

# IPEM 2021 PROGRAM & SPEAKERS

July 6/7/8 - Cannes, Palais des Festivals

## DAY 1 (July 6)

### PRE-OPENING LP ONLY SESSIONS (invitation only)

10:30-13:00

- LP Leadership Committee Meeting (invitation only)
- LP Welcome Lunch (for all registered LPs, invitation only)

Sponsored by Ardian

### REGISTRATION AND WELCOME COFFEE

From 12:45

### REBUILDING THE ECONOMY AFTER THE PANDEMIC

CROISETTE CONFERENCE ROOM 1 / 13:00-18:00

TIME	SESSION
13:15	<b>IPEM 2021 Welcome Speech</b> <ul style="list-style-type: none"><li>• Antoine COLSON, CEO IPEM</li></ul>
13:30	<b>Chairman's Opening Keynote</b> <b>"Reshaping capitalism to drive real change"</b> <ul style="list-style-type: none"><li>• How compassionate capitalism embraces both profit AND impact</li><li>• The importance of monetising impact and publishing results in financial accounts</li><li>• How Covid-19 could provide an opportunity for accelerating a shift towards compassionate capitalism</li><li>• Why compassionate capitalism will ultimately become the dominant model and those that fail to adopt its values will be left behind</li></ul> <b>Sir Ronald Cohen, Chairman of the Global Steering Group for Impact Investment and The Portland Trust</b>
14:00	<b>Investing after the outbreak, a global GP's views (fireside chat)</b> <ul style="list-style-type: none"><li>• How the pandemic has forced private markets investors to reassess their values</li><li>• The importance of displaying empathy with all stakeholders</li><li>• Practical steps that will ensure private markets lead an inclusive recovery</li></ul>
14:30	<b>Lessons learned. How the private equity industry adapted and changed in the Covid-19 crisis (panel discussion)</b> <ul style="list-style-type: none"><li>• Rehabilitation. How private equity's approach to nursing distressed portfolio companies has moved on since the Financial Crisis</li><li>• Sophistication. How the evolution of the fund finance, investor relations and secondaries industries have supported private equity's Covid-response</li><li>• Adaptation. How private equity has learnt to operate in a remote working environment</li><li>• Realisation. How private equity has responded to the social and humanitarian aspects of the Covid crisis</li></ul>
15:15	<b>BREAK</b>

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## DAY 1 (July 6)

15:30	<p><b>"Allocating capital, allocating responsibility". How asset owners' investment policies have been redefined in 2020 (keynote address)</b></p> <ul style="list-style-type: none"><li>• A joint statement from IPEM's LP Leadership panel, which includes many of the most influential institutional investors across Europe</li><li>• A clear mission and series of actionable proposals for addressing private markets social and economic innovation from those that fund the asset class</li></ul> <p><b>Sarah McPhee, Chairwoman of AP4</b></p>
15:50	<p><b>The global mega trends that will shape the next decade for Private Markets (panel discussion)</b></p> <ul style="list-style-type: none"><li>• Healthcare. Tech advances and a new political perspective on care provision offers exciting opportunities for savvy GPs</li><li>• Consumer. Tech trends and rapidly evolving consumer behaviour calls for a new breed of growth investor in the sector</li><li>• Environment. From water shortages to energy transition, a rich seam of investment propositions lies in wait</li><li>• Manufacturing and construction. Automation and robotics have the potential to transform legacy industries</li></ul>
16:35	<p><b>It's a small world. How geopolitical upheaval could affect investment opportunities at home</b></p> <ul style="list-style-type: none"><li>• Post-US elections: is the US still a destination market? Trump &amp; deregulation/Biden's tax hikes and regulatory assault</li><li>• China vs. the US: what a new cold war could mean for private equity</li><li>• Rising protectionism: what would an EU Cfius mean for Asian GPs?</li><li>• Rethinking supply chains post-pandemic</li><li>• Brexit: a challenge or an opportunity?</li></ul>
17:00	<p><b>From villain to hero: how private equity can deal with criticism and assert its purpose in a post COVID-19 world</b></p> <ul style="list-style-type: none"><li>• PE under scrutiny: access to governmental support schemes, LBO models challenged and the "Billionaire factory"</li><li>• Review of the most corrosive media coverage</li><li>• Promoting PE's role in the economy and society : job creation, social inclusion, innovation, environmental transition</li></ul>
17:30	<p><b>Roadmap to a European "third way": Combining global competitiveness with environmental, technological, and social ambition</b></p> <ul style="list-style-type: none"><li>• How will the EU's E700bn stimulus package actually be put to work</li><li>• What role will private markets investors play in deploying it</li><li>• How policy directives around digitization, localization and energy transition will shape the investment landscape of the future</li></ul>
18:00	<b>END DAY 1</b>

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<b>NEW MANAGER LP/GP SUMMIT (LP/GP only)</b> RIVIERA SUMMIT ROOM / 14:00-16:00	
<b>14:00</b>	<b>Welcome coffee and introduction</b>
<b>14:05</b>	<b>Discussion 1: Despite headwinds, why first-time funds will keep their appeal (LP-only panel discussion)</b> <ul style="list-style-type: none"><li>• Forging new relationships in lockdown. Was investing in emerging managers really impossible without meeting face to face?</li><li>• Risk and reward. How does emerging manager performance compare with the tried and tested?</li><li>• Diversification. Why it is vital to inject fresh blood into your portfolio</li></ul>
<b>14:35</b>	<b>Discussion 2: Pitching without a track record. Best practices from LPs and GPs (panel discussion)</b> <ul style="list-style-type: none"><li>• The art of attribution. Piecing together a complex track record</li><li>• Team dynamics. How to portray chemistry and cohesion</li><li>• Strategy. Articulating a differentiated approach</li><li>• Pipeline. Converting an investment philosophy into a convincing reality</li></ul>
<b>15:05</b>	<b>Networking</b>
<b>16:00</b>	<b>END</b>

Sponsored by CACEIS, Wafra

<b>ESG UPDATE</b> LERINS SUMMIT ROOM / 15:00-17:00	
<b>15:00</b>	<b>Welcome coffee and introduction</b>
<b>15:15</b>	<b>Discussion 1: Addressing the climate emergency. ESG KPIs, reporting and action taken at a portfolio level</b> <ul style="list-style-type: none"><li>• The clock is ticking. Why now is the time to step up your efforts for environment and biodiversity</li><li>• Strategies for implementing positive change in your portfolio companies</li><li>• Best practice for reporting to LPs and other stakeholders</li></ul>
<b>15:45</b>	<b>Discussion 2: Sharing value and propositions for an inclusive recovery</b> <ul style="list-style-type: none"><li>• How private equity can help deliver a recovery for all - irrespective of race, gender or social-economic background</li><li>• Why private equity firms must learn to share value creation with all stakeholders</li></ul>
<b>16:15</b>	<b>Networking</b>
<b>17:00</b>	<b>END</b>

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## DAY 1 (July 6)

CORPORATE AND PE NETWORKING RIVIERA SUMMIT ROOM / 16:00-17:30	
16:00	<b>Introduction: Corporate x Private Equity's most creative deals in review</b> Analysis of some of the most innovative joint ventures between corporates and private equity firms
16:30	<b>Panel discussion: Finding the right model for a strategic partnership with private equity</b> <ul style="list-style-type: none"><li>• Structuring for the appropriate attribution of risk and reward</li><li>• Playing to your strengths. Understanding roles and responsibilities throughout the hold period</li><li>• The end game. Ensuring both parties have planned for exit</li></ul>
17:00	<b>Networking cocktail</b>
18:00	<b>END</b>

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## OFFICIAL OPENING COCKTAIL

18:00-21:00

Sponsored by Campbell Lutyens

# IPEM 2021 PROGRAM & SPEAKERS

July 6/7/8 - Cannes, Palais des Festivals

## DAY 2 (July 7)

### WELCOME COFFEE

From 08:45

### IPEM 2021 EUROPEAN DAY (PART 1) CHALLENGES AND OPPORTUNITIES POST-COVID FOR THE OLD CONTINENT

CROISSETTE CONFERENCE ROOM 1 / 09:15-13:00

TIME	SESSION
09:15	<b>Chairman's Opening Keynote</b> <b>"Private equity is well positioned to help jump-start the European economy" (keynote)</b> <ul style="list-style-type: none"><li>As emergency state support measures taper off, how can private equity pick up the mantle</li><li>What role can the asset class play assisting governments with their long-term plans for economic revival</li><li>How can private equity ensure it emerges from the crisis with its reputation, not only intact, but enhanced</li></ul> <b>Eric de Montgolfier, CEO - Invest Europe</b>
09:30	<b>Macro outlook: "Testing Europe's economic resilience" (keynote presentation)</b> <b>Nick Brooks, Head of Economic and Investment Research - ICG</b>
10:00	<b>"The music never stops." How pan-European dealmakers keep investing amid turmoil (panel discussion)</b> <ul style="list-style-type: none"><li>Showcasing some of the most impressive deals to be completed during lockdown</li><li>Including mega deal triumphs in the midst of mayhem</li><li>Adaptation to international travel bans and a moratorium on face-to-face meetings</li><li>Spotting the trough in a market distorted by government support measures</li></ul>
10:45	<b>No bargains around? Finding value in a pricey market (panel discussion)</b> <ul style="list-style-type: none"><li>Why prices are remaining stubbornly high across many sectors</li><li>Origination techniques for identifying pockets of value</li><li>Value creation strategies that can help justify prices paid</li></ul>
11:30	<b>Cross border build-ups. Creating the next European champions (panel discussion)</b> <ul style="list-style-type: none"><li>The post-Covid consolidation story. Which sectors are ripe for acquisition strategies?</li><li>Buy and build best practice. The art of creating pan European champions in your portfolio</li><li>Growing from a country-specific firm to a regional investor. How to become a pan European champion yourself</li></ul>
12:15	<b>Public markets, the new hunting ground for Private Equity? (panel discussion)</b> <ul style="list-style-type: none"><li>What's driving the surge in public markets investing?</li><li>Which sectors and geographies offer the most interesting opportunities?</li><li>How to overcome the challenges of price negotiations and deal structuring in take-privates?</li><li>PIPEs and other creative public market strategies</li></ul>
13:00	<b>END</b>

# IPEM 2021 PROGRAM & SPEAKERS

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## DAY 2 (July 7)

CROISETTE CONFERENCE ROOM 2 / 09:45-13:00

TIME	SESSION
09:30	<b>European Private Markets Update (keynote presentation)</b> <i>Jim Strang, Chairman EMEA – Hamilton Lane</i>
10:00	<b>Is Europe set for a Post-Coronavirus industrial boom? (panel discussion)</b> <ul style="list-style-type: none"><li>• How the Covid crisis has transformed thinking about our ideal economic mix</li><li>• Why reindustrialisation plans could kickstart fresh investment opportunities</li><li>• The third industrial revolution. Hot sectors from EVs to automation and battery storage</li></ul>
10:45	<b>Trends in consumer investing: serving the digitally savvy and environmentally conscious shopper (panel discussion)</b> <ul style="list-style-type: none"><li>• How Covid has accelerated the emergence of a new breed of consumer</li><li>• From bricks to clicks. Ensuring legacy businesses are ready for the new world</li><li>• Financially constrained and tech savvy. Coping with the killer combination</li><li>• The importance of trust. From data policy to environmental best practice, companies must build faith amongst their following</li></ul>
11:30	<b>Shaping the future of health and healthcare systems in Europe (panel discussion)</b> <ul style="list-style-type: none"><li>• Embracing the promise of technological transformation - from tele-medicine to big data</li><li>• De-risking supply chains to ensure the delivery of strategically essential items</li><li>• Financial pressures driving consolidation and cost containment measures</li><li>• Dealing with healthcare's new national security status</li></ul>
12:15	<b>The golden age of tech and software buyout? (panel discussion)</b> <ul style="list-style-type: none"><li>• Since the epidemic, what have been the dynamics and the opportunities in the European software industry?</li><li>• Will tech-focused GPs keep their lion's share of the tech buyout segment? How can generalists join this booming trend?</li><li>• Are record valuations and high leverage a concern for tech buyouts?</li><li>• Will VC-to-PE deals become mainstream? What are the implications of this new exit route for VCs?</li></ul>
13:00	<b>END</b>

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## DAY 2 (July 7)

VENTURE LP/GP SUMMIT (LP/GP only) LERINS SUMMIT ROOM / 09:30-14:00	
09:30	<b>Welcome coffee and introduction</b>
10:00	<b>Discussion 1: Why invest in European venture capital?</b> <ul style="list-style-type: none"><li>Charting the unprecedented rise of the European tech industry</li><li>Understanding why institutional capital nonetheless remains in short supply</li></ul>
10:45	<b>Discussion 2: How best-in-class-early-stage investors achieve outstanding returns</b> <ul style="list-style-type: none"><li>Identifying opportunities early. Spotting sectors, and businesses, before valuations soar</li><li>Product differentiation. Ensuring your company stands apart from the crowd</li><li>Building world class management teams</li><li>Eye on the exit. Positioning assets for lucrative listings or sale to tech giants</li></ul>
11:30	<b>Coffee break</b>
12:00	<b>Breakout session: How to build an LP base for the long term</b> <ul style="list-style-type: none"><li>Prioritise the faithful. Identifying LPs that have demonstrated a long-term commitment to the asset class</li><li>Investor education. Convincing other institutional investors that European venture is the place to be</li></ul>
13:00	<b>Networking Lunch</b>
14:00	<b>END</b>

Sponsored by White & Case

INTERNATIONAL PE MARKETS UPDATE RIVIERA SUMMIT ROOM / 11:30-14:00	
11:30	<b>Welcome coffee and introduction.</b>
	<b>"Accessing international private equity's hottest opportunities"</b>
11:45	<b>What's hot in the US? Top themes from the small and mid-cap markets</b> <ul style="list-style-type: none"><li>The impact of the Presidential election result</li><li>Where investors are eyeing post Covid opportunities</li><li>Innovative deal structuring and financing strategies</li><li>What to expect next in Europe. Trends crossing the Atlantic in 2021</li></ul>
12:30	<b>What's hot in Asia? Focus on growth geographies and technology</b> <ul style="list-style-type: none"><li>Challenges in access Asian private markets</li><li>The China story. How to generate value in a slowing economic powerhouse</li><li>India and South East Asia. Spotting opportunities</li><li>The art of relationship building in distant markets</li></ul>
13:15	<b>Networking Lunch</b>
14:00	<b>END</b>

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### NETWORKING LUNCH

13:00-14:00

### SPEAKERS' LUNCH (speakers only)

13:00-14:00

Sponsored by BNP Paribas

Updated Dec. 20

For more information contact [valentine.veyssiere@europ-expo.com](mailto:valentine.veyssiere@europ-expo.com)

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## DAY 2 (July 7)

### IPEM 2021 EUROPEAN DAY (PART 2)

### CHALLENGES AND OPPORTUNITIES POST-COVID FOR THE OLD CONTINENT

CROISSETTE CONFERENCE ROOM 1 / 14:00-18:45

TIME	SESSION
14:00	<b>European private equity is digging deep into growth equity deals (panel discussion)</b> <ul style="list-style-type: none"><li>• Why the world's mega funds are developing growth platforms for Europe</li><li>• What makes European growth opportunities attractive on the global stage</li><li>• Is growth investing now overtaking buyouts as the strategy of choice?</li></ul>
14:45	<b>Iberian Private Equity recovery and rebuild playbook (panel discussion, with ASCRI)</b> <ul style="list-style-type: none"><li>• Restructuring opportunities for domestic and pan European players</li><li>• Hot spots for investment in 2021</li><li>• Creative deal making to get transactions over the line</li></ul>
15:30	<b>How French Private Equity firms took leadership in Europe (fireside chat, with France Invest)</b> <ul style="list-style-type: none"><li>• Why is it that French managers have grown into some of the largest and most diversified European players?</li></ul>
16:00	<b>BREAK</b>
16:30	<b>Will DACH Mittelstand finally give in to the sirens of Private Equity? (panel discussion, with BVK)</b> <ul style="list-style-type: none"><li>• The lure of the mittelstand. What makes Germany's SME market so attractive to homegrown and international investors</li><li>• Overcoming the common obstacles of buying into mittelstand potential</li><li>• Restructuring opportunities as government support schemes are eased</li></ul>
17:15	<b>Nordic Private Equity, a best in class model? (panel discussion, with the Nordic Private Equity Associations)</b> <ul style="list-style-type: none"><li>• What is the secret behind Nordic private equity's consistency?</li><li>• The tech agenda. Growing world beaters from small beginnings</li><li>• An industrial heritage. The truth about Nordic private equity's operational prowess</li><li>• The ESG edge. Why cultural sensitivities mean good ESG has always been critical for Nordic managers</li></ul>
18:00	<b>France small and mid-markets. The virtues of hands-on and local investors (panel discussion, with France Invest)</b> <ul style="list-style-type: none"><li>• Why feet on the ground is essential for investing in France's mid-market</li><li>• The art of working with French stakeholders, from unions to management teams to the state</li><li>• Uncovering hidden gems. How locals are originating proprietary deals</li><li>• The importance of relationships with larger French firms when it comes to exit</li></ul>
18:45	<b>END</b>



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CROISETTE CONFERENCE ROOM 2 / 14:00-18:45

TIME	SESSION
14:00	<b>Restructuring is painful but necessary: the role of private equity (panel discussion)</b> <ul style="list-style-type: none"><li>• The need to repair company balance sheets post-COVID</li><li>• What sectors are most in need of help</li><li>• Successful M&amp;A: the importance of combining disparate company cultures</li><li>• Why special situations managers get a bad name- and how to address this</li></ul>
14:45	<b>Oh dear. Hard times for UK Private Equity? (panel discussion, with the BVCA)</b> <ul style="list-style-type: none"><li>• Can UK-based investors defy both Brexit and a global pandemic?</li><li>• Will London managed to retain its crown as a financial centre and as the natural home for Europe's private equity giants</li><li>• The looming threat of tax on carried interest</li></ul>
15:30	<b>"The investment case for Europe" (keynote presentation)</b> <i>Marco de Benedetti, Co-Head European Buyout Group – Carlyle</i>
16:00	<b>BREAK</b>
16:30	<b>Italy. What opportunities for Private Equity in one of Europe's hardest hit economies? (panel discussion, with AIFI)</b> <ul style="list-style-type: none"><li>• Accessing Italy's army of cash-strapped family-owned businesses</li><li>• Harnessing exports to drive growth</li><li>• Distressed deals. Finding opportunity in times of turmoil</li></ul>
17:15	<b>Towards a European model for private equity (panel discussion, with Invest Europe)</b> <ul style="list-style-type: none"><li>• Does European private equity have a fundamentally different DNA to its US cousin?</li><li>• Do the origins of the asset class in Europe lend themselves to a more socially aware and inclusive brand of investment?</li><li>• How do these differences manifest themselves in financial performance and social and economic impact?</li></ul>
18:00	<b>Diversity wins: forging a career path as a woman in Private Equity</b> <ul style="list-style-type: none"><li>• Is private equity winning its gender diversity battle?</li><li>• What are the principal obstacles that women still face in progressing their careers?</li><li>• How can women overcome these challenges?</li><li>• How can their male colleagues support them?</li></ul>
18:45	<b>END</b>

### WOMEN IN PE NETWORKING COCKTAIL

18:45-20:00

Sponsored by Mayer Brown

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## DAY 2 (July 7)

SECONDARY MARKET UPDATE	
LERINS SUMMIT ROOM / 15:00-17:30	
15:00	<b>Welcome coffee and introduction.</b> <b>"State of the secondaries market" (by Greenhill &amp; Co.)</b>
15:20	<b>Discussion 1: Assessing the outbreak's impact on portfolio liquidity</b> <ul style="list-style-type: none"><li>• How severely has liquidity been impacted by Covid? Comparisons with the GFC</li><li>• Capital calls, recycling, and alternative options</li><li>• A death of distributions and the denominator effect</li><li>• When accessing the secondaries market makes sense for sellers</li></ul>
15:50	<b>Discussion 2: Gauging opportunities in secondaries after the market dislocation</b> <ul style="list-style-type: none"><li>• When will post-Covid secondaries opportunities eventually kick in?</li><li>• Who will the sellers be this time around? What will ultimately force them to sell? How will valuations be impacted?</li><li>• What will Covid mean for the burgeoning GP-led secondaries market?</li><li>• Single vs multi-assets continuation funds</li></ul>
16:20	<b>Networking</b>
17:00	<b>END</b>

Sponsored by Greenhill, Neuberger Berman

VALUE CREATION UPDATE	
LERINS SUMMIT ROOM / 15:00-17:15	
15:00	<b>Welcome coffee</b>
15:15	<b>Discussion 1: The ingredients for a fast ramp-up strategy post-crisis</b> <ul style="list-style-type: none"><li>• Why the private equity governance model is better suited to driving recovery than the public markets</li><li>• Taking advantage of tailwinds. Acceleration in sectors that have benefited from Covid</li><li>• Rebuilding businesses. Repositioning legacy corporates to flourish in a brave new world</li></ul>
16:00	<b>Discussion 2: Leveraging technology to foster value creation throughout the lifecycle</b> <ul style="list-style-type: none"><li>• Identifying potential value creation levers in due diligence</li><li>• The power of data. How digitisation can transform businesses in any sector</li><li>• Emerging technologies. Embracing innovation while not being consumed by it</li><li>• The importance of robust cyber security</li></ul>
16:45	<b>Networking</b>
17:15	<b>END DAY 2</b>

### EUROPEAN NIGHT

18:45-20:00

### IPEM 2021 OFFICIAL DINNER (invitation only)

20:00-22:00

Sponsored by CACEIS, CACIB, White & Case

### IPEM 2021 VENTURE PARTY

22:00-00:00

Sponsored by Pitchbook, Breega, Isomer Capital

Updated Dec. 20

For more information contact [valentine.veyssiere@europ-expo.com](mailto:valentine.veyssiere@europ-expo.com)

10/19

# IPEM 2021 PROGRAM & SPEAKERS

July 6/7/8 - Cannes, Palais des Festivals

## DAY 3 (July 8)

### WELCOME COFFEE

From 08:45

### ALLOCATORS' DAY (PART 1) "A NEW ALLOCATION PARADIGM"

CROISETTE CONFERENCE ROOM 1 / 09:15-13:00

TIME	SESSION
09:15	<b>Chairperson opening keynote</b>
09:30	<b>Lessons learned in 2020 and outlook for 2021. A global allocator's views (fireside chat)</b> <ul style="list-style-type: none"><li>• Why private markets are poised to deliver the performance of a generation</li></ul>
10:00	<b>LPs' growing social and environmental imperatives and what they mean for Private Markets (panel discussion)</b> <ul style="list-style-type: none"><li>• Just say no. The growing number of LPs that have zero tolerance for negative impact sectors</li><li>• The importance of sharing value with all stakeholders</li><li>• Deep dive analysis. New LP diligencing techniques for ESG performance</li><li>• Beyond the environment. How Covid has intensified focus on social issues</li></ul>
10:45	<b>The pitfalls of a flight to quality. Will risk aversion affect future returns? (panel discussion)</b> <ul style="list-style-type: none"><li>• How times of turmoil encourage 'safe bets' with brand names</li><li>• The downside of missing out on niche strategies and emerging stars</li><li>• The dangers of portfolio concentration</li></ul>
11:30	<b>The added value of funds of funds and advisers in times of turmoil (panel discussion)</b> <ul style="list-style-type: none"><li>• Why funds of funds are experiencing a revival</li><li>• Diversification. The value of a well-balanced portfolio has never been clearer</li><li>• Expertise. Navigating a turbulent market requires experience and significant resource</li><li>• Access. How the firepower and clout of a fund of funds can help LPs take advantage of Covid opportunities</li></ul>
12:15	<b>Will LPs lose appetite for co-investments after the crisis? (panel discussion)</b> <ul style="list-style-type: none"><li>• Has co-investment proved a winning formula? How have LPs with significant direct strategies fared now that crisis has struck?</li><li>• How will Covid fall-out impact LP risk appetite for co-investment going forward?</li><li>• How is GP appetite for offering co-invest likely to be affected?</li><li>• What are the advantages and disadvantages of co-investment in a down market?</li></ul>
13:00	<b>END</b>

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CROISSETTE CONFERENCE ROOM 2 / 09:45-13:00

TIME	SESSION
10:00	<b>"Brothers in arms" How LPs and GPs handled this crisis together (panel discussion)</b> <ul style="list-style-type: none"><li>• How relationships between GPs and LPs have flourished in lockdown</li><li>• How communication over capital calls prevented defaults</li><li>• A joint approach to preserving portfolio value</li><li>• How LPs and GPs are working together to take advantage of the opportunities to come</li></ul>
10:45	<b>"Quit or stick." Will LPs rebalance their Private Equity allocation after the crisis? (panel discussion)</b> <ul style="list-style-type: none"><li>• Are LPs planning to reduce, maintain or increase their exposure to private equity?</li><li>• Will investors shift the composition of their portfolios by size, sector or strategy?</li><li>• What are the advantages of a reactive vs long-term approach?</li><li>• What role will the secondaries industry play in this rebalancing?</li></ul>
11:30	<b>LPs scouting niche opportunities in Private Markets (panel discussion)</b> <ul style="list-style-type: none"><li>• Alternatives to alternatives. Which new investment propositions are creeping into the private markets fold?</li><li>• The role of litigation finance, 5G frequency and film finance in an institutional portfolio</li></ul>
12:15	<b>The retail revolution looming for Private Equity (panel discussion)</b> <ul style="list-style-type: none"><li>• What impact would an influx of retail investors have on existing investors in the asset class?</li><li>• What will the most pervasive retail investment models be?</li><li>• What advantages and what challenges would working with retail investors bring for GPs?</li><li>• What structural or regulatory changes would need to be implemented to make this happen at scale?</li></ul>
13:00	END

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## DAY 3 (July 8)

<b>INFRASTRUCTURE UPDATE</b>	
LERINS SUMMIT ROOM / 09:30-14:00	
09:30	<b>Welcome coffee and introduction.</b> <b>What the infrastructure recovery will look like - segment by segment (by Conquest)</b>
09:45	<b>Discussion 1: The deployment challenge in infrastructure. Larger funds vs smaller deals</b> <ul style="list-style-type: none"><li>Infrastructure funds are soaring in size but Covid fallout means the majority of assets are mid-cap</li><li>Challenges for mega managers deploying at the smaller end of the market</li><li>Why buy and build strategies are flavour of the day</li></ul>
10:30	<b>Discussion 2: Green deal opportunities for infrastructure in Europe</b> <ul style="list-style-type: none"><li>What investment opportunities is the European green agenda creating for infrastructure?</li><li>Wind vs solar. Where are the most attractive renewables opportunities in Europe?</li><li>The next big story. Identifying investable battery storage technologies</li><li>Managing merchant risk. The evolution of offtake agreements</li></ul>
11:15	<b>Coffee break</b>
12:00	<b>Discussion 3: Digital infrastructure. Where are the most attractive sub-sectors?</b> <ul style="list-style-type: none"><li>Is digital infrastructure, really infrastructure?</li><li>Towers, fibre and data centres. Where are the most interesting opportunities today?</li><li>The impact of 5g migration</li><li>Managing technology risk in a fast moving sector</li></ul>
12:45	<b>Networking Lunch</b>
14:00	<b>END</b>

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<b>PRIVATE DEBT UPDATE</b>	
RIVIERA SUMMIT ROOM / 10:30-14:00	
10:30	<b>Welcome coffee and introduction.</b> <b>"Assessing the impact of the crisis in Private Debt markets"</b>
10:55	<b>Discussion 1: What alternative credit opportunities will remain when the tide goes out? (special situations, NPLs, secondaries, mezzanine, preferred equity...)</b> <ul style="list-style-type: none"><li>Secondaries opportunities in a crisis</li><li>Special situations and non-performing loans</li><li>The evolving mezzanine and preferred equity story</li></ul>
11:40	<b>Coffee break</b>
12:05	<b>Discussion 2: Once in a lifetime? Will Private Debt outplay banks in Europe?</b> <ul style="list-style-type: none"><li>How have private equity funds reacted to their first full blown crisis?</li><li>With banks tied up with government support schemes, can debt funds steal a lead on new investment?</li><li>Are LPs still supporting the private debt narrative?</li></ul>
12:50	<b>Networking lunch</b>
14:00	<b>END</b>

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# IPEM 2021 PROGRAM & SPEAKERS

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## DAY 3 (July 8)

### NETWORKING LUNCH

13:00-14:00

### SPEAKERS' LUNCH (speakers only)

13:00-14:00

Sponsored by BNP Paribas

### FAMILY OFFICES LUNCH (invitation only)

13:00-14:00

## ALLOCATORS' DAY (PART 2)

### "A NEW ALLOCATION PARADIGM"

CROISSETTE CONFERENCE ROOM 1 / 14:00-16:00

TIME	SESSION
14:00	<b>Are family offices growing queasy about Private Equity? (panel discussion)</b> <ul style="list-style-type: none"><li>• How family offices are balancing responsibility for their core business in times of crisis with their appetite for external investment</li><li>• The evolution of direct vs fund investment strategies. What's working and what's not?</li></ul>
14:45	<b>LPs on the Phalippou controversy. Is Private Equity really outperforming public markets? (panel discussion)</b> <ul style="list-style-type: none"><li>• Does private equity really deliver out-sized returns? The truth behind the numbers</li><li>• Do managers earn too much money for the service they provide?</li><li>• What Phalippou fails to take into account. The irreplaceable value that private equity brings to the economy and to society</li></ul>
15:30	<b>Will the bargaining power shift back toward LPs? (panel discussion)</b> <ul style="list-style-type: none"><li>• Will we see any movement on fees, hurdles or carry?</li><li>• What other terms are investors keen to push back on?</li><li>• Have LPs learnt lessons about pooling their purchasing power?</li><li>• Or Will GPs retain the upper hand?</li></ul>
16:00	<b>IPEM 2021 closing remarks</b> <i>Antoine Colson, CEO &amp; Managing Partner, IPEM</i>

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## DAY 3 (July 8)

EMERGING MARKETS / PE IN AFRICA UPDATE LERINS SUMMIT ROOM / 14:30-16:00	
14:30	<b>Welcome coffee and introduction.</b> <b>"Betting on the African / EM's recovery"</b>
14:45	<b>Discussion 1: What geographies and strategies did well in Africa / Emerging markets during the crisis?</b> <ul style="list-style-type: none"><li>• The catastrophic implications of Covid on emerging markets</li><li>• Which sectors and geographies have fared best, and which have suffered the most?</li><li>• What does the future hold for investment in the region in the months and years to come?</li></ul>
15:15	<b>Discussion 2: Focus on venture/growth capital investment in Africa and emerging markets</b> <ul style="list-style-type: none"><li>• The evolution of the African venture and growth capital markets</li><li>• How the manager and entrepreneur pool is growing</li><li>• An explosion in technology and fintech in Africa</li></ul>
16:00	<b>END</b>

IR BEST PRACTICES UPDATE RIVIERA SUMMIT ROOM / 14:30-16:00	
14:30	<b>Welcome coffee and introduction.</b> <b>"Testimonials of the most successful fundraisers"</b>
14:45	<b>Peer-learning session 1: Fund positioning and pitch</b> <ul style="list-style-type: none"><li>• A workshop for IR professionals focused on communicating a differentiated investment strategy</li><li>• Demonstrating a replicable track record</li><li>• Selling your people</li><li>• And articulating a positive corporate culture and long-term vision</li></ul>
15:15	<b>Peer-learning session 2: Getting the deal closed</b> <ul style="list-style-type: none"><li>• A peer learning session focused on getting deals closed in a lockdown environment</li><li>• The value of interim closes and the use of preferential terms</li><li>• Maintaining momentum. Don't let your fund get stale</li><li>• The devil's in the detail. From fund finance to FX strategy - make sure you have the answers to hand</li></ul>
16:00	<b>END</b>

## IPEM 2021 CLOSING PARTY

16:00-19:00

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## IPEM 2021 CONFIRMED SPEAKERS

First Name	Last Name	Job title	Company
Alice	Albizzati	Founding Partner	GAIA CAPITAL PARTNERS
Jean-Luc	Allavena	Chairman	ATLANTYS INVESTORS
David	Arcauz	Managing Partner	FLEXSTONE PARTNERS
Bertrand	Badre	CEO, Founding Partner	BLUE ORANGE CAPITAL
François	Barbier	Managing Partner & CEO	21 INVEST
Francesco	Battazzi	Head of Diversified Debt Funds	EIF
Christophe	Bavière	CEO and Managing Partner	IDINVEST PARTNERS
Hazem	Ben Gacem	Head of Corporate Investment - Europe	INVESTCORP INTERNATIONAL
Cédric	Bisson	Partner	TERALYS
Andreas	Bohn	Managing Partner & Co-CEO	SWANCAP PARTNERS
Andrea	Bonomi	Chairman	INVESTINDUSTRIAL
Nicolas	Bourdon	Partner	ACCURACY
Hendrik	Brandis	Co-Founder & Partner	EARLY BIRD
Nick	Brooks	Head of Economic and Investment Research	ICG
Nicolas	Brugère	Partner	EQT PARTNERS
Kine	Buroy - Olsen	Managing Partner	CUBERA PRIVATE EQUITY
Gabriel	Caillaux	Managing Director, Head of EMEA	GENERAL ATLANTIC
Ronald	Cohen	Founder of Apax Partners and Chairman of the Global Steering Group for Impact Investment	THE PORTLAND TRUST
Jeremy	Coller	CIO & Chairman	COLLER CAPITAL
Gilles	Collombin	Partner	CHARTERHOUSE DEVELOPMENT CAPITAL
Antoine	Colson	CEO & Managing Partner	IPEM
Abhik	Das	Managing Director, Head of Private Debt	GOLDING CAPITAL
Marco	De Benedetti	Managing Director and Co-head of the Europe Buyout	THE CARLYLE GROUP
Renaud	De Matharel	CEO	CUBE INFRASTRUCTURE MANAGERS
Laurent	De Rosière	Partner, Co-Head of Investor Relations	BC PARTNERS
Jérôme	Delmas	CEO	SWEN CAPITAL PARTNERS
Paul	Desmarais III	CEO & Chairman	POWER FINANCIAL CORPORATION
Massimo	Di TRIA	Chief Investment Officer	CATTOLICA ASSICURAZIONI



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First Name	Last Name	Job title	Company
Marleen	Dijkstra	Principal	ALPINVEST PARTNERS
Jorrit	Dingemans	Manager Private Equity - Fund and Co-Investments	FMO
Antoine	Drean	Founder & Chairman	TRIAGO
Johnny	El Hachem	Chief Executive Officer	EDMOND DE ROTHSCHILD PE
Ragheb	El Rami	Managing Director, IDG	ACTIS
Bernhard	Engelien	Managing Director	GREENHILL
Hélène	Falchier	Partner	PORTAG3 VENTURES
Laurent	Fayollas	Senior Managing Director at Ardian Infrastructure	ARDIAN
Ambroise	Fayolle	Vice Président	EUROPEAN INVESTMENT BANK
Antoine	Fine	Managing Partner, Co-founder	EUTOPIA
Antoine	Flamarion	Managing Partner & CEO	TIKEHAU INVESTMENT MANAGEMENT
Anne	Fossemalle	Director, Equity Funds	EBRD
Per	Franzen	Partner and Co-Head of EQT Private Equity Advisory Team	EQT PARTNERS
Dominique	Gaillard	Chairman of France Invest, Senior Advisor Ardian	ARDIAN
Claire	Gawer	Director	BNP PARIBAS
Ralf	Gleisberg	Partner	UNIGESTION
Benoist	Grossman	Managing Partner	IDINVEST PARTNERS
Pascal	Heberling	Partner	BC PARTNERS
Manuel	Hertweck	Managing Partner	CAPITON
Regina	Hodits	General Partner	WELLINGTON PARTNERS
Alexis	Hojabr	Partner	WHITE & CASE
Hanna	Ideström	Senior Portfolio Manager	AP-FONDEN 4
David	Jeffrey	Partner Head of Europe	STEPTONE
Dana	Johns	Senior Portfolio Manager	MARYLAND STATE RETIREMENT AND PENSION SYSTEM
David	Klein	Co-Founding Partner	ONE PEAK PARTNERS
Wol	Kolade	Managing Partner	LIVINGBRIDGE
Elias	Korosis	Partner	HERMES
Arnaud	Lambert	Partner	ACCURACY
Karsten	Langer	Managing Partner	THE RIVERSIDE COMPANY

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First Name	Last Name	Job title	Company
Daniel	Leith	Managing Director, Funds, Private Equity	CDPQ
Hugo	Lestiboudois	Private Debt Manager	IVO CAPITAL PARTNERS
Fanny	Letier	Founding Partner	GENEO CAPITAL ENTREPRENEUR
Thomas	Liaudet	Partner	CAMPBELL LUTYENS
Bernard	Liautaud	Managing Partner	BALDERTON CAPITAL
Brice	Lionnet	Président du Directoire	ISATIS
Maggie	Loo	Partner	BRIDGES FUND MANAGEMENT
Alexandre	Mars	Founder & CEO	BLISCE
Cécile	Mayer Levi	Head of Private Debt	TIKEHAU INVESTMENT MANAGEMENT
Garvan	Mc Carthy	Global Head of Alternatives EMEA-Asie	MERCER
Sarah	McPhee	Chairwoman	AP-FONDEN 4
Cem	Meric	Partner	LGT CAPITAL PARTNERS
Olivier	Millet	Président du Directoire d'Eurazeo PME	EURAZEO PME
Eddie	Misrahi	Chairman & CEO	APAX PARTNER
Virginie	Morgon	CEO	EURAZEO
Carl	Nauckhoff	Head of Investor Relations	INVESTINDUSTRIAL
Christophe	Nicolas	Managing Director	ALPINVEST PARTNERS
Shami	Nissan	Head of Responsible Investment	ACTIS
Giovanni	Orsi	Managing Director, Private Equity, Funds	PSP INVESTMENTS
Frédéric	Palanque	Managing Director	CONQUEST ASSET MANAGEMENT
Christine	Panier	Head of Lower Mid Market	EIF
Emmanuel	Parmentier	Partner	INDEFI GROUP
Pär-Jörgen	Pärson	General Partner	NORTHZONE
Jean-Marc	Patouillaud	Managing Partner	PARTECH
Emily	Pennec	Partner	MAYER BROWN
Tristram	Perkins	Global Head of NB Secondary PE / Managing Director	NEUBERGER BERMAN
Pontus	Pettersson	Partner	CINVEN
Fabian	Poetter	Managing Director	GOLDING CAPITAL
Philippe	Poletti	Member of the Executive Committee - Head of Buyout	ARDIAN
Peder	Prahl	Managing Partner	TRITON

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First Name	Last Name	Job title	Company
Ian	Prideaux	CIO, CFO	GROSVENOR ESTATE
Ralf	Rank	Managing Partner	BROOKFIELD ASSET MANAGEMENT
Joana	Rocha Scaff	Head of PE Europe	NEUBERGER BERMAN
Nicolas	Rose	Partner	SIPAREX XANGE VENTURE
Holger	Roszbach	Senior Investment Director	CAMBRIDGE ASSOCIATES
Tom	Rotherham Winqvist	Managing Director, Europe	WAFRA INC
Frédéric	Sadaca	Responsible Investissements	PRO BTP
Joe	Schorge	Founder & Managing Partner	ISOMER CAPITAL
Raj	Shah	Head of Healthcare	NORDIC CAPITAL
Helen	Steers	Partner	PANTHEON VENTURES
Frode	Strand-Nielsen	Managing Partner	FSN CAPITAL
Jim	Strang	Head of EMEA	HAMILTON LANE
Anders	Strömblad	Head of External Management	AP-FONDEN 2
Alessandro	Tappi	Chief Investment Officer	EIF
Amanda	Tonsgaard	Head of Investor Services	TRITON
Rafaèle	Tordjman	CEO & Executive Investor	JEITO CAPITAL
Marc	Valentiny	Managing Director & Co-Founder	CORE EQUITY HOLDINGS
Harrie	Van Rijbroek	Director Private Equity	PGGM
John	Van Rossen	EMEIA Strategy and Transactions Partner	EY
Ivan	Vercoutere	CIO, Managing Partner	LGT CAPITAL PARTNERS
Guillaume	Vitrich	Partner	WHITE & CASE
Naveen	Wadhera	Managing Director	TA ASSOCIATES