified talents.
- Data will dominate the new Life Sciences landscape, with technology players in a pivotal role in the R&D value chain and the Swiss government committed to a 'Digital Switzerland' strategy.
- Switzerland is among the leading countries for Blockchain Technology. Zug is called the Blockchain Valley.
- Due to the Corona crisis the trend for more local production will bring some outsourced technologies back into the country.

INRALS Member: Hölzle, Buri & Partner

Main expertise

Recruitment; Assessments; Coaching; Strategic Consulting including Post-merger Integration and Market Access Management.

Hölzle, Buri & Partner | Consulting

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Published April 2020

inrals Intel - Focus on Sweden

General situation in Sweden

10,3 million

Inhabitants

US $ **54,608**

Per capita GDP (2018, 11th in OECD 2019)

- Public debt: 22.1% of GDP (2019)
- Annual GDP growth rate: 1.2% (2019), 2.3% (2018), 2.4% (2017)
- Unemployment rate: 6.8% (2019)

The Life Science industry in Sweden

- 42,000 employees
- 3,000 companies
- Total turnover of € 15 billion
- Export € 8,2 billion

The Swedish government has a high focus on the industry, and has recently applied a National Strategy for Life Science as well as a Vision for eHealth. Sweden has five life science clusters: Malmö/Lund (part of Medicon Valley), Gothenburg, Stockholm/Uppsala and two smaller clusters in Umeå and Linköping. Stockholm/Uppsala is the largest and ranks as top 10 Life Science cluster in Europe.

Research & Development

Sweden is one of the top countries to invest in research, based on GDP shares. The total investments of R&D covered for 3.3% of Sweden's GDP (2018). Sweden tops the EU list as Europe's most innovative country in 2019.

Higher education and publications

Times Higher Education for 2020 places five Swedish universities among the 200 highest ranked in the world. The number of scientific publications per thousand inhabitants in Sweden ranks as one of the highest in the world. Sweden's share of highly cited publications is just over 11 percent.

Medicon Valley Alliance

Medicon Valley is the most competitive and vital life science cluster in Northern Europe. It includes the island of Zealand in Denmark and the Skåne region in Sweden. With its 4 million inhabitants, it employs 40,000 people, in more than 300 private life science companies. The region's triple helix includes 12 universities, 32 hospitals (11 are university hospitals), regional governments, 7 science parks with 6 incubators. Almost 400 international companies have affiliates in Medicon Valley. Sweden and Denmark are the EU innovation leaders and Medicon Valley is ranked among the most innovative regions in the EU.

Trends

- eHealth and Digitisation: "In 2025, Sweden will be best in the world at using the opportunities offered by digitisation and eHealth to make it easier for people to achieve good and equal health and welfare."
  (The Governments "Vision for eHealth 2025")
- Research funding: the Swedish Research Council supports research of the highest quality within all scientific fields (almost € 700 million yearly).
- Strengthening of research cooperation by triple helix.

INRALS Member: Carpenova

Carpenova

Main focus

Executive sourcing, recruitment, interim assignments and assessments in Sweden and Denmark.

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Published May 2020

inrals Intel - Focus on United Kingdom

General situation in United Kingdom

66,7 million

Inhabitants

US $ **46,827**

Per capita GDP (2018)

- Public debt: 85.2% of GDP (2018)
- Annual GDP growth rate: 1.4% (2019), 1.3% (2018)
- Unemployment rate 3.8% (March 2020)

Pharmaceutical and Life Science Industries in the UK

- Life Sciences is a Key Strategic Industry of the UK Government
- 5,469 Life Science businesses, 6,300 sites in UK
- $ 87.9 billion turnover
- 240,000 people employed in the sector
- The top 25 global Biotechnology companies have operations based in the UK
- The top 30 global Medtech companies have operations in the UK

Largest sectors by turnover
1. Small Molecules; 2. Digital Health; 3. In vitro diagnostics

Startups
Investment in startups increased by 30% to $ 3.6 billion in last 4 years.

Top universities
3 of the global top 10 universities for science are based in the UK: Cambridge, Oxford and Imperial

Research & Development
Life Sciences and Pharmaceutical R & D represents 18% of the UK total.

Cluster highlights

Digital Health: NHSX
A joint unit bringing together teams from the Department of Health and Social Care and NHS England and NHS Improvement to drive the digital transformation of care and become leaders in AI, big data and virtual consultation.

Pharmaceuticals: World Class research
Funded by i.a. the **Wellcome Trust**, supporting individuals, teams, resources, seed ideas, places and major initiatives in areas like biomedical science and population health. The independent **Francis Crick Institute**, the biggest (1,500 scientists and support staff) biomedical research facility under a single roof in Europe, is dedicated to understanding the fundamental biology underlying health and disease and translating discoveries in new ways to prevent, diagnose and treat illnesses.

Genomics: 100,000 Genomes Project
Flagship government project to sequence 100,000 whole genomes from NHS patients (focus on rare diseases and cancer). Main aims: to create an ethical and transparent programme based on consent; to bring benefit to patients and set up a genomic medicine service for the NHS; to enable new scientific discovery and medical insights; the development of a UK genomics industry.

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Published July 2020

inrals Intel - Focus on Ireland

General situation in Ireland

4.98 million

Inhabitants

US $ **77,771**

Per capita GDP (2019, world rank 4)

- Public Debt 58.8% of GDP (2019)
- Annual growth rate: 4.1% (2019), 6.8% (2018), 8.1% (2017)
- Unemployment (Pre-Covid): 5%

Life Science Sector Overview

Pharmaceutical/Biopharma

- 10 of 10 Top Global Pharma companies
- 85 pharma and biopharma companies in Ireland
- 30K people employed in sector
- 5 Billion Dollar capital investment in Biotech last 5 years
- 3rd largest global pharmaceutical exporter with 80 Billion Dollars
- 2 Billion Dollar investment in Biotech R&D
- Key areas: Large molecule in addition to API and oral & solid dose manufacturing

Youngest EU **population** with 33% under 25; **Education** Third Level percentage top 10 in the world

Medical Device

- 9 of Top 10 companies in Ireland
- 2nd largest device exporter in Europe
- $12.6 Billion exports, 32K people employed
- Over 300 companies with 70% involved in R&D
- 33% of global contact lenses produced in Ireland
- 75% of orthopaedic knees
- 30M diabetics using Irish made injectable devices
- Key areas: Vascular, Orthopaedic, Diagnostics, Ophthalmic, Drug Delivery and Connected Health

Recent Investment News
Regeneron: 400 jobs for Limerick to position for Covid treatment ramp up; **Allergan**: 160M Biotech investment in Mayo; **Janssen & Lilly**: new Bio sites in Cork

Key clusters

Manufacturing: key global player for Pharmaceutical & MedTech production

Process Development: significant process optimisation expertise

Shared service centres/centres of excellence (financial, supply chain, IT) supporting EMEA region

CareerWise Recruitment

CareerWise recruitment

- Founded 1999, Owner Managed, Irish Owned, Local Knowledge, Global Presence
- 21 Employees
- Executive Search, Professional Recruitment, Contractor Management & Payroll Services
- Specialist in Life Sciences, ICT, Engineering & Food Sectors

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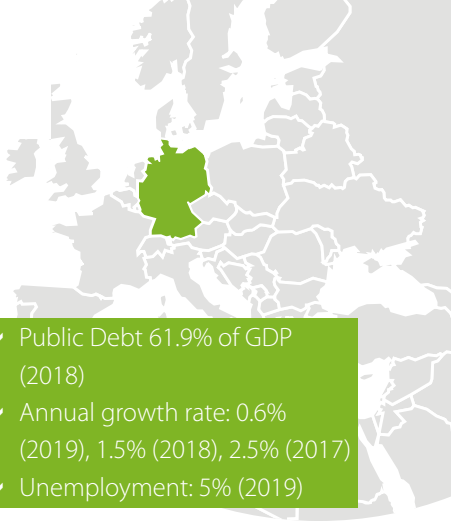

General situation in Germany

83.2 million

Inhabitants

US $ **47,603**

Per capita GDP (2018)

- Public Debt 61.9% of GDP (2018)
- Annual growth rate: 0.6% (2019), 1.5% (2018), 2.5% (2017)
- Unemployment: 5% (2019)

Life Science Market overview

- Within Europe Germany offers the largest market for life sciences and healthcare products.
- Germany ranks first and second in clinical trial terms in Europe and the world respectively.
- Almost every sixth job is situated in the health sector.
- Due to demographic change and chronic therapies the market will continue to grow.
- One in three medical devices sold is less than three years old.

Around 30 universities offer life sciences studies

Cluster highlights

Biotech
Turnover 4.84 Bn Euros; 1,200 active companies, 33.706 jobs; over 500 assets available for licensing; 478 USD of venture capital attracted and double-digit growth (2019).

Pharma
Cornerstone of economy: turnover of over 41.5 billion Euros; < 121,000 employees; health expenditure 376 Bn Euros (2017) and 11.7% of GDP (2018).

Medtech
30+ specialized cluster networks focusing on medical technology; 210.000 employees; total turnover 33,4 Bn Euros (2019); export share of 65%.

Key reforms and trends

Pressing ahead with **transformative technologies** such as IoMT, SaMD and Blockchain.

More **personalized medicine** is expected through advancements in genetics.

Increased **digitalization of health:** E-Health Act (2016); rapidly increasing implementation of health-IT, telemedicine and mobile e-health platforms.

- New law on tax support for research (January 2020) supporting especially small and medium-sized companies. This makes Germany more attractive as a location for research and innovation.
- Greater outsourcing of know-how is expected especially in the areas of cognitive automation, AI and cloud computing.

INRALS Member: ageneo Life Science Experts/Interim Solutions GmbH

ageneo LIFE SCIENCE EXPERTS

Founded in 2011
13 employees
142 jobs completed (2019)

Our services
Recruitment (Search & Selection) and outsourcing (freelance) of professional and executive staff.

Our expertise
Pharmaceutical industry; Medical devices; Biotechnology; Diagnostics industries; Cosmetics.

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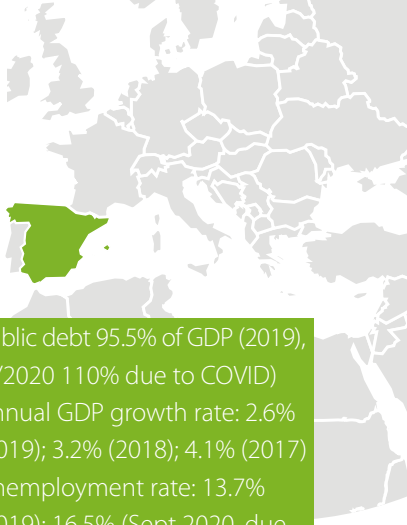
inrals Intel - Focus on Spain



General situation in Spain

47 million

Inhabitants

US $ **29,700**

Per capita GDP (2019)

- Public debt 95.5% of GDP (2019), (II/2020 110% due to COVID)
- Annual GDP growth rate: 2.6% (2019); 3.2% (2018); 4.1% (2017)
- Unemployment rate: 13.7% (2019); 16.5% (Sept 2020, due to COVID)

Life Science Industry overview

Pharma

Production value € 15 Bn (2019); 40,000 professionals, 13% work in R&D; € 1.2 mio R&D investment, 60% spent on clinical research; Spanish centers in 1/3 of all EU clinical trials.

Biotech

Total income € 8.2 Bn (2018) and accounting for 100,000 jobs: 50% human health companies, 40% in agri-cultural and food. Strongly expanding with a growth rate of over 10%.

Medtech

Close to € 8 billion revenues and exported 3.7 billion euros (46 %). The Spanish market represents 6.3% of the European market (2018). The sector has 29,800 direct employees.

Trends and interesting facts

Spain ranks 9th worldwide in **scientific production in biotech** and has the highest percentage of **scientific papers** in high-impact journals of any country (83.3%).

Spain is home to some of the **top centers in basic research** but has historically been lacking behind in converting science into sellable technology. This has changed. Over the last decade an attractive **biotech ecosystem** has developed with **increasing interest from international investors.** **Fundraising** by Life Science companies has **doubled** over the last 5 years. 2020 is expected to be a record year with a 50% increase despite the COVID-19 pandemic because these are **science-based, long-term investments.**

The number and especially the size of **seed financing rounds** has constantly been increasing in recent years demonstrating a growing confidence of (inter)national investors in Spanish **science and technology** especially in the **Advanced Therapy Medicinal Products** area. Spain is considered a hotspot in **Cell & Gene Therapy (CGT) and Oncology** ranked in the top 5 in Europe in these strategic areas in publications as well as patent filing by local institutions. The Spanish biotech ecosystem is well positioned in **Advanced Therapies** with 43% and 25% of Spanish biotech companies focusing on Oncology and CGT, respectively.

Growing interest and number of deals in **digital health** with increasing interest from other digital technology **investors** who are attracted by the Healthcare Industry.

INRALS Member: LIM global

LIMglobal

Founded in 2000
7 employees
52 searches (2019)

Our services
Executive Recruitment and Flexible Staffing Solutions (Outsourcing, Interim Management)

Our expertise
Pharmaceuticals and Biotechnology, Medical Devices and In-Vitro Diagnostics, Digital Health, Veterinary; proven track record with startups, SMEs and Multinationals

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Future issues: the series continues

In 2021, INRALS members will continue sharing their expertise and market intelligence in issues of 'Focus on…', with contributions by our Members in Australia, Brazil, China, Finland, Italy, Norway, Poland, South Korea and USA.

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International Network of
Recruitment Agencies in Life Sciences

About INRALS

INRALS is an international network of agencies specialized in HR Management with focus on high quality Recruitment, Assessment, Outsourcing and Consulting in the Life Sciences. Members are characterized by high success rates, quality procedures, stability, proven track records, profound knowledge of the markets they serve and high moral standards.

For more expert information and support in global Life Sciences recruitment, contact the member of your home country, through **www.inrals.com**.

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