

**22-24 April 2018**

Tivoli Mofarrej

São Paulo, Brazil

**BgC<sup>®</sup>**



# STRENGTHENING ROOTS

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# WHAT'S HAPPENING THIS YEAR?

Since the first edition in 2013, BgC has played a fundamental role in gathering key operators, investors and legislators to explore the potential of the Brazilian gaming market and how best to prepare once it becomes regulated.

## STRENGTHENING ROOTS

With the theme, 'Strengthening Roots', the focus of BgC 2018 is to **bring key people together in one place to meet and build the important foundations and relationships** needed, to enter this new potential market.

BgC 2018 will also go beyond the approval of the law itself and discuss the challenges Brazil might face in creating a stable marketplace that is attractive for long term investment as well as how expectations can be met in terms of boosting the economy.

## WHO ATTENDS BGC?



400+

senior level  
decision-makers  
in attendance



7/10

delegates said  
they would return  
in 2018



55%

of BgC attendees regard  
this event very important  
to their business



80%

of surveyed attendees  
claimed the relevance of  
topics the main reasons  
for attending BgC

## SENIORITY BREAKDOWN

33%

C-LEVEL

31%

DIRECTOR HEAD

28%

MANAGER / EXEC

8%

CONSULTANT

# NEW FORMAT

# THREE STREAMS & QUIET CONFERENCE

To embrace this new phase – beyond the Law approval, BgC 2018 has a new format.

This new format is designed to address a wide range of topics the market demands and deliver, at the same time, in-depth and relevant content to support the decision-making of those interested in taking advantage of this new upcoming market.



**ALL ACTION IN ONE ROOM:**  
with 2 full days of networking opportunities;



**TED LIKE PRESENTATIONS:**  
relevant content being addressed in an objective and assertive way;



**QUIET CONFERENCE:**  
freedom of choice among three simultaneous audio channels /content (headphones at BRANCH-OUT sessions with translations available)

The content will be presented through three types of sessions:



**SOW-THE-SEEDS:**  
to raise the main issues (plenary format);



**CULTIVATE:**  
to identify the questions and best practices (introducing the quiet conference format);



**BRANCH-OUT:**  
to answer the questions and deep-dive into specifics (quiet conference with three simultaneous audio channels /content)

# STRENGTHENING ROOTS

# BRAZILIAN GAMING CONGRESS 2018

# AGENDA

Please note: This is a draft working agenda, subject to change.

## DAY 0 - APRIL 22, 2018 - SUNDAY

16:00 **Registration Open & Badge Collection**

19:00 **Opening Drinks Reception**

Tivoli Mofarrej Hotel (Pool Area)

## DAY 1 - APRIL 23, 2018 - MONDAY

08:30 **Registration & Welcome Coffee**

09:10 **Clarion's Welcome Address and chairman presentation**

Sergio Jardim, Managing Director, **Clarion Events Brasil**

Ewa Bakun, Head of Industry Insight and Engagement, **Clarion Gaming**

09:20 **Chairman remarks**

Where are we now in the path to the Legalization and Regulation of the Brazilian gaming market: a view through rose-coloured glasses.

09:30 **SOW-THE-SEEDS: LEGISLATION**

Breaking down the bills currently being discussed: what do they enable and how? What is the government control level per vertical, channel, taxes to be paid and revenue destination? How are areas such as responsible gaming, licensing and amnesty for the current operators tackled?

- Chamber of Deputies bill PL 442/1991: How the recently established Gaming Parliament Front can help speed up the discussions and is the wide scope of the Law an advantage or disadvantage?
- Senate bill PL 186/2014: Reviewing the key amends proposed in the back and forth with the CCJ Special Commission. How commercially viable is the framework set out by this Bill?
- Ministry of Tourism Project (Integrated Resorts): What is a Provisional Measure and how it interplays with the Chamber of Deputies and Senate bills?
- Ministry of Finance Project (Sports Betting) as a Provisional Measure: The likelihood of passage
- The role and activities of various market stakeholders – how they're pushing towards the creation of the legal market in Brazil: Addressing the challenge of dealing with government relations in a country where lobbying is not regulated.

**SOW-THE-SEEDS Q&A Session**

11:00 **Networking Coffee Break**

11:30 **CULTIVATE: REGULATION & LICENSING – LESSONS FROM AROUND THE WORLD**

 **Quiet Conference Format**

Establishing a consistent and sustainable model in Brazil is nothing short of complex. This session will detail the regulatory & licensing requirements that the model law would require and bring examples of ideal regulatory models within the vertical matrix, including best practice relevant to Brazil in various verticals:

- Best practice in Online Gaming: Sports Betting & Online Casino
- Best practice in Land Based Gaming – Casino & Bingo
- Best practice in Land Based Gaming – Jogo do Bicho & Lotteries
  - Caixa experience in attempting to regulate Jogo do Bicho back in 1994. What went wrong and what can be learned from this?
  - Drawing a comparison with the experience of Quiniela regulation
  - State vs. federal lottery models

12:15 **BRANCH-OUT: REGULATION & LICENSING – LESSONS FOR BRAZIL**

 **Quiet Conference Format**

Zooming in on what specific best practices might be applied and altered to suit the Brazilian market for each vertical being considered for regulation.

### Online Gaming & Sports Betting

- Transitioning from grey to regulated market
- Identifying current companies and target audiences within online casino market
- What do we know about the profile of Brazilian players and their playing behaviour?

### Land Based Gaming – Casino and Bingo

- What will be demanded in terms of job creations and training for casino workers?
- Impact on the hotel sector – how can the existing hotel and resort sector incorporate gambling into its existing offering
- Large scale, IR-style vs. urban casinos – implications for tax revenue to the state and the operators
- Pros and cons: Big Bingo halls focused on social interaction or small bingo establishments with video bingo

### Land Based Gaming – Jogo do Bicho and Lotteries

- What is the ideal regulation framework to encourage Jogo do Bicho operators turn into regulated entities?
- Bill 9237/2017 that allows creation of state lotteries & Memorandum SEAE (that states that state lotteries operate illegally based on the law from 1967)

12:30 **CULTIVATE + BRANCH OUT Q&A Session**

12:45 **Networking Lunch**



# BRAZILIAN GAMING CONGRESS 2018

# AGENDA

## 14:15 SOW-THE-SEEDS: REGULATORY AGENCY

*Creating a regulatory agency – key requirements and tools available for a sustainable and trustworthy regulation that will attract long-term investment and create trust within the consumer base*

- Does an ideal regulator exist between requirements of industry, policy-makers and consumers?
- Responsibilities of a regulatory agency: primary and secondary regulation
- Gaming Control & Monitoring: AML requirements, control systems and enforcement policies
- Market case studies
  - Mature Market
  - Emerging Market

### SOW-THE-SEED Q&A Session

## 15:45 Networking Coffee Break

## 16:15 CULTIVATE: REGULATION & OPERATION



### Responsible Gaming and Rules for Gaming Advertising

- How can industry be more proactive in preventing the harm in gambling rather than just acting to stop when it occurs – examples of the use of technology in RG
- Financing Responsible Gambling prevention and treatment
- Advertising rules – finding a balance between marketing and responsible play: the Case of Spain
  - National Council of Self-Regulation in Advertising (CONAR) expected legislative requirements
  - Consumer law and its potential impact to RG rules

### Payment Methods: cash, electronic payments and bitcoin

- Regulating the market will create new streamline payment flows but will the old ones be blocked for non-regulated brands – or will they continue to be open to non-regulated brands giving them an added advantage?
- Gambling account in online and land based operations: an option to cash out and pros and cons in bet tracking
- Role of digital currencies: what is their impact on gambling operators and future of payments

### Control System and Law Enforcement

- Forcing the illegal market out – what works and what doesn't and how will Brazil do that in its regulatory model and existing laws
- Implications of Amnesty (Criminal Responsibility) – How important will it be to encourage current operators to migrate from a grey to a regulated market?
- Regulatory-industry interaction in a regulated model for control and auditing of licensees
- Ensuring integrity of games played through a certification process
- Cooperation with police, international regulators and other enforcement agencies

## 17:15 BRANCH-OUT: REGULATION & OPERATION



*Deep-dive into the regulatory specifics of:*

### Responsible Gaming and Advertising

- Identifying tools that can be used to prevent gambling addiction?
- Statistics on addiction rates pre & post-regulation
- Self-exclusion set-up and management
- Will spending limits be required to set up by players and at what stage?
- Interventions: Training your staff to act responsibly and support at-risk and problem players
- Market collaboration – how can the industry help establish effective legislation
- Requirements for commercial communication of gambling and sponsorship

### Payment methods

- Educating the market: operators are not banks and do not lend money
- Will the players be able to use credit cards?
- Will land based operators be able to offer the convenience of having points of service of credit banks within the establishments? What about having it nearby?
- The Brazilian banking system and how it can be used to ease the payment methodology in gambling

### Control and Law Enforcement

- How ready is Brazilian market to address topics such as compliance, fraud and cheating prevention?
- Location of servers and data storage for monitoring
- How necessary is it to have a special Law Enforcement agency/police department to stop illegal gaming
- Sanctions for non-compliance

## 17:30 CULTIVATE + BRANCH OUT Q&A Session

## 17:45 End of Day One

## 18:3 OFFICIAL COCKTAIL RECEPTION

**Location:** Chez Oscar (Oscar Freire, 1128, Jardins, São Paulo/SP, Brazil)

**Shuttle from hotel:** 18:15, 18:30, 19:00 and 19:15

**Shuttle from the bar:** 21:30, 22:00, 22:30 and 22:45



# BRAZILIAN GAMING CONGRESS 2018

# AGENDA

## DAY 2 – APRIL 24, 2018 - TUESDAY

08:30 **Registration & Welcome Coffee**

09:00 **Day Two Welcome Address**

09:05 **Keynote session**

*Gambling as part of a wider entertainment offering in Brazil*

09:35 **Keynote Session Q&A**

09:45 **SOW-THE-SEEDS: OPPORTUNITIES & STRATEGIES FOR BRAZIL**

*Creating your strategy for Brazil in a volatile political environment. Options for market entry, partnerships, acquisitions, pre-regulatory strategies*

- Digital innovation to support the Brazilian promising market of Online and Mobile Gaming
- Partnerships and acquisitions in Gaming industry
- Marketing opportunities for operators targeting Brazil
- LOTEX: Business plan and opportunities

**SOW-THE-SEED Q & A Session**

11:00 **Networking Coffee Break**

11:30 **CULTIVATE: TAXATION**

 **Quiet Conference Format**

*Assessing the tax benefits to the country's budget enabled by various models of regulation being considered and getting your head around the Brazilian multi-layered taxation framework for business, manufacturing, services and the future of regulated gambling. What is the threshold to create a commercially viable market, how specific the law needs to be and how not to make the business unfeasible by taxation.*

### Gaming Revenue to the State budget

- Estimating possible revenue gained through taxation based on the legalization of various verticals and regulatory frameworks
- Presenting a realistic forecast of when the country will start to draw financial benefits from the regulation of each vertical – how regulation of land-based casinos, bingos, jogo do bicho and online gaming offers different revenue timescales
- Investing tax revenue back into society and economy – examples of how the revenue from gambling could be allocated to benefit specific underserved areas of sectors financed from the state budget
- Example of UK: Olympic Games Performance

### Importance of a stable taxation framework. Financial and legal boundaries to counter tax evasion

- How changing the rules can interfere in the market: the Panama example

### Business, Gaming and Player Taxation – introduction to a complex taxation structures in Brazil

- Requirements for establishing a new entity in Brazil
- What is the impact of taxation in the process of turning the market into a regulated one?
- Taxation on turnover vs. profit
- Rationale of various taxation levels depending on vertical or channel
- How likely are Brazilian players to play even with players taxation? Drawing a comparison to other sectors

12:45 **BRANCH-OUT SESSION: TAXATION deep dive**

### Taxing as a business

- What is the best type of company to set up according to each vertical and income forecast?
- How adding gaming to an existing business portfolio can help or hinder your market share
- Case studies of gaming activity added to a business portfolio
- Which market is the most business friendly?

### Taxing gaming: Online and Land based operations

- Why and what are the different taxation rates for online and land based operations, for casino vs. sportsbook vs. bingo?
- Which market is the most gaming friendly from the operational taxing point of view?
- Case studies of taxing Online and Land based operations

### Taxing Players

- Taxation impact on players development strategies
- Worldwide experience in taxing VIP, Local and Foreign Players
- The impact of taxing VIP Players: revenue vs risk – examples for other regulated markets
- Taxing Foreign players: What is double taxation and how to avoid it
- An exercise: how much would it cost to play in Brazil vs other destinations.

13:00 **CULTIVATE + BRANCH OUT Q&A Session**

13:15 **Networking Lunch**

# BRAZILIAN GAMING CONGRESS 2018

# AGENDA

## 14:30 SOW-THE-SEEDS: ALL ABOUT THE PLAYERS

*What are the market best practices to ensure a sustainable growth of casual and VIP players whilst continuing to ensure player protection and development?*

- Painting the profile of the Brazilian players: what's their demographic, spending power, location, age, gender, spend patterns and preferences for various games and channels & payments
- Responsible Gaming and Market development
  - Increasing the social acceptance to make gambling more of a main-stream entertainment activity
  - The communication process required to ensure responsible gaming, players protection, sports integrity and AML work cohesively while still not discouraging players from safe and enjoyable play
  - Gambling high rollers and their importance to the Brazilian Gaming market
  - Strategies for player development and marketing: what promotional channels are likely to be available and what works best to market to various demographics of players
- Game Localisation: How important is it to adapt products to local consumers?
  - Social gaming as a lab to test Brazilian taste on gaming
- The success of Poker in Brazil
  - What other verticals can learn from it?

### SOW-THE-SEED Q&A Session

## 16:00 Networking Lunch

## 16:30 CULTIVATE: NEW TRENDS IN GAMING

 Quiet Conference Format

*Developing a competitive marketplace that responds to the future trends and player preferences – new technology and products focus*

- Marketing to the new generations
  - Impact of skill based slots on casinos and bingos
  - Why to attract young players?
  - How different are these consumers from the traditional players?
- New technologies, tools and concepts to improve the land based industry
  - Live casinos
  - Case Study – What changes Las Vegas operators had to go through to keep themselves as sustainable businesses, attractive to a younger demographic?
- eSports: How to fit this trend in the gambling market?
  - e-Sports at the Olympic Games of 2024. A reality?
  - Opportunities for the betting industry within the e-Sports universe

## 17:15 BRANCH-OUT: NEW TRENDS IN GAMING

 Quiet Conference Format

*A deep-dive & Q&A about the future of gaming trends*

### Marketing to the new generations

- Behaviour of Brazilian Young consumers

### New technologies, tools and concepts to improve the land based experience

- Improving operations within “physical walls” and on the digital space – building integrated spaces for fully immersive gaming experiences

### eSports: How it could fit into Brazilian gaming

- The development of the e-Sports market, and its increasing impact on young Brazilians – what is the state of eSports in Brazil?
- The challenges and opportunities in the Brazilian e-Sports scenario
- e-Sports: what is the size of the challenge for the National Games Industry to insert their products into the Brazilian competitive landscape?
- eSports in a land-based casino environment vs. betting on eSports – is this a viable gambling opportunity in Brazil?

## 17:30 CULTIVATE + BRANCH OUT Q&A Session

## 17:45 End of BgC

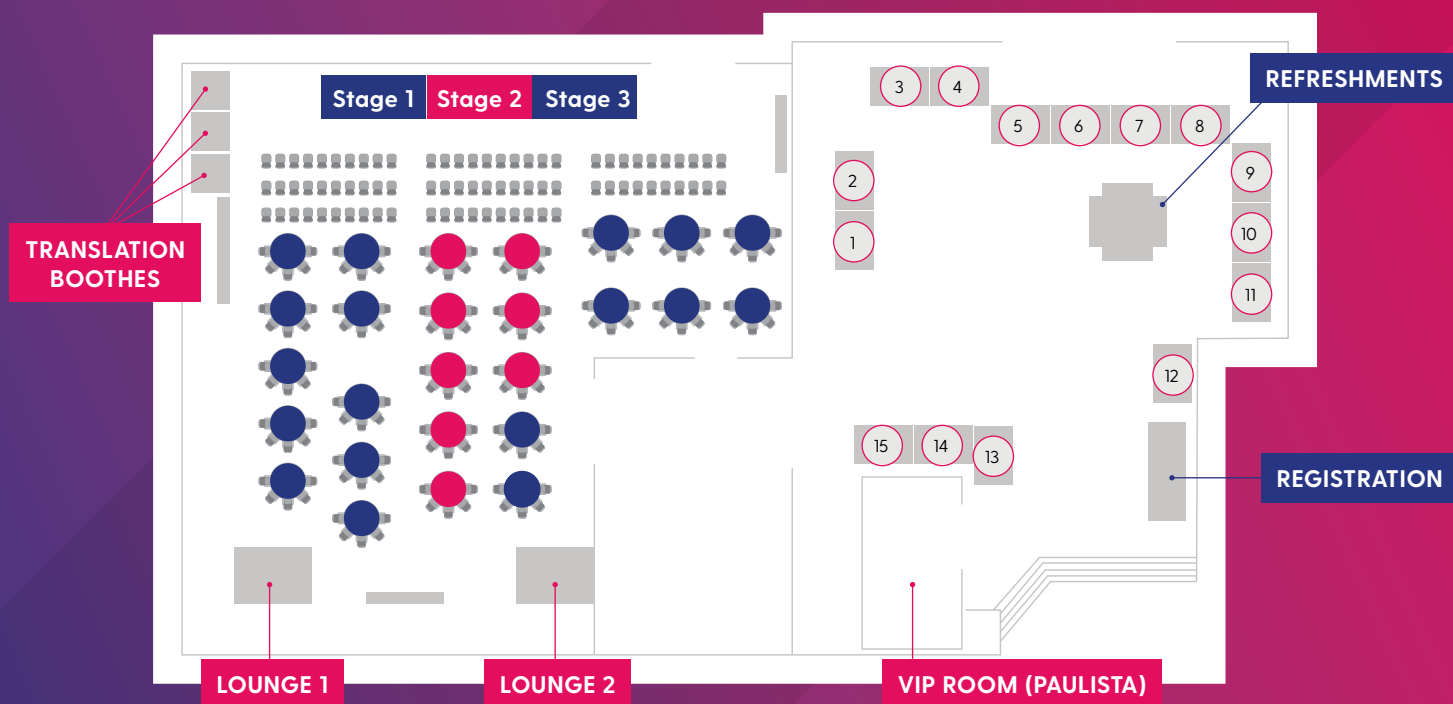


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