QUEENSLAB

ESTD Group 2025

ONE IN TEN

BUSINESS CASE STUDY

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One in Ten

Application of The Plasma Paradox framework to 10 Czech cities

Two cities in the Czech plasma market meet all criteria for defensible location-strategy analysis. Eight others lack essential market structure. This framework identifies which.

Why this matters

Site-selection analysis is only meaningful when the underlying market structure supports real comparison. A city with only one plasma center, or one where centers are across the street from each other, cannot reveal location strategy—only operational convenience or donor cannibalization. A city where no commercial rent data exists cannot support cost-comparison analysis. This framework identifies which of ten Czech cities have the structural prerequisites for location-strategy analysis worth conducting.

Without these criteria, analysis becomes narrative decoration rather than evidence. With them, location decisions become defensible.

The five factors

1. Archetype clarity

At least two distinct building types (Business Center and Shopping Center minimum) where plasma centers operate, enabling a comparison of location strategy across different commercial environments.
Why: Comparing centers in the same building type reveals only operational or staffing differences. Comparing across archetypes reveals how market structure itself shapes strategy.

2. Rent-data availability

Buildings housing plasma centers are either part of major commercial portfolios with published rent data (RICS, URW, etc.) OR rent figures are accessible through commercial market research and property owner data.
Why: Cost-as-percentage-of-strategy analysis requires actual rent figures. Without them, location economics remain speculative.

3. Competitive density & distance

At least 2 plasma centers in the city, located in different city districts/neighborhoods, at least 5+ km apart, enabling meaningful location-strategy comparison and eliminating pure donor cannibalization.

Why: Centers across the street or in the same neighborhood compete for identical donors. Distance indicates deliberate market segmentation, not operational overlap. This factor is particularly important when archetype diversity exists—it ensures centers represent distinct geographic strategies rather than operational convenience.

4. Tenant-mix data quality

Shopping centers (if present in the city) publish official tenant directories online, with sufficient granularity to categorize tenants (food, financial services, tobacco/news outlets, etc.).
Why: Tenant mix determines foot traffic patterns and donor demographic. Without it, location comparison is surface level.

5. Operator diversity

At least 3 different plasma operators are present in the city, creating competitive pressure that forces disciplined site-selection decisions rather than opportunistic placement.

Why: With one or two operators, location choices reflect company-specific logistics. With three or more, location reflects market-driven strategy.

Scoring methodology

Each city is scored on all five factors. PASS = 1, FAIL = 0 for the factor's point value.

Factors 1, 3, 5 (market structure) = 2 points each | Factors 2, 4 (analytical foundation) = 1 point each | Maximum = 8 points

Threshold: 8/8 points (all five factors must pass). No partial credit. A city either has structural prerequisites, or it does not.

Validation results: 10 Czech Cities

City	F1	F2	F3	F4	F5	Score	Status
Prague	P	P	P	P	P	8/8	PASS
České Budějovice	P	P	P	P	P	8/8	PASS
Brno	F	P	P	P	P	6/8	FAIL
Zlín	P	P	F	F	P	6/8	FAIL
Liberec	P	P	F	P	F	4/8	FAIL
Pardubice	P	P	F	F	F	3/8	FAIL
Most	P	F	F	F	F	3/8	FAIL
Plzeň	F	P	F	F	P	3/8	FAIL
Mladá Boleslav	F	P	F	P	F	2/8	FAIL
Ústí nad Labem	F	P	F	F	F	1/8	FAIL

The finding: two cities qualify

Prague and České Budějovice are the only two Czech cities in this analysis that meet all five structural criteria for location-strategy analysis. Both have archetype diversity (Business Center and Shopping Center locations), accessible rent data, competitive density with geographic separation, published tenant-mix information, and three or more operators creating market pressure for location discipline.

All other cities fail Factor 3 (Competitive Density & Distance). The operational reality in these cities: plasma centers are located less than 1 km from each other, often on the same street or in the same neighborhood. This is not location strategy — it is pure donor cannibalization, where centers compete for the identical donor pool rather than serving distinct geographic markets. No meaningful location comparison is possible when the centers are this close.

The other common disqualifier is lack of archetype diversity (Brno, Plzeň, Mladá Boleslav have only Shopping Centers or Regular Buildings, not a mix). These cities lack the comparative structure needed for location-strategy analysis.

Near-miss insight

Brno and Zlín score 6/8 and are one factor away from qualification. Both have three operators and adequate data availability. Brno lacks a Business Center archetype; Zlín lacks sufficient geographic separation (its centers are less than 1 km apart). If either condition changes (a second location type emerges for Brno, or Zlín opens a new center 5+ km away in a different district), these cities become analytically viable.

Market dynamics & active consolidation

The Czech plasma market is not static. Even cities that qualify on the framework are actively consolidating, showing that this analysis is not historical — it reflects live business decisions happening right now.

České Budějovice exemplifies this dynamic. The city opened its first plasma center in 2019. A second center followed in 2021. Then, in a 12-month period spanning 2025-2026, three new centers opened or are opening. One operator now controls three of the five centers in the city. This is not coincidental placement — it is deliberate geographic network building in real-time.

Timeline: České Budějovice plasma center expansion
2019: First center opens
2021: Second center opens
2025: Two new centers open (multi-operator expansion accelerates)
2026: Additional center opens; one operator controls 3 of 5 total

This consolidation pattern confirms the framework's relevance: operators are actively making location decisions in qualifying cities, and they are iterating on network structure. The rapid expansion by a single operator moving from opportunistic placement to deliberate geographic coverage suggests they are optimizing for market structure — exactly what the framework predicts should happen in cities with sufficient archetype diversity and competitive pressure.

Proof-of-Concept caveat

This framework was developed and initially validated across 43 cities in the Czech plasma market. The ten cities presented in this analysis represent the full range of outcomes — two that qualify (Prague, České Budějovice), two that nearly qualify (Brno, Zlín), and six that fall significantly short due to donor cannibalization or archetype gaps. The validation demonstrates the framework's discriminatory power across the broader market, not just a subset.

The framework is a proof-of-concept validated against known cases, not a statistically robust dataset or a predictive model. Its value is in making site-selection decision criteria explicit and testable. The five factors are derived from market-structure principles (archetype diversity enables comparison, competitive pressure enforces discipline, data availability enables analysis) and calibrated to Czech regional reality. Future iterations could expand validation to additional datasets or markets.

What this means

Location strategy analysis is only defensible when grounded in market structure. Most Czech cities lack the prerequisites — most critically, their plasma centers are positioned in pure cannibalization mode, less than 1 km apart, competing for the same donors rather than serving distinct markets. Prague and České Budějovice have them. If a plasma operator is evaluating site selection in a city that doesn't meet these criteria, the analysis should focus on operational fit (staffing, rent affordability, logistics) rather than market strategy, because the market structure doesn't exist to support strategy comparison.

Next steps & future directions

This framework will be available as an interactive Power BI tool on 24th of July, allowing operators or analysts to apply the five-factor model to new cities or updated market data. The scoring logic is replicable; the factors are transparent. Expansion could include additional Czech regions, Central European markets, or sector-specific variants (coworking, fitness, medical clinics) by adapting the archetype and tenant-mix factors to each sector's dynamics.

This framework is a proof-of-concept. The real test is replicability: can someone else apply these five factors to a different market and get consistent, defensible results? That will be the measure of whether site-selection criteria have been successfully systematized.

ABOUT QUEENSLAB GROUP

QueensLab Group is a specialized analytical powerhouse at the intersection of Biopharmaceuticals, Plasmapheresis, and Medtail commercial real estate. We deliver high-precision data modeling, financial planning, and strategic commercial analysis to drive data-driven decision-making in the healthcare segment.

Core Expertise:

Data Analytics & Modeling: Advanced proxy data synthesis and real-world evidence analysis.
Commercial Strategy: Financial performance modeling for healthcare infrastructure and Medtail assets.
Bio-Pharma Intelligence: Strategic insights in plasma-derived therapies and healthcare sector metrics.
We transform complex, fragmented datasets into actionable growth strategies.

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