
# Our Consulting Services

# About Mathys & Squire

***Dedicated to protecting and defending your future.***

**Mathys & Squire is an intellectual property (IP) powerhouse that puts its specialist knowledge to work for clients, to strengthen and secure what most modern businesses today treat as one of their most valuable strategic assets - intellectual property.**

The firm's agile teams of attorneys, scientists and strategists are steeped in experience, working with IP-rich and high-growth industries to leverage complex technologies and sophisticated commercial models across a broad range of industry sectors.

A full-service IP firm, Mathys & Squire has unrivalled expertise in patents, trade marks, design protection and litigation. Highly ranked in leading legal and IP directories, and leading the field with insight, innovation and quality, Mathys & Squire celebrated its 115th Anniversary in 2025, testament to its proven track record in the protection and commercialisation of IP rights.

The firm has a broad spread of clients, ranging from start-ups to major UK and global corporations, many of which are household names. Clients of the firm value its commitment to professional excellence and technical expertise.

Mathys & Squire has over 100 attorneys (both training and qualified) and a dedicated IP consulting team across offices in London, Birmingham, Cambridge, Manchester, Newcastle, Oxford, Luxembourg, Munich and Paris, as well as teams based in China and Japan. The firm's attorneys and trainees have a mix of scientific degrees extending from chemistry, biochemistry, pharmacology, genetics, microbiology, plant sciences and zoology through to physics, electronics, telecommunications and engineering.

We are passionate about creating and delivering innovative, high-quality, client-focused services and building close and longstanding relationships with clients in order to establish defensive and offensive IP portfolios that generate commercial value. We are proactive when working with clients and valued for our integrity, honesty and collegiate approach.

***We protect, so that you can invent the future.***

# Strategic IP consulting to support growth, investment and commercial value

At Mathys & Squire Consulting, we help organisations turn intellectual property and intangible assets into practical commercial advantage. We combine legal insight, technical understanding and commercial experience to help clients protect value, manage risk, support growth and make better, data driven, business decisions.

Whether you're an early-stage startup with growth plans, or a large corporation seeking to get more from your IP portfolio, our intellectual property consultants can help. Our extensive in-house and private-practice experience is at your disposal, to help you achieve your business goals. Regardless of your sector or developing technology, realise meaningful value from your intangible assets, reduce risks, and get support with business growth and, ultimately, your success.

## Advice to match your business's pace as it grows and flourishes

We understand that innovation businesses require flexibility and agility from their service providers, and thanks to our considerable experience, our service model has been built on this very foundation: we adapt and develop our advice to match your business's pace as it grows and flourishes.

Clients benefit from an unrivalled in-house capability; we work closely as a team drawn from across the Mathys & Squire business, to provide a holistic service that encompasses both the legal and commercial aspects of IP.

Not sure where to start? We can help you understand your current IP position and identify the next practical steps.

*The overall customer journey was nothing less than holistic. The team helped me to paint a strategic map, with various options that injected confidence… Their input was seminal in the final successful outcome, so I would have no doubt encouraging anyone looking for specialised advice on IP management to work with them.*

**KP Acoustics**

# Our core service offering includes:

## Strategy and governance

- Fractional IP Advisor
- IP Strategy and Process Development
- IP Training

## Portfolio and Value

- IP Valuations
- IP Audits
- IP Portfolio Optimisation
- IP Market Intelligence and Landscape Reports

## Transactions and commercialisation

- IP Due Diligence
- IP Contract Review, Drafting and Negotiation
- IP Licensing and Sale Support

# Strategy and Governance

Strategy and governance

# Fractional IP Advisor

For many growing businesses, IP is too important to leave unmanaged, but too specialist to justify a full-time senior hire. Our fractional IP advisor service gives you access to senior strategic, legal and operational IP support on a flexible basis, helping you manage IP as a business asset without building an internal IP function before you are ready.

## What we support

- IP strategy and governance

Helping you define what IP should achieve for the business, how it supports commercial objectives, and where protection, enforcement, licensing or risk mitigation should be prioritised.

- Patent and IP portfolio management

Reviewing patent portfolios, identifying gaps and weaknesses, improving filing discipline, supporting prosecution strategy, and ensuring spend is focused on commercially relevant assets.

- Invention capture and internal IP processes

Creating practical processes for identifying, assessing and protecting new inventions, designs, know-how, software, data and brand assets.

- Commercial IP support

Supporting licensing, collaboration agreements, R&D agreements, university relationships, joint development arrangements, IP assignments, investor materials and IP marketing packs.

- IP risk management

Helping identify freedom-to-operate risks, ownership issues, open source exposure, contractor and employee IP gaps, competitor patent risks, and transaction diligence issues before they become deal blockers.

- Board, investor and transaction support

Preparing IP positions for fundraising, acquisition, sale, due diligence, licensing discussions or strategic partnerships.

- External attorney coordination

Acting as an experienced internal-facing IP lead to manage outside patent attorneys, reduce unnecessary spend, improve instructions, and ensure advice is commercially focused.

**The aim is not simply to create more IP. It is to create better IP decisions.**

## Strategy and governance

# IP Strategy and Process Development

Our IP strategy and process development service helps businesses create a clear, practical framework for managing IP in a way that supports commercial objectives, protects value and improves decision-making across the organisation.

### This service is particularly useful for:

- scaling businesses moving beyond founder-led IP decisions;
- companies preparing for investment;
- businesses launching new products or entering new markets;
- organisations with growing but unmanaged IP portfolios;
- companies considering their first internal IP hire;
- legal teams needing specialist IP operating support.

### Turning IP into a managed business function

An effective IP strategy is not just a filing plan. It should connect IP activity to the company's products, markets, technology roadmap, funding plans, competitive position and risk appetite.

### What we support

- IP strategy development

Defining the role of IP in the business, including how it supports revenue, market position, investment, partnerships, employee innovation, licensing, exit value and risk management.

- Patent strategy

Developing filing, prosecution, territorial and portfolio management strategies aligned with product roadmap, competitor activity, budget and commercial priorities.

- Trade mark and brand strategy

Creating a structured approach to brand clearance, trade mark filing, international protection, enforcement, portfolio management and brand governance.

- Trade secret and know-how strategy

Identifying valuable confidential information and creating practical controls to protect technical know-how, processes, data, algorithms, methods and commercial information.

- Software, data and digital IP strategy

Addressing software ownership, open source use, data rights, AI-generated materials, source code control, platform assets and digital asset governance.

- IP contract and ownership strategy

Ensuring that contracts with employees, contractors, consultants, universities, suppliers, customers and collaborators properly capture and protect IP.

- Competitor and freedom-to-operate strategy

Developing processes for monitoring competitor IP, assessing third-party risks and supporting product launch decisions.

- IP governance and decision-making

Creating clear responsibilities, approval processes, review points and reporting structures for IP decisions.

## Developing an IP operating model

For growing businesses, one of the most important questions is how IP should be managed day to day.

We can help design an IP operating model that defines:

- who is responsible for IP decisions;
- when inventions and brands should be reviewed;
- how technical teams should disclose new ideas;
- how legal and commercial teams should be involved;
- when external patent or trade mark attorneys should be instructed;
- what approvals are needed for filings and renewals;
- how IP spend should be monitored;
- how portfolio decisions should be documented;
- how IP risks should be escalated;
- what information should be reported to the board or investors.

This is particularly useful for companies that are scaling, preparing for investment, moving from founder-led decision-making, or considering their first internal IP hire.

Strategy and governance

# IP Training Service

Intellectual property is often treated as a specialist legal topic, but many of the most important IP decisions are made before lawyers are involved. Engineers disclose inventions, commercial teams discuss collaborations, marketing teams create brands, developers use third-party code, and founders negotiate with customers, investors and partners.

Our IP training service helps businesses build practical IP awareness across the organisation, so that teams can identify valuable assets, avoid common risks and make better decisions at the right time.

Training can be tailored for leadership teams, technical teams, legal and commercial teams, product teams, finance teams, marketing teams, founders, investors and operational staff.

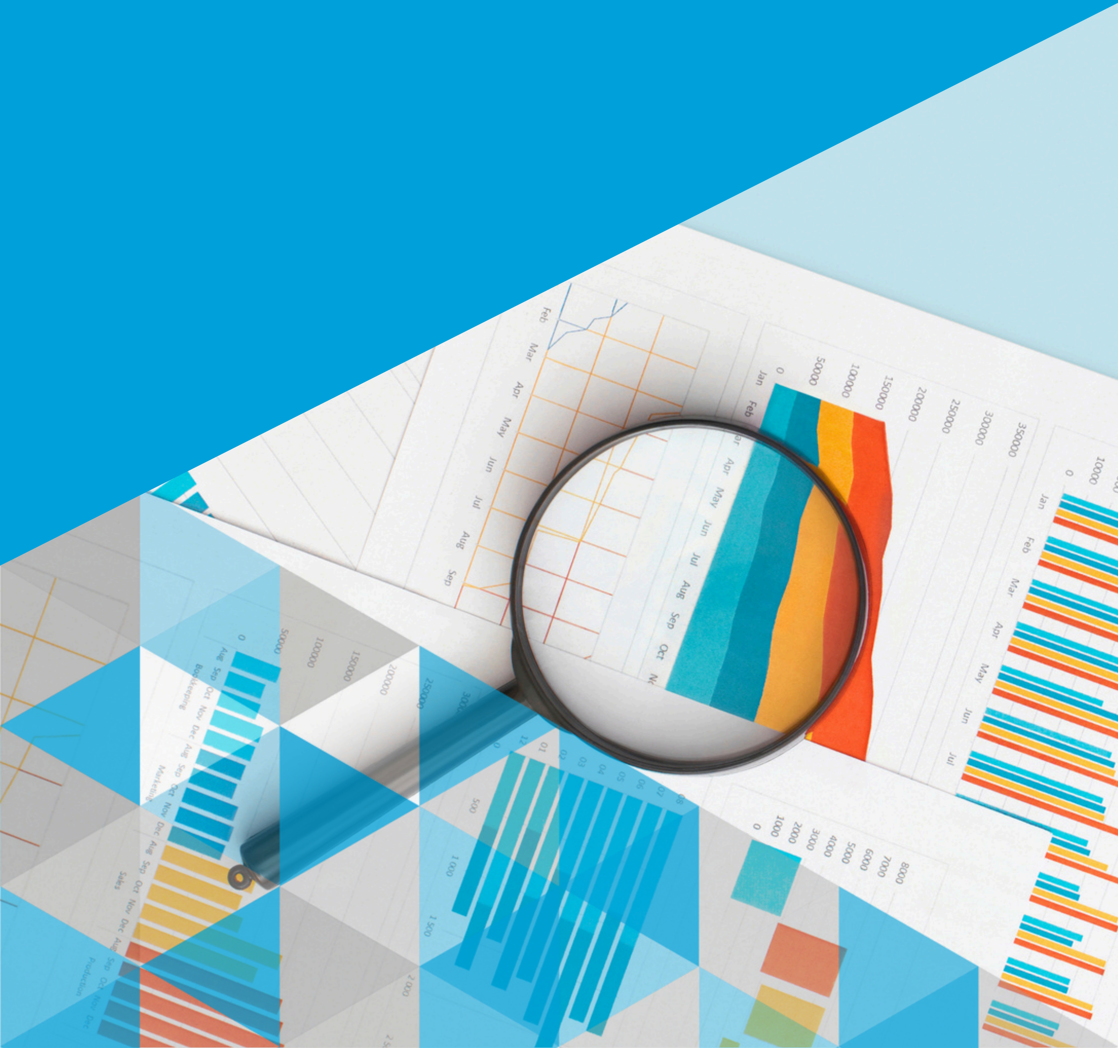
## Practical training, not legal theory

Effective IP training should not be an abstract explanation of patents, trade marks, copyright and designs. It should help people understand what IP means in their role, what risks they need to recognise, and when they should escalate an issue.

Example training modules include:

- IP essentials for leadership teams;
- invention spotting for technical teams;
- trade secrets and confidentiality;
- software, open source and data risks;
- IP in commercial contracts;
- IP for marketing and brand teams;
- IP awareness for sales and business development teams;
- preparing for investment or due diligence.

# Portfolio and Value



Portfolio and Value

# IP Valuation Service

Intellectual property can be one of the most valuable assets in a business, but its value is not always visible on the balance sheet. Patents, trade marks, software, data, know-how, copyright, designs and trade secrets can all contribute to competitive advantage, revenue generation, investment value and transaction outcomes.

Our IP valuation service helps businesses, investors, buyers, sellers and management teams understand the potential value of their intellectual property in a clear, reasoned and commercially grounded way.

We provide bespoke IP valuations for a variety of commercial reasons including:

- licensing negotiations;
- IP sales or acquisitions;
- fundraising;
- shareholder or management discussions;
- tax or accounting support;
- litigation or settlement discussions;
- portfolio strategy;
- internal investment decisions.

We present valuation outputs in a clear, commercially usable format, explaining the assumptions, evidence, methodology and limitations behind the conclusion.

## Valuation based on purpose, context and evidence

There is no single correct way to value IP in every situation. The appropriate valuation method depends on the purpose of the valuation, the type of IP, the quality of available data, the maturity of the business, the expected commercial use of the asset, and the level of uncertainty involved.

A valuation prepared for an IP sale may look different from one prepared for licensing negotiations, investor discussions, internal decision-making, tax, accounting or litigation support. For that reason, we tailor the valuation approach to the context rather than applying a generic formula.

Our aim is to provide a valuation that is transparent, evidence-based and useful for decision-making.

Income Approach

Cost Approach

Market Approach

## Valuation methodologies

We use a variety of recognised valuation methodologies depending on the requirements of the valuation and the available data.

### Income approach

The income approach values IP by reference to the future economic benefit that the asset is expected to generate. This is often the most relevant approach where the IP supports products, services, licensing income, cost savings, market exclusivity or competitive advantage.

Income-based methods can be particularly useful for patents, technology platforms, software, brands, data assets and trade secrets where there is a clear link between the IP and future commercial returns.

Common techniques may include discounted cash flow analysis, relief-from-royalty analysis, excess earnings analysis and scenario modelling.

### Cost approach

The cost approach values IP by reference to the cost of creating, replacing or reproducing the asset. This can be useful where the IP is early-stage, not yet generating revenue, or where reliable income or market data is limited.

The cost approach does not always capture the full commercial upside of IP, but it can provide a useful benchmark, particularly for early-stage assets, internally developed technology, software, technical documentation, designs and know-how.

### Market approach

The market approach values IP by reference to comparable transactions, royalty rates, licence agreements, asset sales or market benchmarks. It can be especially useful where there is good evidence of similar IP being licensed, sold or commercially exploited.

Because true like-for-like IP comparables can be difficult to find, market evidence often needs careful interpretation. We use market data to support, test and benchmark valuation conclusions rather than relying on headline figures alone.

Portfolio and Value

# IP Audit

### Understand. Protect. Maximise.

An intellectual property audit provides a structured, evidence-based review of your organisation's intellectual assets, ownership position and associated risks.

Whether you are preparing for investment, growth, collaboration or exit, an IP audit ensures your intangible assets are properly identified, secured and aligned with commercial objectives.

Our audit services can be customised to fit the needs of your business, from UKIPO part-funded audits where available, through to comprehensive reviews of IP portfolios, IP protection opportunity assessments, contractual reviews, market benchmarking and IP risk analysis.

We combine legal and commercial expertise, with extensive practical experience, to assess your current IP position and provide clear, prioritised recommendations to enhance your IP strategy.

### More than a legal checklist

A good IP audit should not simply confirm whether patents, trade marks or designs are registered. It should look at the business as a whole: its products, technology, brands, data, software, trade secrets, processes, contracts, people, markets and commercial objectives.

We help clients understand not only what IP they have, but whether it is properly owned, properly protected, commercially relevant, and aligned with the direction of the business.

### Risk and opportunity identification

An IP audit should identify both problems and opportunities, for example:

- Ownership and chain of title
- Protection gaps
- Contract and third-party risks
- Portfolio cost and relevance
- Governance and process issues
- Investment or transaction readiness

Portfolio and Value

# IP Portfolio Optimisation Service

## Turning IP portfolios into managed business assets

Portfolio optimisation is about making deliberate decisions. It helps businesses understand which assets should be maintained, strengthened, licensed, sold, abandoned, consolidated or expanded. The aim is not simply to reduce cost. It is to ensure that the portfolio supports commercial value, risk management and strategic goals.

## What we review

Our portfolio optimisation work can cover a range of registered and unregistered IP assets, including:

- Patents and patent applications

Patent families, granted patents, pending applications, prosecution strategy, claim scope, territorial coverage, annuity costs, commercial relevance, competitor coverage and remaining term.

- Trade marks and brands

Registered marks, pending applications, product names, logos, defensive filings, territorial coverage, renewal strategy, brand architecture and unused or duplicate marks.

- Designs

Registered and unregistered design rights, product appearance protection, filing strategy, renewal decisions, market relevance and overlap with product lifecycle.

- Software, data and know-how

Core technical assets, source code, algorithms, datasets, trade secrets, confidential processes, documentation, access controls and protection strategy.

- Licences and encumbrances

Existing licence rights, sublicensing restrictions, exclusivity commitments, field restrictions, retained rights, collaboration rights and third-party dependencies.

- IP processes and governance

Invention capture, filing criteria, portfolio review cadence, decision-making authority, budget control and alignment between legal, technical and commercial teams.

Typical outputs may include:

- portfolio scoring or categorisation;
- maintain/abandon/strengthen recommendations;
- renewal and filing recommendations;
- territory review;
- cost-saving opportunities;
- licensing or sale candidates;
- gaps in protection;
- governance improvements;
- executive summary for management or board use.

Portfolio and Value

# IP Market Intelligence and Landscape Reports

Our IP Market Intelligence and Landscape Reports services help clients turn complex patent data into practical and actionable commercial insight.

We provide focused, accessible reports that identify what is happening in a defined technology area, who is active, where protection is being sought, and what the results may mean for your business strategy.

**Turning patent data into commercial insight**

**Our reports can help answer questions such as:**

- Who are the main patent filers in this technology area?
- Is the field crowded or relatively open?
- Which companies are increasing their activity?
- Where are competitors protecting their technology?
- Are there potential partners, acquisition targets or licensing candidates?
- What technical themes are emerging?
- Is there evidence of patenting activity around a specific product, market or technology trend?
- Where might there be opportunities for differentiation or further protection?

Our IP market intelligence and patent landscape work can support a wide range of business decisions, including:

- R&D prioritisation

Identify areas of high activity, emerging technical themes and potential whitespace to help guide innovation investment.

- Competitor monitoring

Understand which companies are active in a technology area, how their portfolios are developing, and whether they may present a competitive, licensing or enforcement risk.

- Market entry assessment

Assess whether a target technology area appears heavily protected, fragmented, emerging or underdeveloped.

- Partner, supplier and acquisition screening

Use patent ownership, filing activity and technical focus to identify companies with relevant capabilities or complementary assets.

- Investment and transaction support

Provide high-level intelligence to support investment decisions, due diligence, valuation, licensing discussions and acquisition strategy.

- IP strategy development

Use landscape evidence to align patent filing, risk management and commercial strategy with real market activity.

# Transactions and commercialisation

Transactions and commercialisation

# IP Due Diligence

Our IP due diligence service provides a focused legal, technical and commercial review of intellectual property assets in the context of a transaction, investment, licence, acquisition, sale or strategic partnership.

## Turning patent data into commercial insight

Patent landscape reports are often treated as technical search exercises. Our approach is broader.

Effective IP due diligence should answer practical business questions.

- Does the target own the IP it says it owns?
- Does the IP protect the key products, technology or brand value?
- Are there gaps in ownership, protection or freedom to operate?
- Are there third-party rights that could restrict use?
- Is the portfolio aligned with the commercial rationale for the deal?
- Are there issues that should affect price, warranties, indemnities, completion conditions or post-completion integration?

## Buy-side IP due diligence

For buyers, investors and licensees, IP due diligence helps test whether the assets support the proposed deal.

We review the IP position against the buyer's intended use, commercial objectives and risk appetite. This helps identify issues that may affect valuation, deal structure, negotiation strategy or completion.

## Sell-side IP due diligence

For sellers, IP due diligence is an opportunity to prepare the business before the buyer starts asking difficult questions.
A well-prepared IP position can reduce transaction friction, improve buyer confidence, support valuation and avoid last-minute issues that delay or weaken the deal.

## Due diligence for licensing and strategic transactions

IP due diligence is not limited to company acquisitions. It is equally important in licensing, technology transfer, joint ventures, spin-outs, collaborations and strategic partnerships.
In these situations, the key question is often whether the proposed rights are sufficient for the intended commercial purpose.
Contact us to discuss IP due diligence support for your transaction, investment, licence or strategic partnership.

Transactions and commercialisation

# IP Contract Review, Drafting and Negotiation

IP issues often sit at the heart of commercial agreements, but they are not always dealt with clearly. Ownership, licensing, access rights, confidentiality, improvements, liability, warranties, indemnities and freedom-to-use provisions can all have a significant effect on value, risk and future commercial flexibility.

Our IP contract review, drafting and negotiation support service helps businesses identify, manage and negotiate the IP issues that arise in commercial contracts.

We support clients who need specialist IP input into contracts, whether as a focused review of specific clauses, support during negotiations, or preparation of tailored IP provisions for a wider agreement.

## Specialist IP support for commercial agreements

When businesses engage with customers, suppliers, contractors or commercial partners, IP terms are often among the most important issues, but they are not always discussed clearly at the outset. This can lead to misunderstandings about ownership, permitted use, improvements, exclusivity, liability and future commercial flexibility.

At Mathys & Squire Consulting we utilise our deep understanding of IP and in-house experience to provide our clients with the support and advice they need to:

- Understand the key IP matters when engaging with third parties;
- Negotiate IP matters at a commercial level, to simplify and accelerate the contracting process;
- Take a practical and risk-managed approach to negotiating IP clauses in agreements; and
- Have confidence that their negotiated contracts meet their commercial needs.

## We offer the following services:

- Pre-contract IP strategy and priorities support
- Specialist IP input to support agreement drafting and negotiation
- IP agreement analysis and interpretation

We can help you identify the key IP issues in your contracts and support practical, commercially focused negotiations.

Transactions and commercialisation

# IP Licensing and Sale Support

Buying, selling or licensing intellectual property is rarely just a legal transaction. The value of the deal depends on understanding what the IP actually protects, how strong it is, how it supports the buyer's commercial objectives, and whether the transaction structure properly captures the intended value.

Our IP licensing and sale support service helps IP owners, buyers, sellers and licensees navigate the commercial, legal and technical aspects of IP transactions with confidence.

We support clients from early-stage negotiations through to due diligence, deal structuring, contract negotiation and completion.

## Support for IP owners, sellers and licensors

For IP owners, the challenge is often not simply finding a buyer or licensee. It is presenting the IP in a way that makes its value clear, credible and commercially attractive.

We help IP owners package their IP for maximum appeal and value by identifying the strengths of the portfolio, clarifying the commercial opportunity, addressing weaknesses before negotiations, and preparing materials that help potential buyers or licensees understand the assets quickly.

Our services include:

- IP portfolio review

Assessing the scope, status, ownership, relevance and commercial strength of the IP assets.

- IP restrictions and encumbrances check

Understand the limitations on a buyer's rights.

- IP value positioning

Identifying the technical, legal and commercial features that make the IP valuable to potential buyers, licensees or partners.

- Buyer and licensee readiness

Preparing the IP package so that it can withstand technical, legal and commercial scrutiny during negotiations and due diligence.

- Negotiation support

Supporting commercial discussions on deal structure, pricing, exclusivity, field restrictions, territory, royalties, milestones, sublicensing, enforcement rights, improvements and retained rights.

- Contract support

Assisting with licence agreements, assignments, option agreements, heads of terms, term sheets, confidentiality agreements, collaboration agreements and related transaction documents.

Mathys & Squire

T +44 (0)20 7830 0000 // E info@mathys-squire.com // @mathyssquire // www.mathys-squire.com