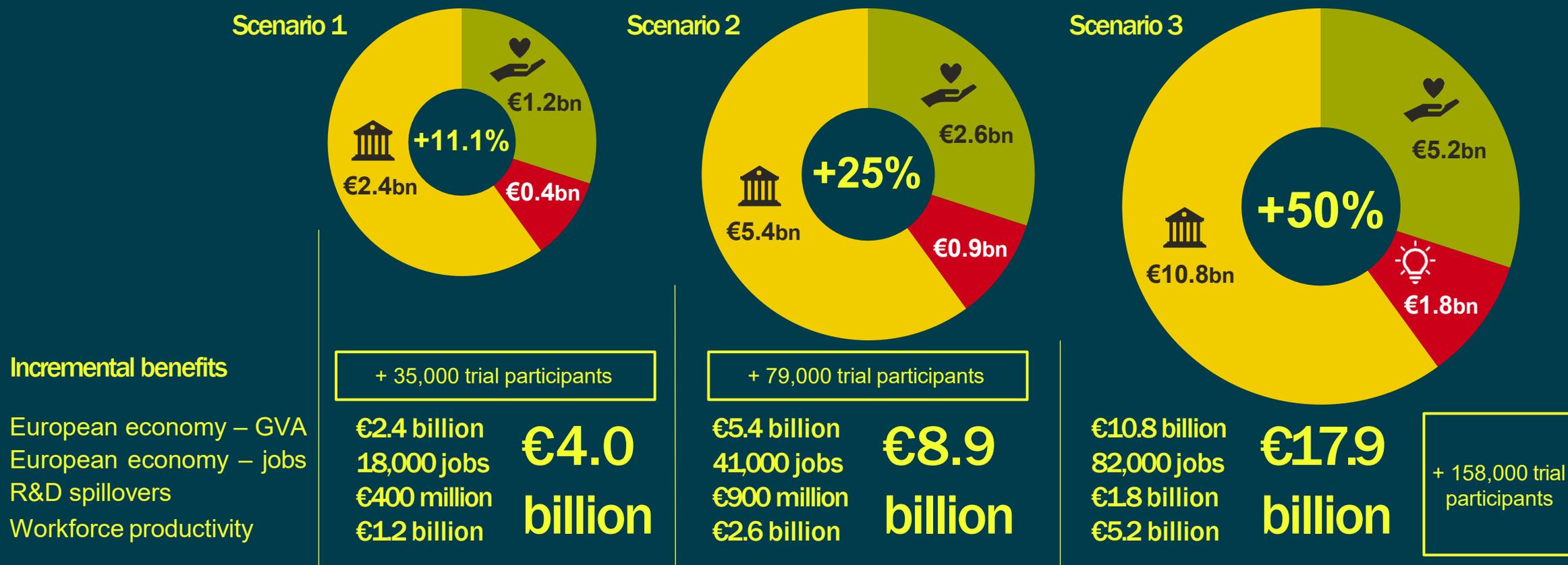


Industry clinical trials could contribute €4.0 – 17.9 billion more in GVA if the number of trials increases

We model 3 alternative 'what if' scenarios of increasing the number of clinical trials by **11.1%** (in line with the EMA target¹), **25%** (increasing back to the 2013 level) and **50%** (to 'catch up' with growth in China and North America).



¹ See slide 14 for additional information regarding these scenarios. Scenario 1 based on European Medicines Agency (2025). *New targets for clinical trials in Europe*, 23 September 2025. <https://www.ema.europa.eu/en/news/new-targets-clinical-trials-europe>