



a SYNEOS HEALTH company

Prepared By:

**TSP, a Syneos Health®
company**

POPSIGHTS LABOR MARKET & INDUSTRY TRENDS REPORT 2025

POWER OF PERSONAL INSIGHTS REPORT: *HIGHLIGHTS*

The second half of 2025 is well underway, and the life sciences labor market is showing cautious signs of stability after years of volatility. Hiring has resumed in critical functions, compensation trends are leveling, and hybrid work models are firmly established. Still, competition for specialized talent, particularly in AI, advanced therapies, and regulatory affairs, remains intense, while diversity in leadership roles continues to lag.

This report explores the forces shaping talent across the U.S., Europe, and Asia-Pacific, from workforce demographics and skills shortages to compensation outlooks and regulatory pressures. By connecting regional trends with global implications, our goal is to provide leaders with insights to anticipate challenges, refine workforce strategies, and strengthen their organizations' ability to compete and innovate in an evolving market.

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WELCOME TSP'S LABOR MARKET REPORT

EXPERIENCE THE **POWER OF PERSONAL**

The life sciences sector is a landscape of rapid innovation and intense competition for skilled talent. The regions known for their rich ecosystems of academia, industry, and investment are expanding their horizons, incorporating emerging markets brimming with potential.



Welcome to our comprehensive white paper, where we delve into the strategic imperatives for growth and talent acquisition within the life sciences sector. As President of TSP, I'm thrilled to present insights that encapsulate the transformative landscape of life sciences in 2025 and beyond. Our analysis hinges on the geographic distribution of talent pools, key market developments, and the shifts in hiring dynamics that are shaping the future of the industry.

Our report provides a roadmap for life sciences firms looking to navigate the complexities of an evolving job market, financial constraints, and regulatory landscapes and serves to our dedication to empowering life sciences companies with the foresight and strategic planning needed to thrive in a competitive global marketplace.

Mike Gamble
President of TSP



EXECUTIVE SUMMARY

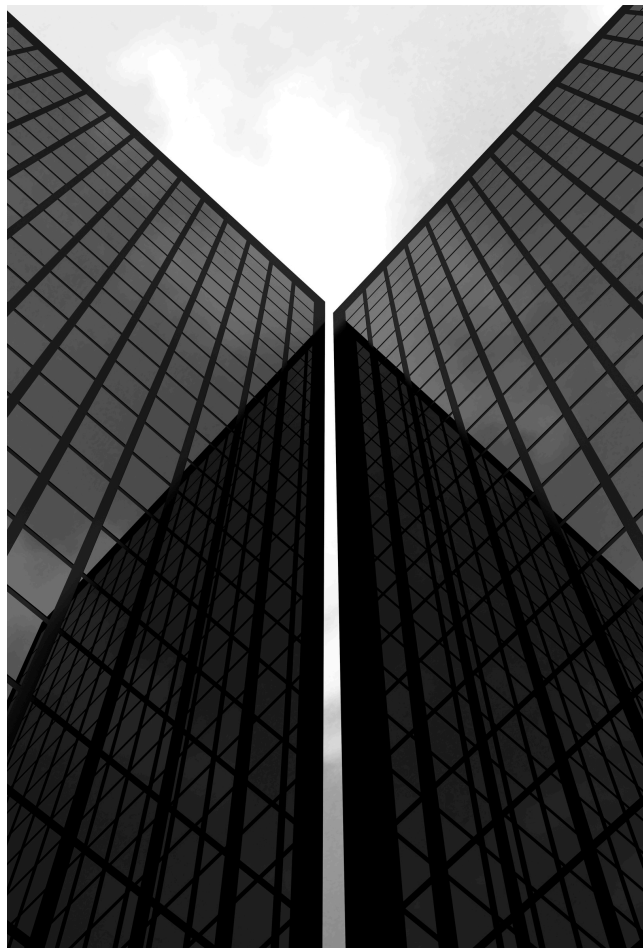
LIFE SCIENCES LABOR MARKET OUTLOOK FOR 2025

As we continue on through 2025, the life sciences industry navigates a challenging yet cautiously optimistic environment shaped by significant macroeconomic and geopolitical forces. The global economy stands at a critical juncture, with signs of stabilization emerging after several years marked by unprecedented volatility and policy uncertainty. Economic recovery, while underway, remains fragile and uneven across regions and sectors.



The International Monetary Fund's April 2025 World Economic Outlook emphasizes that global growth projections remain modest at approximately 2.8% for 2025, reflecting persistent inflationary pressures, high interest rates, and escalating trade tensions that heighten uncertainty across markets. The geopolitical landscape, notably ongoing tensions between major economies like the U.S. and China, continues to disrupt global supply chains and influence trade policies significantly.

Within this broader economic context, the pharmaceutical and biotechnology sectors face unique challenges and opportunities. Deloitte's 2025 Life Sciences Executive Outlook indicates that the sector is experiencing cautious optimism, driven by expectations of improved funding environments despite persistent economic uncertainties. These uncertainties include fluctuating fundraising conditions, where 41% of industry executives anticipate stability, while 30% foresee greater difficulty in securing financial resources.



U.S. LIFE SCIENCES LABOR MARKET TRENDS

Current Employment Landscape & Trends

As of early 2025, the U.S. life sciences industry is experiencing a notable shift in employment dynamics following the significant volatility of the previous two years. According to BioSpace's 2025 U.S. Life Sciences Employment Outlook Report, employment within the biopharma sector shows signs of cautious recovery after extensive workforce disruptions in 2024, including around **24,000 layoffs across life sciences companies**.

Despite these challenges, the labor market has shown resilience. Deloitte's 2025 Life Sciences Executive Outlook indicates that **approximately 59% of organizations within the sector have resumed active recruitment efforts**, driven by a renewed focus on specialized skill sets critical to innovation and regulatory compliance. Early 2025 hiring data suggests a cautious optimism among employers, with **42% of companies forecasting an increase in hiring activities** compared to the previous year.

Looking ahead to the second half of 2025, **market analyses forecast moderate employment growth in the range of 3-5%**. This growth trajectory is supported by stabilizing macroeconomic conditions, including easing inflationary pressures and the anticipated steadying of the fundraising environment. According to the latest U.S. Bureau of Labor Statistics (BLS) projections for 2025, roles related to biotechnology research, regulatory affairs, and artificial intelligence integration are expected to experience higher-than-average growth rates.

The stabilization observed in early 2025 can largely be attributed to strategic adjustments made by life sciences organizations in response to previous market volatility. Companies have increasingly shifted their employment strategies toward targeted hiring practices, focusing on acquiring highly specialized talent capable of addressing critical skill gaps, particularly in emerging technology areas and advanced therapeutic solutions.

The U.S. life sciences employment landscape of early 2025 demonstrates signs of careful recovery, with moderate yet meaningful growth anticipated for the remainder of the year. Strategic hiring, skill specialization, and cautious optimism define the industry's current trajectory, setting the stage for sustainable expansion and innovation throughout the rest of 2025 and beyond.

1. BioSpace. (2025). 2025 U.S. Life Sciences Employment Outlook Report.
2. Deloitte. (2025). 2025 Life Sciences Executive Outlook. Retrieved from <https://www.deloitte.com/us/en/insights/industry/health-care/life-sciences-and-health-care-industry-outlooks/2025-life-sciences-executive-outlook.html>
3. U.S. Bureau of Labor Statistics. (2025). Employment Projections. Retrieved from <https://www.bls.gov>

Hiring, Attrition & Layoffs

In early 2025, the life sciences sector is still in a state of recalibration. Companies are cautiously restarting recruitment, but opportunities remain limited, and competition is fierce.

Hiring Landscape: Limited Openings, Intense Demand

- According to BioSpace's Q1 2025 report, live job postings declined year-over-year, while applications per role significantly spiked—a clear indication of escalating competition and limited openings. [1]
- Labiotech echoes this: despite a rebound in select functions (like AI, regulatory, and biologics), many biotech firms remain in "survival mode," only hiring for mission-critical roles. [2]
- Though **59% of firms are recruiting**, as BioSpace's early 2025 hiring outlook indicates, **nearly 50% of unemployed professionals have been out of work for over six months** [3] —highlighting that while roles exist, landing them is especially challenging.



1. Blair, B. (2025, April). The brutal reality of the 2025 biotech job market (and how to survive it). LinkedIn.
2. Intuition Labs. (2025, April 19). The life sciences job market in 2025: Trends, skills, and outlook. Retrieved August 15, 2025
3. HubSpot. (2025, July 17). Q2 2025 job market report [PDF]. HubSpot.
4. Gabriel, A. (2025, July 10). The 5 largest biopharma layoffs of H1 2025. BioSpace.

Attrition Dynamics: Stabilization Amid Uncertainty

- **Attrition rates, high during 2023-24, are slowly normalizing.** Deloitte attributes this to ramped-up retention efforts, hybrid work options, and a more cautious workforce mindset in uncertain economic times.
- However, with layoffs still happening, attrition remains nuanced. While fewer professionals are leaving voluntarily, continuing instability may limit voluntary exits as employees prioritize job security over job hopping.

Layoffs: Deep Cuts Continuing Into 2025

- With streamlined budgets and slowed investment, hiring is being offset by cuts, creating a labor market that looks oversupplied on paper, but is actually highly constrained for quality roles.

Job cuts remain significant

13,470 life science roles lost in H1 2025

marking a

32% increase versus the same period in 2024.[4]



Synthesis: A Market Defined by Caution and Selectivity

- Hiring activity is restrained: fewer jobs posted, tighter budgets, and companies remaining wary of overexpansion.
- Talent competition is extreme: record-high applications are sweeping up limited openings in highly specialized fields.
- Layoffs continue, though targeted adjustments are more common than mass reductions—indicating that leaders are trying to preserve core capabilities.
- Voluntary attrition is moderating, but largely because professionals are choosing stability in uncertain times.

Implications for Talent Strategy

To navigate this difficult environment successfully, life sciences organizations must adopt a three-pronged approach:

1. Be surgically intentional
 - Focus hiring on critical, high-impact functions—like AI, regulatory, and advanced therapies—with compensation aligned to scarcity.
 - Reduce time-to-hire and improve candidate experience to secure top talent amid fierce competition.
2. Highlight employee value
 - Double down on retention strategies: accelerated career paths, expanded hybrid work options, and robust upskilling programs.
3. Prepare workforce redundancies
 - Anticipate ongoing cuts with transparent communication and flexible redeployment programs—avoiding both reactive layoffs and talent drain.

WORKFORCE

DEMOGRAPHICS & DE&I

PROGRESS

As of early 2025, the life sciences sector has continued to make strides in diversifying its workforce. Nearly half of U.S. life sciences employees are women, but leadership roles remain heavily skewed. The latest data shows **women occupy 48% of roles across the sector, but just 21% of executive positions.** Minority representation is still low: **Black professionals hold around 5% and Hispanic/Latino professionals 7% of leadership roles** – both figures showing minimal change since last year. [1]

How the Administration is Shaping DE&I Practices in Life Sciences

The executive orders issued earlier this year by President Trump, notably EOs 14151 and 14173, which restrict DE&I initiatives among federal contractors and grant recipients, have had meaningful impact on major life sciences organizations. While federal contractors must comply, many pharmaceutical and biotech companies are actively adjusting programs to maintain legal compliance yet preserve forward momentum on inclusion.

Meanwhile, clinical trial diversity remains a strong focus. **Firms like Eli Lilly, Bristol Myers Squibb, Sanofi, and Genentech confirm that efforts to diversify trial participants are ongoing and central to their mission,** even as compliance strategies evolve. [2]

Gender Breakdown Across Life Science



Gender Breakdown In Leadership Roles



1. Alvaro, D., Ph.D. (2025, March 6). Fighting for diversity and equity in pharma and biopharma. Pharma's Almanac. (David Alvaro, Ph.D., serves as Editor-in-Chief of Pharma's Almanac and is credited with authorship of this article.)
2. Incorvaia, D. (2025, February 27). As Trump targets DEI practices, 4 pharmas reaffirm commitment to diversifying clinical trials. Fierce Biotech.

Corporate Responses & Strategic Impacts

- Many companies have transitioned from public goals and quotas to embedded, analytics-driven approaches—shifting DE&I leadership into broader HR, legal, and compliance teams to align with legal frameworks, [1]
- Transparency audits have become common, with firms reviewing contracting, supplier pipelines, compensation bands, and training to ensure neutrality and compliance. This reflects a broader micro-shift: from visible, target-based programs toward culture- and process-driven DE&I models that emphasize inclusion without explicit quotas.
- Executive compensation is increasingly tied to DE&I outcomes such as hiring advancement and inclusive initiatives—especially where programs can be framed in business terms (e.g., improving clinical trial diversity, enhancing patient access).



Forecast: DE&I as Strategic Priority Despite Pressure

Although life sciences companies are reframing their DE&I strategies in response to federal policy changes, commitments remain robust:

- Diversity, equity, and inclusion continue to rank high on leadership agendas, viewed as essential to innovation, scientific rigor, and global competitiveness.
- Going into late 2025, companies are expected to accelerate indirect but impactful efforts—such as targeted career development, inclusive leadership training, and improved reporting metrics—rather than public targets or mandates.
- Clinical trial diversity remains non-negotiable, driving DE&I-linked decision-making in R&D and corporate communications.
- The legal risk environment is evolving; however, leading firms are adapting proactively—realigning, piloting approaches in less legally sensitive jurisdictions, and leveraging analytics to guide policy—rather than abandoning DE&I goals altogether.

1. Dunleavy, K. (2025, March 19). Amid Trump's push to abolish DEI, Roche and Novartis adjust hiring initiatives: reports. Fierce Pharma. Retrieved August 20, 2025

COMPENSATION & BENEFITS OUTLOOK

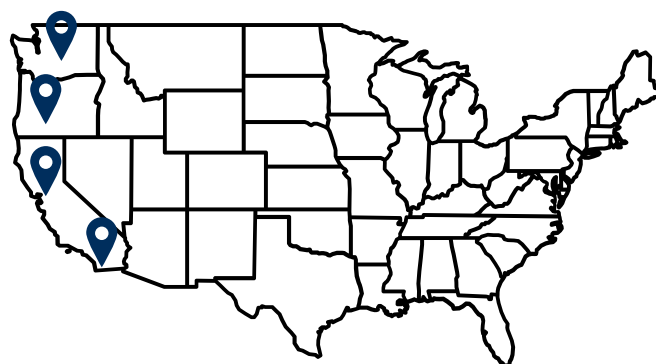
After a period of exceptional salary growth, the life sciences sector has settled into a more moderated compensation environment in 2025. Base salary increases are modest, equity programs are being recalibrated, and companies are sharpening their total rewards strategies to stay competitive yet prudent.

Current Compensation Trends (Early 2025)

- The **average base salary for life sciences professionals reached \$159,419 in 2024**, marking a **9% increase** from the previous year—the largest single-year rise since 2021. However, **growth has noticeably cooled**, with 2025 salary increases expected to moderate compared to prior years. [1]
- Bonus prevalence declined slightly: **69% of employees received a bonus in 2024, down from 71% in 2023**. Notably, **bonus amounts fell 9% year-over-year**, and **equity participation dropped from 36% to 33%**. [1]
- Top-paying regions remained life sciences hubs—with salaries highest in BioForest (Oregon/Washington, **~\$184K**), Biotech Bay (San Francisco, **~\$180K**), and Biotech Beach (San Diego, **~\$172K**). [2]



While 66% of professionals received raises in 2024, the majority (48%) saw only 1-5% increases, down from stronger increments in earlier cycles. [1]



1. BioSpace Insights. (2025, March). 2025 U.S. Life Sciences Salary Report [PDF]. BioSpace.
2. Gabriel, A. (2025, March 25). Average life sciences salaries up 9% in 2024, but bonuses and equity values drop: BioSpace report. BioSpace.

Equity & Incentive Strategy Adjustments

- A shift away from equity-heavy compensation is underway. **Equity participation among life sciences professionals declined to 33% in 2024, down from 39% the year prior.** [1]
- Many firms—especially startups and mid-market biotechs—are favoring cash-based retention bonuses, milestone-driven equity grants with deferred vesting, or updated long-term incentive plans to appeal to investors and signal financial health.



Outlook for the Remainder of 2025

- Salary budgets are being kept moderate. According to Pearl Meyer, **merit increase pools in 2025 are projected at ~4-4.5% for large companies and ~4.5-5% for smaller firms.** [2]
- Merit and market adjustments will skew toward specialized technical roles—AI, data science, regulatory affairs, and advanced therapies—where demand remains strong.
- With increased regulatory focus and ESG expectations, pay equity analysis is becoming standard, ensuring fair compensation across demographics.
- Benefits are gaining importance. BioSpace notes that **health insurance, PTO, and retirement benefits rank high among candidates.** Emerging perks include caregiving stipends and mental health services. [3]



1. BioSpace Insights. (2025, March). 2025 U.S. Life Sciences Salary Report [PDF]. BioSpace.
2. Newth, T., & James, R. (2024, September). Getting a jump on salary budgets at life sciences companies. Advisor Blog. Pearl Meyer & Partners.
3. Gabriel, A. (2025, March 25). Average life sciences salaries up 9% in 2024, but bonuses and equity values drop: BioSpace report. BioSpace.

SKILLS GAP & WORKFORCE DEVELOPMENT

Skills Demand Update (Early 2025)

Life sciences organizations are increasingly prioritizing multidisciplinary skill sets—especially where science intersects with technology:

- AI & Data Analytics are now central to innovation. A Randstad study found that **88% of life sciences leaders view AI as enabling higher-value work**, yet **83% report struggling to find necessary talent**, with **75% expecting skills shortages to worsen in 2025**. [1]
- Advanced therapeutic modalities—such as gene and cell therapies – are driving demand for technical scientists, biomanufacturing engineers, and regulatory experts proficient in IND/BLA filings. [2]
- Clinical operations and data roles remain benchmarked as critical hiring areas, particularly for managing complex trials and regulatory loads. [2]
- Additionally, industry reports emphasize the evolution of hiring methods: for AI and tech roles, skills-based hiring is on the rise, with job listings increasingly favoring specific certifications and competencies over formal degrees. [3]

1. Kovalev, A., Stefanac, N., & Rizoiu, M.-A. (2025). Skill-Driven Certification Pathways: Measuring Industry Training Impact on Graduate Employability (
2. Intuition Labs. (2025, April 19). The life sciences job market in 2025: Trends, skills, and outlook.
3. Bone, M., Ehlinger, E., & Stephany, F. (2023). Skills or Degree? The Rise of Skill-Based Hiring for AI and Green Jobs



Predicted Skills Shortages & Pipeline Risk Through 2025

- The Randstad report highlights that while digital and scientific expertise are essential, ongoing shortages persist and are forecasted to worsen through 2025. [1]
- **Deloitte's 2025 Life Sciences Executive Outlook shows that nearly all executives anticipate increased investment in digital and AI capabilities.** [2]
- Clinical and regulatory data roles continue to be bottlenecks, particularly in trial design, bioinformatics, and validation, indicating a narrowing talent pipeline.
- The Life Sciences Workforce Collaborative warns that long-term R&D success will require building capabilities now—reports show gaps between skill demand and new graduate availability. [3]



95% now regard these technologies as core strategic enablers, and 93% expect to increase investment throughout 2025 and beyond.

Use Cases for AI Tools Cited by Life Sciences Industry Executives [3]

- 1** Automation in Manufacturing and Operational Processes
- 2** Data Analytics and Decision Making
- 3** Drug Discovery and Development
- 4** Regulatory Compliance and Quality Control
- 5** Clinical Support



1. Randstad Enterprise. (2025, May 2). 2025 talent trends: life sciences & pharma [White paper]. Randstad Enterprise.
2. Majeed, M., & Jarvis, J. (2024, November 21). 2025 outlook: Life sciences leaders on data, digital and AI. ZS Insights.
3. Life Sciences Workforce Collaborative. (2025, June/July). 2025 National Life Sciences Workforce Trends Report [Report]. Life Sciences Workforce Collaborative.

Recommended Workforce Development Investments

Invest in AI/Data Science Upskilling

- Encourage internal upskilling through structured programs. For example, J&J launched mandatory generative AI training for 56,000 employees, while Merck's "GPTeal" platform equips over 50,000 staff. [1]
- Organizations should replicate this model with tiered learning tracks: basic AI fluency for all employees, plus advanced programs for data scientists, trial leaders, and manufacturing personnel.

Adopt Skills-Based Hiring Models

- Use competency-oriented job design—prioritizing certifications, portfolios, and project-based assessments (e.g., AI prompt evaluation, regulatory case studies) instead of just degrees. Education and AI certifications improve employability.[2]

Expand External Pipeline Partnerships

- Establish apprenticeships, bootcamps, and university collaborations to source qualified early-career professionals—especially in underserved areas like bioinformatics and automation engineering.
- Partner with regional training programs and initiatives like InnovATEBIO to attract a broader talent pool. [3]

Strengthen Cross-Functional Mobility

- Build internal mobility frameworks to transition bench scientists into digital, regulatory, or data roles, increasing talent flexibility. Experts recommend creating multidisciplinary career tracks to retain valuable staff. [4]

Track and Report Capability KPIs

- Implement workforce analytics to monitor skill levels, internal promotions, and training ROI—reinforcing accountability and guiding hiring budget shifts toward capability gaps.

1. McFarland, M. (2025, March – exact date unspecified). Pharmaceutical companies embrace AI in drug discovery efforts. Business Insider.
2. Doron, G., Genway, S., Roberts, M., & Jasti, S. (2023). New Horizons: Pioneering Pharmaceutical R&D with Generative AI from lab to the clinic – an industry perspective
3. Life Sciences Workforce Collaborative. (2025, June/July). 2025 National Life Sciences Workforce Trends Report [Report].
4. Deloitte Center for Health Solutions. (2024, December 10). 2025 life sciences executive outlook [Report]. Deloitte.



HYBRID & REMOTE WORK EVOLUTION

Current Hybrid Work Adoption Rates

The life sciences sector has firmly adopted a structured hybrid work model. According to the Flex Index report cited by BioSpace, 69% of biotech and healthcare firms offer work-location flexibility, with most mandating around three days per week onsite for eligible roles—aligning with broader cross-industry standards. [1]

- Roles that blend lab and analytical work are embracing flexibility: **companies offer 1-2 remote days per week for data analysts, clinical writers, and project managers, while essential on-site roles remain laboratory-based.**
- Fully remote positions persist but remain limited. They're primarily found in bioinformatics, software development, regulatory consulting, and clinical data monitoring, often filled through remote or contract arrangements by firms seeking niche expertise. [2]
- Demand-side surveys highlight that flexibility is a key recruiting lever: **83% of biostatisticians prefer hybrid work, and roles that offer it see up to 25% higher offer acceptance rates.** [3]

1. Gabriel, A. (2025, March 11). Return-to-office movement should give life sciences employers pause. BioSpace.
2. Intuition Labs. (2025, April 19). The life sciences job market in 2025: Trends, skills, and outlook.
3. Warman O'Brien. (2025, July 8). What's making life sciences talent choose your job offer in 2025? Insights [Blog post].
4. Gallup. (n.d.). Hybrid work. Global Indicator.
5. Owl Labs. (2025). 2025 predictions: The hybrid work revolution continues.
6. CBRE. (2025, June 16). U.S. life sciences talent trends 2025 [Report].

Executive Perspectives & Policy Trends

Leaders across life sciences recognize that productivity remains stable with hybrid models. **Broader research shows hybrid and fully remote workers perform on par with onsite staff when structured effectively.** [4]

C-suite and HR leaders are moving toward a **"3-2 hybrid model"** – three days onsite, two remote – as the default for flexible roles, following both internal outcomes and industry-wide practices. [5]

Companies are actively reshaping real estate strategy: CBRE reports that lab and R&D space per employee dropped to a three-year low in early 2025, reflecting densification and planned use of facilities under hybrid schedules. [6]



Forecast: Sustained Hybrid Models

Hybrid will remain the status quo

- Ongoing flexibility is expected to persist in late 2025, with firms refining their hybrid policies to balance operational needs, culture, and employee satisfaction.

Flexible role definition

- Flexible arrangements will be reserved for jobs that don't require frequent bench or site presence. Typically, lab, manufacturing, and trials-based positions will be more site-based, while analytical and office-based functions enjoy hybrid options.

Recruiting edge

- The ability to offer hybrid working—especially in specialized roles—is anticipated to raise recruitment success and remain a key differentiator in tight talent markets.

Continued office densification & reconfiguration

- As hybrid work solidifies, firms are optimizing lab and office floor plans—reducing per-employee space usage and redesigning labs to support collaboration during core days onsite.

Monitoring & adaptation

- HR and operational leaders are adopting policy analytics to track engagement, performance, and space utilization—adjusting hybrid models where mandatory office presence reduces employee morale or collaboration efficacy.



REGULATORY & MARKET SHIFTS

IMPACTING TALENT

Drug Pricing Reform: Strategic Relief and Hiring Implications

In April 2025, the White House amended the “pill penalty” provision of the Inflation Reduction Act (IRA), extending the Medicare price negotiation window for small-molecule drugs from nine to thirteen years—bringing them closer to the 13-year standard for biologics. While this move provides temporary relief for pharmaceutical companies focused on small-molecule therapies, it adds strategic complexity that is already influencing workforce needs.

Market access, pricing analytics, and Commercial strategy teams are being leaned on more heavily to adjust long-term forecasting models and build flexible go-to-market plans. These teams require talent who can keep pace with ongoing regulatory uncertainty, political shifts, and payer expectations, particularly as litigation around the IRA continues to unfold (Faegre Drinker, 2025).

Artificial Intelligence: The Regulatory Frontier Reshaping Talent Strategy

The FDA’s early 2025 draft guidance, Considerations for the Use of Artificial Intelligence to Support Regulatory Decision Making for Drug and Biological Products, introduced a new regulatory framework for integrating AI into every stage of product development. In tandem, the FDA released guidelines on AI-enabled device software, offering structure on premarket submissions, lifecycle updates, and risk-based management of AI tools used in medical devices (FDA, 2025).

These changes mark a turning point in how organizations must approach hiring. Talent strategies are expanding to include hybrid professionals, those who blend regulatory knowledge with fluency in machine learning, data governance, and algorithmic transparency.



Meanwhile, the FDA itself is modernizing. In May 2025, the agency announced the rollout of “Elsa,” its internal AI-powered document reviewer. **Elsa is expected to streamline NDA and BLA reviews by supporting regulatory scientists with content analysis** and cross-reference validation (Morgan Lewis, 2025).

These advancements will require companies to build AI governance teams with capabilities that include:

- Regulatory affairs and GxP compliance
- AI/ML auditability and model validation
- Cross-functional communication between data scientists, software engineers, and QA

HHS Restructuring: Public-Sector Shifts, Private-Sector Ripples

In March 2025, the HHS Secretary Robert F. Kennedy Jr. announced a sweeping reorganization of the U.S. Department of Health & Human Services. The initiative aimed to streamline HHS from 28 divisions to 15, consolidating key agencies—including HRSA and SAMHSA—into a new structure called the Administration for a Healthy America (AHA), and undertaking a workforce reduction of approximately 20,000 employees, with an expected 20% cut within FDA and CDC (HHS press release, April 2025).

By early April, the department had initiated the first phase of reduction in force (RIF), including **high-impact workforce reductions across FDA, CDC, and CMS (e.g., about 3,500 roles at FDA, ~300 at CMS)** aimed at consolidating administrative, IT, HR, procurement, and external affairs functions (Health Management Blog, April 2025; Mintz Analysis, April 2025; Latham & Watkins, April 2025).



Although the majority of cuts target non-scientific or support functions, many industry leaders are closely monitoring for possible delays in regulatory reviews or inspection scheduling. In response, life sciences firms are:

- Shifting to external advisory models, contracting former FDA personnel
- Outsourcing regulatory and CMC functions to consultants or CROs
- Upskilling existing staff to manage evolving submission processes

For roles adjacent to FDA operations, such as clinical compliance, regulatory operations, and post-market surveillance, this reorganization signals a forthcoming spike in demand and competition, as firms seek to offset federal capacity reduction with private-sector capabilities.

Key Talent Implications

Each regulatory shift is tied to tangible changes in how life sciences organizations structure and deploy their teams:

IRA “Pill Penalty” Adjustment

Expanded hiring in pricing, value strategy, market access

FDA AI Guidance

Emergence of hybrid regulatory-data governance roles

FDA’s “Elsa” Implementation

Internal upskilling in AI tools and digital submission processes

HHS Workforce Reductions

Increased demand for FDA-experienced consultants and contractors



EUROPEAN MARKET SPOTLIGHT

Employment & Hiring Trends

Early 2025 brings cautious optimism to Europe's life sciences job market. After a difficult 2024, the sector is seeing signs of stabilization and even moderate growth. According to Labiotech, many biotech firms are still operating in "survival mode," focusing hiring efforts on critical functions like clinical operations, regulatory affairs, and business development. [1]

That said, overall job openings are climbing:

- **+17% increase in biotech job listings** YOY across the EU, per the Q2 2025 European Life Sciences Workforce Index
- **Hiring remains targeted**, with highest demand in:
 - Translational research
 - Clinical bioinformatics
 - Biomanufacturing [2]

Regional breakdowns show hiring disparities:

- Germany & Switzerland: CMC and manufacturing talent in high demand
- UK & Netherlands: Focused on regulatory affairs, digital health, and data science
- Spain & Italy: Maintaining conservative hiring to stabilize internal teams

Outlook for Late 2025

Executives expect **10-15% hiring growth** through Q4, particularly in mid-sized biotechs in France, Belgium, and Scandinavia. The emphasis is on quality over quantity –selective, ROI-driven hiring that supports scale-up strategies without bloating teams.



1. Adam, J. (2025, April 9). The biotech job market in 2025: Still in survival mode? Labiotech.
2. Eurosciencejobs. (2025). The new war for talent in life sciences: Inside the 2025 biotech surge. Eurosciencejobs.

Regional Workforce Dynamics

The aging population across Europe presents a major talent challenge. EU data shows a rising share of workers aged 55+, especially in technical and regulatory roles where experience is vital. [1]

How Countries Are Responding:

- Germany's BioCampus Initiative: Upskills mid-career professionals in manufacturing and regulatory science
- University partnerships: Expanding biotech programs in France, Denmark, and the Netherlands
- Flexible employment models: Used to retain late-career professionals nearing retirement

DE&I Trends:

- 58% of life sciences firms in Europe now cite diversity and inclusion as a top priority. [2]
- Yet executive representation remains stagnant, with progress slowed by:
 - National labor law fragmentation
 - Language and cultural barriers
 - Uneven access to underrepresented talent pools

Talent Migration:

- The UK, Germany, and France are investing in skilled immigration:
 - Fast-tracked biotech visas
 - Global recruitment campaigns
- Example: Liverpool's biotech resurgence, driven by academic-industry partnerships and favorable cost structures [3]

Strategic Workforce Priorities for H2 2025:

- Retain experienced professionals through phased retirement programs
- Upskill internal teams in AI, digital health, and GMP
- Increase recruitment reach across borders and sectors

1. European Commission. (2025). Europe's life sciences opportunity: A strategic vision for global leadership [Report]. European Commission.
2. Deloitte Center for Health Solutions. (2024, December 10). 2025 life sciences executive outlook [Report]. Deloitte.
3. Sanders, K. (2025, January 12). From the Beatles to biologics - how Liverpool became a life science hotspot. The Guardian.



Regulatory & Market Outlook

Europe's evolving regulatory landscape is directly influencing how companies plan, staff, and grow.

HTA & Market Access

The rollout of EU HTA Regulation 2021/2282 is:

- Centralizing value assessments across member states
- Driving hiring in:
 - Health economics & outcomes research (HEOR)
 - Market access strategy
 - Reimbursement modeling

Data Privacy & Compliance

GDPR enforcement is intensifying in 2025, particularly around:

- Clinical trial data
- Cross-border data transfers
- This is boosting demand for:
 - Data privacy officers
 - Legal and compliance teams
 - Clinical operations professionals with regulatory expertise ([Deloitte, 2025])

Public Funding & Innovation

Government incentives are accelerating growth:

- UK: Life Sciences Innovative Manufacturing Fund
- France: Grants to scale GMP and bio-production

These initiatives are creating jobs in:

- Quality assurance
- Process development
- Advanced manufacturing



ASIA-PACIFIC MARKET SPOTLIGHT

Employment Growth & Regional Variations

Employment in Asia-Pacific's life sciences sector grew modestly in early 2025, demonstrating both resilience and opportunity across key markets.

According to the ManpowerGroup, the Q1 2025 **Net Employment Outlook (NEO) in APAC** stood at **+27%**, matching the Q4 2024 rate and only slightly down from Q1 2024. Within life sciences and healthcare, the NEO was **+31%**, led by strong employer sentiment in:

- **India: +40%**
- **Mainland China: +29%**
- **Singapore: +25%**
- **Hong Kong: +6%**. [1]

CBRE reports significant real estate investment tied to workforce demand, with **Beijing and Shanghai leading APAC** in life sciences lab space development (13.7M sq ft) and India emerging as a strategic manufacturing hub. [2]



Lessons by country:

- **China:** Biotech jobs are flourishing. **The Hang Seng Biotech Index is up 62% YTD**, reflecting renewed investor confidence, notably in cancer therapy licensing. [3]
- **India:** Clinical operations are growing rapidly. **Parexel plans to hire 2,000+ in the next 3-5 years** as India becomes a preferred global trial hub. [4]
- **Japan & Singapore:** These markets are focusing on scaling medtech and digital health, with both governments backing innovation through funding and regulation.

Hiring outlook for late 2025 is positive:

- **Regional biotech and manufacturing hiring is projected to grow moderately**, 10-20% forecasted across APAC, particularly in China, India, and Singapore.
- Funding in immunotherapy, AI-enabled therapeutics, and advanced biologics is accelerating, driving demand in research, clinical ops, and technical manufacturing roles.

1. Cushman & Wakefield. (2025, March). March 2025 life sciences update [Report]. Cushman & Wakefield. Retrieved
2. CBRE. (2025, April 22). Rapid expansion of international life sciences markets with strong growth in China [Press release]. CBRE.
3. [Author Unknown]. (2025, April 28). China biotech shares surge as Big Pharma looks to license cancer treatments. Financial Times.
4. Satija, B., & Tandon, K. (2025, February 26). India on the verge of becoming clinical trials hub, Parexel executive says. Reuters.

Workforce Trends & Skills Shortages

Despite growth, the APAC talent pipeline remains under strain—especially in advanced skills.

A BioSpectrum Asia report highlights the rising gap in cell and gene therapy expertise, as well as digital health and AI-readiness across the region.[1]

Contributing factors:

- Varied regulatory maturity across APAC complicates multicountry trials and standards-driven hiring. [2]
- Clinical trial capacity is being tested; China's NMPA is consulting on halving review times to 30 days for rare or innovative therapies, increasing hiring demand in regulatory and clinical teams. [3]
- India is working to streamline trial regulations and expand ethical compliance amid rapid growth in trial volume and diversity. [4]

Key strategic responses from employers:

- Creating specialized clinical research roles to meet emerging trial standards.
- Expanding regulatory affairs teams with local expertise in NMPA, CDSCO, PMDA, and HSA guidelines.

1. Siddiqui, A. (2025, July 1). Medical advances soar with APAC's clinical trial growth. BioSpectrum Asia.
2. Gumafelix, E. (2025, May 30). Overcoming regulatory challenges in APAC cell and gene therapy development. IQVIA Asia Pacific Insights [Blog post].
3. Gross, A. (2025, July 7). China moves to expedite clinical trials with 30-day review proposal. Pacific Bridge Medical.
4. Satija, B., Tandon, K., & Sadam, R. (2025, February 27). Healthcare experts urge India to rewrite clinical trial rules to boost global market share. Reuters.
5. ManpowerGroup. (2024, December 10). APAC hiring intentions hold steady as employers maintain measured outlook [Press release].

Mobility trends:

- Professionals are moving regionally—especially from China to Singapore or Japan for digital health roles.
- Global CROs like Parexel are investing heavily in India to scale trial capacity.[5]
- Governments are investing in workforce readiness via subsidies, bioeconomy zones, and licensing partnership hubs.





Regulatory & Economic Influences

The regulatory and economic environment in APAC is a key driver of labor demand:

- China: The NMPA's push to accelerate trial approvals (from 60 to 30 days) for priority drug types signals increased hiring in regulatory project and compliance roles. [1]
- India: Regulatory challenges persist, but reforms are underway. Industry experts are calling for faster processes and expanded trial site readiness. [2]
- Regional integration: Lack of harmonized standards across APAC increases demand for local regulatory specialists, particularly in cell and gene therapeutics. [3]

Broader economic and geopolitical factors:

- China's biotech resurgence—fueled by investor optimism and licensing deals—continues despite geopolitical risk. [4]
- India is growing as a trial destination, drawing sponsors seeking diversification from China due to cost, ethics, and regulatory trust.
- Governments across APAC are incentivizing medtech and biotech hubs; Singapore, Tokyo, and Sydney are pushing global competitiveness via public funding and lab infrastructure.

1. Angus Liu. (2025, June 16). China proposes shorter clinical trial reviews in efforts to accelerate drug development. Fierce Biotech.
2. Satija, B., Tandon, K., & Sadam, R. (2025, February 27). Healthcare experts urge India to rewrite clinical trial rules to boost global market share. Reuters.
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