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The private equity market has been buoyant over the course of the past year as appetite for private capital continued to rise and institutional investors were keen to put their money to work. Managers are service providers in the space have been deepening their relationships as they work more closely together to meet their clients' needs.

Speed, sustainability and scale have all been elements which rose to further importance throughout the year. This report shines a light on the players who have been going above and beyond and adapting their product suite and their services to better serve the industry and its investors. Here are a few of the winners of the Private Equity Wire European Awards 2022.

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ALTER DOMUS

BEST FUND ADMINISTRATOR (GPS WITH ASSETS >$30BN)

As private equity asset managers forge more strategic relationships with their institutional investor clients, their needs for data and timely reporting are becoming sharper and more essential. The advent of retail participation in the PE space will also herald new challenges.

The PE space has been growing faster than anyone could have predicted, with the industry witnessing record fundraising growth. This has led to a change in the dynamics of the market.

"Managers and investors have seen the investment opportunities available and, as a result, the market has been maturing. Some of the larger institutional investors have become co-investors and partner with GPs to provide deals with a lot more capital," Tim Toska, group sector head, private equity, Alter Domus, outlines.

He explains how this has led to a more consultative relationship also between the managers and service providers, like Alter Domus: "We've seen a greater focus on what back-office operations teams are providing, with this becoming more of a value-add proposition for managers. This part of their business is starting to become a differentiating factor for some of the GPs we work with."

The firm has not only been providing GPs



with greater levels of data and portfolio analytics, but also doing so in ways for the managers to communicate this information to their LPs. "The investors themselves have become a lot more sophisticated and therefore cannot simply rely on basic information; they need more thorough data," Toska notes.

GPs have historically struggled with the disaggregation of data, which has the potential to cripple firms. Toska outlines how technology is helping to break old habits where people would send data over email: "It's a constant exercise in improvement, to make sure the process of data centralisation and aggregation is streamlined and works well across the whole organisation."

Alter Domus is keen to highlight its focus on providing clients with the highest level of service. Toska also stresses the attention the firm continues place on technology and workflow processes over the coming year: "It's about 'taking the robot out of the person' by automating any processes that can free up our people's time to focus on more value-added work, which undoubtedly leads to greater job satisfaction. In the end, this helps managers increase efficiency and allows our teams to build even closer and more valuable relationships with them."

Considering the outlook for the PE industry, Toska observes that the current geopolitical and macroeconomic/inflationary concerns may have destabilised fund-raising prospects. However, despite this, he says: "I still think private equity as an asset class has set itself up for success and will continue to be a front-runner of continued growth."

According to Toska, the participation of retail investors in the PE market will be one of the critical drivers of this growth: "This will mean changing the way the industry operates to a certain extent as we adjust to a higher volume of investors. Managers will need to lean on technology and service providers for several elements, such as new KYC requirements and AML processes, and close communication with this new group of clients. This is an area that Alter Domus has been paying close attention to." ■



TIM TOSKA

GROUP SECTOR HEAD, PRIVATE EQUITY, ALTER DOMUS

Prior to becoming group sector head, private equity, Tim was managing director and co-head, private equity operational leader, North America where he oversaw the private equity operations management team from the Darien, Connecticut office. In addition, he assisted on various operating initiatives and business development for the firm across private equity, focusing on fund-of-funds. Tim was a director at Carta Fund Services, which became part of the Alter Domus Group in 2017. He was responsible for managing fund engagements and leading various business development and operating initiatives for the firm.

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LOCKTON COMPANIES LLP

BEST INSURANCE SERVICE PROVIDER

The last two years have been particularly challenging as the global insurance market went through a 'hard market', that is, a sustained period of constriction and correction. This environment, coupled with the uncertainty generated by the Covid-19 pandemic meant insurance brokers have had to ensure key parts of cover remain in play, hire even more quality associates and invest in innovative technology to support their clients further.

"We saw reductions in capacity, increases in premiums and deductibles, restrictions in coverage and limits of liability available to our clients," details Gareth Abbott, senior vice president, Lockton Companies LLP. The firm's tech investment came in the form of the Lockton Global FI digital portal, which helped streamline its client renewal process by doing away with a number of proposal forms and having one centralised resource for their insurance needs.

Abbott notes clients continue to need and demand the highest level of standard and service from their insurance broker. The digital portal means Lockton has created a process that delivers this in the most efficient way possible. "This enables us to spend more time looking at their common problems/risks and to provide uncommon and innovative solutions to these," Abbott outlines.

Over the course of 2021, Lockton reviewed and revised its bespoke wording with the help and advice of top international insurance law firms.

Abbott discusses the impact of this exercise: "To best protect our clients, we have upgraded our policies to provide the right cover going forward which will ensure that we can retain top quality rated security. This includes the Senior Managers and Certificate Regime as well as cyber insurances which continue to be at the forefront of boardrooms.

"Many insurers have advised that they wish to remove key parts of cover, but we have pushed back and managed to resist this. As the indemnities provided by service providers change, understanding where insurance can fill that gap is the key to good operational and risk governance that Lockton strives to provide."

Moving forward, the broker aims to continue to develop its services to add value to clients beyond transactional placements. For example, Abbott highlights how in 2022 and beyond Lockton looks forward to continuing keeping existing clients and prospects informed regarding evolving and emerging risks and changes in the market through delivering high quality content and

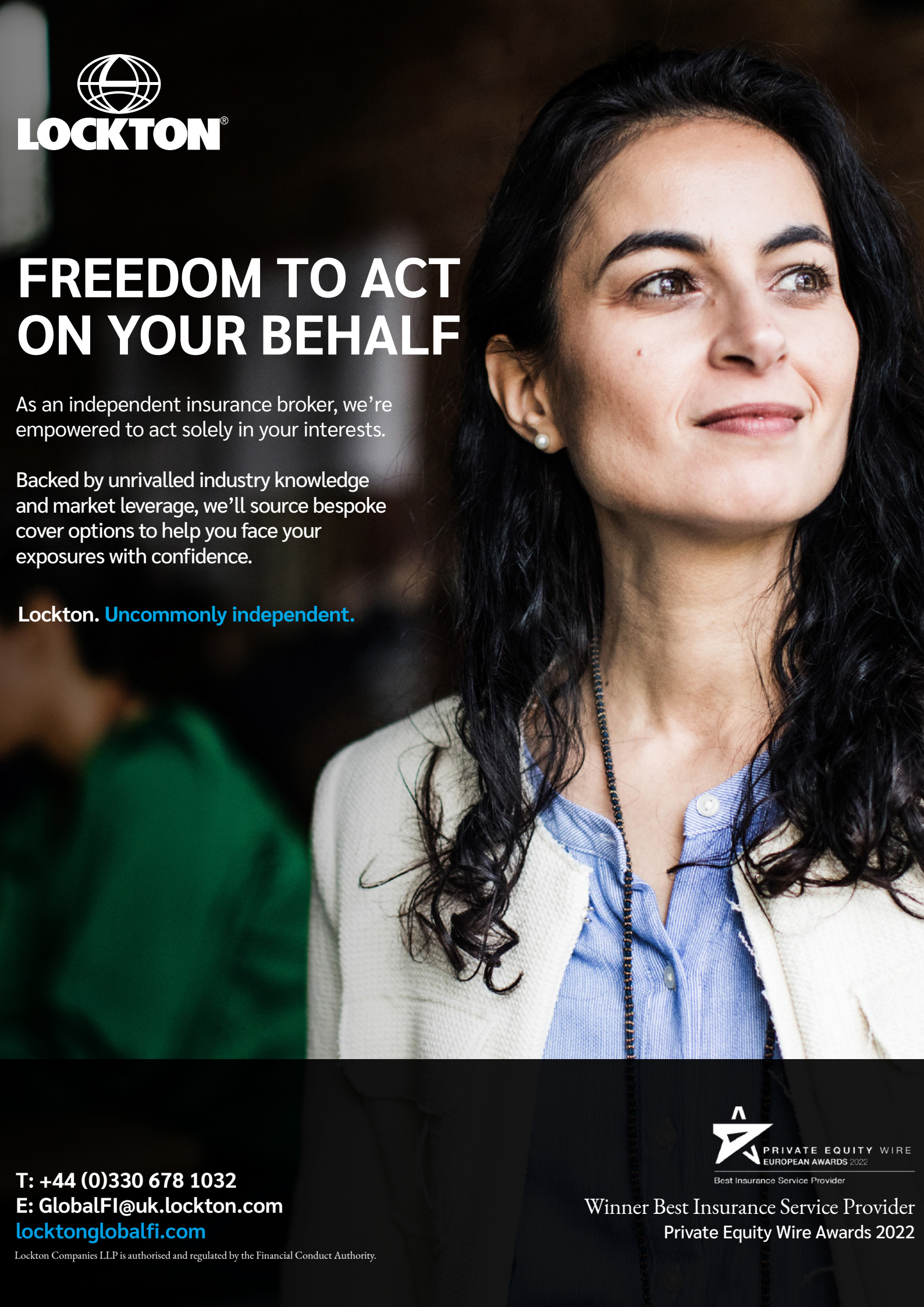


events aimed at sharing knowledge and best practice and exploring new innovations and trends.

"Lockton is committed to engaging regularly with our PE clients. We make sure they are informed and educated in what their existing policies provide. We also strive to innovate, to try and find new solutions for our clients which can help mitigate the evolving risks that could potentially impact their portfolios as well as their own businesses," he explains, "We have always viewed our offering to the alternative asset community as far more than just the policies we place. We are able to draw upon the resources of the whole business to influence our servicing and understanding, including the work we do within the eco-system of the wider financial sector." ■



GARETH ABBOTT
SENIOR VICE PRESIDENT, LOCKTON CAPITAL LLP
Gareth joined Lockton's Global Financial Institutions team in Autumn 2019. He specialises in the programme design and placement for financial institutions, publicly listed companies, as well as complex private and asset management entities. With his decade-long experience in the insurance industry, Gareth is extremely knowledgeable on the particular requirements of real estate managers, private equity firms and their portfolio companies.


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BEST TECHNOLOGY ADVISORY FIRM

As automation allows private equity firms to achieve scalability, the tightening of data governance processes behind the technology becomes indispensable. Further, best-in-class operating models are becoming more accessible to smaller organisations.

"As the industry grows and the inflow of capital increases, firms are increasingly looking to scale," outlines Travis Broad, director, private markets at Lionpoint Group, "this leads them to identify areas of resistance around manual processes that consistently require more and more people to action." Hence, the need for automation is elevated. There is also an abundance of new and exciting technologies that seek to automate operational areas of private equity firms.

This signifies somewhat of a sea change in the industry, given that historically, private markets tended to be generally inconsistent in their approach to operations and technology. "Today, as we discover more transparency across the market, there's a better view of what good looks like. This means that while operating models were formerly based on adapting technology around current processes, there's more of a drive towards industry best practice," Broad observes.

In addition, the explosion of data has increased the need to fundamentally re-visit approaches to implementations or selection processes which underpin operating model designs, Broad says: "While in the past, clients have selected and implemented systems largely in siloes, they're now looking at identifying the right solutions for their wider business and considering the downstream impact of where this data will be used."

Broad expects private equity managers will have to contend with a more sizable impact resulting from regulations, like IFPR or SFDR, as more capital pours into the industry: "This means reporting capabilities needs to be systematised. This way, the additional reporting requirements should not increase the ongoing reporting burden."

According to Broad, increasing dry powder, multi-fund administrator models, and the growth in private credit opportunities all drive the needs for more accurate liquidity management. In view of this, understanding how these processes fit within an organisation is increasingly important.

"As we start seeing more volatility in market with recent events, our clients need deeper insights into the impacts on their portfolios," Broad explains when outlining the outlook for the industry, "we see the ability to offer these insights with scenario modelling capabilities, to truly unlock access to the value behind the data, as vitally important to our growth."

From its perspective, Lionpoint looks look forward to expanding its team to bring on board skillsets to cover the ever-expanding market. "As the industry continues this march towards best practice, there's more of a blueprint for success, which makes best-in-class operating models more accessible to smaller organisations," Broad says, "Firms are more inclined to approach technology early and get scaled with it in place – by commoditising the analysis involved in reviewing an organisation's operating model according to a structured profile, it allows for five-year roadmaps to be set out early in the lifecycle of a business." ■



GILES TRAVERS

EXECUTIVE DIRECTOR, LIONPOINT GROUP

Giles has over 17 years' experience working with leading global investment managers and financial services firms in respect of strategy, technology and operations. In his role at Lionpoint, he works with executive management teams of global private equity and private debt funds, helping them to define their technology strategy and implement practical technology and operational transformation projects. Prior to joining Lionpoint, Giles was an investment funds lawyer in London and Shanghai before moving into senior roles within the alternative asset management industry.



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LIONPOINT

OGIER

BEST LAW FIRM - FUND DOMICILE

Stiff competition in the private equity world means deals are being done at incredible speed. In this context, managers need their advisers to work at pace; across jurisdictions, service lines and time zones, to ensure those deal timetables can be met.

"These goals can only be met by co-ordinated, technologically-savvy law firms that understand the PE industry as a whole. Our clients needs have continued to drive Ogier's private equity offering forward, both in terms of expertise and depth, across all of our key PE jurisdictions," declares Richard Daggett, partner in the private equity team at Ogier.

Approaching private equity holistically has been instrumental in the firm's growth within the sector. There are more than 100 professionals in Ogier's global private equity team and Daggett says, "understanding how the private equity life cycle operates as a whole, and where our service lines interact with that life cycle, has resulted in a stronger, co-ordinated offering."

Outlining the potential challenges private equity managers may face, Daggett notes that the private equity sector has remained robust over the past 18 months. However, with such a huge amount of "dry powder" having been raised, just waiting to be spent, there is a concern about overpaying for assets just to deploy capital. "Higher buy-out multiples have put pressure on the industry to keep generating higher returns. As a result, many firms are shifting their focus to value creation and use of longer-term funds and fund extensions facilitated by the secondary market," he comments.

Despite uncertainties in the geopolitical landscape, which could cause some short-term nervousness in fundraising, acquisitions, or divestments, Ogier's view remains that we are likely to experience a further year of exceptionally strong numbers for the private equity industry.

"Our depth of expertise across each of our jurisdictions, combined with our multidisciplinary approach to cross-border transactions, provides a global perspective that is fully aligned with that of our international client base," explains Daggett.

He confirms Ogier will continue to focus on what its private equity clients want most from the firm, that is, providing all aspects of the legal, regulatory and administrative services required by PE funds and investors throughout the PE life cycle from the five leading centres for PE - Jersey, Guernsey, Luxembourg, BVI and Cayman. ■



RICHARD DAGGETT
PARTNER, OGIER

Richard is partner at Ogier and has a broad corporate finance practice focusing on offshore property holding structures, mergers and acquisitions (public and private), IPOs, private equity structures and joint ventures. He is also part of Ogier's multi-disciplinary private equity team, specialising in downstream corporate advisory work and related financings. Richard's achievements include working with Carlyle, KKR, OMERS, Cinven and ABRY Partners on numerous high-profile acquisitions and disposals. .

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SS&C INTRALINKS

BEST INVESTOR RELATIONS TECHNOLOGY

The year ahead promises to be exciting as continued interest in private markets persists and the market uncertainty creates potential for investment opportunity.

"We know there's going to be continued interest in digital transformation of the private markets ecosystem, in how we're onboarding funds, how we're serving investors and how we're serving dealmaking teams," comments Ken Bisconti, co-head, Intralinks, "We plan to continue to invest in our ability to serve all of those needs within an integrated suite of capabilities which is also surrounded by first-class, high-quality services."

He explains how the firm aims to contribute to the growing efficiency of the overall private markets ecosystem. SS&C Intralinks will also take advantage of the insights and the analytics that will, "make us all smarter in the way we conduct business and more competitive in the face of the growing challenges we expect to see throughout the year," Bisconti outlines.

From its point of view, Intralinks has continued to see increasing demand from investors for enhanced transparency as well as frequency of information access. "This becomes increasingly burdensome for GPs to provide as their businesses and their funds grow," Bisconti notes, "Therefore, we're seeing a strong response from professionals now able to use interactive portals as opposed to emailing reporting information. We can also observe increasing competition on the fundraising and marketing side."

In light of these developments, having efficient use of technology and digital transformation of those processes, continues to be increasingly attractive.

As a firm, SS&C Intralinks is in the fortunate position of being at the centre of the private markets ecosystem - between dealmakers, institutional investors and GPs, as well as accountants, lawyers, other advisors. This means Intralinks is uniquely positioned to understand the unique challenges of fund managers and to assist throughout the entire fund lifecycle with solutions from fundraising, fund reporting, deal execution and portfolio monitoring.

"Intralinks provides all of those capabilities directly and through our parent company, SS&C we can offer outsourced fund administration. We currently enable over 6 million people within our ecosystem; 240,000 LPs and 1500 GP firms regularly use our products," says Bisconti.

The past year has been an exciting one for Intralinks, buoyed by the significant momentum in the private markets ecosystem. Bisconti highlights: "We have taken advantage of technologies from our broader company, SS&C, in expanding our portfolio. Maybe most notably, we introduced an



offering called eInvestor, which allows us to introduce subscription document processing and electronic digitisation of the onboarding process in fundraising. We've also been increasing our ability to provide unique data reporting, alongside the documents we provide in our interactive investor portals."

This has allowed Intralinks to provide more value in software enabled services capabilities that the firm provides the marketplace.

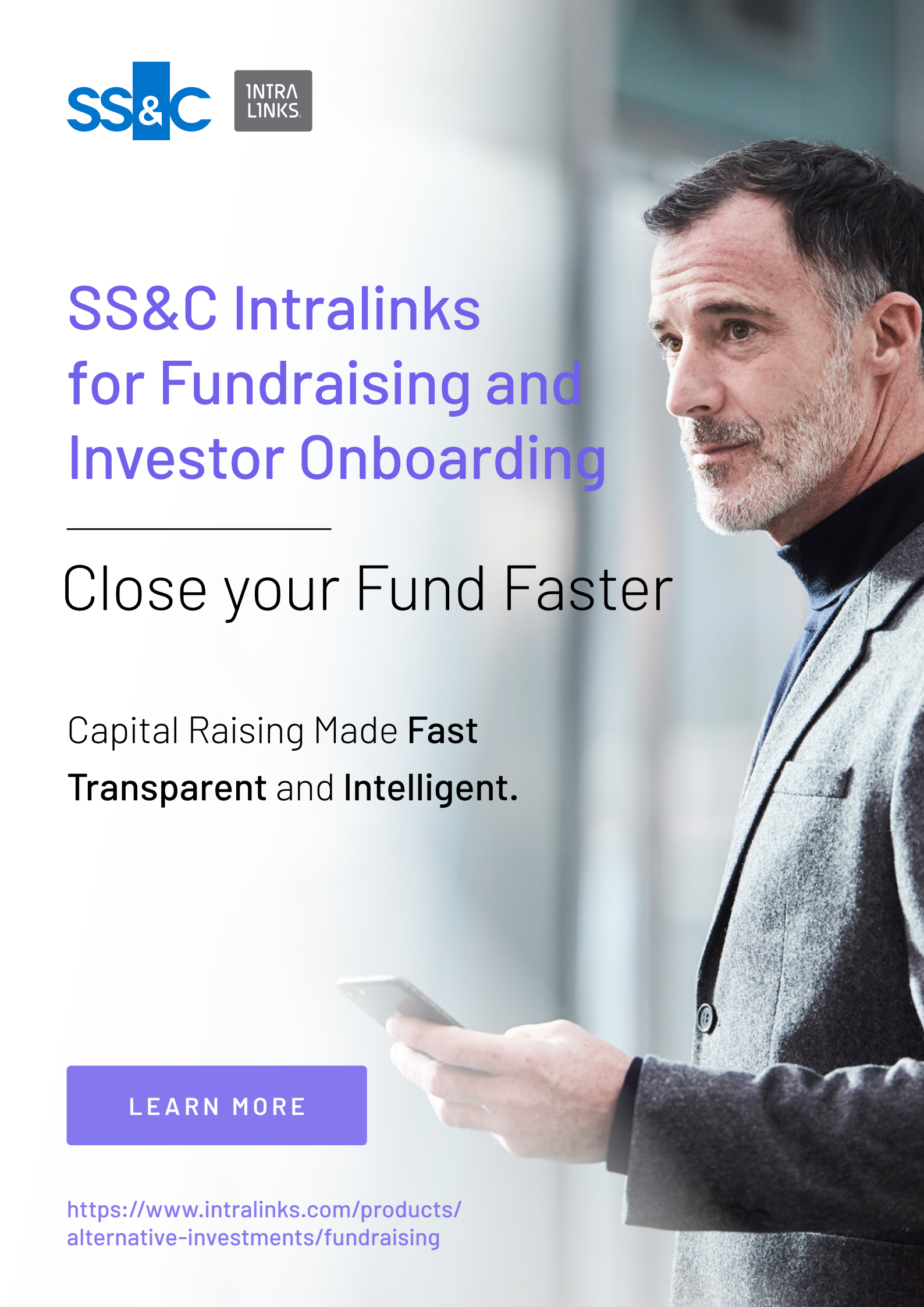
Bisconti anticipates: "This year ahead is one where we expect to see continued interest in the private markets. We expect to invest more in our fundraising and fund reporting capabilities and build out an end-to-end front office suite of capabilities for our alternatives clients. This allows us to bring fundraising, fund reporting, deal execution, portfolio management and investor portals into one integrated set of capabilities." ■



KEN BISCONTI

SENIOR VICE PRESIDENT & CO-GENERAL MANAGER, SS&C INTRALINKS

Ken Bisconti is Senior Vice President and Co-General Manager of SS&C Intralinks. In this role, Mr. Bisconti is responsible for the end-to-end management of the organization along with Bob Petrocchi. He formerly served as Chief Product Officer for Intralinks where he developed a very deep and insightful understanding of market needs and strategic opportunities for Intralinks and put those insights to work defining the organization's product offerings. Prior to joining SS&C, Mr. Bisconti led several business units at IBM, including the integrations of Filenet, Tealeaf, Coremetrics, PSS and Datacap acquisitions. He holds a Bachelor's degree in Quantitative Economics from the University of California at San Diego.



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ONTRA

BEST REGULATORY & COMPLIANCE TECHNOLOGY

Fund managers' ever-evolving regulatory and contractual obligations generate complex compliance requirements that can be simplified by technology focused on contract automation and intelligence.

"In recent years, we saw increased demand from our asset management clients for a technology tool that would make compliance with fund documentation simpler," says Bridget Deiters, senior managing director & international lead at Ontra. "In March 2021, we launched Insight, a purpose-built software solution for fund managers, to address that demand and to help our customers track and manage their complex regulatory and contractual compliance obligations."

Deiters also notes that compliance isn't just a regulatory requirement but, rather, is an important piece of firms' relationships with their limited partners. "GPs' proactive compliance with fund documentation engenders trust and confidence among their LPs, bolstering investor relations," says Deiters. "A failure to comply, on the other hand, can be extremely damaging in that respect."

In addition to addressing complex fund obligations, Ontra highlights potential regulations by the U.S. Security and Exchange Commission (SEC), which may impact asset managers in the private equity space. "These regulations could require additional reporting requirements that would be difficult for asset managers to comply with without a system to track and manage their fund documentation," comments Deiters. "We could also see limitations or restrictions on certain provisions in limited partnership agreements and side letters, which asset managers may need to address in their existing fund documents."

Ontra's solutions are specifically tailored for the needs of private asset management firms. The company's service and tools enable fund managers to not only address existing regulations in a proactive way, but also to react to stricter regulations should they come into effect.

The growing volume of routine work is another concern. "Private equity firms have been facing higher volumes of routine legal work, such as non-disclosure agreements, release letters, and engagement letters," explains Deiters. These routine legal tasks take up the valuable time of in-house lawyers and business professionals, pulling them away from the high-value tasks they should be focused on. Organisations are turning to Ontra's contact automation and intelligence solutions to help alleviate this pressure.



In October 2021, Ontra closed a Series B funding round of approximately USD200 million from investors including Blackstone Growth. Over the coming year, Ontra will leverage this capital for structural growth, redoubling its investment in artificial intelligence and contract process automation and continuing to expand globally to serve its customers. ■



BRIDGET DEITERS

MANAGING DIRECTOR, ONTRA

Bridget is a managing director at Ontra. Prior to Ontra, Bridget practiced corporate and capital markets law at Kirkland & Ellis and Cravath. Bridget holds a J.D. from Georgetown and a B.A. from Yale. In her spare time, Bridget enjoys cooking, arts and crafts, and country walks with her dog.

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ADDLESHAW GODDARD

ADDLESHAW GODDARD

BEST LAW FIRM – FUND STRUCTURING

A buoyant private equity market has powered the growth of Addleshaw Goddard's transactional practice, as the focus on ESG came further to the fore and cross-border deal activity also experienced significant uplift.

"ESG firmly took centre stage in 2021. This has been driven by the increased "mainstreaming" of impact funds and B corp certified GPs," says Jan Gruter, partner in AG's Investment Management group, "The increased focus on ESG has come from a number of angles: LPs, the workforce in GPs pushing for change and of course the regulators with a myriad of ESG related regulatory changes coming online, most notably the EU SFDR in March 2021."

The firm has seen this strongly reflected in its funds practice. The transition to "net zero" has underpinned strong fund-raising activity for green infrastructure funds and renewables focussed funds – and AG has advised on mandates in this space raising between GBP100 million to GBP500 million plus.

However, in spite of the growing activity in this space, Gruter warns: "The transition to net zero will not be painless. It is important that GPs and LPs do not overlook societal impact and inclusivity to ensure it's a just transition, securing worker's rights and creating new opportunities for employment."

He also highlights the mounting regulatory complexity GPs and LPs are having to grapple with: "GPs and LPs are navigating an ever more intricate web of regulations. This is particularly true when it comes to ESG regulation, owing to the fact that it is still evolving with standardisation and reporting more advanced on environmental matters than on social matters.

"There is also a risk that adding too many layers of regulation will restrain innovation and efficiency – making it ever harder to actually apply regulations in practice."

In response, GPs and LPs should cooperate to navigate this challenging landscape. The industry should also engage constructively with policymakers – highlighting the positive role that private equity plays in channelling private capital towards long term investing, creating positive social and environmental impacts. Put simply, the days when private equity was private are gone. The industry should embrace the drive towards transparency.

In AG's view, deal and fundraising activity look set to remain high in the coming year.



"We have seen a large number of funds already in or coming to the market this year. In terms of deals, there appears to be dry powder in the market which will result in sustained levels of investments and exits.

"Of course, there will be other factors at play, such as rising inflation, interest rates and supply chain issues, the precise effect of which remains to be seen, as well as a much more uncertain geopolitical outlook and the lingering risk of new covid variants," Gruter outlines.

From its perspective, the firm aims to continue building its international profile and innovating in the ESG space by providing new tools and advisory services. AG will be making significant investment in its systems and developing AI to help clients make legal spend efficiencies and do more for less. ■



JAN GRUTER

PARTNER, ADDLESHAW GODDARD

Jan is a partner in AG's Investment Management Group and leads the firm's private funds offering. He has a unique mix of transactional and regulatory experience, having also spent part of his career at the FCA and as general counsel at a leading asset manager, giving him a practical insight on the issues facing both fund managers and investors. He combines his core focus on raising private funds (incl. structuring, formation and marketing with a strong interest in fund regulation, such as AIFMD and emerging ESG regulation affecting fund managers and investors alike, with a particular interest in raising sustainability-focussed funds and other related investment products for both established and emerging fund managers.

ADDLESHAW GODDARD

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SS&C Intralinks is a pioneer of the virtual data room, enabling and securing the flow of information by facilitating M&A, capital raising and investor reporting. SS&C Intralinks has executed over USD35 trillion worth of financial transactions on its platform.
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