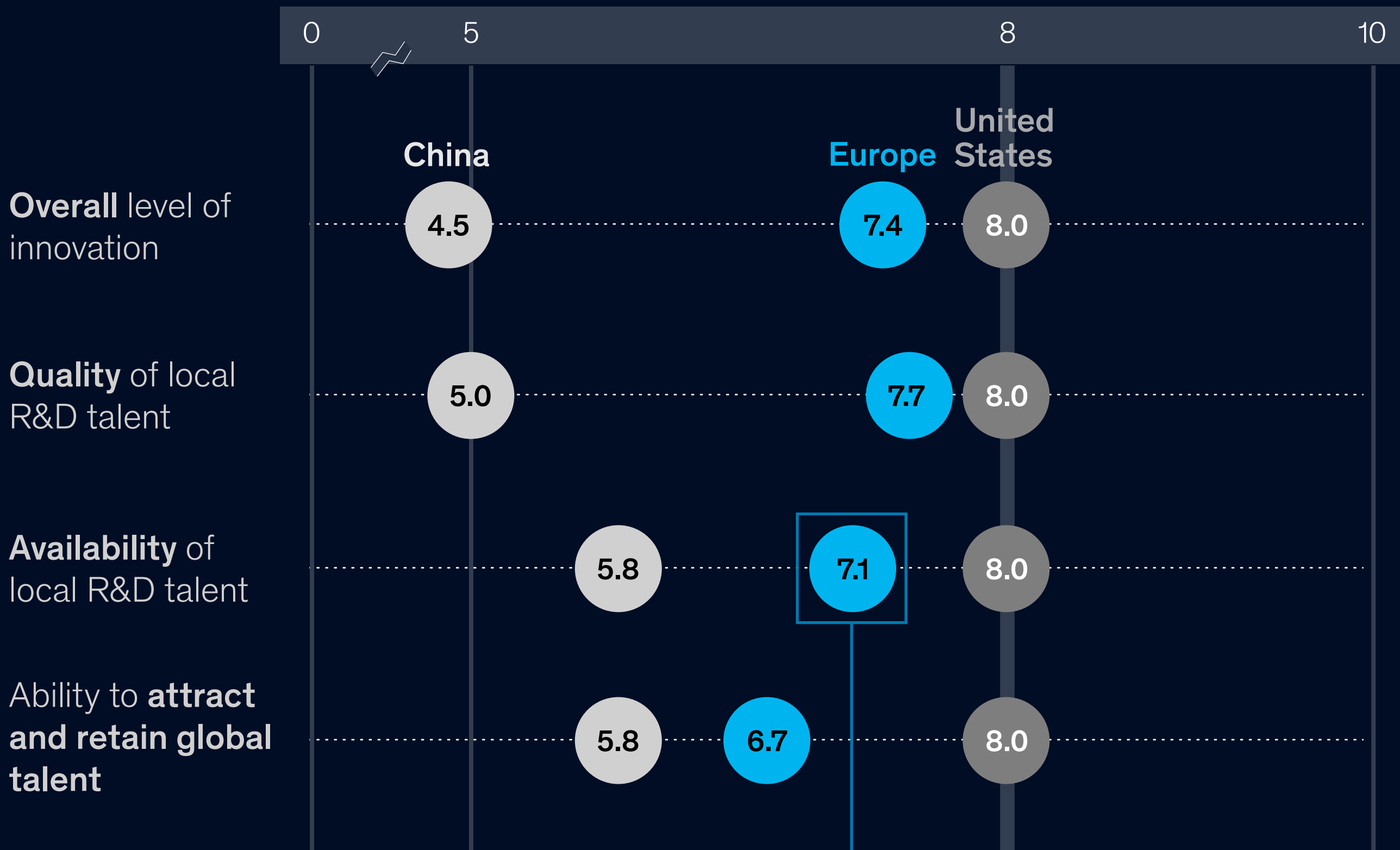


Building the European biotech sector with world-class talent

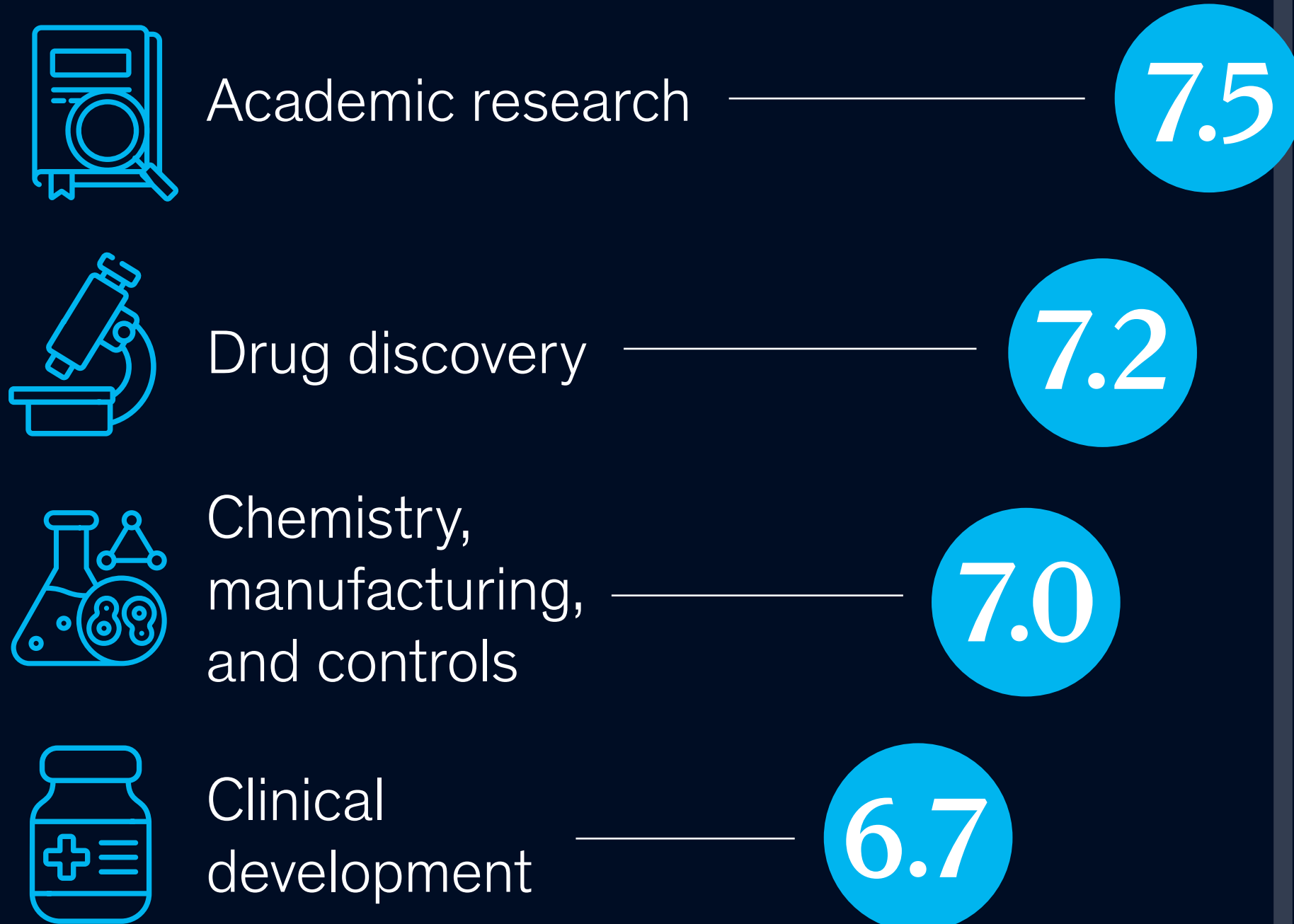
Europe has top-rated R&D talent

Based on a survey where respondents answered on a scale of 1 to 10.

The United States was assigned a value of 8 across the board to serve as a reference peg point for China's and Europe's ratings.



Top recruiting challenges by skill sets based on survey responses



Sources: Expert surveys and interviews, including the 2018 China Drug Innovation Index from the China Healthcare Summit 2018 McKinsey report, *Building Bridges to Innovation*