



AN INDUSTRY BRIEFING FROM GRAIL

What's Changing in the Specialist Bench You're Building

Your senior regulatory leads are watching. Your junior pathway has quietly collapsed. Your 2030 specialist bench is being shaped by decisions you were not invited to. A briefing for Chief Human Resources Officers at mid-market European specialty biotech, CDMO, and diagnostic services firms.

PREPARED BY

Johan Grönstedt · GRAIL

FOR

European mid-market specialty
biotech people leaders

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Every CHRO at a mid-sized European specialty biotech has had the same Tuesday. Three things in the inbox. Your Head of Talent forwarded Friday's resignation from your senior regulatory affairs lead, the one who carried the lead programme's IND narrative for four years, the one named in the partnership-diligence pack you sent to a major sponsor on Friday. She went to an AI-native discovery firm offering current-decade-high cash and pre-IPO equity. Your CFO attached the latest Mercer engagement report to Thursday's GMT calendar invite, with a single-line note: "need your read before this lands with the board." Your CEO forwarded a question from the chair: "the diligence pack flagged key-person dependency on three programmes. Where are we on succession?"

You have held this seat for four years. The pattern used to be simple. Hire the right specialists. Train them well. Keep the works council in the loop. Protect the senior bench through equity and milestone alignment. The business was understandable.

Something changed. Your junior pathway compressed quietly through 2024 and 2025 because the analyst-prep, submission-drafting, literature-monitoring, and CMC-documentation work that used to train juniors into senior regulatory and CMC specialists is running on agents. Your A-players are reading every AI deployment as a signal about whether the firm is being redesigned around them or away from them. Your senior regulatory lead who resigned on Friday was not the first warning. Your thriving signal slipped at the last engagement survey and nobody reconstructed the programme-team-level story. Your works council has stacked questions about AI-augmented systems in recruiting and clinical-data work that have not been answered.

You do not have a retention problem. You have a pathway problem. Your firm's workforce-architecture is being written every week in decisions you were not invited to. The question is not whether to have one. It is whose handwriting the one you already have is in. Your senior specialists read it last month. Your works council is decoding it right now. Your 2030 senior-specialist bench is being shaped by decisions that look like budget items and are actually architecture.

This briefing covers what is happening in your sector, what it means for the people function you run, and the three questions your leadership team should answer before the next GMT.

Specialty biotech just lost the apprenticeship that ran it for a decade

For the last decade, the architecture of the European specialty biotech, CDMO, and diagnostic services workforce ran on a quiet exchange. Junior regulatory associates drafted eCTD sections under a senior regulatory lead. Junior CMC scientists assembled tech-transfer packages under a senior CMC architect. Junior clinical operations associates built first-pass trial protocols under a senior medical director. Over eight to fifteen years the best juniors became seniors, and the firm's regulatory and CMC bench compounded. That apprenticeship work is fifty to seventy percent of the routine output of a development-stage organisation. It is also the layer most exposed to AI.

The AI-native discovery firms in your category are not experimenting. Recursion, Insilico Medicine, Iktos, and Isomorphic Labs are recruiting your senior regulatory and CMC specialists because they need development-and-submission judgement they cannot grow internally. Specialist-fund distributions at decade lows tighten the equity-and-milestone retention envelope at the moment those competitor offers intensify. AI is compressing early discovery and pulling more programmes through the translational-to-clinical bridge simultaneously, which puts further capacity pressure on the regulatory, clinical-development, and CMC specialists who were already scarce. Every mid-market firm is making the same quiet decision about the junior layer this year. Almost none are rebuilding the pathway.

Your apprenticeship ran for a decade on routine analyst-prep and submission-drafting work that is no longer yours to give. The question is whether the pathway gets rebuilt before the 2030 senior opening has no internal candidate.

Partnership diligence has the iron grip. The standard question now includes specific probes on programme-knowledge continuity and key-person dependency. The CHRO who cannot show the firm has institutional regulatory-and-CMC memory rather than three senior heads carrying it walks the chair into a valuation conversation that costs more than the recovery package would. Your senior specialists watch which way the firm moves. With AI-native capital available and the recruitment market hot, the lift-out risk is higher than it has been in five years. The CEO who cannot articulate a compelling firm-level workforce architecture risks losing the seniors whose departure would be fatal.

Your people function is feeling it every day

Your talent acquisition. Your senior regulatory lead resigned on Friday. Your best lateral recruit of the last two quarters came from an AI-native discovery firm who read your firm's hesitation as opportunity. Your graduate offer-accept rate is holding, but the best biotech postdocs are asking in second-round interviews what your AI-and-workforce strategy is, and "we are thinking about it" is not an answer that wins them. Senior specialists do not quit on the spot. They start looking quietly. By the time retention moves in the dashboard, they have already decided.

Your L&D. Your firm's L&D budget is allocated to compliance modules, GxP refresh training, and an annual scientific conference. None of it is designed for continuous in-the-work coaching, agent-paired practice on real submission packages, or deliberate cohort rotation across programmes. Two populations are forming inside your firm whether you designed it or not. The top decile is using AI daily on first-pass eCTD authoring, regulatory precedent search, and CMC-documentation drafts, and they are building judgement that compounds weekly. The rest is practicing not-knowing. Both groups are becoming who they practice being.

Your compensation architecture. Your equity-and-milestone retention package was designed in 2022 when specialist-fund capital was abundant and your senior specialists' next-best alternative was another European mid-market biotech. The next-best alternative is now an AI-native discovery firm offering current-decade-high cash and pre-IPO equity. Your senior regulatory leads see the math earlier than your comp committee does. With pathway-pressure and AI-native recruiting intensifying, your seniors are reading every quarter's compensation run for a signal about whether the firm is being redesigned around them or without them.

Your employee relations and works council. Your works council in DACH (or your equivalent representation body in the Nordics) has stacked questions about AI-augmented systems in recruiting, performance management, and clinical-data work that shipped without HR in the room. The regulatory load on people functions has stacked: AI literacy documentation, high-risk recruiting and performance systems, framework-agreement openings, data-minimisation in agentic submission tools. None of it shows up on the cost-reduction deck on the CFO's desk. All of it lands on you.

Your workforce planning and succession. Your 2030 senior-specialist bench has six names on it. Three of them came through the analyst-prep and submission-drafting work that agents have already absorbed. You have not replaced the pathway. The external senior hire in 2030 will cost a thirty to forty percent premium, take eighteen to twenty-four months to integrate, and bring the previous firm's regulatory-and-CMC context. On a long enough horizon, the CHRO who let the junior pathway collapse in 2024 is the CHRO the board blames for the 2031 partnership-diligence call that flags key-person dependency.

The apprenticeship clock was always the architecture

Your sector is repricing the senior-specialist bench because the analyst-prep and submission-drafting layer is compressing. Your people function is stretched because every deployment decision, every budget line, every framework-agreement opening is a fragment of a workforce-architecture that somebody is writing and you are not always in the room when they do. Same force, two altitudes. But there is a third thing happening that most mid-market biotech CHROs have not named yet.

Your firm's workforce-architecture is being written every week. The AI literacy programme procured in regulatory operations. The headcount line cut in clinical development. The framework agreement opened without HR in the room. Your senior regulatory leads read the handwriting last month. Your CMC architects are decoding it right now. Your 2030 senior-specialist bench is being shaped by decisions that look like budget items and are actually architecture.

Medical residency works because the resident sits next to the attending on the hardest case from week one. The workup happens in the room, the judgement-call exposure compounds daily, and graduation is earned on demonstrated judgement, not on time-in-seat. Your firm's senior regulatory and CMC apprenticeship used to run on the same mechanism. It got broken when juniors stopped doing the work that put them in the room. That mechanism is available to your firm again for the first time in a decade, because agents make it affordable to put juniors next to seniors on real submission work from week one, instead of next to first-draft binders for two years.

You can tell which camp a firm is in from a single question. Of your successors on the 2030 list, which ones came through work that still exists? Most mid-market biotechs cannot answer. The ones that can have already rebuilt the pathway.

You have twelve to eighteen months to author the answer deliberately, or the cost-reduction deck on the CFO's desk writes it for you. Same technology. Same workforce. Different outcome depending on whose handwriting the answer is in.

What most firms are doing. What the winners are doing instead.

Every CHRO has had the AI conversation. Most are making the same four decisions. A smaller group is making different ones.

THE DEFAULT PATH

Restrict AI tools across the regulatory bench for compliance safety

Most staff use AI anyway. Senior specialists read restriction as mistrust and start looking quietly.

Cut the junior layer to extend runway-to-readout

Cheaper function in Q1. Empty senior bench by 2031. External senior hire at a premium the firm cannot absorb.

Announce firm-wide redesign to the leadership team for vote

Senior specialists whose practice gets compressed have the power to slow it. Lift-out risk rises.

Ship the annual engagement survey as your main HR deliverable

Your cadence is slower than the CFO's quarterly deck. Cost-reduction writes the workforce answer. You inherit the damage.

THE WINNERS' PATH

Publish three rules that defend real trust

Routing by task sensitivity, not tool. Audit trail writes itself. Seniors watch when an experiment fails.

Ship one senior role redesigned as a triad unit

Senior, junior, and agent ensemble as one unit on a real submission. Junior sits inside every judgement call from week one.

Six senior specialists author their own programmes' redesigns first

Eight-week council cadence. They bring it to the leadership team as work they authored.

Publish the workforce-architecture answer in first 100 days

Two pages, co-signed by the CEO, referenced every quarter. Every AI deployment gets decoded against it.

Same workforce. Same twelve months. Opposite outcomes. The difference is whose hand is on the pen.

Talent Gravity. Capability Compounding. Succession Readiness.

Three questions every biotech CHRO is tracking. None of them used to be the same question. They are now.

01 · TALENT GRAVITY

Are your senior specialists staying because of you, or despite you?

Your senior regulatory lead resigned on Friday to an AI-native discovery firm. Your best CMC architect lateral last quarter came from the same place. The best biotech postdocs are asking what your AI-and-workforce strategy is in second-round interviews. Senior specialists watch which way you lean the first time something goes wrong. The ones who start looking quietly have already decided.

02 · CAPABILITY COMPOUNDING

Is your median senior associate sharper in December than they were in January?

Two populations are forming in every biotech. The top decile is using AI daily on eCTD drafting and regulatory precedent search and building judgement that compounds weekly. The rest is practicing not-knowing. Your L&D budget funds compliance modules and a scientific conference. Neither moves the median. The firms pulling ahead are making the 90th-percentile workflow the firm's default workflow.

03 · SUCCESSION READINESS

Of your 2030 senior bench, how many came through work that still exists?

Your successor list has six names. At least three came through the analyst-prep and submission-drafting work that agents have already absorbed. You have not replaced the pathway. The external senior hire in 2030 costs a thirty to forty percent premium and brings the previous firm's regulatory-and-CMC context. The apprenticeship architecture gets rebuilt now or gets inherited as a gap.

What the firms winning this play are actually doing

Four concrete moves any biotech CHRO can start this quarter. Each addresses one sub-function. Pulled together, they become one answer the firm compounds on.

1

Talent: publish the workforce-architecture answer in your first 100 days

Two pages, signed by the CEO. What this firm believes its senior specialists are for. Which investments are being made in their pathway-and-agent partnership. Which roles are being redesigned around judgement. What happens to someone whose role changes materially. Referenced every quarter. Every AI deployment after it gets decoded against this memo. Without the memo, every deployment is decoded against rumour.

2

L&D: ship one senior specialist role redesigned as a triad unit this quarter

Senior regulatory lead, junior regulatory associate, and agent ensemble as one inseparable delivery unit on a real IND or CTA package. The junior does not assemble binders for the senior. The junior operates the agent ensemble in front of the senior on live submission work from week one. The senior watches the judgement calls in real time. Apprenticeship clock compresses from twelve years to six. Start with regulatory. Template the next three across CMC, clinical operations, and medical affairs.

3

Succession: six senior specialists author their own programmes' redesigns first

Do not ship a firm-wide redesign to the leadership team for vote. Invert. Assemble six senior regulatory and CMC leads, the ones whose books are largest and whose lift-out risk is highest, as the authoring council. Their first assignment: redesign their own programme's task architecture in eight weeks. They bring it as work they authored, not as work the CHRO is asking them to approve. The six loudest possible critics become the six loudest possible defenders.

4

Trust: publish three rules, one escalation, one red line

Three rules about what the workforce can do with AI without asking permission. One rule about what requires review before it leaves the firm. One rule about what never goes to an agent (anything touching a regulatory submission or a clinical-data lock without senior validation). Published. Defended to the board when an experiment fails. Senior specialists watch which way you lean the first time something goes wrong. Published rules create real capability.

The only firm that joins workforce authorship to working infrastructure

The biotech CHRO has four places to go. None can do what we do.

The life-sciences talent advisories (Heidrick, Korn Ferry, Russell Reynolds) place the senior specialist when the seat opens. The search-firm model is biased toward external placement, not pathway rebuild.

The Big Four human-capital practices (Deloitte, Mercer, Korn Ferry HR, Willis Towers Watson) run survey-benchmark models with audit-relationship conflicts. A benchmark smooths the differences that actually matter.

The HR-tech vendors (Workday, SuccessFactors, Eightfold, Gloat) sell platform software. The data encoding which senior regulatory leads carry which programmes IS your specialist-bench architecture in machine-readable form. Building on the vendor stack licenses it back.

The L&D platforms (LinkedIn Learning, Coursera, Sana Labs, Josh Bersin Academy) sell content libraries. The senior-specialist pathway is a pattern-exposure problem, not a content-library problem. A platform cannot rebuild the architecture agents have collapsed.

The market offers four things you have already said no to. GRAIL is the fifth option.

WHAT YOU GET

Senior advisory that speaks GMT, not HR-deck

Working infrastructure your team uses the same week

One senior role redesigned at task level with incumbent

Workforce-architecture memo the CEO co-signs in 100 days

No vendor lock-in at any phase of the engagement

WHY IT MATTERS

Founded by operators who have carried people-adjacent seats

Business first, technology second

Three weeks from first meeting to working infrastructure

Your team keeps the infrastructure, you own the IP

Every next step earned by what just shipped, never assumed

Three sessions with your people leadership. Working infrastructure from week one.

We start with your people leadership team because the change cannot outrun the team's personal understanding of what is possible. Three workshops. Each delivers standalone value. Each earns the right to the next.

WORKSHOP 01

How to think

Walk through what is happening in your sector and inside your people function. Draft the first page of your workforce-architecture memo in the room, with your CEO present. Your leadership team leaves with a shared view of what the firm believes its senior specialists are for and the first draft of the document the CEO will co-sign.

WORKSHOP 02

Your people infrastructure

A half-day build. Your Head of Talent, Head of L&D, Head of Compensation, and Head of Employee Relations each leave with working infrastructure tuned to their function. Task-level role-mapping agent for the regulatory bench. Senior-specialist authoring-council architecture. Framework-agreement drafting for the works council. Three-rules trust document. Infrastructure your team is using the same week.

WORKSHOP 03

Ready to run

Refined infrastructure based on real use. The first senior regulatory role redesigned as a triad unit with the incumbent in the room. The published workforce-architecture memo, co-signed. The senior-specialist council kickoff agenda. The CFO conversation with numbers the CEO can check: external-hire premium math, cohort-retention forecast, succession-readiness count.

Three weeks. No IT project. No board approval needed to start. The infrastructure your people function is already running on when we finish.

For your next GMT

The questions where your people leadership cannot agree on an answer are the ones worth an hour on the agenda. Ask these honestly.

If you asked three of your best senior specialists privately tomorrow whether the firm's AI strategy is being done for them or to them, what would they say? Do you know the names, and can you describe the evidence for what they would say?

Walk me through one senior specialist role in your firm that has been redesigned at the task level in the last twelve months. Who did the redesign, what did it change, and what does the incumbent do with their week that they did not do before?

Of the six names on your 2030 senior-specialist bench, how many came through the analyst-prep and submission-drafting work that agents have already absorbed? What is replacing the pathway for the ones whose pathway is gone?

Your workforce-architecture is being written this quarter in deployment decisions, budget lines, and framework-agreement openings. How many of those fragments are you the author of, and how many are you decoding after they ship?

Of your senior regulatory and CMC leads whose lift-out risk is highest, have any been asked to author the redesign yet, or are they waiting to be presented with a vote on yours?

If any of these produces a disagreement, that is the conversation worth having before the next board meeting.

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