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Official Event Guide

Day 1 • 8 June 2020

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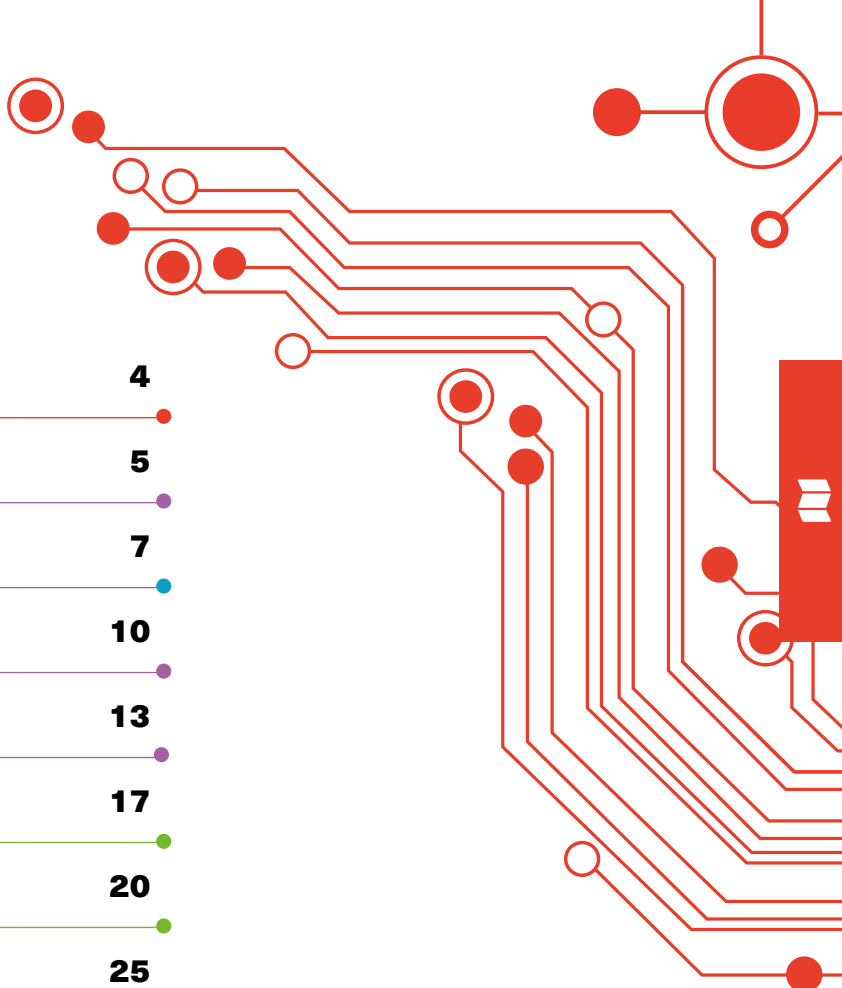
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WELCOME

WELCOME TO ICE ASIA DIGITAL

While the in-person event has been rescheduled for 27-28 May, 2021, it is my pleasure to welcome everyone to our inaugural ICE Asia DIGITAL. It is great to see so many of you online wanting to connect and interact.

Bringing three days of live streamed content, this event has been designed to deliver a comprehensive selection of discussion, expert insight and thought leadership in an online webcast environment.

As an exhibition business, shifting into a digital environment has involved engaging the team in a new challenge, but thanks to a collective and collaborative effort we're able to continue to provide content dedicated to current trends in the fast-moving Asian market - be those land-based or hospitality tech-related.

We have over a thousand people signed up from all areas of the industry, including land-based, casino and hospitality technology. There's also a mixture of operators and suppliers from all over the world, so I encourage you to connect with as many people as you can!

Once on the event platform, you will notice a number of exciting functionalities, which put usability and connectivity at the forefront. This will allow you to easily access the live stream for each session, take part in discussions with industry leaders, customise your schedule and chat face-to-face via video calls with those who are eager to learn and do business, despite current difficulties.

Our thanks go out to all our sponsors, partners and associations who have been driving this initiative forward with us and I hope that you have a great experience throughout.

Greg Saint
Event Director | Clarion Gaming



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3

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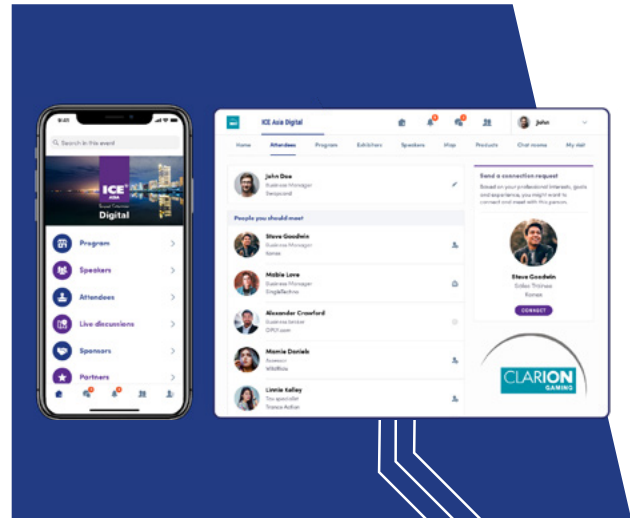
Begin connecting with your peers, customizing your program and scheduling one-on-one video meetings ahead of the live event.

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AGENDA MONDAY, 8 JUNE

 FROM 3PM ICT / 4PM PHT / 5PM JST / 9AM BST / 10AM CET

WELCOME

Hosted by



Chris Wieners, Managing Partner,
HOGO Digital



Joji Kokuryo, Managing Director, Bay
City Ventures

KEYNOTE:



Andrea D. Domingo, Chairman &
CEO, PAGCOR

PANEL: OUTLOOK FOR ASIA GAMING IN A POST COVID-19 WORLD

The huge impact that COVID-19 has had on Asia Gaming will be the focus of this session. We will be joined by some of the regions key thought leaders and analysts, who will focus on the trajectory of recovery, the future of some of the key gaming markets such as Macau, Singapore & Philippines as well as some financial analysis and predictions for the 18 months ahead.



**Moderated by:
Alidad Tash**,
Managing Director, 2nt8 Ltd



Kevin Clayton,
Chief Marketing Officer,
Board Advisor & Consultant



Vitaly Umansky,
Senior Research Analyst, Global
Gaming at Sandford C. Bernstein

QUICK TAKE: RUNNING A CASINO IN A PANDEMIC ERA



Michael Gore, VP Corporate Strategy,
Hamatomo Corporation

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PANEL: IMGL MASTERCLASS - REGULATORY IMPACT & RESPONSES TO COVID -19 ACROSS THE ASIA-PACIFIC ON THE GAMBLING SECTOR, FOCUS ON AUSTRALIA, INDIA AND SINGAPORE.

How have regulators responded, and continue to respond to COVID-19? This panel of experts and regulators will explore some of the regulatory change to potentially emerge in a post COVID-19 era of gaming. What can different regulatory responses learn from each other across the Asia Pacific region?



**Moderated by:
Jamie Nettleton**,
Chairman, IMGL



Ranjana Adhikari,
Co-head Media Entertainment &
Gaming, Nishith Desai Associates



Lau Kok Keng,
Head Intellectual Property, Sports
& Gaming, Rajah & Tann Singapore



Michael Sarquis, Executive Director,
Office of Liquor and Gaming Regulation
Department of Justice and Attorney-
General, Australia

QUICK TAKE: THE BENEFITS OF OFFERING DIGITAL SERVICES AS A LAND-BASED CASINO.



Erwin Dickman, Marketing Manager,
Asia Live Tech

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AGENDA MONDAY, 8 JUNE

IN FOCUS: THE MARRIAGE OF DIGITAL, AND LAND-BASED IN THE FUTURE ASIA PACIFIC MODEL.

What can Asia learn from some of the European markets regarding customer experience, loyalty and digital engagement from land-based and Omni-channel operators & suppliers?



Moderated by:
Harmen Brenninkmeijer,
Managing Director, Dynamic Partners



Jonathan Pettemerides,
Director, Omni-Channel,
Rank Group



Wolfgang Bliem,
CEO, Casino Luzern

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Chris Wieners, Managing Partner,
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INTERVIEW

The future for the integration of iGaming and digital technology with land-based operators in a post-COVID19 world



Clarion Gaming sat down with Jonathan Petteimerides to get his thoughts on the future of digital as it relates to land-based gaming. Mr. Petteimerides comes from a 15-year background in the gaming industry including both land-based and online sectors. He has specific experience around the convergence of gaming product, customer proposition and channel operations in regulated markets. Jonathan currently works for Rank in London as their omnichannel director.

Clarion Gaming: Thank you for taking the time to answer a few questions Jonathan! We don't want to reveal too much, as we know you have an exciting panel discussion planned for 8 June at ICE Asia Digital 2020. However, can you give us a sneak preview of some of the key topics and data points you will cover in your panel "The Marriage of Digital and Land-Based in the Future Asia Pacific Model"?

Jonathan Petteimerides: I'm looking forward to the panel on June 8th and hope that my fellow panelists and I can provide some useful insight from our collective experience. The marriage of land based and digital gaming has been a core focus of my career to date and I hope that previous experiences working in Asia, will add some value to the conversation. Given the diversity of Asia as a region, it is clearly isn't as simple as a one size fits all strategy nor a case of what has worked in parts of the US and Europe being directly replicated in Asia Pacific. The region is many years ahead of the rest of the world in some areas, which isn't always recognised. This is certainly the case in the creation and adoption of digital technologies to improve customer experience. I'm expecting the panel to provide some insight into what has worked in their respective operations over the years with consideration given for what a future regulatory model could look like. In my opinion, regulation and operating experience of multichannel businesses are two principle areas where insight could benefit attendee's. Rank is the UK's leading multi-channel gaming operator with significant experience in operating digital gaming as well as their long-standing venues business, within an advanced regulatory framework. There is a clear rationale for being a multi-channel business rather than a venues only operation.

CG: Who, in your opinion, will be able to benefit from your content? Is this focused at existing iGaming operators, land-based operators or both? Should regulators also listen in and if so, what can they learn from your upcoming discussion?

JP: I would like to think that everybody who currently operates or has an interest in operating or providing industry solutions to the region, will find the panel of interest. That could extend to private equity and finance groups who in my opinion are likely to be increasingly involved in a changing industry landscape. This panel should be particularly relevant to government regulators, without whom such a marriage of channel operations in the future, will remain on the distant horizon. There is little doubt that the recent Covid19 enforced situation has

sharpened the conversation about online gaming meeting a clear customer need and whether land-based operations will change to better meet those customer expectations. Having a clearly defined regulation would support governments, businesses and customers alike. We hope to discuss some examples of where iGaming regulation is working.

CG: Is it fair to say that there has been some "negative PR" around iGaming and digital gaming (especially offshore) in general throughout Asia? Do you feel that this will be a difficult hurdle for governments to overcome in order to even consider instituting iGaming or other digital formats into their regulated environments?

JP: Any current regional challenges around online gaming licensing and the negative publicity may be a catalyst to drive greater consideration by state governments to regulate iGaming. There is a knowledge gap which needs to be bridged with anybody working in the online market tarnished by association to any negative PR. In the Philippines for example, there are some credible businesses working within an improving licensing regime who are not targeting markets where they are not permitted to operate. However, on the flip side there appears to be completely unlicensed operations popping up across the region and it is the closure of those, which will best protect the consumer in the first instance.

CG: Where in Asia do you see the next great opportunity for this marriage of iGaming with existing land-based operations? Do you feel there is any "low hanging fruit" that should be considered in the short term?

JP: There is little appetite to explore online gaming regulation in some countries and I therefore don't expect regulatory progress in Asia Pacific at the speed of some others in the industry. However, the way that consumers engage with entertainment has changed and there needs to be an evolution in a number of areas to meet the customer needs and expectations. There are several markets where progress is being made and we will surely discuss those on the panel. The COVID19 situation will potentially accelerate the need for planning across a wide range of stakeholders, including operators, vendors and regulators.

Petteimerides is set to discuss The Marriage of Digital, and land-based in the future Asia Pacific model, on June 8th. **Click here** to add to your schedule of sessions you want to stream.

INTERVIEW

Establishing global recognition for The Philippines throughout Asia and the world



The Philippine Amusement and Gaming Corporation (PAGCOR) has been instrumental in working with the ICE Asia brand in the development of the show (including support for both the digital event in 2020 and the planned 2021 event to be held in Manila). Clarion Gaming sat down with Andrea Domingo, the Chairman and CEO of PAGCOR, to answer a few questions.

Clarion Gaming: [PAGCOR is headlining ICE Asia Digital 2020 this June - why was it important for PAGCOR to throw its support behind this event?](#)

Andrea Domingo: It is important for PAGCOR to support events like ICE Asia Digital 2020 in order to broaden its market and establish its presence, not just in the Philippines and Asia, but globally. Considering that PAGCOR is both a regulator and an operator, it is important for it to keep abreast of gaming developments worldwide, especially during this pandemic. One of the functions of PAGCOR is to provide funding for the government which is really badly needed now. And by participating in events like this, PAGCOR will learn from what other gaming regulators and operators have been doing in trying to cope with the situation we all are in right now.

CG: [How has the Philippines emerged as a central hub for gaming in Asia and the ASEAN? What hurdles will it have to navigate in order to maintain its crown in the region?](#)

AD: Throughout history the Philippines has been a pioneer in gaming, emerging as a central hub in the region. This fits nicely with our current management's vision; ensuring that there is a level playing field, maintaining transparency, and regulating and operating with credibility and integrity. Furthermore, the Philippines is known for tourism, entertainment, and hospitality, foreign players do not just come here to play, but also to enjoy the other attractions that our country has to offer. With the emergence of the Integrated Resorts and Casinos there is now a holistic approach to tourism, entertainment, and amusement. There are a few hurdles that need to be navigated in order to maintain its lead in the region, such as:

- a) Conservatives in the Philippines who believe that gambling is evil.
- b) The emergence of other countries which would want to go and develop their respective gaming industry, such as Japan, Cambodia, Vietnam, Malaysia, Laos, Singapore, Korea and Taiwan.
- c) Politics the continuous opposition of one small group whose sole objective is to bring down the gains of the current administration
- d) The COVID-19 pandemic, which requires social distancing and other health protocols, and overcoming the fear it has caused.

CG: [The gaming industry in the Philippines is the third highest source of revenue after taxes, how big a role does this sector have to play in securing the country's economic future post-COVID-19?](#)

AD: The gaming industry, specifically PAGCOR, plays a significant role in securing the country's economic future post COVID-19. People need to realise that PAGCOR and the Government do not only benefit from the gaming fees and taxes but also trigger economic activities as well. The whole industry employs about 132,000 direct hires. It also generates many other economic activities and businesses like restaurants, hotels, malls in IRs, services, transport, and real estate. There will even be more economic and employment opportunities when other gaming stations and casinos open.

CG: [A moratorium was placed on the issuing of POGO licenses from August 2019 until the end of this year, pending review – what is the situation as of today?](#)

AD: The moratorium is still in place. Until we finish our evaluation of the whole operating manual on POGOs and have arrived at a much superior one, we will not lift the ban.

CG: [Do POGOs have an important role to play in helping the industry in Asia to operate in a sound, regulated framework?](#)

AD: POGOs play an important role in helping the industry in Asia to operate a sound and regulated framework. Considering that the trend right now under the New Normal is doing business online through the internet because of the need to have physical distancing, POGOs will now be a trend in gaming. There will be players who will prefer to play online. Thus, there is a need to ensure that proper regulations are in place to address money laundering, prohibiting banned players like minors, responsible gaming, data privacy, cyber fraud, proper collection of bets and payouts, auditing and ensuring that proper taxes are remitted to the government.

CG: [China has been very clear on what they think of online gambling – is their voice loud enough to upset future plans for a stable, regulated framework?](#)

AD: I think this has been addressed. The Philippines has its own sovereignty and laws which we enforce within our jurisdiction and China respects that, as we respect their laws.

We have been coordinating with the Embassy of China to ensure that only legitimate POGOs, those that are registered under Philippine laws, are allowed to operate in our country.

Domingo is a keynote speaker on the 8th & 9th June 2020. **Click here** to add to your schedule of sessions you want to stream.



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GREY IS THE NEW WHITE: INVESTING IN ASIA

There are clear reasons why the smart money is shifting east, but as we found with Europe, this grey honeymoon is not indefinite, writes **Julian Buhagiar**

It is a truth universally acknowledged that an investor's long-term success is based mainly on their risk strategy.

Let's unpack this a bit. Broadly speaking, investments can be classified into three risk groups. At the lower end of the risk spectrum, pension funds – the destination for pragmatists' retirement – usually have between 5-10% of their management vested in highly volatile asset classes.

In the middle segment, there are specialist funds, particularly the emerging markets and derivatives categories, which take on a significantly higher proportion (typically 20-30%) of larger-spread investments based on the promise of higher returns.

At the upper end, there is private equity and venture capital, and they

have a wholly different approach to risk. For instance, VC-based funds, where I spend most of my time (and money), price in an assumption that out of every 10 start-up investments, four will fail (hopefully with a sufficiently gratifying explosion), another four will just about return the original investment, and the remaining two will be stratospheric superstars. So, at any one time, it's safe to assume that at least 50-60% of PE/VC money is invested in high-risk assets.

“This year – thanks in no small part to Covid-19 – carnage will be unleashed on stock prices that will be felt for the better part of a decade”

SHOW ME THE RETURNS

Here's the clincher. Out of all these different investments, which asset classes have been recently delivering solid returns to their shareholders?

Not the pension funds, indeed in recent years many of these asset classes have been tracking way below standard stock market indices. And this year – thanks in no small part to Covid-19 – carnage will be unleashed on stock prices that will be felt for the better part of a decade. Witness how many normally robust stocks are in decline this year. If you're thinking of retiring soon and living solely on a classic pension fund, it probably wouldn't hurt to sit it out for a while.

Neither are specialist funds faring any better at present. Boutique asset classes, while seemingly defying gravity

over the last few years, have found an Achilles heel when markets start to panic. In otherwise normal times, it makes sense to focus portfolios on more niche areas. Emerging markets, rare earth minerals, future lithium reserves: all were great topics of smug and savvy post-dinner prattle along with the Armagnac. But, as with all trends, they rapidly lose their edge once sentiment gravitates. Buy the rumour, sell the news indeed.

It doesn't fare any better with crypto-based investments, at least on anything more sophisticated than 'hodling' (storing bitcoins in feverish belief that their real-world value will eventually reach the moon – no, me neither). The recently announced crypto funds, for example, attempt to stabilise the volatility in crypto-asset prices by locking them into longer-term well-behaved mixed asset classes; hence why most five-year crypto ETFs have predicted returns that are lower than the expected prices of their underlying crypto assets. But as can be seen from the recent crypto-massacre they are still classed as high risk; whether Bitcoin will be \$2,000 or \$200,000 in a 3-5 year investment horizon is anyone's guess.

So where is the investment edge with VC-backed funds? Most start-ups are not impervious to market shakers; indeed this year will be harder than most for many pre-profit based companies. But quite a few funds have a few high-performing assets – some even unicorn potential – up their sleeves, and most of them are pointing eastward.

ALL POINTS EAST

Why is there such a concentration of value in Asia at present? First off, this is not a trend specifically limited to gaming. From a business perspective, finance and especially tech have been investors' destinations of choice in Asia.



Almost without exception, these early-stage businesses are replete with hard-working founders on minimal salaries and 18-hour days, and no entitlement. Also, when coming from Europe it's almost impossible to comprehend the full potential of a market that is still nascent yet already orders of magnitude larger in opportunity.

Here's one example to show how a crypto-based investment can be done properly. A Hong Kong digital asset platform has recently floated on the stock exchange offering full brokerage and futures pricing on most prominent crypto assets, and – importantly – backed by full banking liquidity. In a few weeks, it is already worth twice its initial outlay. From an investor's perspective, this is truly a goldmine.

From a gaming vendor standpoint, prospects are even more compelling. Faced with an over-regulatory stance in Europe, and a still-nascent market in

the US, Asia feels like a refreshing industry for gaming money. Still basking in mostly grey markets, and little to no incentives to go white anytime soon, it's clear that there's money to be made in the short to medium horizon. Furthermore, no other continent boasts both the largest (Japan) and smallest (Vietnam) global player lifetime values, together with similarly record-breaking proportional acquisition costs. Get your LTV/CAC ratios right here, and talk of your investment fund returns will be the stuff of legend at your kids' birthday parties.

Which is why practically most of the gaming stocks at the moment – especially, and somewhat counter-intuitively, the public players – have no qualms about broadcasting their activity in the East. It seems strange that vendors and operators – Bet365, Scientific, Playtech, SBTech and NetEnt to name a few – that invest so much of their operating capital to ensure they fully comply with markets in Europe have no qualms reporting their quarterly takings from non-regulated markets. And investors seem to be happy to take their dividends from these markets for the time being.

50-60%
Percentage of PE/VC money
invested in high-risk assets



“THERE IS AN INCREASING NUMBER OF VERY TALENTED, ASIAN-SPECIFIC CONTENT PLATFORMS THAT CONVERT VERY HIGH LIFETIME VALUE PLAYERS INTO LONG-TERM CUSTOMERS. COUPLE THAT WITH A SUITABLE ACQUISITION AND ENGAGEMENT NARRATIVE, AND YOU HAVE A LUCRATIVE RETURN ON INVESTMENT”

But the Asian-focused gambling start-up scene is possibly one of the most exciting areas of investment. There is an increasing number of very talented, Asian-specific content platforms that convert very high lifetime value players into long-term customers. Couple that with a suitable acquisition and engagement narrative, and you have a very lucrative return on investment. That is where the smart money is currently at.

In retrospect, the reasons behind this broad shift to the East are clear. Faced with declining revenues (and increasing fines) from traditional old-world markets, any self-respecting fund will rapidly embrace any new strategy that diversifies profits and augurs medium-term growth. Which is why legacy (read: pension) funds are now replacing their recent chant of ‘gaming is bad’, and replacing it with ‘(Asian) gaming is better’...

EVERY SILVER LINING

To every strategy, however, there is a downside. As with Europe, this grey honeymoon is not indefinite. That said, unless there is a concerted national and territorial effort to regulate, expect the process to be long drawn out and

not without delays. Witness how long it has taken Australia to regulate and is still a work in progress. Naming and shaming and/or IP-blocking a couple of scapegoats won’t deter the market from the rest of the (now black) operators and myriads of Curaçao-licensed platforms from supplying content where there is ample demand. Even here, this newly created black market will continue for the foreseeable future, albeit with declining revenues.

Thus, for the time being, focusing on Asia looks like a safe bet. But as with all smart strategies, there should always be a diversified approach to investments. VCs, based on decades of hedged betting, tend to do this out of the box, and gradually we are witnessing this happening across other dynamic funds. In the meantime, going long on stocks that are happy to increase their Asian exposure looks like a relatively good strategy. Which is, of course, deliciously contradictory itself, but such are the contradictory times we live in. Grey is indeed the new white... &



JULIAN BHAGIAR

is an investor, CEO and board director to multiple ventures in gaming, fintech and media markets. He has led investments, M&As and exits to date in excess of \$370m.

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Pronet Gaming offers a next-generation platform that delivers the gaming experience of the future. Armed with a market-specific online sportsbook, casino and retail solutions, it combines a technology-led approach with vast industry know-how to provide clients with a rapid and reliable service tailored to their needs. Its casino portfolio features more than 6,000 of the world's best slots from the industry's leading suppliers, whilst its sportsbook solution promises thousands of betting markets on more than 35,000 live events across 65 sports. Its fully-managed omnichannel retail arm is built to power land-based estates and can connect seamlessly to any online operation to ensure full customisation.

Founded in 1996, the company recently expanded its commercial operations to sharpen its focus on markets in Africa and Asia. With bases in London, Johannesburg, and Singapore, as well as development centres in Ukraine, Bulgaria and Malta, Pronet Gaming's team is passionate about changing the industry.

www.pronetgaming.com

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VIVO GAMING



Vivo Gaming is an innovative company specializing in bringing emerging technologies into the online gaming industry with 15+ years of live dealer and B2B experience.

Our Multi Studios styles and big variety of game interfaces ensures that players have the choice to play the games they love and feel the ultimate World-Class Live Gaming experience. Vivo Gaming offers both live casino software as well as additional online gaming software such as RNG and Sports platforms from the best suppliers in the world.

With 27+ supported languages and all currencies, each of our clients gets a tailored solution to fit their exact needs. We are one of only a few to provide full cross-platform compatibility of our games, with both download and web-based activation for PC and Mobile devices. Vivo Gaming new land-based solution Vivo VLB provides the opportunity to live stream from any brick and mortar casino into the online gaming market, opening the land-based casino to the unlimited online global market. With 99.9% system uptime and 24/7 skype support our clients and partners can keep their minds quiet. We support two ways of integration to ensure our games fit perfectly to your current offering:

Seamless API and Funds transfer API. We are experts in studio set-ups. We will take care of everything needed to connect your studio to the online market whether you're an iGaming entrepreneur, have an existing iGaming business, operate betting shops or a land-based casino. Vivo Gaming has a live casino solution for you.

www.vivogaming.com

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SIGMA is a global event, positioned at the cutting edge of the iGaming industry, which has evolved since 2014 into the definitive iGaming showcase, operating on both a European and world stage.

In 2019, the iGaming summit SiGMA in Malta welcomed a record –breaking 15,000 attendees from over 80 countries and over 400 sponsors and exhibitors, and 200 industry– leading speakers.

The event facilitates growth within the iGaming sector, and has now become the largest expo for the industry in Europe. SiGMA Group's inaugural Asian iGaming expo will be held in Manila, on the 27th and 28th May 2021.

SIGMA Group will also host the SiGMA Digital Focus Asia virtual summit from 8th to 10th June. In line with SIGMA's commitment to cover the various gaming verticals and to bring Asia and the West closer together, the global event company has curated an interesting agenda with a line-up of top speakers discussing everything you need, from business expertise and the effects of COVID-19 on the industry, to emerging market trends across Europe and Asia.

www.sigma.com.mt/events/asia/

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NATIONAL INDIAN GAMING ASSOCIATION (NIGA)



Incorporated in 1985, National Indian Gaming Association (NIGA) is an inter-tribal association of federally recognized Indian Tribes united with the mission of protecting and preserving tribal sovereignty and the ability of Tribes to attain economic self-sufficiency through gaming and other forms of economic development. The common commitment and purpose of NIGA is to advance the lives of Indian peoples economically, socially, and politically. NIGA operates as an educational, legislative, and public policy resource for tribal policy makers as well as the public, on issues related to Indian gaming and tribal community development.

Located on Capitol Hill, NIGA is a leading voice for Indian Country, working diligently to ensure that the special status of tribes is recognized and protected when issues affecting tribal sovereignty arise. NIGA advocates on behalf of Indian tribes with Congress, the White House and federal agencies. In order to accomplish its mission, NIGA often works with Congress and the administration on all Indian Issues under the Commerce Clause.

NIGA completed an expansion of the original building in 2015. The Stanley R. Crooks Tribal Leader Conference Center and a multi-story connection between the historic main house and revolutionary era carriage house structures, transformed NIGA's headquarters from primarily office space to a prime conference-meeting center for legislative activities on Capitol Hill.

www.indiangaming.org

Endorsed By

PAGCOR



WHAT IS PAGCOR?

The Philippine Amusement and Gaming Corporation (PAGCOR) is a 100 percent government-owned and controlled corporation under the Office of the President of the Republic of the Philippines.

The Corporation was created during the Martial Law years by virtue of a Presidential Decree (PD1067-A) issued by then President Ferdinand Marcos in response to calls for the Philippine Government to put a stop to the growing proliferation of illegal casino operations in various parts of the country then. The law creating PAGCOR was later amended and consolidated under PD 1869 otherwise known as the PAGCOR Charter.

www.pagcor.ph

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www.igblive.com

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www.igblive.com



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www.iceafrica.za.com



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berlin.igbaffiliate.com



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sportsbettingusaconference.com

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