

Innovation for Creative Industries

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Chairman



Insight



Tech Demo



ABOUT YOU

High Level PH Clients



PlayStation®



CD PROJEKT RED®



THE
COALITION™



Philippine Points

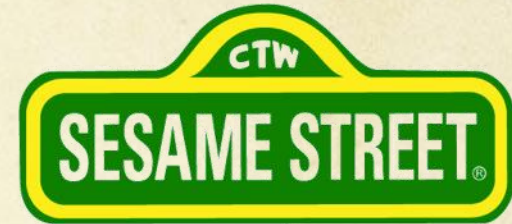
- ◆ 500 years of International Cooperation



1594



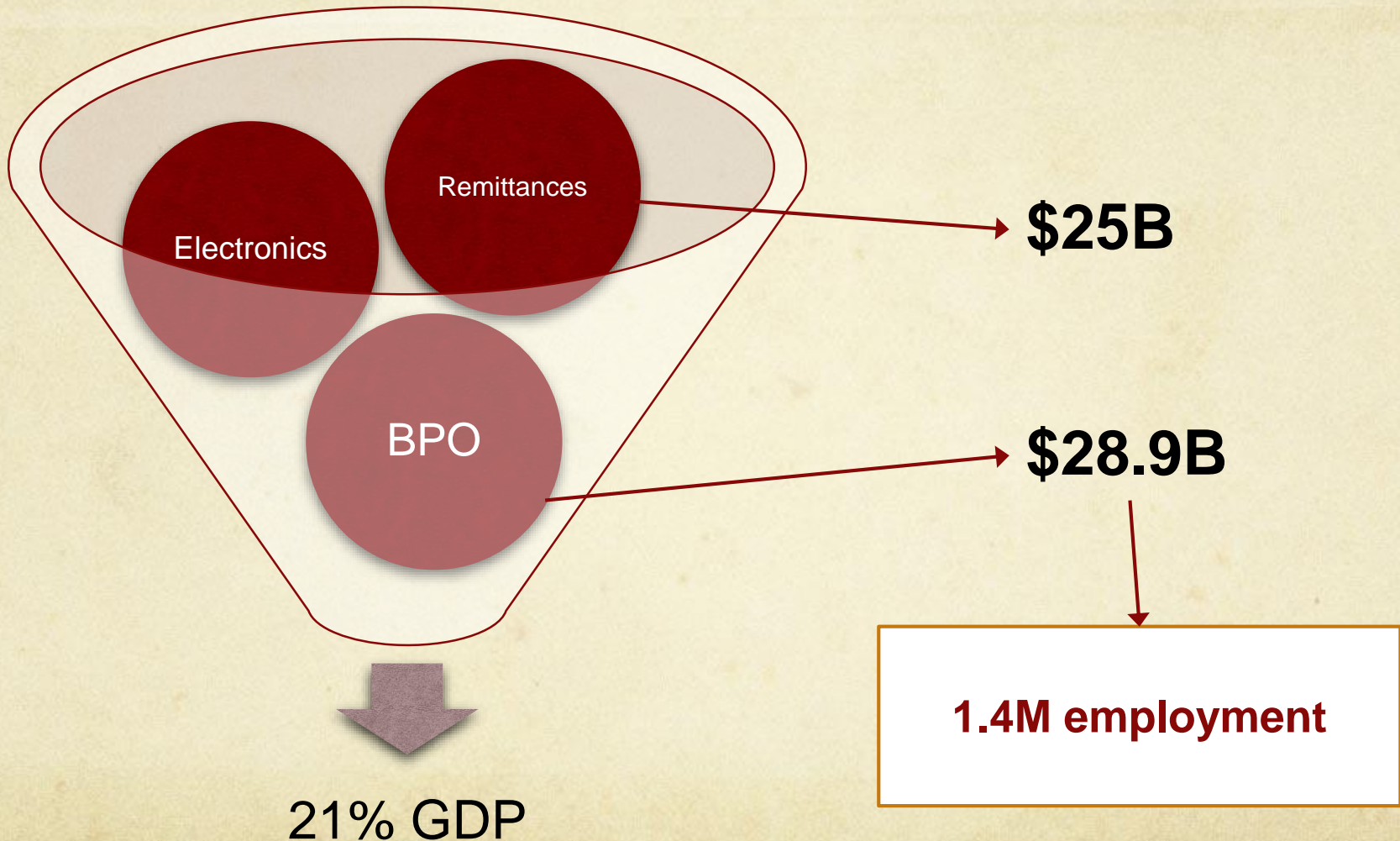
333



100

- ◆ Oldest University in Asia
- ◆ 10+ Years in IT - BPM

2017 Economic Drivers



PARTNERSHIP



5 Year Roadmap [2014-2019]

1. Create more work
2. Create more studios
3. Create more Games



Goal:

5 % of Global Market

Investments



ROI



UBISOFT®



Notes

- ◆ Largest 18-24 demographic in SEA (Total pop. 102M)
- ◆ \$24.1 M Revenue
- ◆ 2,111 FTE's
- ◆ Mobile & PC strength
- ◆ Triple A Niche
- ◆ 57 GDAP members
- ◆ Strong in Management, Support & Communications
- ◆ Supportive Government & Community
- ◆ 5 Major IHLs



Employment Forecast

Game Dev Services

11.5% CAGR
(2016-2022)

2111

2016E

4055

2022E

Future Growth (2016 – 2022)

Game Dev Services

12%



Mobile

15%



PC/Mac

19%



Online

23

Number of
sizeable
companies

79%

Top 5 Companies
Market Share

Gam Dev. services by type

Revenue, 2016

Entertainment based
games

65%

Applied/Serious/
Educational games

35%

Source: SEC Data, SSON, Frost & Sullivan.

Animation & Game Development outsourcing is booming globally

Philippines industry is vibrant but outsourcing work is small compared to rival locations worldwide.

High Impact



Medium Growth Impact



Projected Impact in Philippines

Low Growth Impact

High Growth Impact

Limited scale

Strong client perception

Strong global competition

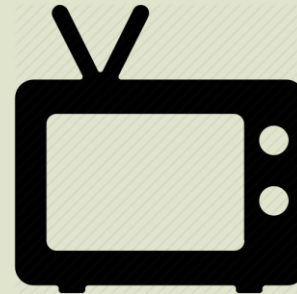
New market opportunities

Sufficient talent but need better skills

High quality 2D work

Limited end-to-end providers

Limited long term strategy



Top Drivers

- Strong client perception of Philippines
- High quality 2D animation and game development work
- New market opportunities in mobile and online space



Top Challenges

- Limited captive investment
- Limited scale (high end) & scope
- Strong global competition
- Fast changing underlying technology



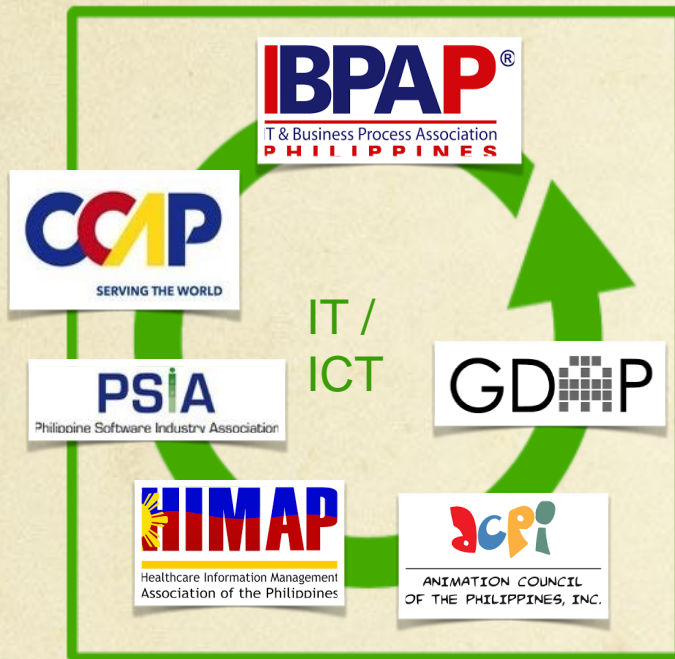
Low

High

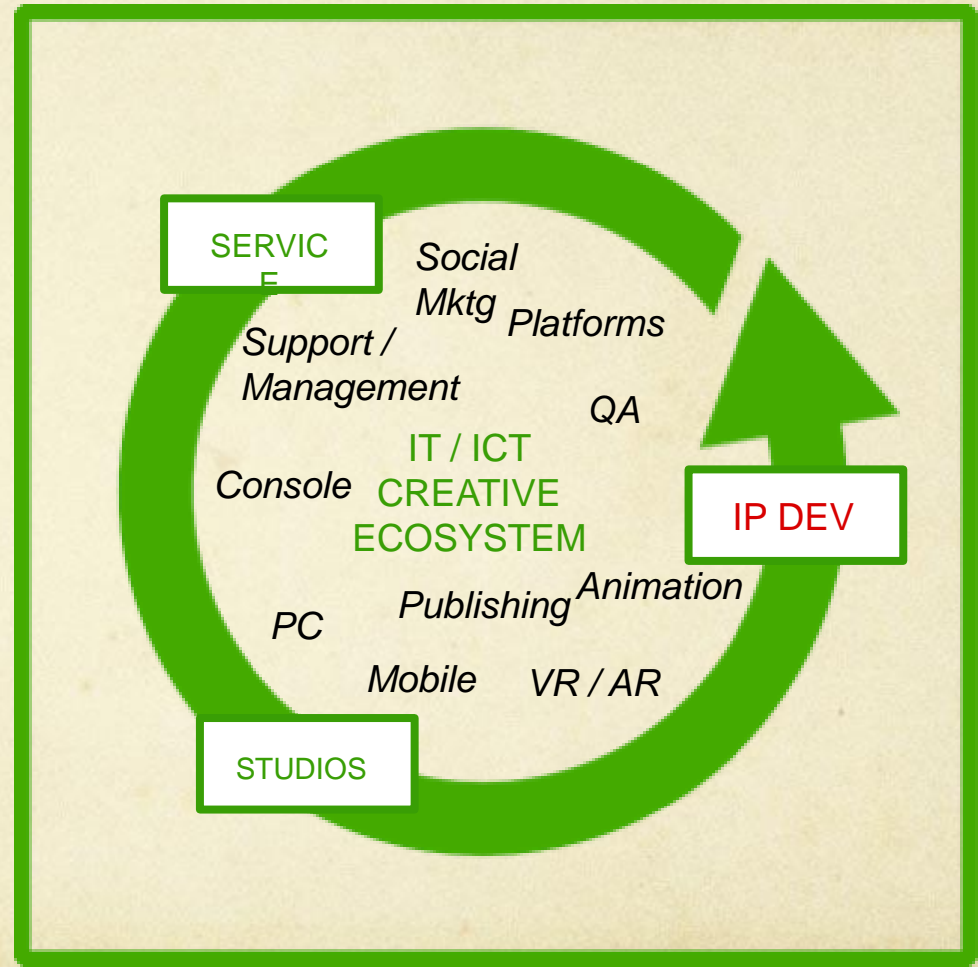
Certainty

● Market Challenge ● Market Driver

Service Offers



Service Culture



Quality Culture

- ◆ Degree in Game Design & Development
- ◆ Game Studio in Z...
- ◆ AAA Studio
- ◆ Bank Loan
- ◆ ASEAN Internship Program
- ◆ Nordic Business Mission

LINKAGES: Need More



Audio Visual Co-Production Agreement
(199_)

GStar | PhilKor
Center



South East Asian Game Initiative
(2015)



Tokyo Game Show | ASEAN Internship Program

Bridging the Gap
(2016)



Frankfurt Book Fair | Story Drive (2016/



Under construction



CREATING A CHAMPION





“It takes a Village to raise a child”

– African Tale

“IT is the greatest tool in Nation Building.”

- Vietnam

“If not us, then who. If not now, then when?.”

- Philippines

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