



Society for Clinical Research Sites



PARTNERING FOR SUCCESS

2026 European Site Landscape Survey

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European Site Landscape



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Faculty Disclosure

In compliance with ACCME Guidelines, I hereby declare:

I do not have financial or other relationships with the manufacturer(s) of any commercial services(s) discussed in this educational activity.

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Criteria for Awarding Contact Hours

Applicants must be present during the “live” event, contact hours are not issued for recordings.

Applicants must attend the activity the whole time, missing no more than ten minutes of the activity.

Applicants must complete the post-meeting survey with a score of at least 70%.

Applicants must complete the post meeting survey evaluation questions.

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Countries

65

Questions

Survey Coverage

- **Conducted January 2025**
- **Sites from France, Poland, Ukraine, UK, and 4 other European nations**
- **Focus areas: Operations, Contracts, Budgets, Staffing, and Site-Sponsor Relations**

European Challenges Exceed Global Averages

European sites report significantly greater pressures than sites worldwide:

43% experienced declining study opportunities (global: 32%)

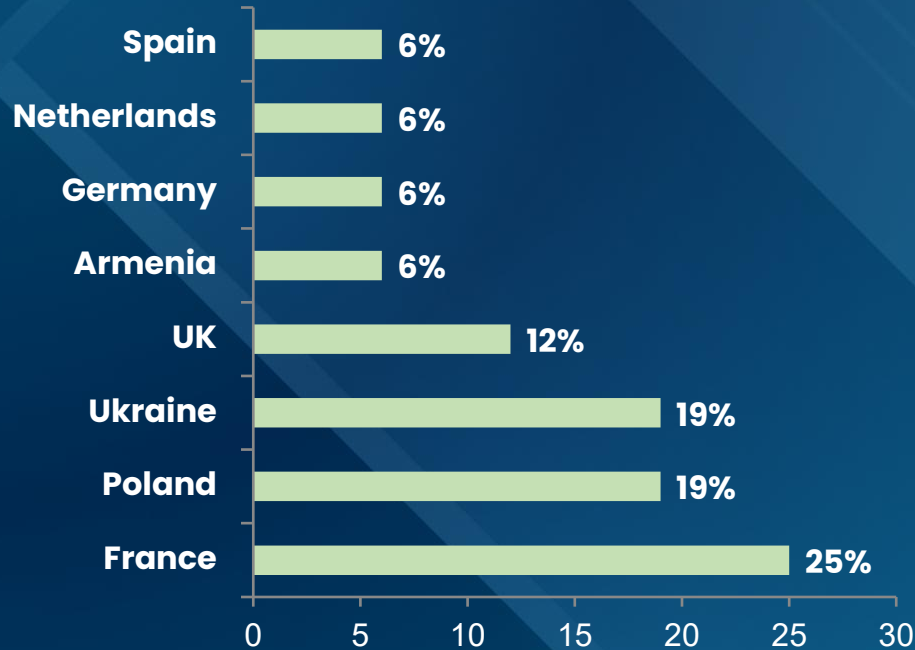
81% struggle with payments overdue >90 days (global: 70%)

73% saw 6-20% cost increases in 2024 (global: 60%)

59% cite protocol complexity as top decline reason (global: 28%)

European sites face heightened challenges compared to global averages
Understanding these regional differences is critical for targeted solutions

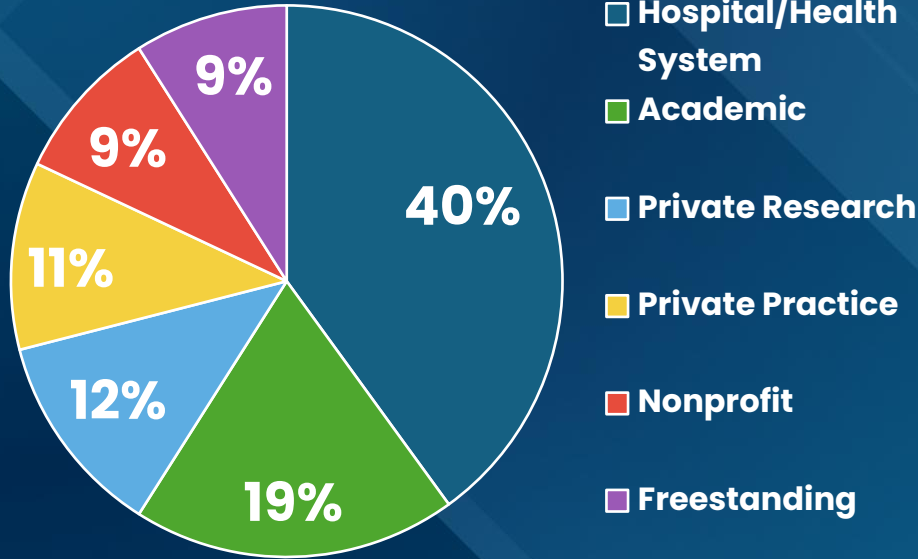
Geographic Distribution



Key Geographic Insights

- **Western Europe leads participation (France 4 sites)**
- **Strong Eastern European representation (Poland, Ukraine)**
- **8 total countries represented**

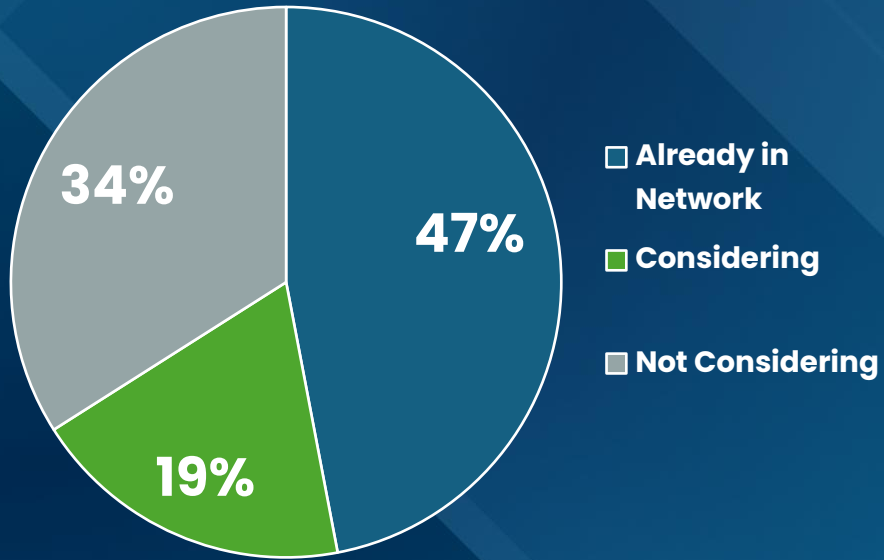
Site Demographics



Key Insights

- Hospital/Health Systems dominate at 40%
- Academic sites represent 19% of respondents
- Diverse mix of site types represented
- Private research and practice combined: 23%

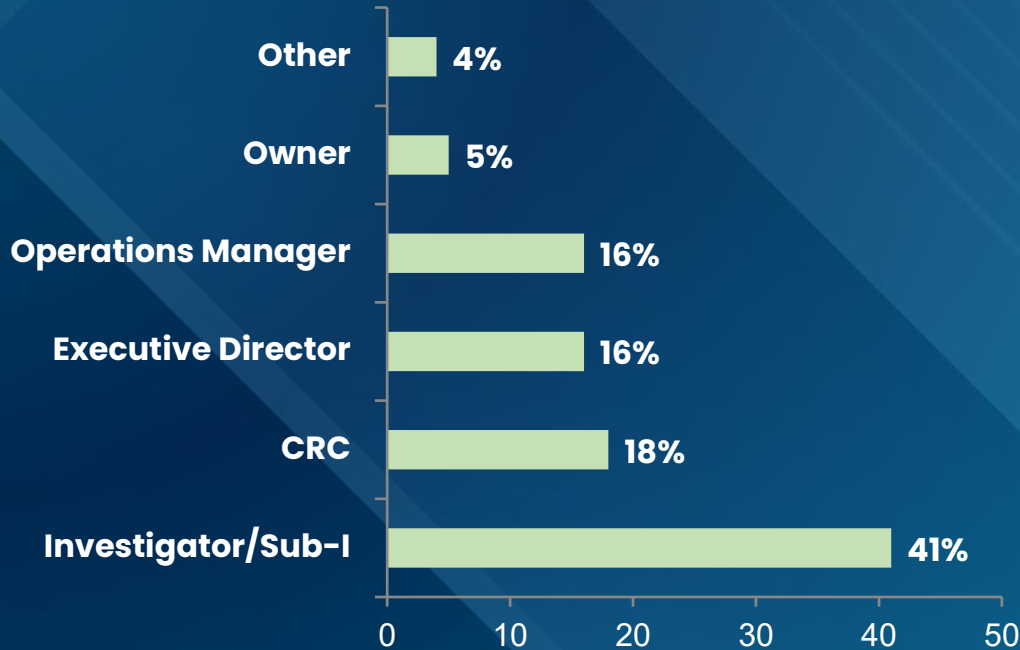
Site Network Participation



Network Participation Trends

- Nearly half (47%) already part of a site network
- Additional 19% actively considering joining
- 66% engaged or interested in networks
- Networks offer efficiency and support

Job Functions

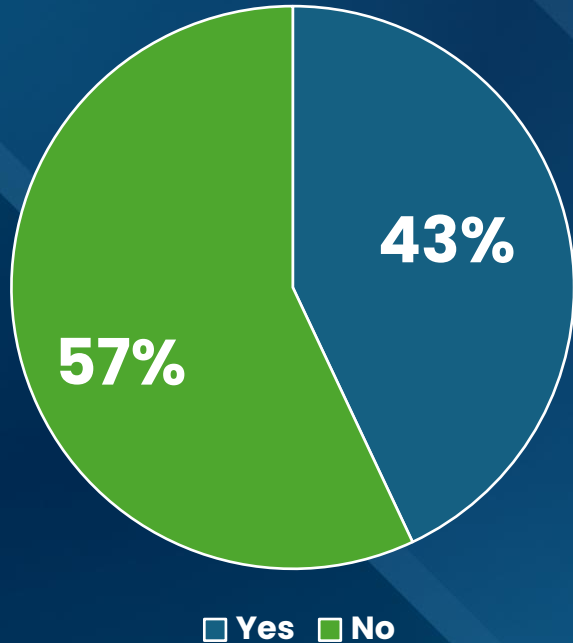


Respondent Profile

Strong investigator voice with 41% of responses from clinical leadership positions

Balanced operations perspective from CRCs, directors, and managers

Study Opportunities Declining



43%

Experienced Decline

Impact on Sites:

- Revenue uncertainty and planning challenges
- Staff retention difficulties
- Reduced capacity utilization
- Less diverse research portfolio

Study Cancellations & Delays

32%

1-5% Cancellation Rate

30%

6-10% Delay Rate

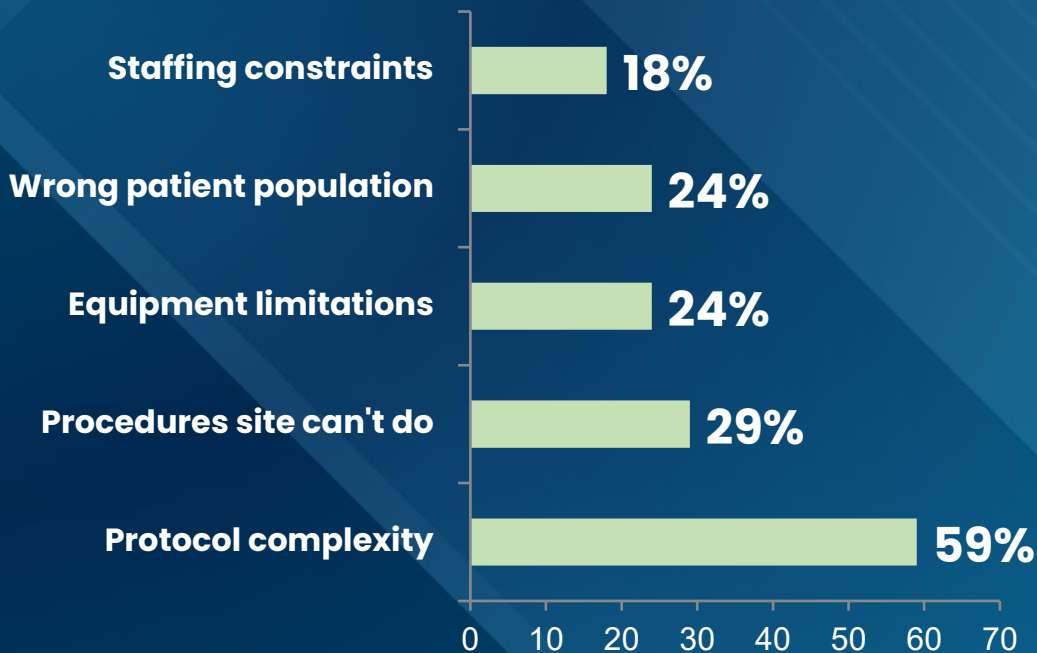
38%

Multiple Impacts

Top Reasons for Cancellations & Delays:

- **Sponsor strategic decisions (budget cuts, pipeline changes)**
- **Enrollment challenges and recruitment difficulties**
- **Regulatory and approval delays**
- **Protocol amendments requiring re-review**

Why Sites Decline Trials



Key Insight

Protocol complexity is the #1 barrier, with 59% of sites citing it as a reason to decline trials

This highlights the need for sponsors to simplify protocols and improve feasibility assessments

Contract Finalization Timelines

83%

Within 60 Days

39%

Under 30 Days

17%

Over 60 Days

Top Contract Delays:

- **Sponsor/CRO legal review bottlenecks**
- **Institutional approval processes**
- **Budget negotiation iterations**
- **Insurance and liability provisions**

Budget Negotiations

46%

Financial Misalignment

46%

CRO Unresponsive

31%

Take >60 Days

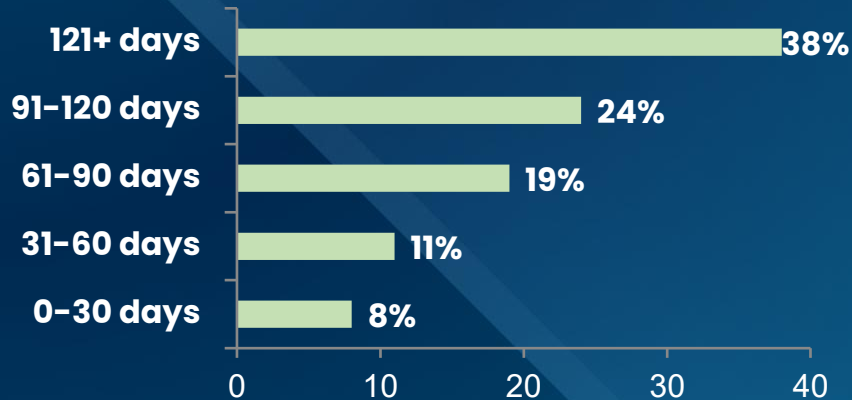
Budget Negotiation Challenges:

- **Initial budgets don't cover actual costs (46% cite misalignment)**
- **Slow CRO/sponsor response times delay negotiations**
- **Per-patient rates don't account for screen failures**
- **Amendment costs often under-budgeted**

Accounts Receivable Challenges

81%

Payments >90 Days Overdue



Top Payment Delay Reasons:

- Query backlogs and data cleaning
- Sponsor payment cycles
- Invoice processing delays
- Budget reconciliation disputes

Operating Cost Increases in 2024

73%

6-20% Cost Increase

Largest Cost Drivers:

56% Staff salaries

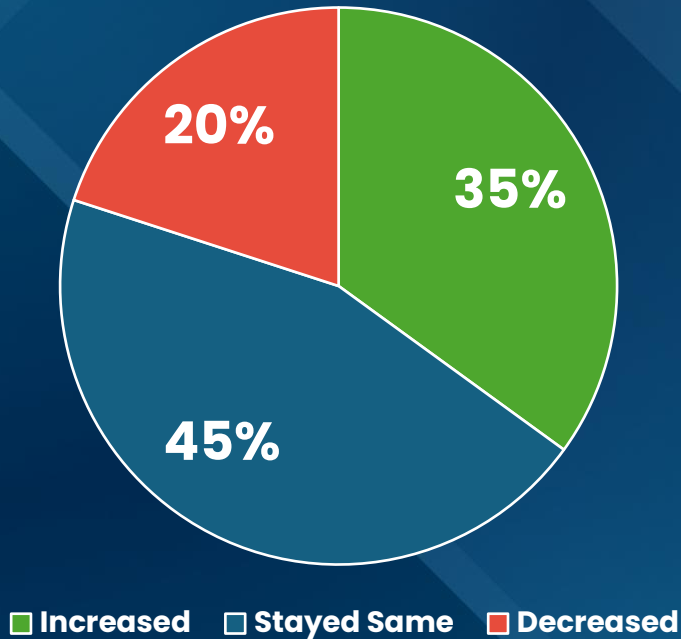
44% Medical supplies

36% Insurance

28% Technology/IT

Impact: Rising costs without corresponding budget increases create unsustainable financial pressure on sites, threatening long-term research capacity.

Workforce Dynamics



Retention Challenges:

45% Salary competition

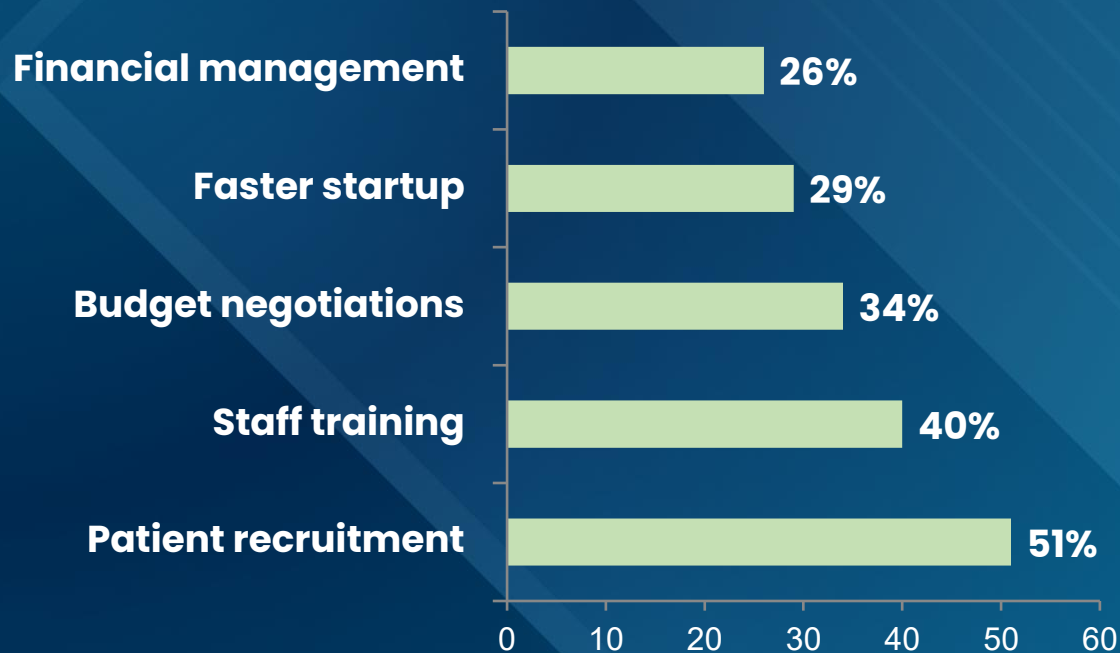
37% Career progression

26% Burnout

23% Work-life balance

Workforce instability threatens site capacity and trial quality

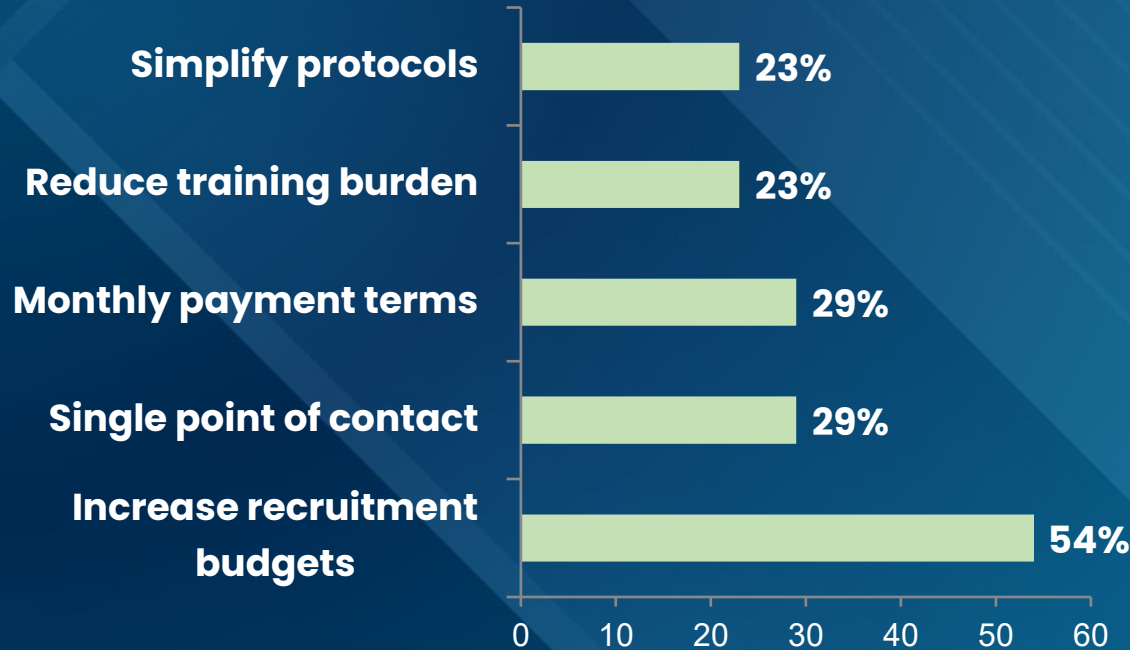
Site Priorities for 2025



2025 Focus Areas

Patient recruitment remains the top priority, followed by workforce development and financial sustainability efforts.

What Sites Need from Sponsors

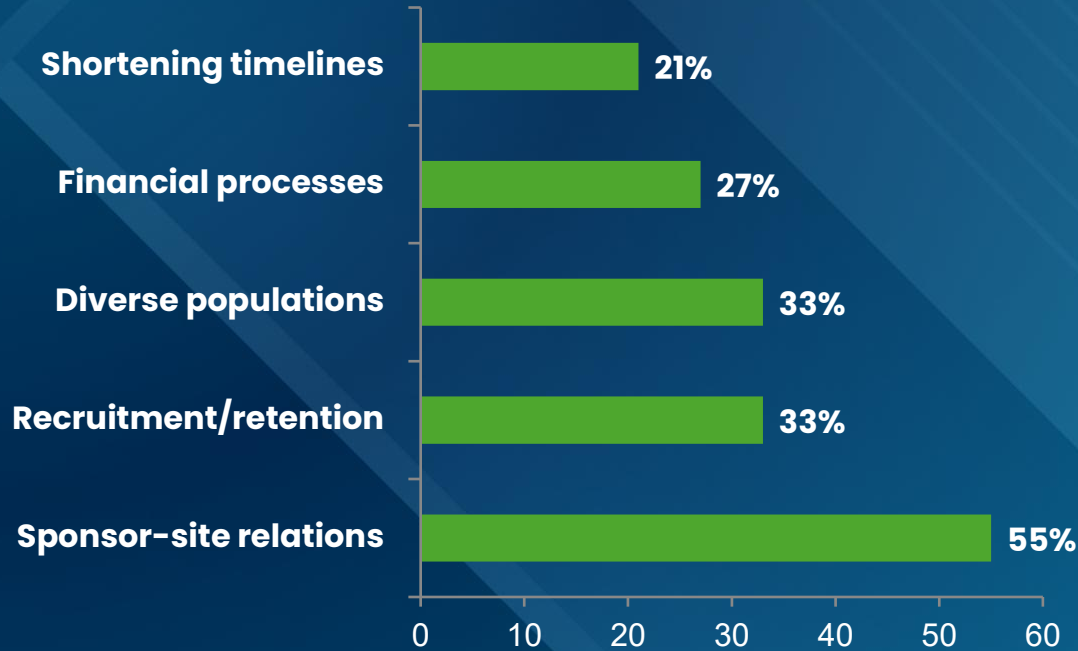


Clear Message

Sites need better financial support (54% want higher recruitment budgets) and streamlined operations

Reducing administrative burden would allow sites to focus on what matters most: patient care

Where Sites Are Innovating

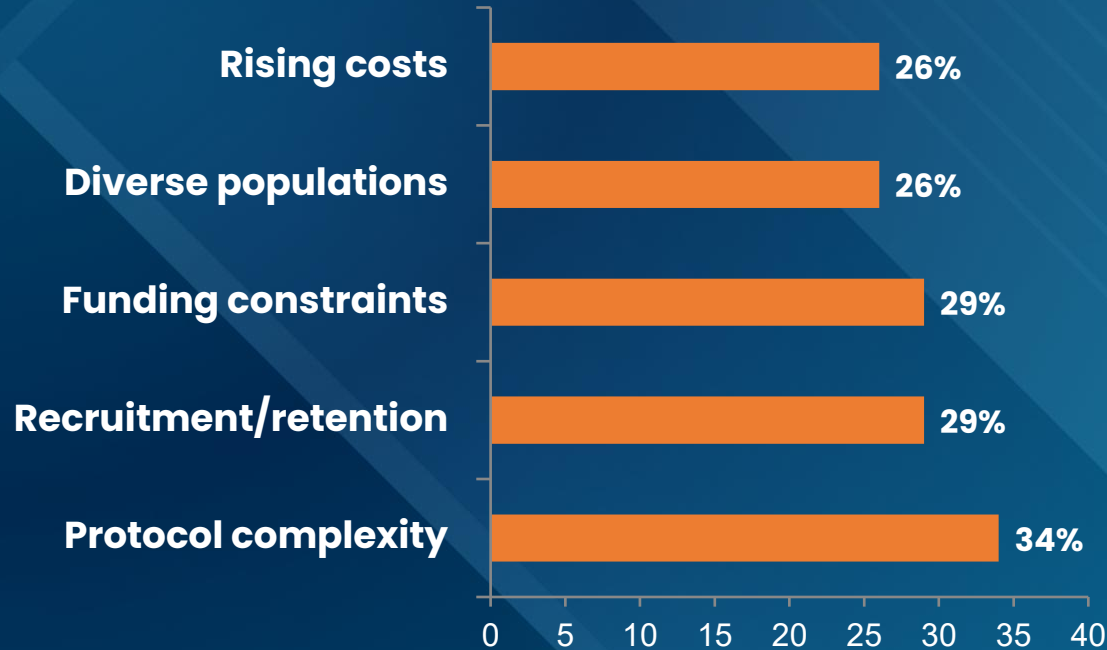


Innovation Focus

Sites are prioritizing relationship-building with sponsors (55%) as the key to sustainable partnerships

Focus on diversity and inclusion shows commitment to representative research

Most Pressing Issues Facing Sites



Industry Challenge

Protocol complexity and financial pressures create a challenging operational environment

These issues require collaborative solutions between sites, sponsors, and CROs

European-Specific Challenges

43%

See Negative US Impact

57%

Concerned About Study Migration


31%

Losing Studies to US

European Market Pressures:

- US regulatory and political climate affecting study placement decisions
- Concern about studies migrating from Europe to other regions
- Competition with US sites for global trials
- Need for European sites to demonstrate unique value proposition

Key Takeaways

 **Financial pressure is mounting: 81% face payment delays, 73% saw cost increases**

 **Declining opportunities: 43% report fewer study opportunities**

 **Protocol complexity is the #1 barrier to trial acceptance (59%)**

 **Workforce strain continues: salary competition and burnout are key concerns**

 **European-specific pressures: 57% concerned about study migration**

 **Partnership is key: 55% innovating on sponsor-site relationships**

Recommendations

Improve Payment Practices

- Move to monthly payment terms
- Clear invoicing processes
- Reduce query backlogs

Enhance Budget Realism

- Cover actual site costs
- Account for screen failures
- Include amendment provisions

Strengthen Relationships

- Single point of contact
- Regular communication
- Collaborative problem-solving

Reduce Admin Burden

- Streamline training requirements
- Simplify protocols
- Harmonize documentation

Looking Forward: 2025 and Beyond

Opportunities

- Growing decentralized trial adoption
- Technology-enabled efficiencies
- Increased focus on site partnerships

Sites Are Ready

- 55% innovating on sponsor relations
- Investment in staff development
- Commitment to patient-centric care

Partnership Needed

- Fair and timely compensation
- Simplified protocols
- Reduced administrative burden

Thank You

Questions & Discussion

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