

INTRODUCING OPPORTUNITYIQ

From Molecule to Market Decision

An AI business intelligence platform for global biopharma commercialisation



Paul Lalovich, PhD

AGILE DYNAMICS · NOVEMBER 2026 · 18 MIN READ

The biggest constraint on taking proven therapies global is not science but sight: owners cannot see which asset, in which country, under which deal, will turn into cash they can actually collect. OpportunityIQ is built to give them that sight.

THE ELEVATOR PITCH

OpportunityIQ is an AI business intelligence platform that tells biopharma IP owners which asset to take to which country, by which deal — and what it is really worth to them.

Biotech portfolios are full of approved and late-stage assets that never leave their home market. The problem isn't the science. Owners can't see which country, indication and deal structure will turn an asset into cash they can actually collect.

OpportunityIQ fixes that. It connects epidemiology, regulatory pathways, tender prices, patent rights, competitors, and sanctions and banking constraints in one system. It sizes every opportunity from real patient counts and screens out anything unworkable first.

Then it models what the owner receives under licensing, supply or technology transfer — risk-adjusted and side by side. **The result: a ranked, auditable pipeline of investable deals in weeks, not a consultant's slide deck in months.**

©Agile Dynamics 2026

8	3	4	8–12
INTELLIGENCE DOMAINS IN ONE MODEL	LAYERS: MARKET, RECEIPTS, RISK-ADJUSTED VALUE	DECISION GATES BEFORE CAPITAL IS COMMITTED	WEEKS PER FULL OPPORTUNITY PASS

01 The wrong question, and the right unit of analysis

Ask most life-sciences strategy teams where to take a product next and the first slide is a league table of the world's largest pharmaceutical markets. It is the wrong question. A country's total drug spend says almost nothing about whether a specific therapeutic vaccine, biosimilar or diagnostic can be registered there, reimbursed there, supplied there, and paid for there — in a currency and through a banking channel the owner can actually use.

Portfolios built over decades of genuine scientific achievement stay stranded at home not because the science is weak, but because the commercial decision is made on the wrong unit of analysis. An asset's approval in one jurisdiction is not evidence of commercial readiness in another; the dossier, the comparator, the payer and the tender calendar all change at the border.

OpportunityIQ starts from a different premise. The unit that matters is the *opportunity*: one asset, for one indication, in one country, through one commercial pathway. The same molecule in the same market is two opportunities if it can be licensed to a local partner or supplied directly, because the cash flows, the risks and the people accountable for them are different.

Every analysis, model and recommendation in the platform is built around that unit. A portfolio of fifteen assets and a dozen candidate markets becomes not a single strategy but a structured population of opportunities — each with its own revenue assumptions, costs, probability of success, timeline and allocation of responsibilities — that can be screened, sized, valued and compared on equal terms.

02 Five questions, eight domains, one system

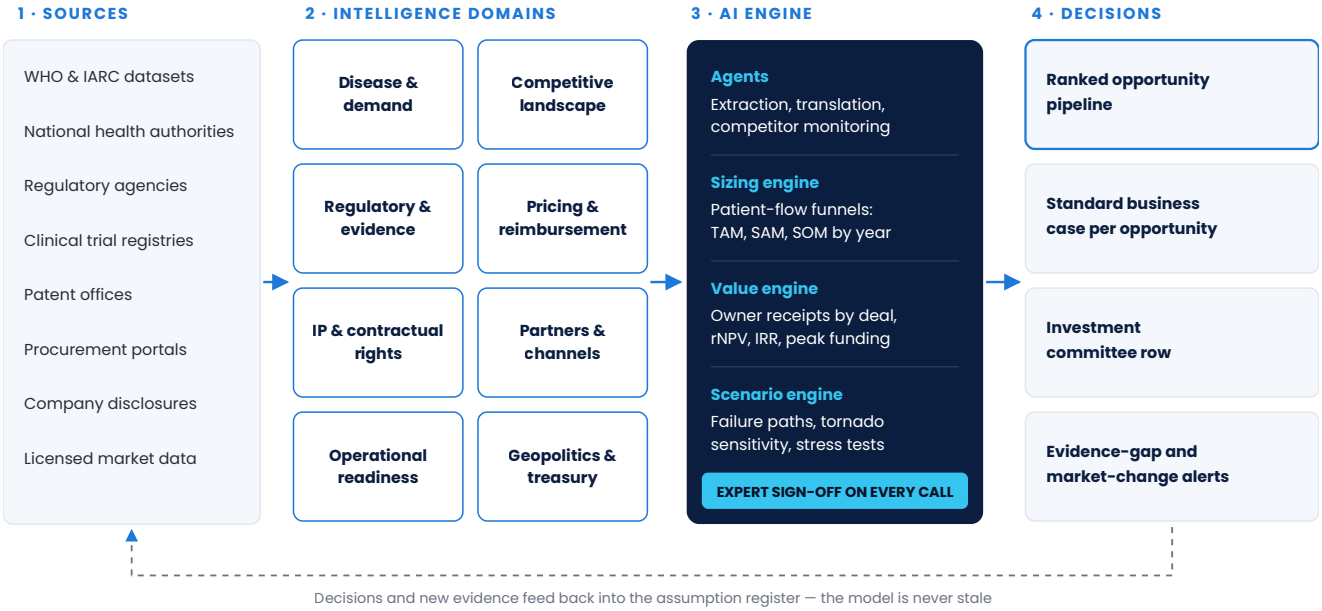
Most market intelligence tools produce dashboards. OpportunityIQ is designed to answer five recurring management questions instead — and every data domain in the platform exists because one of those questions needs it.

Q1	Q2	Q3	Q4	Q5
Where is there a material unmet need?	**Which assets could address it with enough evidence?**	**What must happen before customers can buy and use it?**	**Which deal structure gives the best risk-adjusted return?**	**What new information would change the decision?**
Disease & demand · competitive landscape	Regulatory & evidence · IP & rights	Pricing & reimbursement · operational readiness	Partners & channels · geopolitics & treasury	Sensitivity · evidence-gap monitoring

©Agile Dynamics 2026

FIGURE 1

How OpportunityIQ turns scattered evidence into ranked decisions



Answering those questions requires information that today lives in separate silos — epidemiology in registries, approval routes in regulators' databases, prices in tender portals, claims in patent offices, and sanctions or transfer constraints with the treasury team. OpportunityIQ organises it into eight intelligence domains, each tied to the decision it supports.

Demand analysis deliberately connects disease burden with treatment access and affordability. A large gap between clinical need and access to care is strategically relevant, but it does not automatically constitute funded commercial demand — and the platform never lets the first stand in for the second.

03 The methodology: three layers of truth

Every opportunity is carried through three layers, and the platform refuses to let one masquerade as another. The first is the **end market**: the value of the clinically relevant demand. OpportunityIQ sizes it bottom-up from patients, never from a therapy-area market report. Population, incidence or prevalence, subtype, stage and clinical eligibility build the total addressable market (TAM); diagnosis rates, access to treating centres and payer or tender coverage narrow it to the serviceable market (SAM); competition and a realistic uptake curve give the obtainable share (SOM), year by year.

The platform picks the patient-flow model from how the product is used. Acute and line-of-therapy treatments are sized from annual incidence at the eligible stage; chronic therapies from a treated pool rolled forward each year with persistence and discontinuation; vaccines from birth or target-age cohorts; diagnostics from tests per eligible patient; biosimilars from the current treated volume of the reference product.

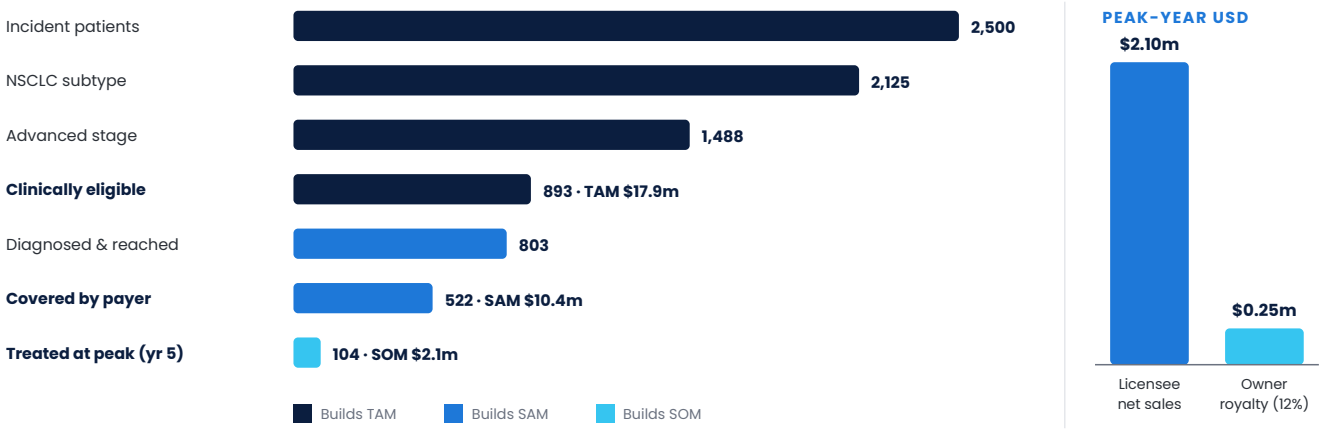
The second layer is **attributable revenue** — what actually reaches the IP owner. This is where most investment cases quietly break. Under a licence, the owner receives an upfront payment, milestones and a royalty on the licensee's sales, not the sales themselves. OpportunityIQ models each structure explicitly, so the same market can be compared across every feasible deal.

©Agile Dynamics 2026

The third layer is **risk-adjusted value**. Every opportunity runs through a scenario tree — approved on time, delayed, approved with a narrower label, failed after spend, terminated by the partner, cash trapped by transfer restrictions — and each branch carries the costs incurred up to its end point. Only then do rNPV, IRR, peak funding requirement and time to first receipt appear in the committee view.

FIGURE 2 · ILLUSTRATIVE

Patients narrow 24-fold from incidence to treatment — and the owner keeps only part of what is sold



Hypothetical therapeutic cancer vaccine for advanced non-small-cell lung cancer, licensed in a hypothetical country of 10 million people at USD 20,000 net per course. All inputs are invented to show the mechanics; none describes a real asset or market.

TABLE 1

Same market, different deal: what the owner actually receives

STRUCTURE	WHAT THE OWNER RECEIVES	SIZING INPUT THAT DRIVES IT
Direct supply	Net product receipts less cost of goods, distribution and commercial costs	SOM volume × net price
Distribution	Transfer price × volume shipped to the distributor	SOM volume × transfer price, not end price
Licensing	Upfront fee, probability-weighted milestones, royalty on licensee sales	Licensee's SOM × royalty rate
Co-development	Share of milestones, royalties or profit, less share of development spend	Programme SOM × agreed split
Technology transfer	Transfer fees, royalties, continuing supply of inputs	Local producer's volume × royalty and supply terms
Joint venture	Distributions after capital calls and withholding tax, exit proceeds	JV SOM × equity share, after JV costs

> **"The same molecule in the same market is two opportunities if it can be licensed to a local partner or supplied directly."**

©Agile Dynamics 2026

04 Gate before you score

A large market figure is seductive, so OpportunityIQ makes it wait. Before any sizing begins, five mandatory screens test legal eligibility, banking feasibility, the regulatory route, supply capability and cash realisation. An opportunity that cannot be lawfully contracted, paid for or supplied is stopped at the first gate, however attractive its patient numbers.

The ones that pass move through sizing, valuation and stress-testing, then into market validation with payers, tender authorities and prospective partners. Funding is released only at four gates — preliminary eligibility, evidence validation, partner and buyer validation, and execution approval — so capital follows evidence rather than enthusiasm.

FIGURE 3

Eight plays, four gates: capital follows evidence, not enthusiasm

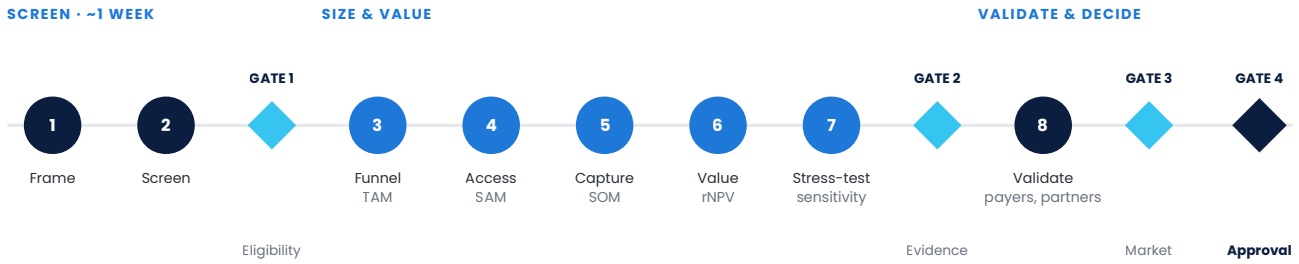


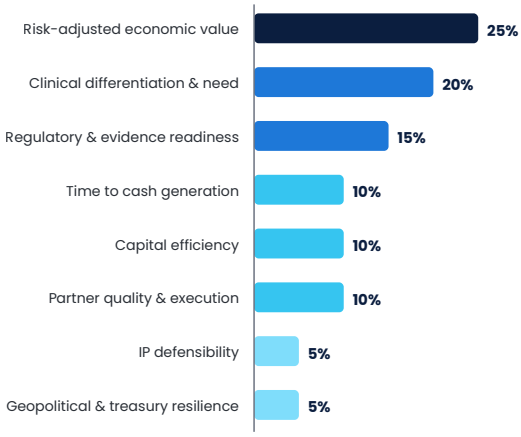
FIGURE 4

Survivors sort into four investment categories



FIGURE 5

How opportunities are ranked after the screens



Weights are management choices, recalibrate

Survivors are classified into four investment categories, and the classification is reviewed as evidence, competitors, patent positions and market conditions change. Within each category, a transparent weighted score ranks opportunities on economic value, clinical differentiation, readiness, speed to cash, capital efficiency, partner quality, IP strength and resilience.

The objective is not to commercialise every asset. It is to concentrate resources where clinical value and commercial feasibility intersect —

©Agile Dynamics 2026

and to stop funding, early and explicitly, the opportunities where they do not.

05 AI that shows its working

OpportunityIQ is AI-native, but it is not a black box. Agents read registries, tender awards, trial records and patent filings in their original languages, keep competitor pipelines current and generate scenarios at a pace no analyst team can match. What they cannot do is decide. Clinical interpretation, patent conclusions, legal eligibility and investment approval stay with named experts, and every sign-off is logged against the assumption it touches.

That discipline runs through the data itself. Every material input carries a source, an observation date, a named owner, a refresh schedule and an evidence grade, together with its measured effect on value. A high-value opportunity resting on assumptions is presented as a research question, not an investment, and the platform names the evidence task that would resolve it. Inputs that could flip the recommendation are triangulated with a second independent source before any gate.

FIGURE 6 · ILLUSTRATIVE INTERFACE

What the investment committee sees: a ranked, graded, gated pipeline

OpportunityIQ Ranked pipeline · Portfolio A · 14 opportunities screened, 6 shown — EXPORT CASE

#	OPPORTUNITY	PATHWAY	PEAK SOM	rNPV	SCORE	EVIDENCE	STATUS
1	**Asset A · therapeutic vaccine · Country 1**	Licensing	$4.8m	$6.1m		A B	GATE 3
2	**Asset B · biosimilar · Country 2**	Tech transfer	$7.2m	$5.4m		B B	GATE 2
3	**Asset C · diagnostic kit · Country 3**	Distribution	$2.3m	$3.9m		A C	GATE 2
4	**Asset A · therapeutic vaccine · Country 4**	Co-development	$9.6m	$3.1m		C D	EVIDENCE TASK
5	**Asset D · paediatric vaccine · Country 2**	Direct supply	$1.8m	$1.2m		B C	GATE 1
6	**Asset E · cardiovascular · Country 5**	Licensing	$3.4m	$0.6m		D D	RESEARCH Q

Mock-up for illustration. Asset names, countries and values are invented. Note row 4: the largest market in the list ranks fourth because its case rests on proxy and assumption-grade inputs — the platform flags an evidence task instead of a recommendation.

TABLE 2

Every number carries a grade, and the grade limits how it can be used

GRADE	MEANING	TYPICAL SOURCES	ALLOWED USE
A Verified	Country-specific, current, primary data	Registries, tender awards, regulator databases, signed term sheets	Base case and decision
B Credible estimate	Published estimate, adjacent year or method	WHO/IARC estimates, peer-reviewed epidemiology, licensed databases	Base case, flagged in sensitivity
C Proxy	Comparable country or population, adjusted	Neighbouring registries, regional averages	Range only; replaced before term sheet

©Agile Dynamics 2026

GRADE	MEANING	TYPICAL SOURCES	ALLOWED USE
D Assumption	Expert judgement or internal belief	Interviews, management input	Scenario only; evidence task required

06 Benchmarking the competition

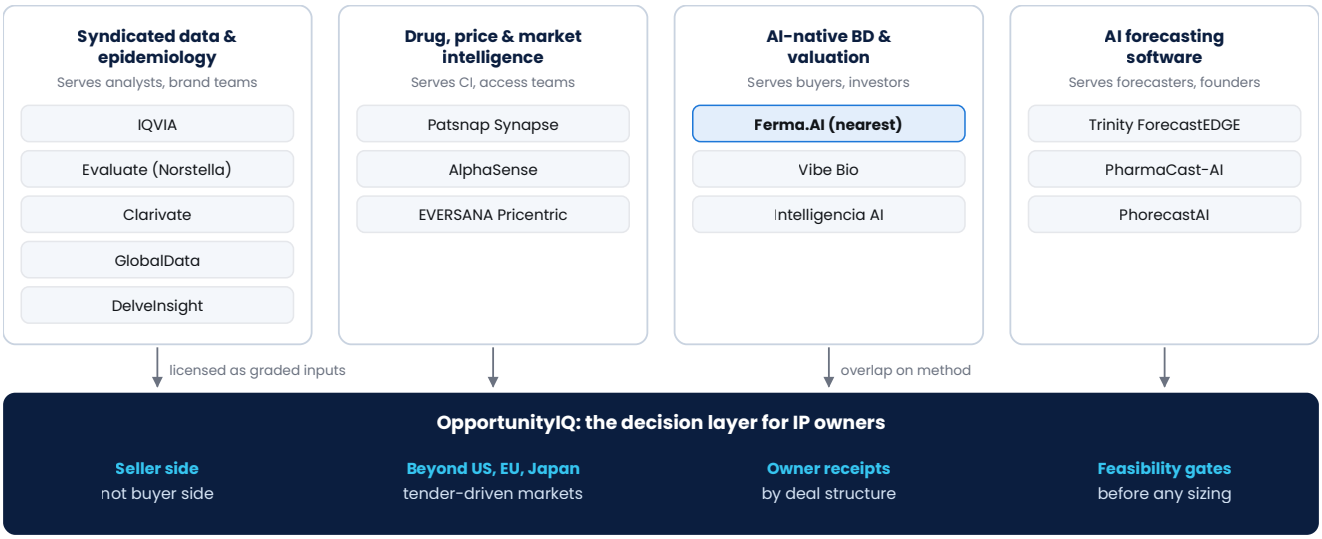
OpportunityIQ does not enter an empty field. Life-sciences teams already buy market intelligence from some of the most established data businesses in the industry, and a new generation of AI-native start-ups is moving fast into business development and forecasting. To understand where OpportunityIQ fits, we reviewed thirteen products across four groups using their public product pages as of November 2026, and scored each against seven capabilities that the OpportunityIQ method depends on.

The four groups are distinct. **Syndicated data and epidemiology** providers — IQVIA, Evaluate, Clarivate, GlobalData and DelveInsight — own deep datasets on patients, sales and pipelines. **Drug, price and market intelligence** tools such as Patsnap Synapse, AlphaSense and EVERSANA Pricentric make documents, prices and landscapes searchable. **AI-native business development** platforms — Ferma.AI, Vibe Bio and Intelligencia AI — screen assets and estimate risk for buyers. **AI forecasting software** from Trinity Life Sciences, PharmaCast-AI and PhorecastAI automates patient-based revenue models.

Two conclusions stand out. First, the building blocks are no longer rare: patient-based sizing appears in eight of the thirteen products, and AI assistance of some kind in nine. Bottom-up sizing on its own will not differentiate anyone for long. Second, no product combines the elements that turn a forecast into a commercialisation decision for the owner of an asset.

FIGURE 7

Four groups of competitors, four gaps none of them covers



©Agile Dynamics 2026

TABLE 3

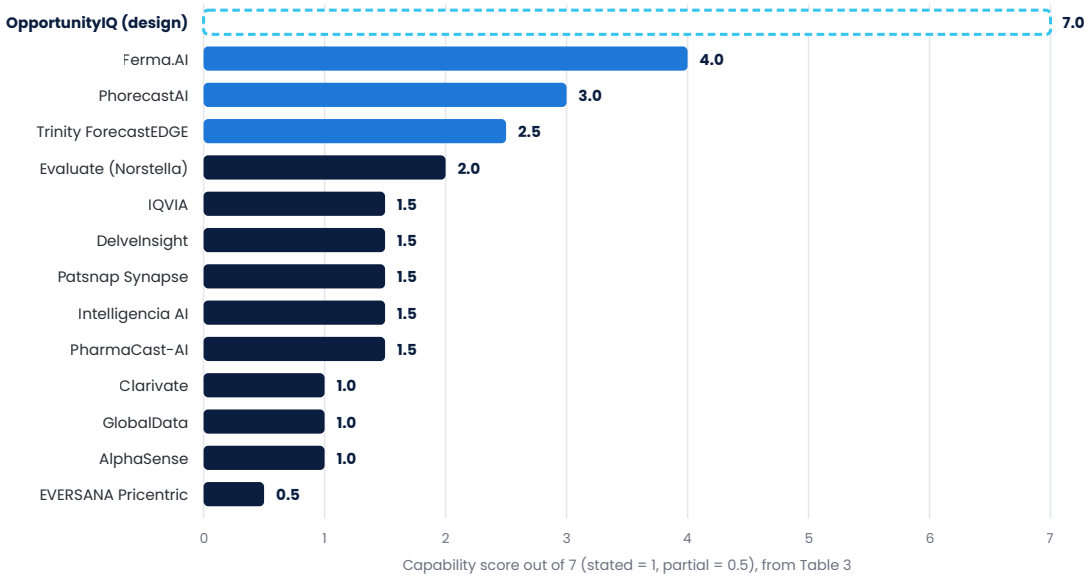
Capability benchmark: thirteen products against the seven capabilities OpportunityIQ combines

PRODUCT	PATIENT-BASED SIZING	VALUATION (RNPV)	AI AGENTS OR ASSISTANTS	SERVES THE IP OWNER	OWNER RECEIPTS BY DEAL TYPE	FEASIBILITY GATES	EMERGING AND TENDER MARKETS
IQVIA	◐	○	◐	○	○	○	◐
Evaluate (Norstella)	●	●	○	○	○	○	○
Clarivate	●	○	○	○	○	○	○
GlobalData	●	○	○	○	○	○	○
DelveInsight	●	○	◐	○	○	○	○
EVERSANA Pricentric	○	○	○	○	○	○	◐
Patsnap Synapse	○	○	●	○	○	○	◐
AlphaSense	○	○	●	○	○	○	○
Ferma.AI	●	●	●	○	◐	○	◐
Intelligencia AI	○	◐	●	○	○	○	○
Trinity ForecastEDGE	●	◐	●	○	○	○	○
PharmaCast-AI	●	○	◐	○	○	○	○
PhorecastAI	●	●	◐	○	○	○	◐
OpportunityIQ (design)	●	●	●	●	●	●	●

● stated on the vendor's public pages ◐ partial or limited ○ not stated (which does not prove the capability is absent). Agile Dynamics assessment of public product pages, November 2026. OpportunityIQ shows design intent, not shipped capability.

FIGURE 8

The nearest competitors cover about half of the capabilities; none covers the owner-side four



©Agile Dynamics 2026

WHAT THE BENCHMARK SHOWS

The incumbents own the data, not the decision. Syndicated providers are strongest on patient and sales data, but their products answer market-level questions. None of them is organised around a single asset, in a single country, under a single deal — the unit at which an owner actually commits money.

The AI-native challengers serve the buyer. Ferma.AI is the closest analogue in method: its agents build bottom-up rNPV models and package investment-committee material. But it, like Vibe Bio and Intelligencia AI, helps a pharma company decide what to in-license. The owner's mirror-image question — where and how to take an asset out — is served by no one in the sample.

The forecasting tools are becoming a commodity. PhorecastAI offers a free tier with rNPV on paid plans; PharmaCast-AI and Trinity's ForecastEDGE pair patient-flow models with AI-suggested, human-approved assumptions. That validates OpportunityIQ's governance model, and it also means the moat must sit above the forecast.

Four capabilities appear nowhere. Serving the IP owner, comparing owner receipts across deal types, gating on legal, banking and cash feasibility before sizing, and depth in tender-driven and emerging markets were not found in any product reviewed. Together they form OpportunityIQ's defensible position. Our strategy follows from it: license incumbent data as graded inputs, and compete on the decision layer above it.

> **"The incumbents own the data, not the decision."**

07 Forecast: a growing market and a missing layer

Three independent signals point in the same direction. Spending on life-science analytics is projected by MarketsandMarkets to rise from USD 40.0 billion in 2025 to USD 68.8 billion in 2030, an 11.4% compound annual growth rate. Within it, the market for AI in pharmaceuticals is growing far faster: BCC Research projects USD 3.8 billion in 2025 rising to USD 15.2 billion by 2030, a 31.7% annual rate.

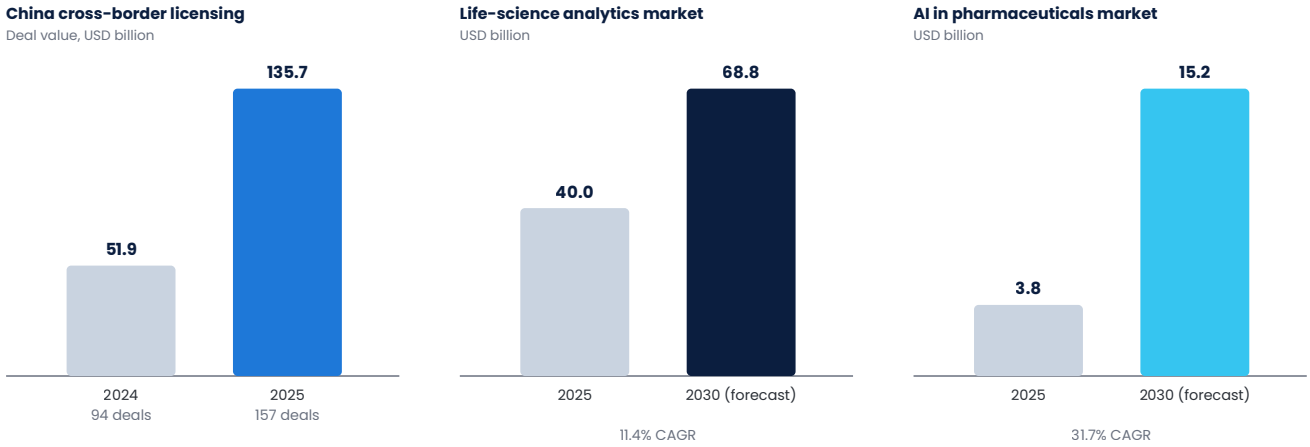
At the same time, the geography of dealmaking is shifting. According to PharmCube data reported by Caixin, Chinese drugmakers signed 157 cross-border licensing deals worth USD 135.7 billion in 2025, up from 94 deals worth USD 51.9 billion in 2024. Valuable assets now originate well beyond the traditional US and European innovation hubs, and owners in those new source markets need to decide where, and through which partner, to take them.

Our view is that these trends will reshape commercialisation intelligence over the next five years in three ways. Budgets will move from data to decisions, as buyers expect AI to deliver a recommendation rather than a dataset. Tools will become two-sided, because owners, buyers, governments and investors increasingly assess the same opportunity at the same time. And the frontier will move beyond the seven major markets, into tender-driven and emerging economies where access, payment and sanctions constraints decide the outcome. OpportunityIQ is designed for all three.

©Agile Dynamics 2026

FIGURE 9

Analytics and AI spending are rising, and licensing deals are flowing from new source markets



Sources: PharmCube NextPharma data as reported by Caixin Global, 14 January 2026; MarketsandMarkets, Life Science Analytics Market press release, May 2025; BCC Research, AI in Pharmaceuticals: Global Markets, press release 17 November 2025. Third-party forecasts; each panel uses its own scale.

2026–2027 · FROM DATA TO DECISIONS

Buyers expect AI to recommend an action, with its evidence, not deliver another dataset.

2027–2028 · TWO-SIDED INTELLIGENCE

Owners, buyers, governments and investors assess the same opportunity on shared, graded evidence.

2028–2030 · BEYOND THE MAJOR MARKETS

Tender-driven and emerging economies become a core arena for licensing and local production.

08 From consulting method to platform

The method behind OpportunityIQ grew out of Agile Dynamics' work helping research-led portfolios build intelligence-led go-to-market strategies. Packaging it as a platform changes the economics. A market-entry study that once took a team months for a single country becomes a living model across many assets and markets, refreshed as registries, tenders and competitors change.

Each new engagement enriches the shared reference layer — country price benchmarks, regulatory timelines, analogue launch curves, partner profiles — so the tenth opportunity is faster and better-evidenced than the first. The assumption register, the standard business case and the committee view travel with the client, so the work stays auditable long after the engagement ends.

FOR PORTFOLIO OWNERS

See which assets, markets and deal structures are worth pursuing — and which to stop funding.

FOR INVESTORS

A standard, auditable business case for every opportunity, comparable side by side.

FOR PARTNERS

Clear evidence of where an asset fits their market, channel and capability.

©Agile Dynamics 2026

FIGURE 10

Prove it on three assets, then scale to the full portfolio

WEEKS 0–2

Set up & screen

- Pick three pilot opportunities with different pathways
- Stand up the assumption register
- Run framing and mandatory screens

WEEKS 2–10

Size, value, test

- Patient funnels, access and uptake
- Owner receipts and rNPV by pathway
- Sensitivity and evidence-gap closure

WEEKS 10–12

Validate & decide

- Payer and partner soundings
- First committee rows and gate decisions
- Method review and recalibration

THEN

Scale

- Roll out across a 10–15 asset scope
- Quarterly register refresh
- Continuous market-change alerts

For owners of proven but under-commercialised science — state-owned portfolios, university spin-outs and mid-sized biotechs alike — the prize is not a bigger slide about a bigger market. It is the confidence to say, with evidence, *this* asset, in *this* country, through *this* deal, is worth doing now.

TAKEAWAY

Market size is not market value. OpportunityIQ sizes from patients, attributes revenue to the owner deal by deal, and gates capital on evidence — turning a portfolio of promising science into a ranked pipeline of investable decisions.

This paper presents Agile Dynamics' point of view on OpportunityIQ, a platform in development. Figures in the worked example and interface mock-up are illustrative and do not describe any real asset, market, partner or transaction. Platform capabilities described are design intent and may change. The competitive benchmark reflects an Agile Dynamics review of vendors' public product pages in November 2026 and is not independently verified; market forecasts are third-party estimates.

SOURCES

IQVIA, Market Prognosis (iqvia.com) · Evaluate, Epi+ and FC+ forecasting software (evaluate.com); Norstella, acquisition of J+D Forecasting, January 2024 · Clarivate Epidemiology Intelligence launch, BioPharma Boardroom, May 2024 · GlobalData Pharma Intelligence Center (globaldata.com) · DelveInsight DelveEpiAI, PR Newswire, March 2026 · EVERSANA Pricentric ONE (eversana.com) · Patsnap Synapse (patsnap.com) · AlphaSense pharma and biotech CI (alpha-sense.com) · Ferma.AI BD & Licensing (ferma.ai) · Vibe Bio (vibebio.com) · Intelligencia AI (intelligencia.ai) · Trinity Life Sciences, ForecastEDGE (trinitylifesciences.com), May 2026 · PharmaCast-AI (pharmacast-ai.com) · PhorecastAI (phorecastai.com) · MarketsandMarkets, Life Science Analytics Market, May 2025 · BCC Research, AI in Pharmaceuticals: Global Markets, November 2025 · Caixin Global, "Chinese drugmakers strike record $136 billion in cross-border licensing deals", 14 January 2026.

ABOUT THE AUTHOR



Paul Lalovich, PhD

MANAGING PARTNER, AGILE DYNAMICS

Paul Lalovich is Managing Partner of Agile Dynamics, a management consulting firm headquartered in Singapore with offices in the UAE and the Americas, and leads its work across the GCC, Asia and Europe. He created the ANDRA™ (AI-Native Dual-Running Architecture) methodology, wrote *From Cubicle to Tribe* (2024), and co-founded the AI-native treasury intelligence platform SwiftMotion. He leads the development of OpportunityIQ.

©Agile Dynamics 2026