



FINDING HIGH-SKILLED TALENT IN A GLOBAL PANDEMIC

Pharmaceutical and life sciences industries
access to the global workforce



A powerful
and balanced
voice for business

Acknowledgments

The present publication is published by the Business Advisory Group on Migration, a network of employer organisations and businesses which advocate for efficient and effective migration frameworks that respond to today's labour market realities. The Business Advisory Group on Migration brings the voice of business to global migration debates, including at the Global Forum on Migration and Development (GFMD) since 2016, and contributes to the implementation of the Global Compact for safe, orderly, and regular migration (GCM), an agreement adopted by United Nations members in 2018.

Participation in the Business Advisory Group is open to all companies and business associations that share its goal: promote more transparent, effective, and humane migration policies, taking into account labour market needs.

The Business Advisory Group on Migration is housed at the International Organisation of Employers (IOE), the largest network of the private sector in the world, which vision is to create a sustainable economic environment around the world, in collaboration with its members and partners, that promotes free enterprise and is fair and beneficial to both business and society.

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Introduction

Employers have long cited the ability to access and move top world talent to where jobs demand as a core factor in driving economic growth and job creation. Governments with immigration policies that facilitate global talent mobility better position their businesses, workforces, and economies to compete in the global marketplace.

Before the pandemic, countries were increasingly turning inward and enacting more restrictive immigration policies. Employers were reporting more difficulty in recruiting, relocating, and retaining the global talent they needed to drive growth and innovation. As COVID-19 rapidly spread worldwide in 2020, the cross-border flow of high-skilled workforce virtually ceased.

This research illustrates the effect the pandemic has had on one sector's ability to access high-skilled talent needed to keep the economy going and power recovery. To that end, the pharmaceutical and life sciences industries provided a highly relevant case study. If ever a sector needed access to a workforce skilled for the task, it is the one charged with leading the development, manufacturing, and distribution of safe and effective vaccines and therapeutics.

While much of the research and development in the industry is conducted in North America, pharmaceutical and life science companies rely on highly specialized manufacturing, logistics, and distribution facilities in Latin America, Europe, Africa, Asia Pacific, and the Middle East. To operate, these facilities require not only scientists but experienced industry professionals in management, research and development, manufacturing, sales and distribution, and information technology. Without exception, these skills are crossing borders as talent moves where it is required.

IOE and Worldwide ERC® launched this research initiative to document the importance of cross-border relocations to fill local high-skilled workforce gaps, to identify specific skills that are difficult to source in different regions, and to highlight government policies that have made workforce mobility more challenging.

This study is based on the participation of 153 Chief Human Resources Officers, HR Directors, and other senior HR leaders in the pharmaceutical and life science industries who have a direct role in their organization's global talent strategies. Key findings of the study include:

The skills gap is real.

Just 43% of companies are finding sufficient local talent to meet their needs. Two-thirds (66%) of companies will need to relocate staff and new hires to meet needs, even as 61% of companies will simultaneously take advantage of remote work capabilities.

Borders must be crossed to fill the gap.

The industry relies on a high volume of international transfers to move skills to the work. The top priority for pharmaceutical and life science companies is to recruit top talent regardless of origin. More than a third of companies relocated more than 500 staff members across regional borders.

Governments should create safe pathways to talent, not erect barriers.

In the pandemic, the most significant obstacles to global workforce mobility have been the governments charged with the safety of their citizens. Visa and immigration processes were the leading sources of friction, with local registrations and social services close behind.

The bottom line is that, like many industries today, the pharmaceutical and life science sector needs access to global talent to operate international facilities that solve global challenges. In developing, manufacturing, and distributing a vaccine for COVID-19, the stakes for access to high-skilled talent could not be higher.

Global Talent Footprint and the COVID-19 Response

The pharmaceutical and life sciences industries operate in multiple capacities throughout the world. However, most employees work in North America in every functional group, with the highest representation in research and development—a significant function in the war against COVID-19 and its variant forms. North America dominates the industry, with the next highest percentages in the region being: 46% in manufacturing, 44% in information technology, 42% in sales and distribution, and 40% in management.

Global Location of Functions or Operations in Pharmaceutical and Life Science

	Research and Development	Manufacturing	Sales and Distribution	Management	Information Technology	Other Support	None
North America (US and Canada)	73%	46%	42%	40%	44%	10%	0%
Latin America	18%	37%	29%	25%	20%	5%	17%
Europe	16%	20%	32%	21%	19%	7%	23%
Middle East	22%	20%	23%	21%	25%	3%	27%
Africa	18%	23%	14%	18%	15%	9%	32%
Asia Pacific	18%	23%	21%	23%	27%	8%	29%

Note: total percentages may not equal 100%.

The majority of industry participants (90%) are involved in developing, manufacturing, or distributing COVID-19 vaccines. With such vital work at stake, given the nature of the pandemic and its variants, the industry must overcome the challenges in finding and keeping skilled professionals, who often must be mobile, crossing borders where necessary. But to achieve their goals in allowing the movement of talent across borders, local governments must participate in removing or minimizing the obstacles.

Challenges Pre-Pandemic with Cross-Border Immigration

Respondents reported that before the urgency demanded by the pandemic, their organizations used cross-border relocations to facilitate their business activities and keep their operations running as smoothly as possible. All respondents transferred substantial numbers of employees to all regions, across functional areas represented in the survey, mainly to recruit top global talent or fill local skills gaps.

In the year prior to the pandemic, participants continued to conduct numerous cross-border employee relocations, transfers, assignments, or new hires. In the order of priority, the reasons cited by participants for such movement of talent are as follows:

1. Recruit top global talent regardless of the individual's country of origin, thereby acquiring the most skilled and expert professionals.
2. Fill local skill gaps with the requisite talent; a priority shared with the need to transfer corporate knowledge and culture to facilities in other locations.
3. Open new markets to promote, sell, and distribute their products.
4. Expand existing markets in areas that would support the increase.

The majority of companies reported between 101 and 500 such relocations, followed closely by 26-100. Very few organizations conducted under 25 such actions, signifying the increased need for mobility of skills to position talent where needed.

Number of Relocations	Percentage
0-25	2%
26-100	30%
101-500	33%
501-1,000	24%
1,001 +	11%

Note: total percentages may not equal 100%.

All functions included in the study indicated that the participants relocated individuals across regional borders. The research and development function, along with management, cited the highest percentages for relocation, with North America in the lead (67%). The next highest percentages for relocation of talent were in management (47%), sales and distribution (43%), manufacturing (39%), and information technology (36%).

Job Functions or Operations Filled by Region with Cross-Border Relocations

	Research and Development	Manufacturing	Sales and Distribution	Management	Information Technology	Other Support	None
North America (US and Canada)	67%	39%	43%	47%	36%	8%	0%
Latin America	23%	39%	29%	23%	23%	7%	14%
Europe	13%	23%	28%	21%	18%	9%	23%
Middle East	18%	21%	24%	23%	24%	5%	28%
Africa	22%	20%	20%	15%	18%	5%	32%
Asia Pacific	15%	28%	18%	27%	25%	9%	26%

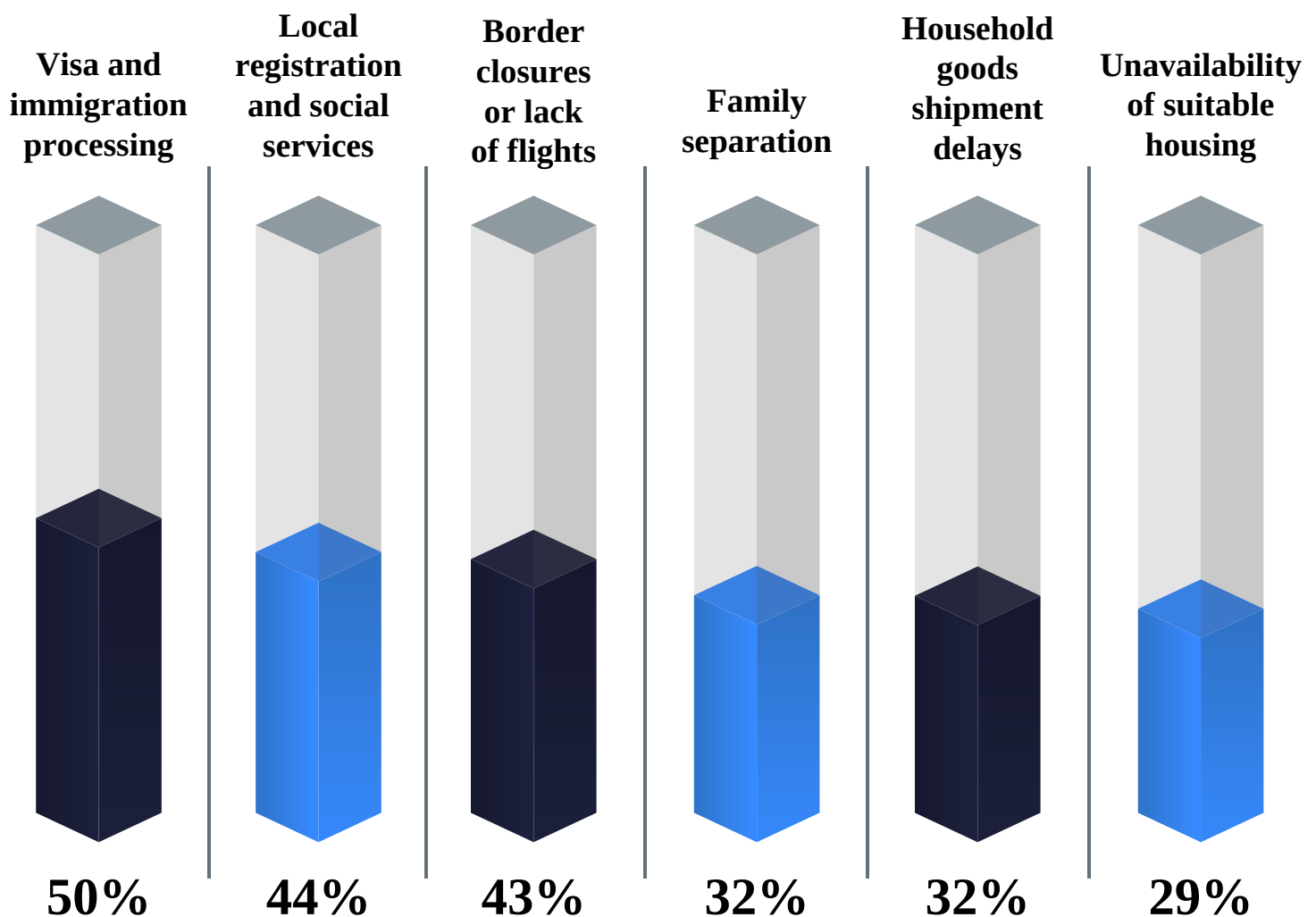
Note: total percentages may not equal 100%.

Finding highly skilled talent is difficult in the best times, but particularly challenging during an ongoing worldwide pandemic. That said, the sources of talent are diverse. Most participants sought highly skilled individuals in North America (98%), followed by Europe (27%), Latin America (25%), and Asia Pacific (14%). The least percentage of new hires appeared in the Middle East (9%) and Africa (6%).

But still, the industry faced difficulties in recruiting local talent in North America (28%), followed by Latin America (16%) and Europe (12%). The remaining regions are comparable: Asia Pacific (4%), Africa (3%), and the Middle East (2%).

Pandemic-Era Challenges and Access to Talent - a Review of Public Policies

Government responses to the health crisis were largely responsible for driving the challenges faced by the industry. Of the obstacles to cross-border movement of talent, participants ranked visa and immigration processing (50%) as the leading issue, followed by local registration and social services (44%), then border closures or lack of flights (43%).



In an effort to resolve these matters, the vast majority (91%) of organizational leadership teams continue to hold discussions and cooperate with government representatives to overcome hurdles. With the removal or minimization of obstacles, the industry can go forward with finding and relocating highly skilled experts, so crucial to the struggle against COVID-19 and the future of global health and wellness.

Despite the continuing obstacles resulting from the pandemic, respondents still successfully moved large numbers of employees across borders to fill critical roles. The need was great, and the effort to meet that need proved demanding in terms of resources and innovation.

However, most participants (88%) managed to initiate new cross-border relocations for a number of key functions or operations. Sharing first place were two critical functions: research and development, along with manufacturing (both at 48%). Sales and distribution (38%) ranked next, then information technology (36%), and finally management (35%).

Specific Hiring Challenges.

When asked specifically about how the pandemic impacted hiring at their organization, many respondents cited the difficulties of hiring individuals through a virtual process. According to one participant, “We can’t meet people directly, so sometimes we miss good talent.” Another confirmed the thought: “It is tough to find good talent at this time; everyone has a fear of COVID, and we are not able to conduct physical interviews.”

Beyond the lack of face-to-face exchanges and interviews proving detrimental, hiring staff are also “spending more time in assessing candidates’ capability to respond skillfully to change and uncertainty.” Another participant agreed: “Our company can’t decide to quickly hire talents without screening them well in person.” With regard to speed, one participant cited the “need to adapt quickly and easily to ensure the efficacy of fully virtual recruiting.”

While some companies initiated an internal mobility program rather than resort to external hiring, others adapted new technology or simply moved to an online platform for hiring. One respondent explained that they were “discovering a global talent pool in processes that have not been used previously.” And finally, one respondent summed up their experience, which has likely been shared by many in the industry: “We have faced a loss in qualified candidates.”

Requisite Skills in Demand.

In conducting the hiring process to fill talent gaps, participants discussed the skills that they require for optimal operation. The following skills and know-how were in the greatest demand:

- Management skills, for example, keeping track of time and money, assisting people in keeping work organized, and so on (68%)
- Technical skills, such as that required to operate computers, machinery, and equipment—or other specialized skill sets, such as scientific and mathematical expertise (66%)

- People skills, or interpersonal skills, that might include negotiating, persuading, and coordinating with coworkers, or helping people to work well with others (57%)
- Basic skills, such as listening, speaking, reading, and writing (47%)

Of the skills needed by the industry to fulfill its urgent role, all are the most difficult to source in North America. Basic skills ranked highest (61%), followed by technical skills (49%), management skills (43%), and people skills (39%).

Difficulty in Sourcing Skills by Region

	Basic Skills	People Skills	Management Skills	Technical Skills
North America (US and Canada)	61%	39%	43%	49%
Latin America	28%	38%	29%	28%
Europe	18%	29%	33%	24%
Middle East	18%	27%	29%	25%
Africa	23%	23%	29%	22%
Asia Pacific	23%	26%	29%	28%

Note: total percentages may not equal 100%.

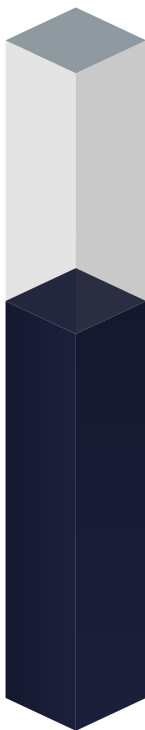
Going forward, finding and acquiring highly skilled individuals with the expertise required in a specific position—whether that involves technical or interpersonal skills or a combination—continues to be an ongoing effort.

Post-Pandemic Global Talent Growth Opportunities and Benefits

Looking ahead to future growth opportunities in the post-pandemic world, the industry is optimistic about investment and market prospects in all regions of the world, with particular emphasis on North America (97%). Europe (24%) ranked next highest, followed by Latin America (22%), the Middle East (14%), Asia Pacific (10%), and Africa (8%).

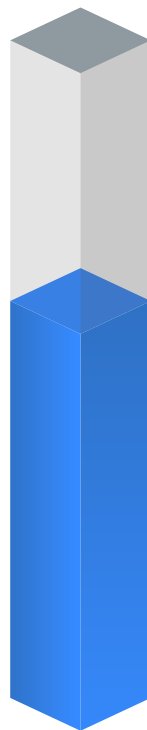
The majority of participants (88%) believe that these investments will require the organization to support a greater number of cross-border relocations. For those who believe that it will not require many relocations, they cite the following reasons:

There is sufficient local talent to meet our needs



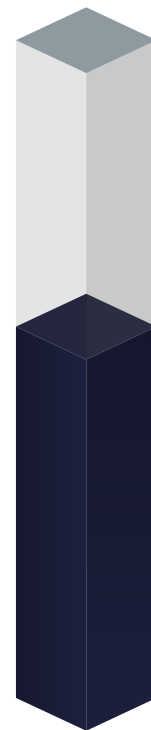
67%

We will redirect relocation from other locations, keeping the overall volume of movement the same



67%

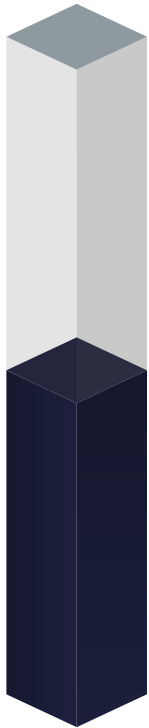
Employees can work remotely from other locations



61%

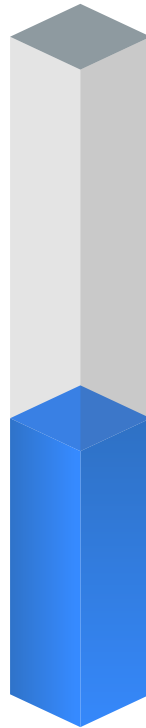
In fact, the majority (92%) anticipate that future investment will create opportunities for local workers, with only 1% not sure of the outcome. Anticipated opportunities included the following:

The goal is to hire and train local talent for all roles



49%

There will be a mix of local and global hires for all roles



33%

Some roles will continue to be filled by global talent, while others will be reserved for local hires



18%

In the future, governments can help to facilitate the movement of talent across borders to fill these skill gaps by undertaking the following actions proposed by participants:

- Promote the movement of talent to fill skills that define our organization's future goals.
- Ensure flexibility to build and manage the business in times of crisis.

Governments can also support the efforts by employers to improve the skills of existing talent in the domestic workforce through such suggestions cited by participants, for example:

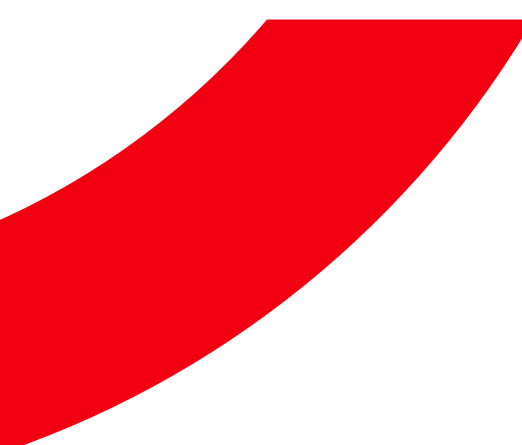
- Offer training programs to equip job seekers with industry-relevant skills.
- Introduce initiatives and skill enhancement programs.
- Develop employment skills aimed at function-specific skills, whether technical, vocational, or academic, as well as problem-solving and idea communication, plus retraining and upskilling programs.

Looking Ahead

Through this research, IOE and Worldwide ERC® aimed to provide a global, comprehensive look at where pharmaceutical and life sciences companies are headed in their effort to find highly skilled talent, wherever in the world they are located. The industry has great need for specific expertise, which is in high demand, particularly during a global pandemic. Highly skilled, cross-border immigration is a crucial piece of the industry's talent strategies—whether to expand their business; invest in new markets and regions; research new products to meet future health scenarios; optimize distribution systems for vital supplies, or other goals.

As the world continues to grapple with COVID-19 and its still-evolving variants, Chief Human Resources Officers, HR Directors, and other senior HR leaders of the pharmaceutical and life sciences industries have demonstrated their ability to adapt and rise to meet the challenges of these unprecedented times. As evident in recent months, their work is critical—and remains so—in the fight against COVID-19 and other diseases that afflict the world's populations. With the support and cooperation of government agencies, through a joint effort to reduce or resolve the challenges that hinder cross-border relocations, the industry can overcome the issues and supply the world with much-needed vaccines, medications, and alternative treatments. But success depends, as always, on having the right expertise in the right place at the right time.

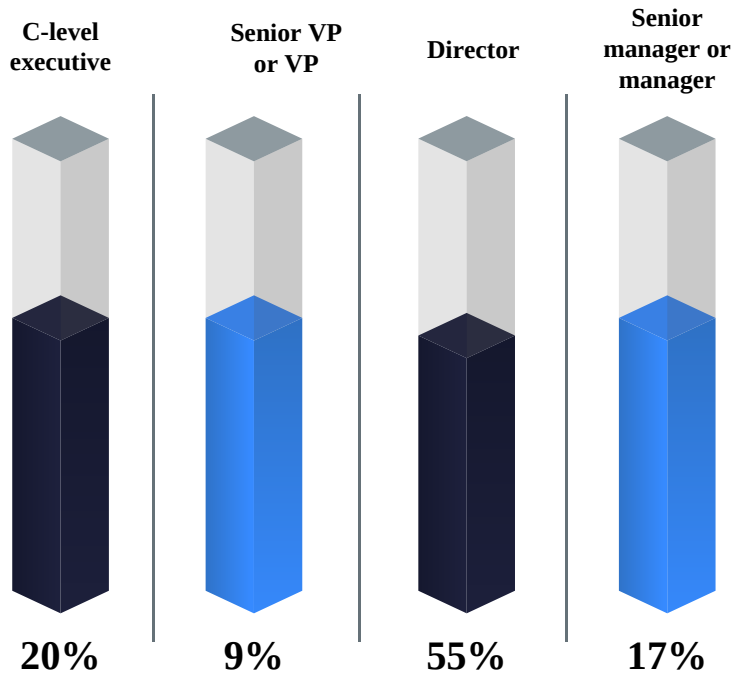
A public policy framework that supports work from anywhere, is agile, and is attentive to the needs of employers and workers should guide governments as they review, reform, and create immigration policies for the near future and beyond.



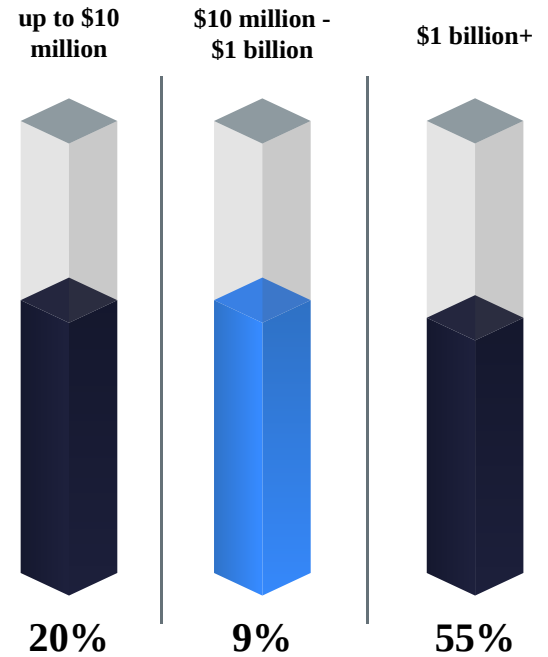
Methodology and Demographics

To better understand and gain insight into how Chief Human Resources Officers, HR Directors, and other senior HR leaders in the pharmaceutical and life sciences industries are addressing the challenges in finding highly skilled talent, Worldwide ERC® conducted a survey from June 16, 2021 to June 26, 2021. The following data comes from 153 senior HR leaders, with 61% headquartered in the United States and 39% headquartered in Canada.

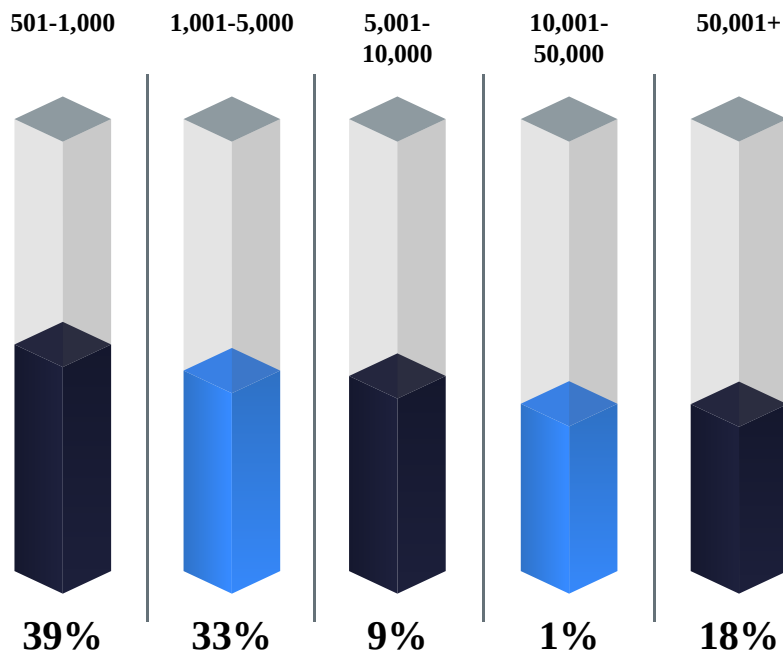
Positions held by participants



Revenue



Employee headcount





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