

Modelos de Negócios na Expansão de Centros de Pesquisa : Experiência Velocity

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Velocity
CLINICAL RESEARCH



Agenda

- O Mercado de Centros de Pesquisa
- O modelo da Velocity
- O processo de M&A e pontos a serem considerados pelo site e pelo *buyer* em uma aquisição
- Conclusão



Market Overview

Global Clinical Trial Market

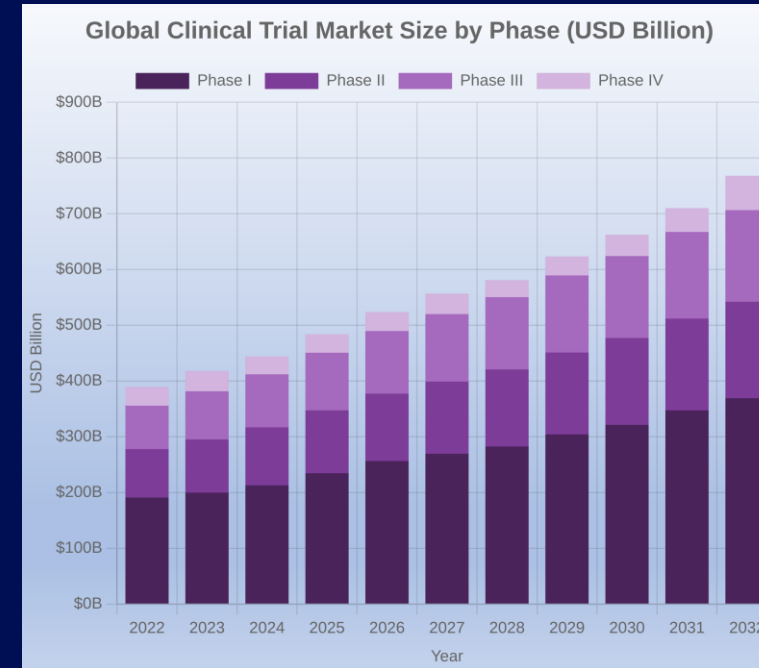
Market valued at \$450 billion in 2022

Projected to reach \$887 billion by 2032

CAGR of 7.2% from 2023 to 2032

Phase III trials represent largest segment

North America dominates with ~40% market share



Source: Market.us, 2023

Clinical Research Site Segment

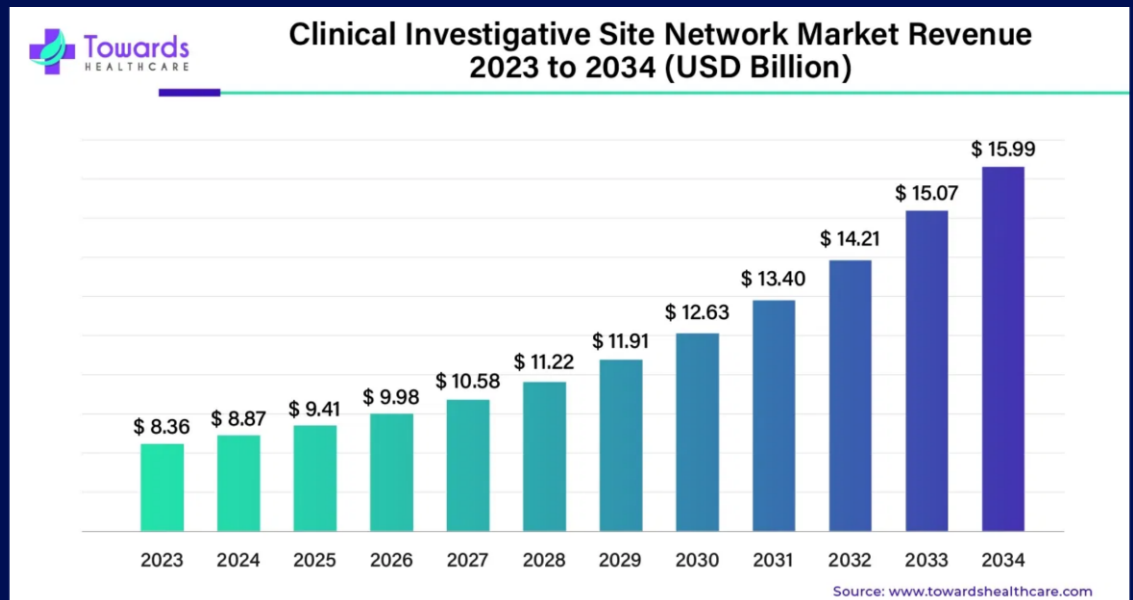
Site Management Organizations market: \$6.24B in 2023

Investigative Site Network market: \$8.36B in 2023

Projected to reach \$15.99B by 2034

For-profit sites growing faster (11.8%) than non-profits (4.9%)

Industry adoption of site networks rose from 30% in 2020 to 70% by 2024 *



The Rise of Mega Networks

Key Drivers of Consolidation

- Historical market fragmentation with many independent sites
- Increasing complexity of clinical trials requiring larger networks
- Financial challenges faced by individual sites
- Private equity investment fueling acquisitions
- Need for operational efficiencies and standardized processes
- CROs acquiring site networks to expand capabilities

Characteristics of Site Mega Networks

- Integrated operations across multiple sites
- Standardized processes and quality control
- Centralized patient recruitment capabilities
- Enhanced data management systems
- Greater negotiating power with sponsors/CROs

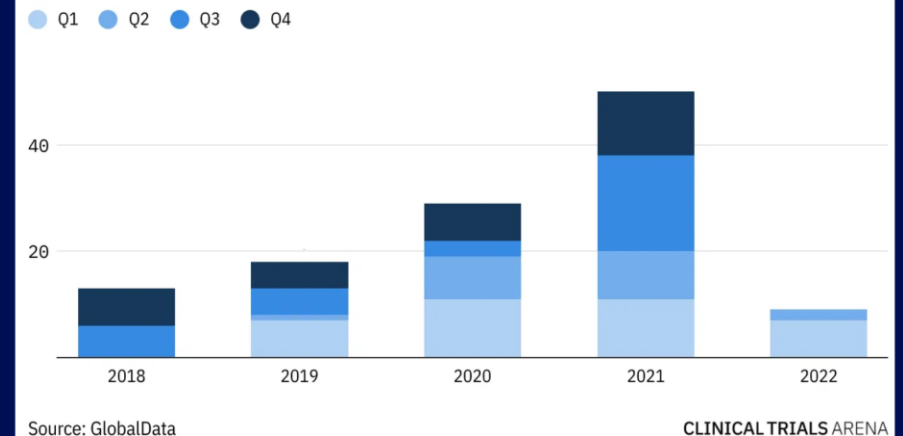
Key Insights

- Sharp increase in consolidation of private sites in the US
- For-profit sites growing faster (11.8%) than non-profits (4.9%)
- Technology integration critical for network success

Source: "The Rise of the Mega Network" Webinar, Xtalks, April 10, 2024

Mergers and acquisitions among CROs increase in past two years

Completed CRO M&A from 2018 to 2022



Strategic Positioning

Geographic Expansion

Therapeutic Focus

Technology Integration

Patient Engagement

Impact on Stakeholders

Sponsors & CROs

- Streamlined site selection and activation processes
- More consistent quality and standardized operations
- Potential for higher costs as networks gain negotiating power
- Improved access to diverse patient populations
- Enhanced data quality and protocol compliance

Independent Sites

- Increased pressure to join networks or find niche positioning
- Challenges competing with larger networks' resources
- Opportunities to specialize in specific therapeutic areas
- Need for technology adoption to remain competitive

Site Network Perceptions

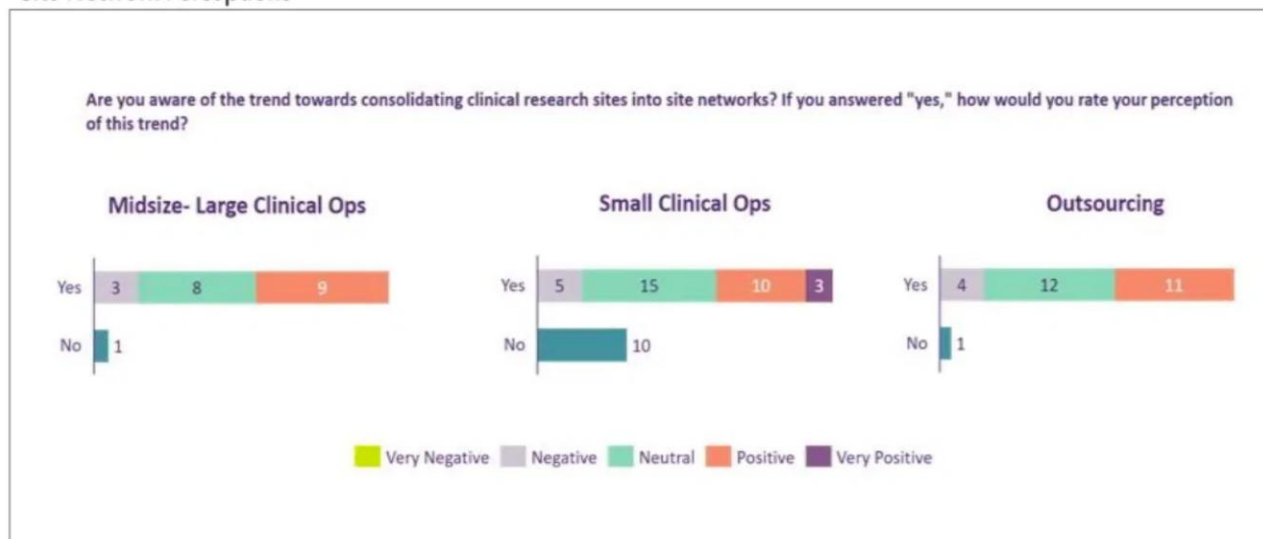


FIGURE 1. Most survey participants are aware of the consolidation of clinical research sites into networks and generally have a neutral or positive perception of this trend.

SOURCE: Gallagher et al.

Source: Gallagher et al., *Applied Clinical Trials*, October 2024

Patient Impact

Benefits

- Improved access to clinical trials
- More consistent trial experience
- Better geographic coverage

Concerns

- Potential loss of personalized care
- Risk of standardization over customization
- Possible reduction in community engagement



We have one goal:

to deliver high-quality clinical trial data from as many patients as possible, as quickly as possible, while providing exemplary patient care at every step.

Paul Evans

President and CEO



2017-2020

- Velocity foi fundada em 2017
- Aquisição de 9 centros de pesquisa
- 1o centro de pesquisa “greenfield”
- Pioneira em infraestrutura totalmente integrada de centros de pesquisa



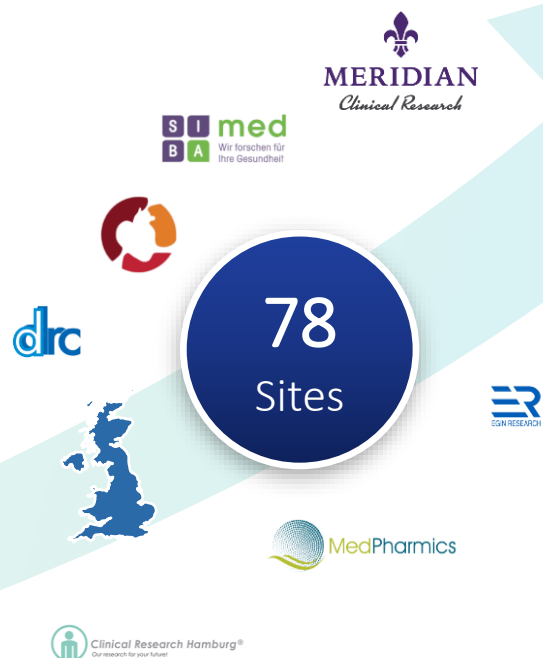
2021

- Expande-se pelos Estados Unidos
- Adquirida pela GHO Capital
- Adquire a Trier Health e estabelece um polo tecnológico em Hyderabad, Índia



2022

- Abre os primeiros sites no Reino Unido
- Expande-se pelos Estados Unidos e Alemanha
- Inicia o desenvolvimento da tecnologia VISION



2023-Now



- Abre os primeiros sites na Polônia
- Faz parceria com a Privia Health
- Lança o VISION
- Lança os “CARE Councils”
- Prêmio SCRS 2023 de Excelência em Centralidade no Paciente

Integrated Across Therapeutic Areas and Geographies

Dedicated Research Clinics

Fully-owned and operated

Velocity employees (including investigators)

Specialized facilities, including labs

Embedded Specialty Care Research

Single and multi-specialty locations

EMR search and specialty care / equipment

E.g., Pediatrics, Cardiology, Dermatology, Neurology

Health System Partnerships

Strategic multi-location partnering

Research as a care option

Embedded referral network



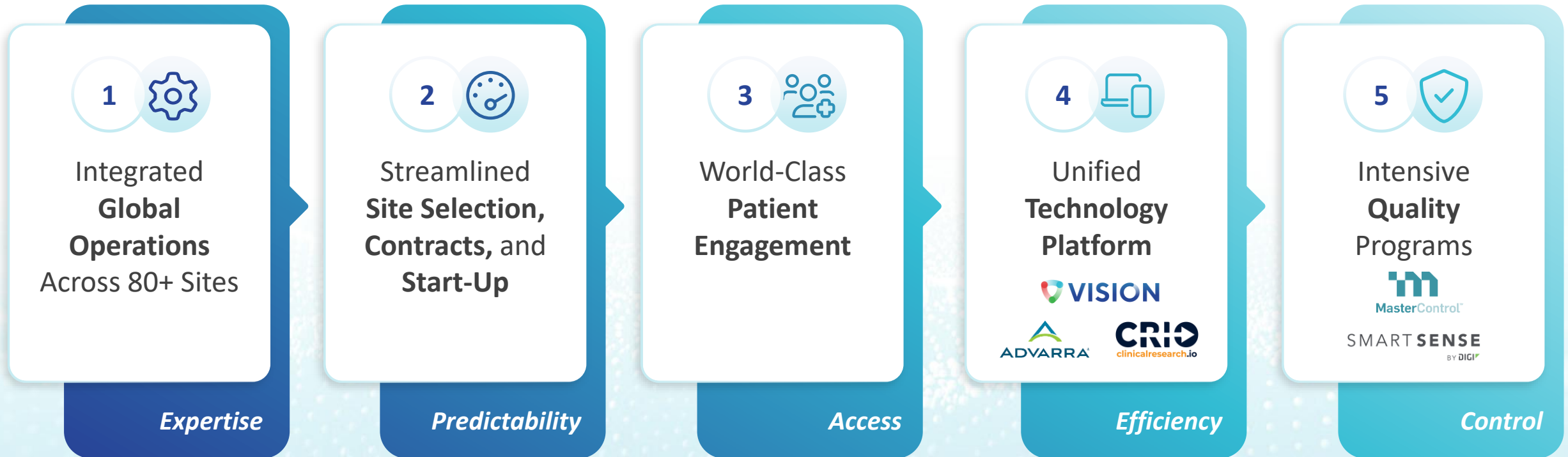
Shared Operations Platform

SOPs, technology, patient and performance data, project strategy, QA/QC



The Velocity Model

A unique, integrated model ensures operational excellence for every trial



CASE STUDY

Enrolling >5,700 Participants for a Global Phase 3 Trial

- Global enrollment goal: 40,000 participants across >300 sites
- Velocity enrollment goal: 5,435 participants (13.5% of trial) across 35 sites (31 U.S., 3 Germany, 1 U.K.)
- Target population: Adults aged ≥50, stratified into three age groups
- Enrollment window: September to November 2024

Three Velocity sites, equipped with on-site peripheral blood mononuclear cell (PBMC) collection, processing, and analysis capabilities, handled a subset of 200 participants requiring PBMC services.

Velocity enrolled >5,700 participants (14.5% of the trial; 106.5% of the initial target). Compared to other trial sites, Velocity delivered an average of >30% more participants per site.

The Trial

Velocity was selected to deliver a large portion of patients for a global Phase 3 vaccine trial.

Client: Large pharma Sponsor

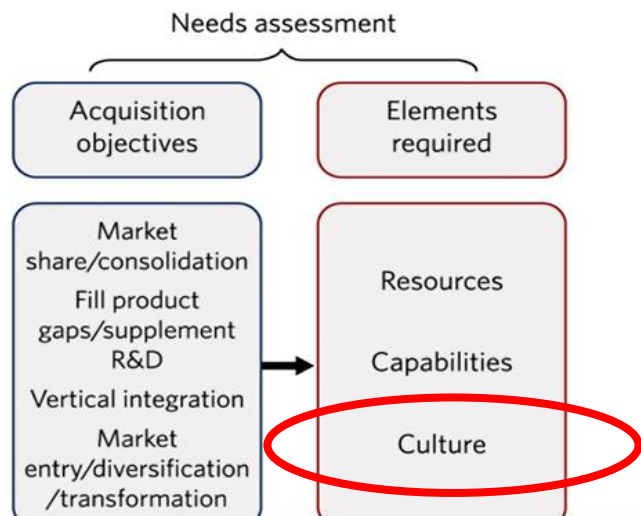
Trial: A multinational Phase 3 vaccine trial

Target population: Adults aged ≥50, stratified into three age groups



O processo de M&A

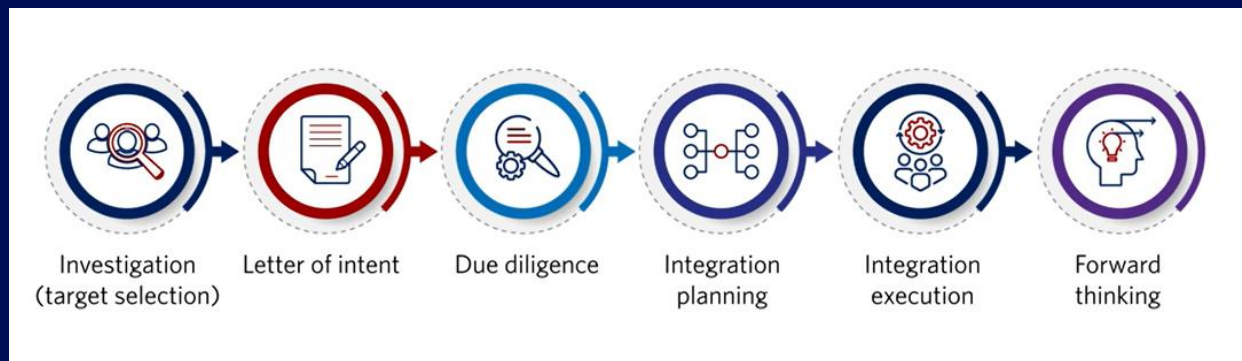
A Framework for M&A Dealmaking and Negotiations



Mais do que o valor financeiro, o sucesso de uma transação de M&A depende do alinhamento estratégico e do ajuste cultural entre as empresas



Etapas do Processo de M&A





Considerações Estratégicas para os Sites

Fatores de Sucesso

- Desenvolver especialização e expertise em áreas terapêuticas
- Investir em infraestrutura tecnológica e capacidades de dados
- Construir relacionamentos sólidos com patrocinadores e CROs
- Focar na eficiência operacional e padronização
- Aprimorar estratégias de recrutamento e retenção de pacientes
- Considerar parcerias estratégicas ou participação em redes
- Priorizar qualidade, integridade dos dados e experiência do paciente

Considerações Finais



O mercado de redes de centros de pesquisa clínica está em crescimento acelerado



Os centros de pesquisa devem investir em infraestrutura adequada, equipe qualificada e processos padronizados.



Cultura alinhada e estratégia compartilhada impulsionam o sucesso de parcerias e empresas

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Obrigada !