

# State of the LegalTech market in Southeast Asia

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May 2019



## Foreword

It gives me great pleasure to pen this foreword for a forward-looking move.

ASEAN is the fifth largest economy bloc in the world. But as the ASEAN Post Team (9 March 2019) article headed “A digital ASEAN for everyone” highlighted, ASEAN’s ginormous economic strength is not matched by its adoption of digital transformation. This is evidenced by the respective rankings of ASEAN member states on the global Digital Adoption Index (DAI) published by the World Bank. Internet connectivity is the basic requirement for participating in the digital economy. For businesses, fixed broadband internet is essential. Mobile internet is both slower and expensive and as such, internet penetration is lower. The International Monetary Fund has pointed out that for less developed countries in ASEAN, approximately 70% of the population have no internet access at all. This represents both a weakness and an opportunity for industry players.

Last year, the Law Society of Singapore was privileged to host the inaugural ASEAN Bar Leaders’ Summit. A priority agenda item was e-commerce. EDB Singapore’s report dated 5 July 2018 entitled “E-commerce in ASEAN : Seizing opportunities and navigating challenges” cited a Google and Temasek Holdings report that Southeast Asia’s (SEA) digital market could exceed US\$200 billion by 2025. The authors wrote: “With 630 million people, a growing middle class and rising internet penetration, SEA is often considered to be the next gold rush for e-commerce.” ASEAN Bar leaders all around warmed to this potential practice positioning in e-commerce law. This consensus is a basic building block for ASEAN Bars to build on for the future.

While there is strong ASEAN Bar to Bar connectivity, we have our work cut out for us to narrow the digital divide across ASEAN. Our challenge is how to lift the bar and equip lawyers across the region to tap into the potential bonanza.

To build transnationally with initiatives like ASEAN Legal Tech goes way past first base. I believe that with ASEAN Legal Tech, there will be invaluable opportunities for ASEAN lawyers to leverage on Legal Tech to provide speedier, more cost-effective and quality legal advice. This is cutting edge innovative thought leadership.

It takes an incredible vision to build regionally in a futuristic and forward looking way. It takes insight and impulsion to break out of inertia and break past the status quo to break through into innovation. ASEAN Legal Tech has the potential to serve as both a compass and a telescope for lawyers.

I commend the founding board, Andrew Stoutley, Cherilyn Tan, Eric Chin, Michael Lew, Hanim Hamzah and Thomas Thoppil, for stepping forward to pioneer a new trail in ASEAN waters. By pulling together and pulling this together, you have sown the seeds to pioneer a prototype of Legal Tech ecosystem across ASEAN markets that subsequent generations will credit you for.

May you blaze a brilliant trail of glory for the future of law. Especially as you go where no lawyer or legalpreneur have gone before.

Gregory Vijayendran  
President, Law Society of Singapore





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## About this whitepaper

The LegalTech segment is at different stages of development across the South East Asian markets. While the global LegalTech narrative is dominated by mature legal markets like Australia, Europe and the USA, there is no shortage of LegalTech startups in the South East Asian region.

As the Founding Board of ASEAN LegalTech, I first embarked on this journey in November 2017 to find collaborators across the region, what I found was a group of visionaries, pioneers and willing listeners who have now become ASEAN LegalTech founders across the South East Asian region. ASEAN LegalTech is a result of late nights and weekends, so I am forever grateful for the founding members of this exciting initiative.

This whitepaper is dedicated to all the LegalTech entrepreneurs, pioneers, doers and regulators who are rolling up their sleeves and proactively engaging with a market that is in its emerging phase in the South East Asian region.

If you're interested in getting involved with ASEAN LegalTech, we would love to hear from you.

I'd like to personally thank ASEAN LegalTech's Board and co-founders, Andrew Stoutley, Cherilyn Tan, Hanim Hamzah, Michael Lew and Thomas Thoppil. I also owe thanks to ASEAN LegalTech's founding country ambassadors, Adeline Chin, Arkka Dhiratara, Athistha Chitranukroh, Daniel Lui, Gladys Chun, Ivan Rawtaer, Jeifan Ira Dizon, Jenna Beh, June Low, Laurent Tam Nguyen, Lorybeth Baldrias-Serrano, Melvin Sumapung, Rozaiman Abdul Rahman and Suebsiri Taweepon for responding to my many requests promptly.

Special thanks also to Chew Seng Kok (ZICO), who was one of the first to lend a willing ear to this venture. Others who've helped me in my journey include Amrie Hakim (Hukum Online), Graeme Grovum (Alpha Creates), Matthew Grace (Alpha Creates) and Steven Walker (Elevate Services).

In addition, we would also like to thank our friends at the Australian Legal Technology Association (Stevie Ghiassi), European Legal Technology Association (Tobias Heining and Holger Zscheyge) and Legal Tech New Zealand (Mark Sorensen) for your guidance and friendship through this journey.

**Eric Chin**  
**ASEAN LegalTech**



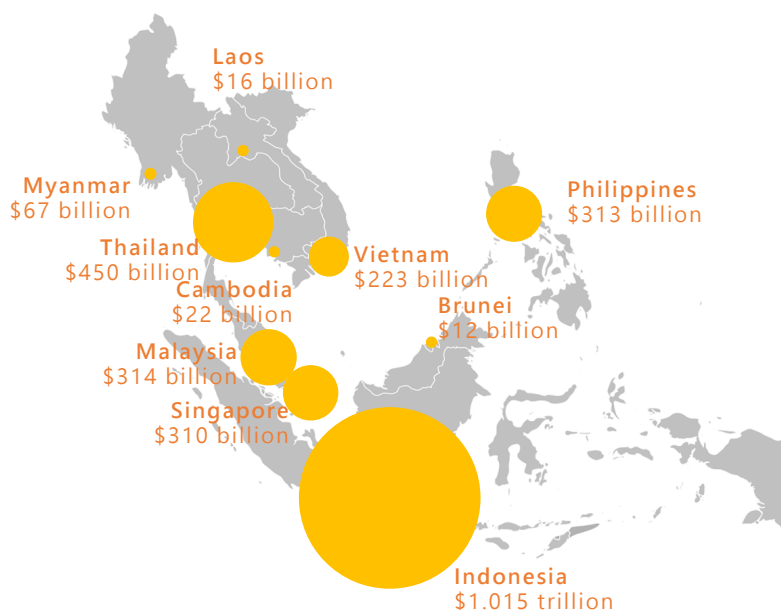
# 1. State of ASEAN's LegalTech market

By Eric Chin

## 1. The ASEAN opportunity

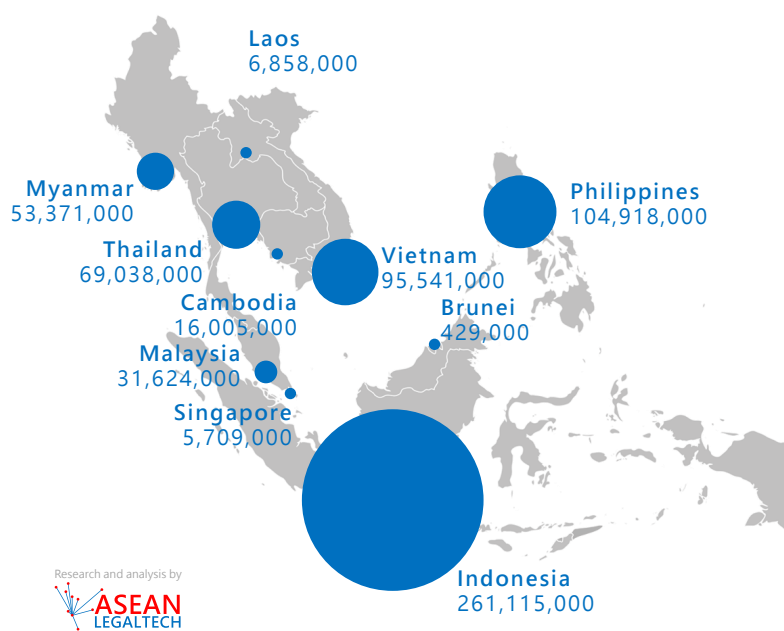
ASEAN is a heterogeneous group of countries with a combined gross domestic product (GDP) of \$2.747 trillion<sup>1</sup> and home to 644.6 million<sup>2</sup> people. Founded in 1967, ASEAN is made up of Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand and Vietnam. These countries rank among the most dynamic and fastest growing emerging economies in the world.

ASEAN economies (2017 GDP)



Source: United Nations Conference on Trade and Development

ASEAN population (2017)



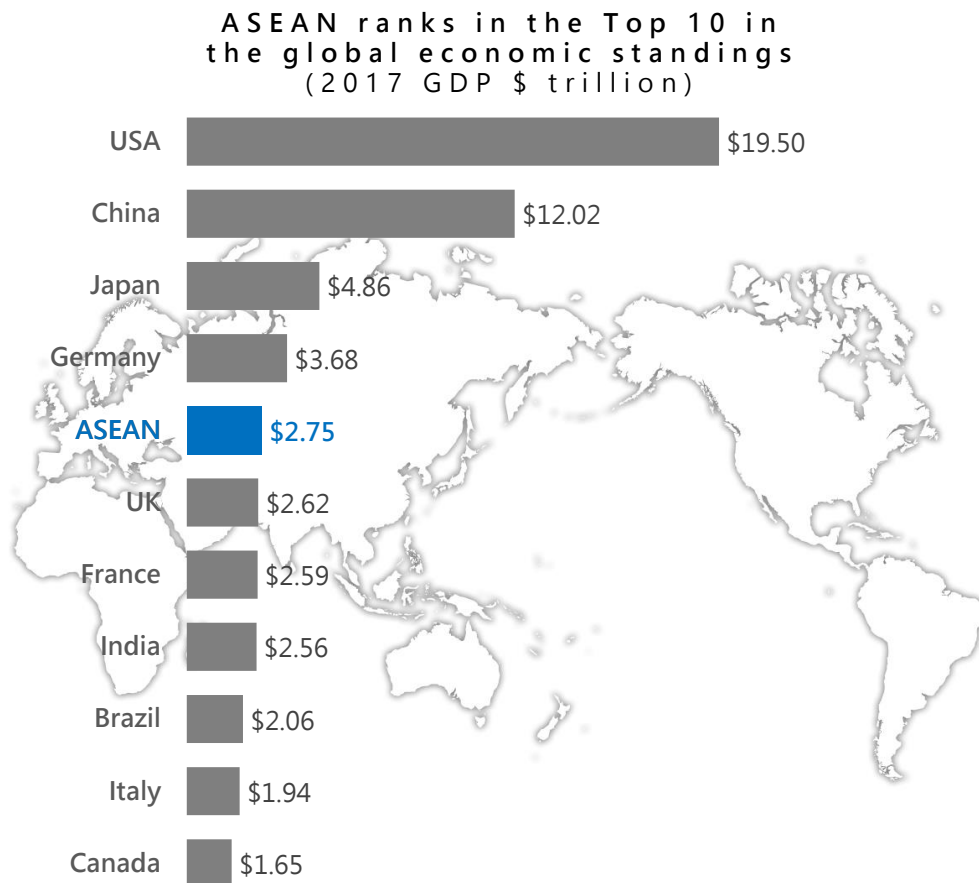
Source: United Nations Conference on Trade and Development

<sup>1</sup> United Nations Conference on Trade and Development. 2019. UNCTAD STAT [ONLINE] Available at: <https://unctadstat.unctad.org/wds/TableViewer/tableView.aspx>. [Accessed 10 January 2019].

<sup>2</sup> United Nations Conference on Trade and Development. 2019. UNCTAD STAT [ONLINE] Available at: <https://unctadstat.unctad.org/wds/TableViewer/tableView.aspx>. [Accessed 10 January 2019].



Indonesia is the largest economic output generator amongst the ASEAN states, with a GDP of \$1.01 trillion in 2017, followed by Thailand's \$450 billion and Malaysia's \$314 billion. The economic drivers of each economy are different, with most having transitioned from agrarian origins to strong industrial and resource economies. With a combined GDP of \$2.75 trillion in 2017, ASEAN countries combine to rank the fifth largest economy in the world (see chart below). With further room for growth, significant economic gains can be realised by the ASEAN states through investments in human capital to expand the labour force and investments in technology to achieve productivity gains.



Research and analysis by



Source: United Nations Conference on Trade and Development

ASEAN is a melting pot of cultures, traditions and religions. As well as having the largest ASEAN economy, Indonesia is also home to the biggest population in the ASEAN region with 261 million people, followed by Philippines' 104 million people and Vietnam's 95 million people. Strong economic growth has simultaneously created a growing middle-class and affluent consumer class, and caused poverty levels across the region to plummet. ASEAN will have an estimated 125 million<sup>3</sup> consumer households by 2025.

ASEAN is also a market in digital transition, with a booming e-commerce market that is driven by high smartphone penetration. Google's annual study on the ASEAN's e-commerce industry, in partnership with Temasek, revealed the region had an estimated \$72 billion internet economy<sup>4</sup> in

<sup>3</sup> Vinayak HV, Thompson F, and Tonby O. 2014. Understanding ASEAN: Seven things you need to know. McKinsey & Company [ONLINE] Available at: <https://www.mckinsey.com/industries/public-sector/our-insights/understanding-asean-seven-things-you-need-to-know>. [Accessed 11 January 2019].

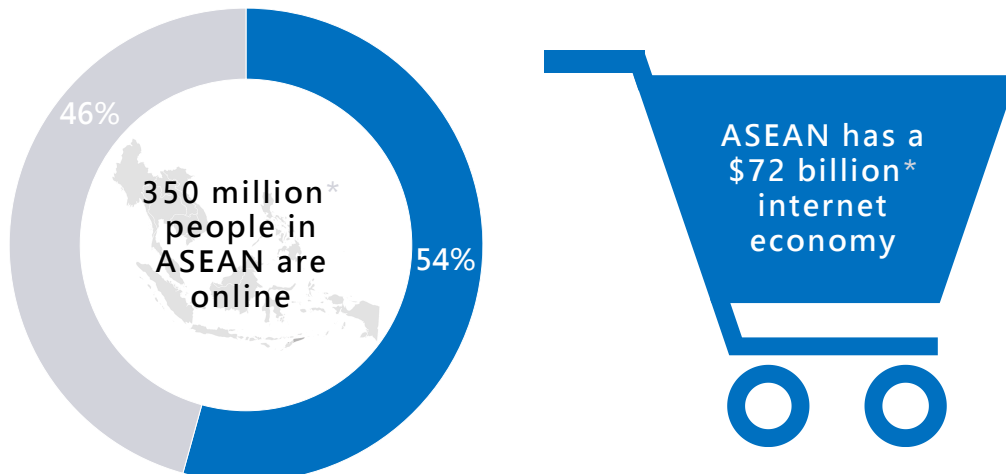
<sup>4</sup> Anandan R, Sipahimalani R, Saini S, Aryasomayajula S and Smittinet W. 2018, e-Economy SEA 2018: Southeast Asia's internet economy hits an inflection point. Google [ONLINE] Available at:



2018 driven by 350 million internet users (or 54% of the 644.6 million person population). The study also projects a \$240 billion Southeast Asian internet economy by 2025. The digital economy-ready population will slowly warm to online legal services as a means of accessing affordable legal services.

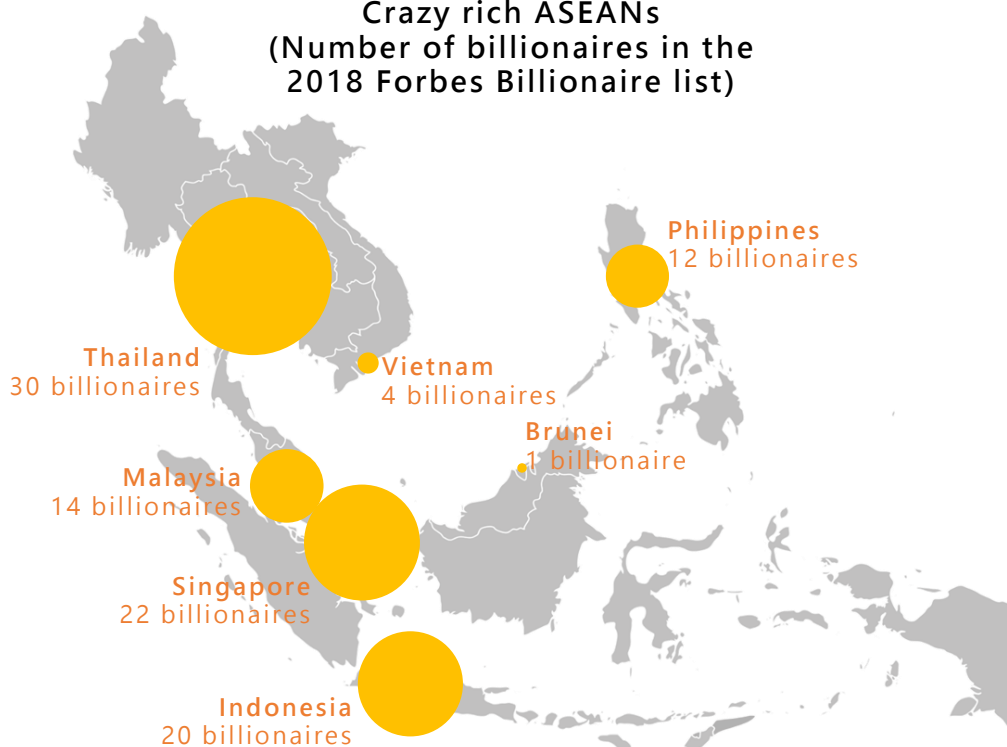
In addition to a digital economy-ready population, strong economic growth has created wealth in the region. Forbes<sup>5</sup> identified 103 billionaires from the ASEAN region in the 2018 World Billionaires List. Legal work relating to wealth generation, preservation and transfers for those billionaires and ultra-high net worth individuals will generate healthy demand for legal services.

### ASEAN's internet savvy population



Source: Google 2018, e-Economy SEA 2018: Southeast Asia's internet economy hits an inflection point

### Crazy rich ASEANs (Number of billionaires in the 2018 Forbes Billionaire list)



Research and analysis by  

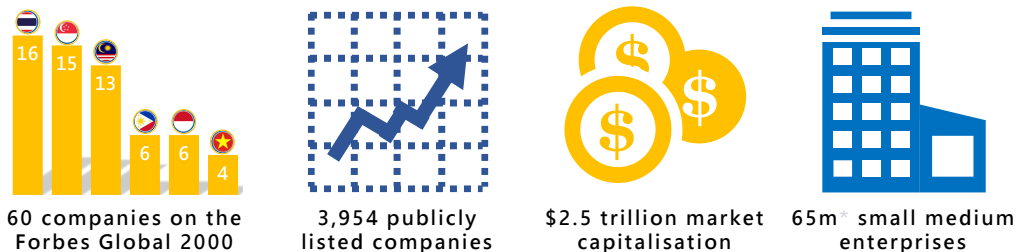

[https://www.thinkwithgoogle.com/intl/en-apac/tools-research/research-studies/e-economy-sea-2018-southeast-asias-internet-economy-hits-inflection-point/?\\_ga=2.176307495.32171799.1548662142-1897658682.1548662142](https://www.thinkwithgoogle.com/intl/en-apac/tools-research/research-studies/e-economy-sea-2018-southeast-asias-internet-economy-hits-inflection-point/?_ga=2.176307495.32171799.1548662142-1897658682.1548662142) [Accessed 13 January 2019].

<sup>5</sup> Forbes. 2018 The World's Billionaires. Forbes [ONLINE] Available at: <https://www.forbes.com/billionaires/list/#version:static> [Accessed 14 January 2019].



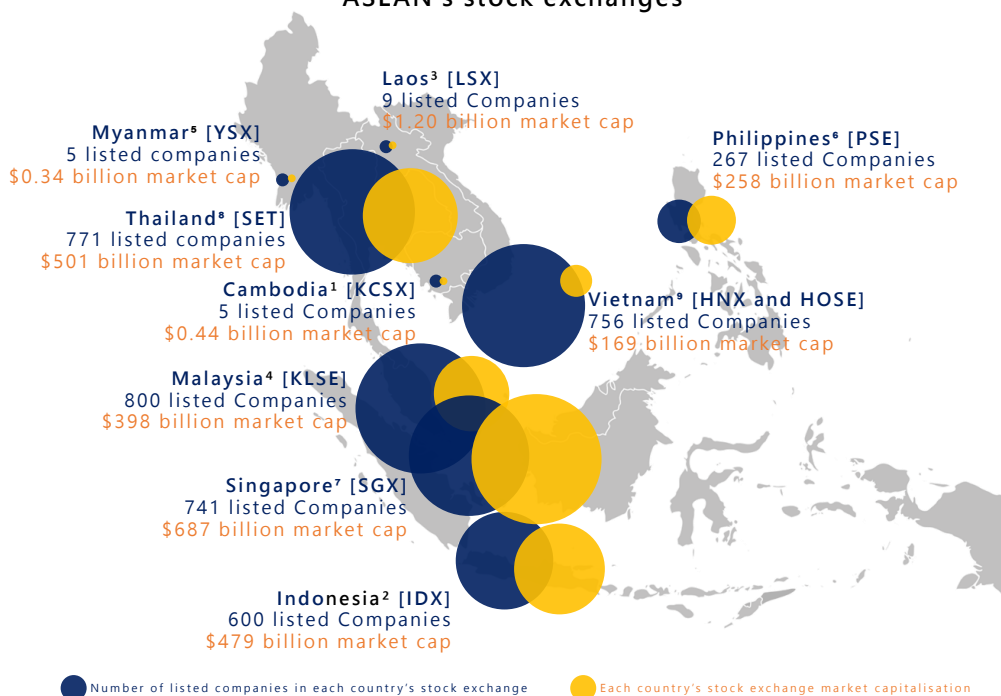
Corporate ASEAN has also benefited from its strong economic and demographic growth in the region, as 60 companies were listed in the 2018 Forbes Global 2000 list<sup>6</sup>. ASEAN is home to 10 stock exchanges across nine countries, hosting 3,825 publicly listed companies and has a combined market capitalisation of \$2.5 trillion. In addition to big businesses, there are an estimated 65 million<sup>7</sup> small medium enterprises (SMEs) in the region, contributing more than 50% to the region's GDP<sup>8</sup>. The business to business (B2B) market's legal needs will only grow as businesses continue to flourish.

### ASEAN's business population



Source: Russell J. 2018. Aspire Capital offers fast finance for SMEs in Southeast Asia. Tech Crunch [ONLINE] Available at: <https://techcrunch.com/2018/07/10/aspire-capital-southeast-asia/> [Accessed 16 January 2019].

### ASEAN's stock exchanges



Note:  
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<sup>6</sup> Forbes. 2018. The World's Largest Public Companies. Forbes. [ONLINE] Available at: <https://www.forbes.com/global2000/list/> [Accessed 16 January 2019].

<sup>7</sup> Russell J. 2018. Aspire Capital offers fast finance for SMEs in Southeast Asia. Tech Crunch [ONLINE] Available at: <https://techcrunch.com/2018/07/10/aspire-capital-southeast-asia/> [Accessed 16 January 2019].

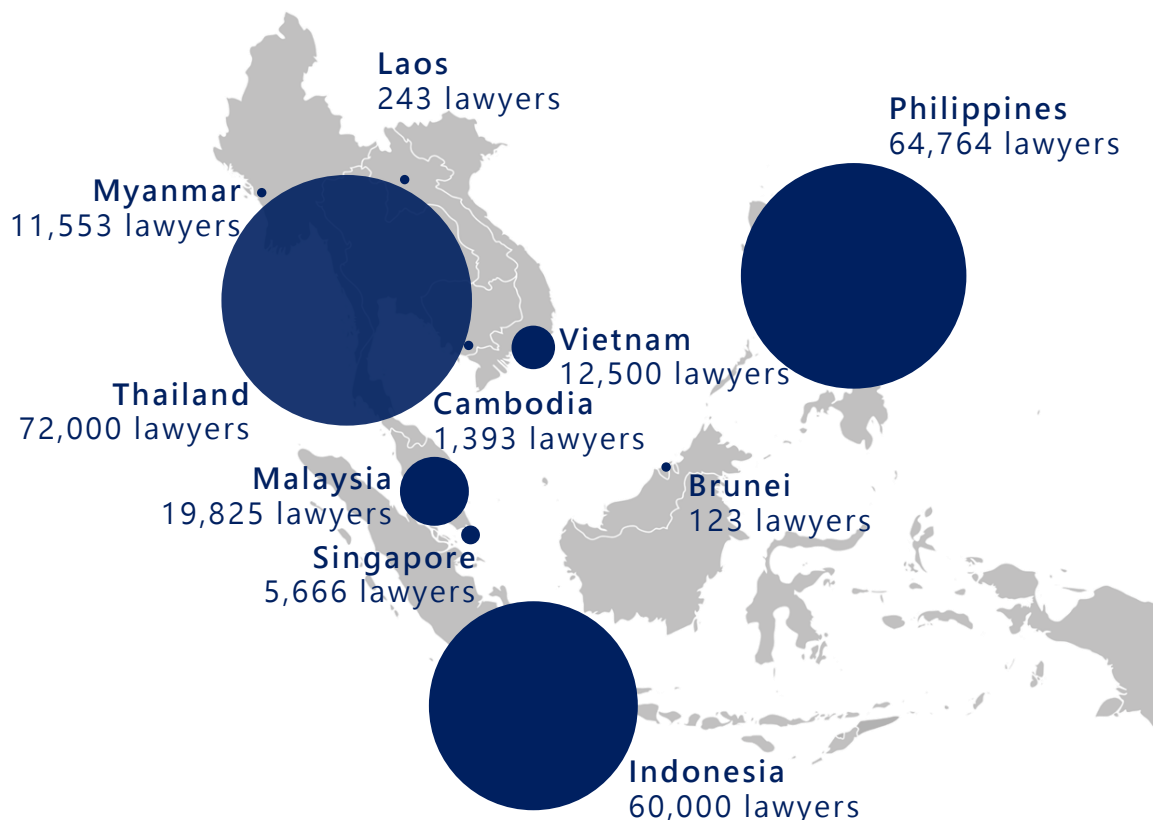
<sup>8</sup> Ernst & Young. 2018. ASEAN SMEs: Are you transforming the future? Ernst & Young [ONLINE] Available at: [https://www.ey.com/Publication/vwLUAssets/ey-asean-smes-are-you-transforming-for-the-future/\\$FILE/ey-asean-smes-are-you-transforming-for-the-future.pdf](https://www.ey.com/Publication/vwLUAssets/ey-asean-smes-are-you-transforming-for-the-future/$FILE/ey-asean-smes-are-you-transforming-for-the-future.pdf) [Accessed 16 January 2019]



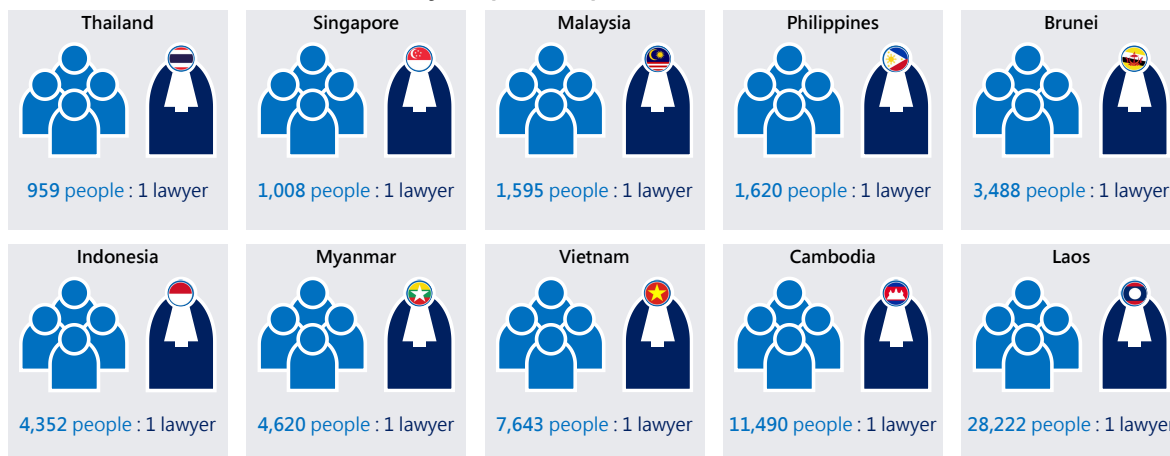
## 2. The ASEAN legal market

Our research reveals ASEAN is home to 248,067 lawyers. Further breakdown reveals Thailand is home to the greatest number of lawyers, with 72,000, followed by Philippines' 64,764 lawyers and Indonesia's 60,000 lawyers. At the other end of the spectrum, meanwhile, Laos and Brunei only have 243 and 123 lawyers respectively. Across the region, Thailand (959:1), Singapore (1,008:1) and Malaysia (1,595:1) lead the ASEAN states on the population to lawyer ratio measurement while frontier markets like Laos (28,222:1), Cambodia (11,490:1) and Vietnam (7,643:1) lag their peers. This points to capacity issue for lawyers in ASEAN and of course there are implications too, for access to justice.

### Number of lawyers in ASEAN



### Lawyer per capita in ASEAN



Research and analysis by

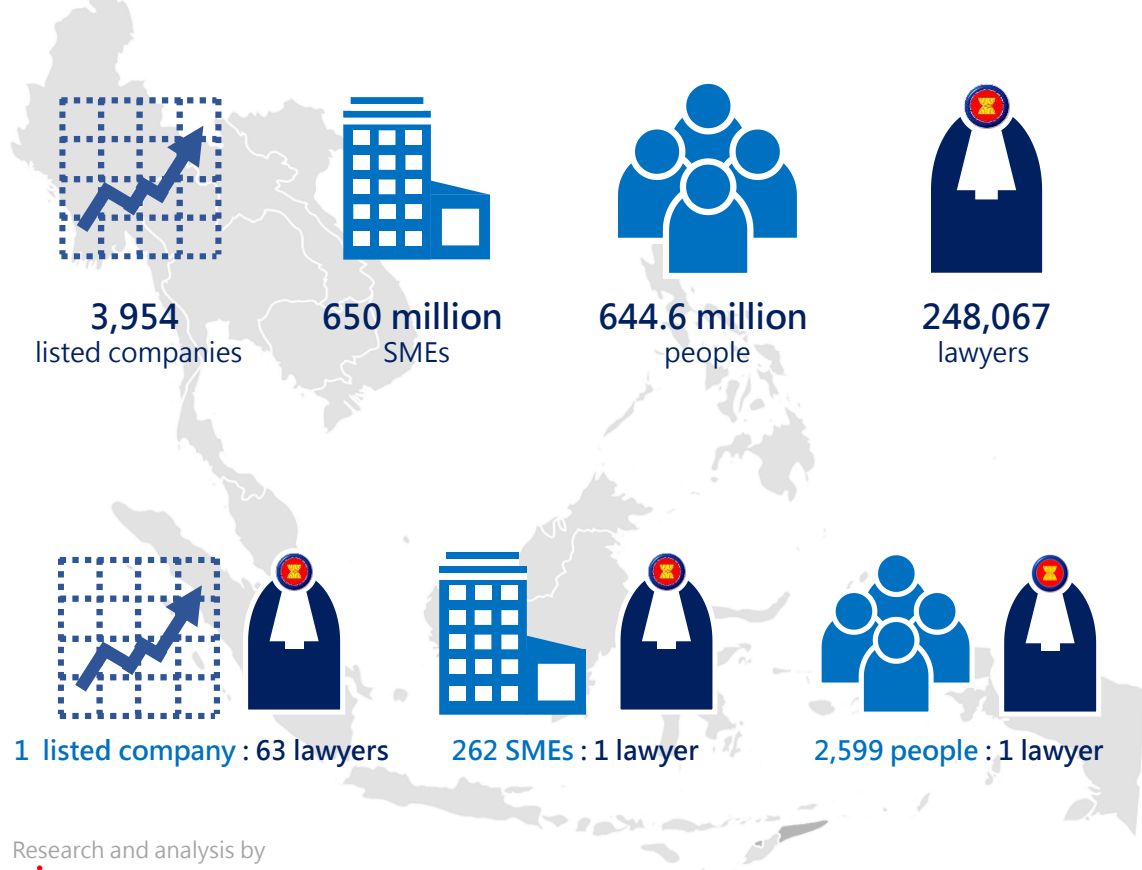






In a region of 644.6 million people with a lawyer population of only 248,012, this translates to one lawyer for every 2,599 people, a very high ratio in comparison to countries like Australia where there is one lawyer for every 322 people<sup>9</sup>. Having so few lawyers per capita in ASEAN means that huge capacity issues exist for lawyers and also creates a significant access to justice issue for the population of the ASEAN region. Although ASEAN's lawyer per capita ratio is very high, the number is a lot lower for the other metrics analysed. For example, there is one lawyer for every 262 SMEs and 63 lawyers for every one listed company in Southeast Asia.

## ASEAN's B2B and B2C market opportunities for lawyers



Research and analysis by



The ASEAN legal landscape is also made up common and civil law jurisdictions combined with Islamic law shaped by each country's history. For example, Islam was introduced to the South East Asian region through Muslim traders. Countries like Brunei, Indonesia, Malaysia, Philippines and Singapore have also adopted Islamic law for the Muslim population.

The region's history with American, British, Dutch, French and Spanish colonialism has also shaped the countries' legal systems. For instance, British common law influence can be found in Brunei, Malaysia, Myanmar and Singapore while the French civil law influence exists in Cambodia, Lao, Thailand and Vietnam. Indonesia's civil law system is influenced by its Dutch colonial history while the Philippines runs a hybrid legal system influenced by Spain's civil law system and USA's common law system.

<sup>9</sup> Chin, E, Grovum, G and Grace, M. 2019. State of legal innovation in the Australian market [ONLINE] Available at: <https://alphacreatives.com/product/white-paper-state-of-legal-innovation-in-australia/> . [Accessed 14 February 2019].



Navigating the different legal systems is a daily routine for regional and multinational companies with presence across South East Asia. Increasing mobility of business and people between ASEAN states is creating the need for cross border legal practices. To serve the increasing demand for cross-border legal needs, we have seen the emergence of regional firms, some with presence across 10 countries, and others with a focus on cultural or economic clusters like the Mekong region or the Malay region.

## Legal systems in South East Asia



Research and analysis by



Source: The University of Melbourne. 2018. Southeast Asian Legal Research Guide: Regional & Comparative Resources. The University of Melbourne [ONLINE] Available at: <http://unimelb.libguides.com/c.php?g=402982&p=4635158> [Accessed 20 February 2019].

The market for legal education in ASEAN is also growing and changing. South East Asia is now home to 407 law schools that are a mix of public and private education institutions. The state of legal education also varies across the region. Some of the private institutions offer twinning programs, allowing local students to obtain an overseas law degree without having to leave their country.

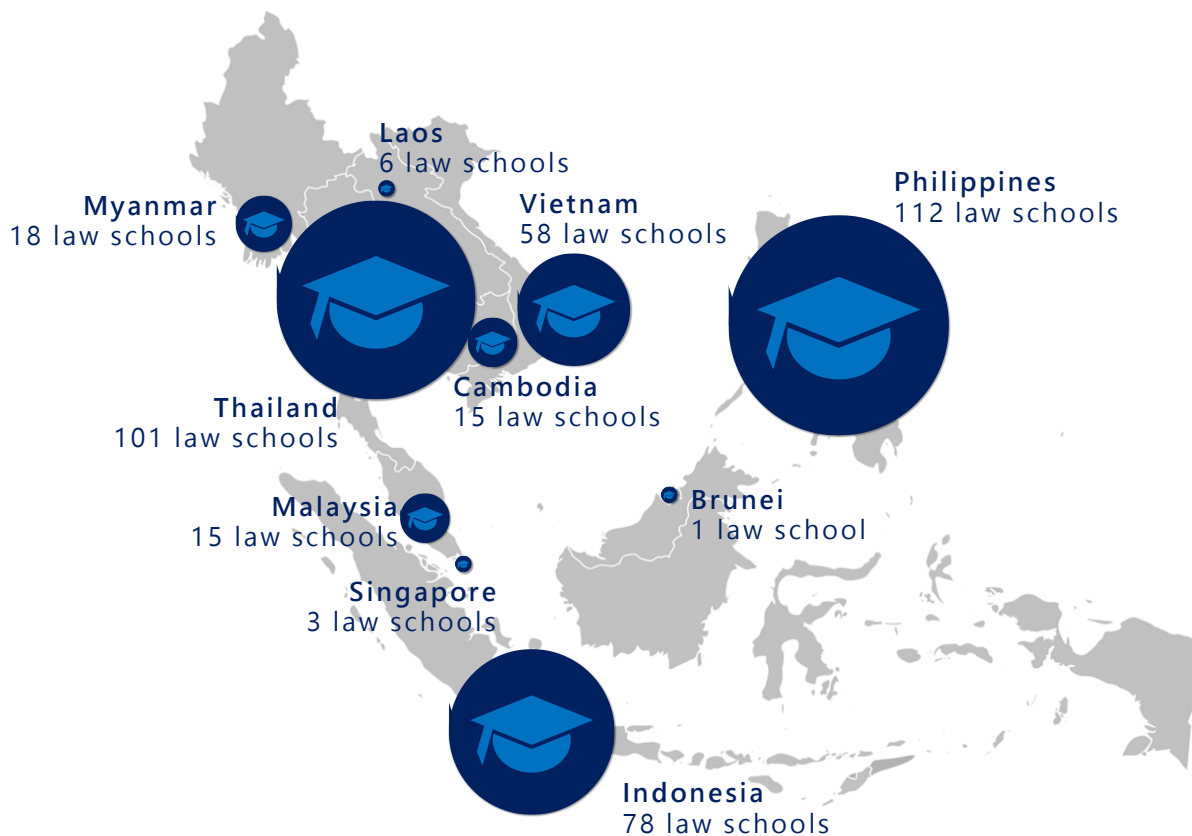
The curriculum of the law schools in the region, while not analysed in this paper, plays an important role in shaping and supplying the next generation lawyers to the market. As the legal profession in South East Asia welcomes next generation lawyers who are technology savvy digital natives, the industry's appetite for LegalTech and change will continue to grow.

Our research reveals Philippines is home to the most law schools with 112, followed by Thailand's 101 law schools and Indonesia's 78 law schools. In addition to the higher education institutions with a physical presence in the South East Asian region, law students can also enrol at online universities where they can access legal education in western countries like USA, UK, Canada and Australia.

Some law schools are also starting to engage with the LegalTech segment. Singapore Management University (SMU) in Singapore has paved the way by collaborating with the Singapore Academy of Law's Future Legal Innovation Program to develop and share education resources.



## Number of law schools in South East Asia



Research and analysis by

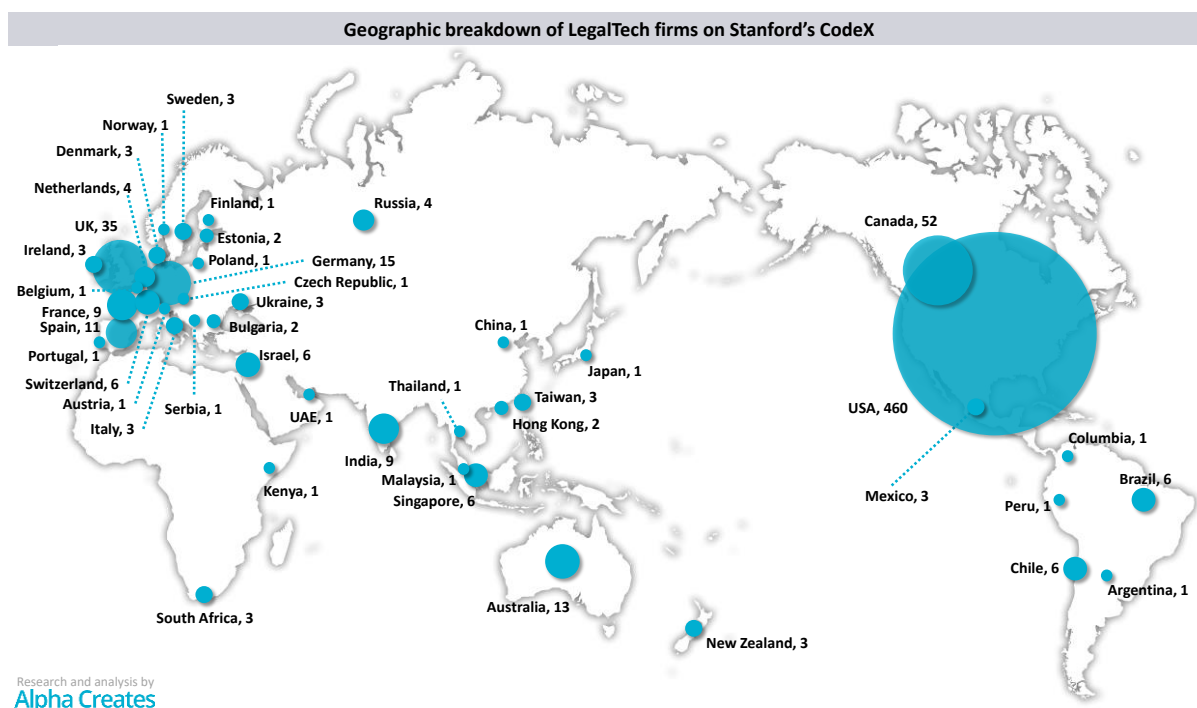




### 3. The ASEAN LegalTech market

The LegalTech market has entered the mainstream consciousness of the legal industry globally. This is most evident in the mature regions of Europe, Australia and New Zealand. We have also seen the creation of European Legal Technology Association, Australian Legal Technology Association and Legal Tech New Zealand as the rallying voice for a segment of the legal market that was once in the periphery.

The global LegalTech market is estimated to be a \$15.9 billion<sup>10</sup> market that is growing and made up of a wide range of solutions, as the Stanford Law CodeX Techindex<sup>11</sup> reveals. Research into the growing crowdsourced database last year reveal 790 LegalTech companies spread across the globe. Only eight LegalTech firms in the South East Asian region were listed on the database, with six from Singapore, one from Malaysia and one from Thailand.



To shed further light on South East Asia's LegalTech market, we have conducted research at the ASEAN LegalTech Association, along with the help of our country co-founders. We were able to identify 89 LegalTech firms in five of the ten South East Asian countries. Singapore has the largest LegalTech ecosystem with 25 firms, followed by Indonesia with 21 and Malaysia with 15. While the LegalTech markets in Philippines and Thailand are currently in the emerging phase, with 13 and eight firms identified respectively.

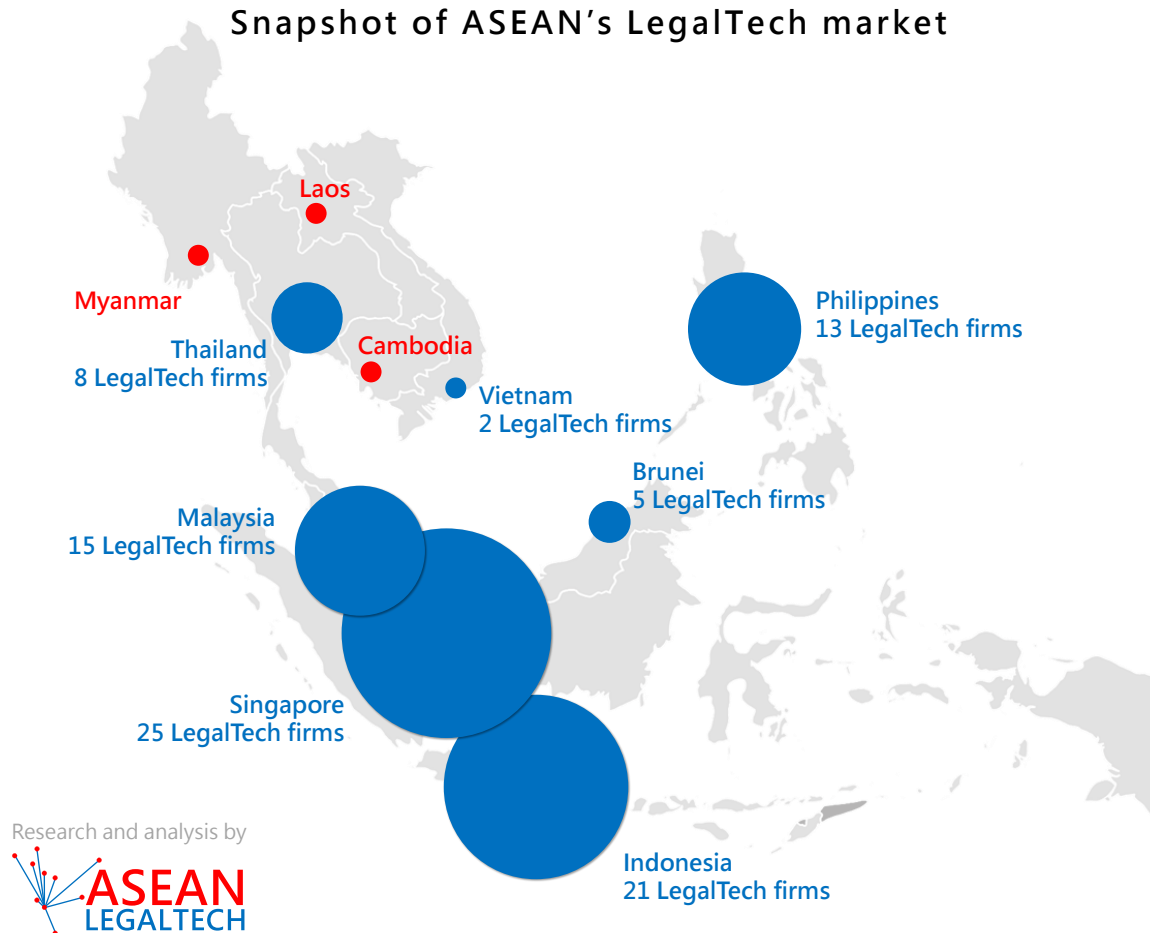
Thanks to an encouraging regulator and availability of capital, Singapore has one of the most vibrant LegalTech markets in the South East Asian region. Following the launch of Singapore's legal technology vision in 2017, the Singapore Law Society has introduced subsidy schemes to encourage law firms to adopt LegalTech solutions through the Tech Start for Law Programme in 2018 and the soon-to-be-launched Tech-celerate for Law in 2019. Singapore Academy of Law has established SAL Ventures to invest in LegalTech and NewLaw startups in Singapore and also the Future Law Innovation Programme (FLIP) that is aimed at bringing key stakeholders from the business community, government sector and academia to collaborate on developing new models for the delivery of legal services.

<sup>10</sup> Mahoney, K. 2017, Legal Tech Market Report, Catalyst Investors [ONLINE] Available at: [https://catalyst.com/research\\_item/legal-tech-market-overview/](https://catalyst.com/research_item/legal-tech-market-overview/) [Accessed 21 January 2019].

<sup>11</sup> Stanford Law School. 2019. Codex Techindex. Stanford Law School. [ONLINE] Available at: <https://techindex.law.stanford.edu/> [Accessed 21 January 2019].



## Snapshot of ASEAN's LegalTech market



\*Research conducted in collaboration with Adeline Chin (MY), Andrew Stoutley (TH), Athistha Chitranukroh (TH), Cherylyn Tan (SG), Daniel Lui (MY), Ivan Rawtaer (SG), Lorybeth Baldrias-Serrano (PH), Melvin Sumapung (ID), Jelfan-Ira Dizon (PH), Jenna Beh (MY) and Suebsiri Taweepon (TH).

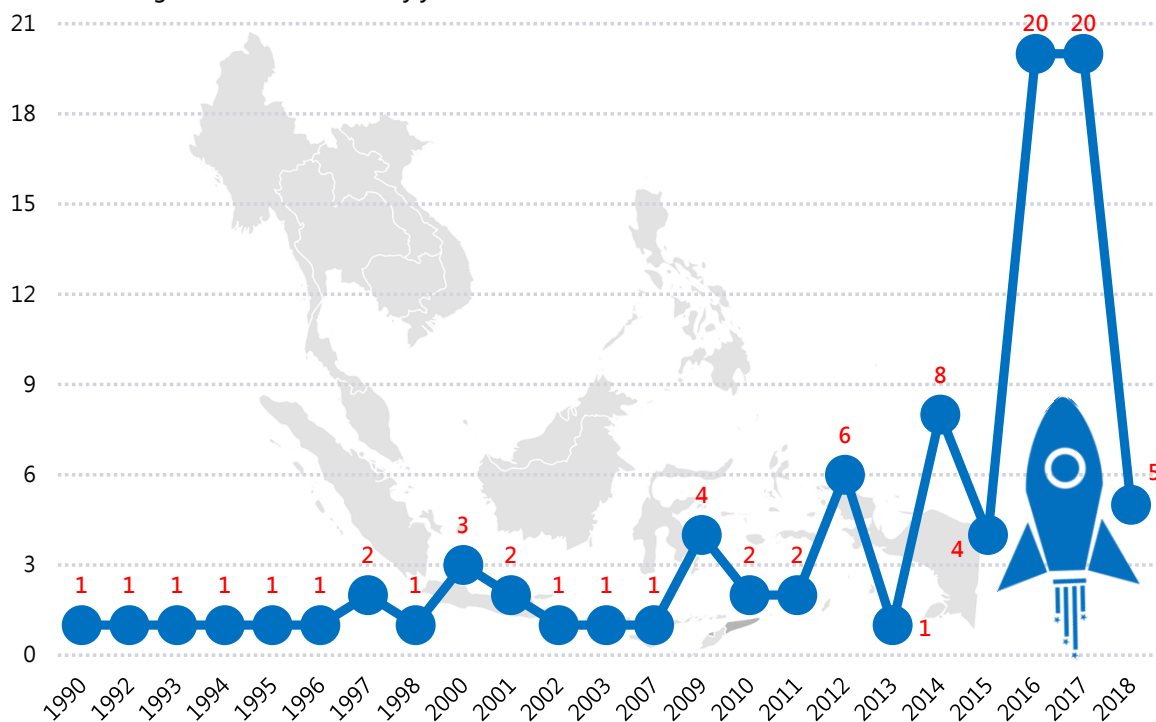
Regulators in other markets are also turning their attention to the LegalTech segment. Singapore's progress is driven by its vision to position itself as the regional legal innovation hub in the Asia-Pacific region, galvanising the stakeholders through a concerted effort by Singapore Law Society and the Singapore Academy of Law.

While the dynamics in other South East Asian markets are different due to the different local market conditions characterised by the positions (or lack of) that local regulators have taken on LegalTech, LegalTech adoption rates in the local market, and the rise of legal entrepreneurs.

Our ongoing research of the LegalTech market in South East Asia reveals that the first LegalTech firm in the region can trace its origins to the launch of Singapore's LawNet in 1990. Since its humble beginnings, LegalTech startups are now mushrooming in jurisdictions that provide the best climates for them to thrive.



Number of LegalTech firms founded by year in the ASEAN markets



Research and analysis by



\*Research conducted in collaboration with Adeline Chin (MY), Andrew Stoutley (TH), Athistha Chitranukroh (TH), Cherilyn Tan (SG), Daniel Lui (MY), Ivan Rawtaer (SG), Lorybeth Baldrias-Serrano (PH), Melvin Sumapung (ID), Jeifan-Ira Dizon (PH), Jenna Beh (MY) and Suebsiri Taweepon (TH).

Similar to other regions, a spike in number of LegalTech firms in ASEAN can be observed from mid 2010s. This timing coincided with an explosion in the lean startup movement of rapid prototyping, early release and testing of minimum viable products in the market, courtesy of Silicon Valley. It also coincides with widespread availability of affordable Software as a Service (SaaS) tools, making it possible for legal entrepreneurs to cheaply produce and test their own solutions.

A further breakdown of the data reveals each of the ASEAN markets at different stages of development. Singapore, by far, is the most mature courtesy of a LegalTech friendly regulator. Indonesia's LegalTech segment is driven by legal entrepreneurs that have witnessed the growth of Fintech<sup>12</sup>, RegTech<sup>13</sup> and e-commerce in a market with high penetration of smartphones. While Philippines' LegalTech market is still in its infancy with the legal research segment leading the way as case law are digitised.

Another driving factor for LegalTech in the market is the relative globalisation of each jurisdiction's legal industry. In international markets like Singapore, where the highest concentration of multinational companies and international law firms can be found, ideas are borderless, and we see LegalTech solutions being imported into the city state from mature financial markets like London, New York and Hong Kong. This is encouraged by the Singapore government whose vision is to build the city state into the Asia-Pacific hub for LegalTech.

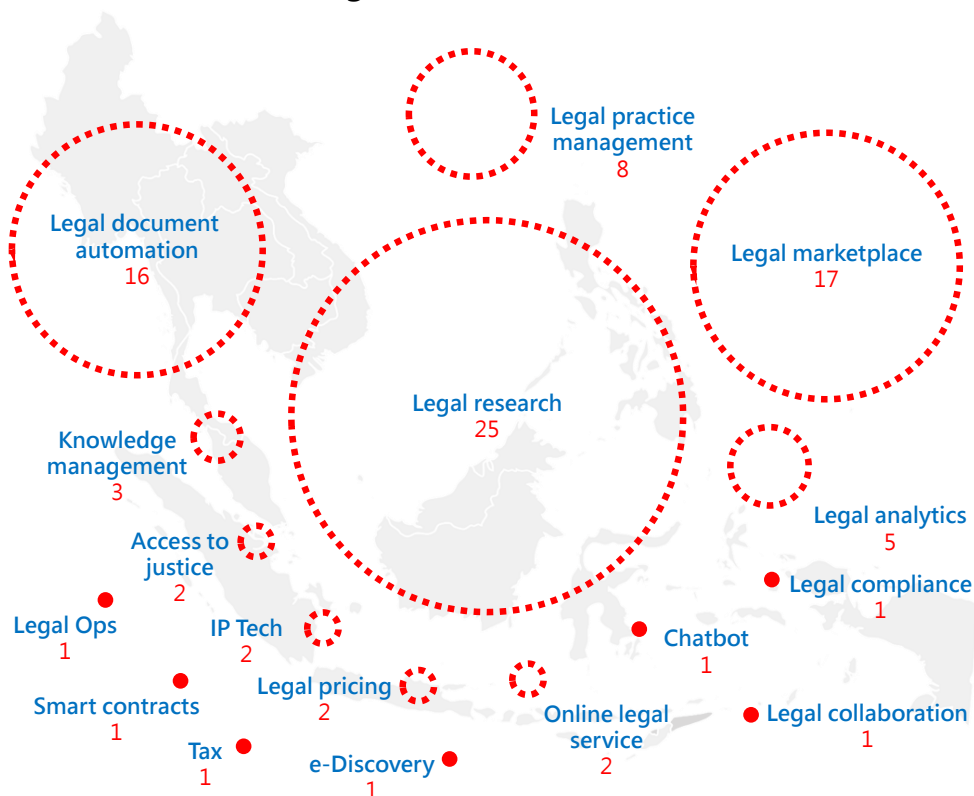
A breakdown of the LegalTech solutions in the South East Asian markets reveal legal research as the largest segment, with 25 companies presence across the 10 countries, followed by legal marketplace firms (17) and legal document automation companies (16). In other words, LegalTech firms are focused on providing lawyer efficiency solutions.

<sup>12</sup> FinTech stands for financial technology. FinTech are technologies and solutions geared towards automating and creating more efficient ways of providing financial services to the client.

<sup>13</sup> RegTech stands for regulatory technology. RegTech are technologies and solutions that enhance the regulatory process for regulators.



# Map of South East Asia's LegalTech firms



**Note:**

1. Research analyses LegalTech firms with a physical presence in the South East Asian markets.
2. We categorised the LegalTech firms by their primary solution e.g. Thomson Reuters and LexisNexis are categorised as 'legal research'.
3. Where a LegalTech firm has a presence in multiple jurisdictions, the sum of their presence are represented in this analysis e.g. Thomson Reuters is in 5 jurisdictions.
4. The spheres represent the relative size of the LegalTech segment by number of companies.

Research and analysis by



\*Research conducted in collaboration with Adeline Chin (MY), Andrew Stoutley (TH), Athistha Chitranukroh (TH), Cheryl Tan (SG), Daniel Lui (MY), Ivan Rawtaer (SG), Lorybeth Baldrias-Serrano (PH), Melvin Sumapung (ID), Jeifan-Ira Dizon (PH), Jenna Beh (MY) and Suebsiri Taweepon (TH).

ASEAN's LegalTech market is not homogenous. Countries like Indonesia, Malaysia, Philippines and Thailand are still in early stages of development, as legal entrepreneurs and legal regulators start to focus on this emerging segment in the legal industry. Singapore is paving the way in the ASEAN region, showing that participation from legal regulators and LegalTech programs can encourage development of the LegalTech ecosystem.

We have come together to form a regional body that will help with the development of the LegalTech ecosystem. We will do so by engaging in informed discussions with regulators, bringing together LegalTech firms to cross-pollinate ideas, and encouraging LegalTech adopters, law firms and legal departments to come together to engage with this emerging segment in the legal industry.



# 2. Snapshot of Brunei's LegalTech scene

By Rozaiman Abdul Rahman



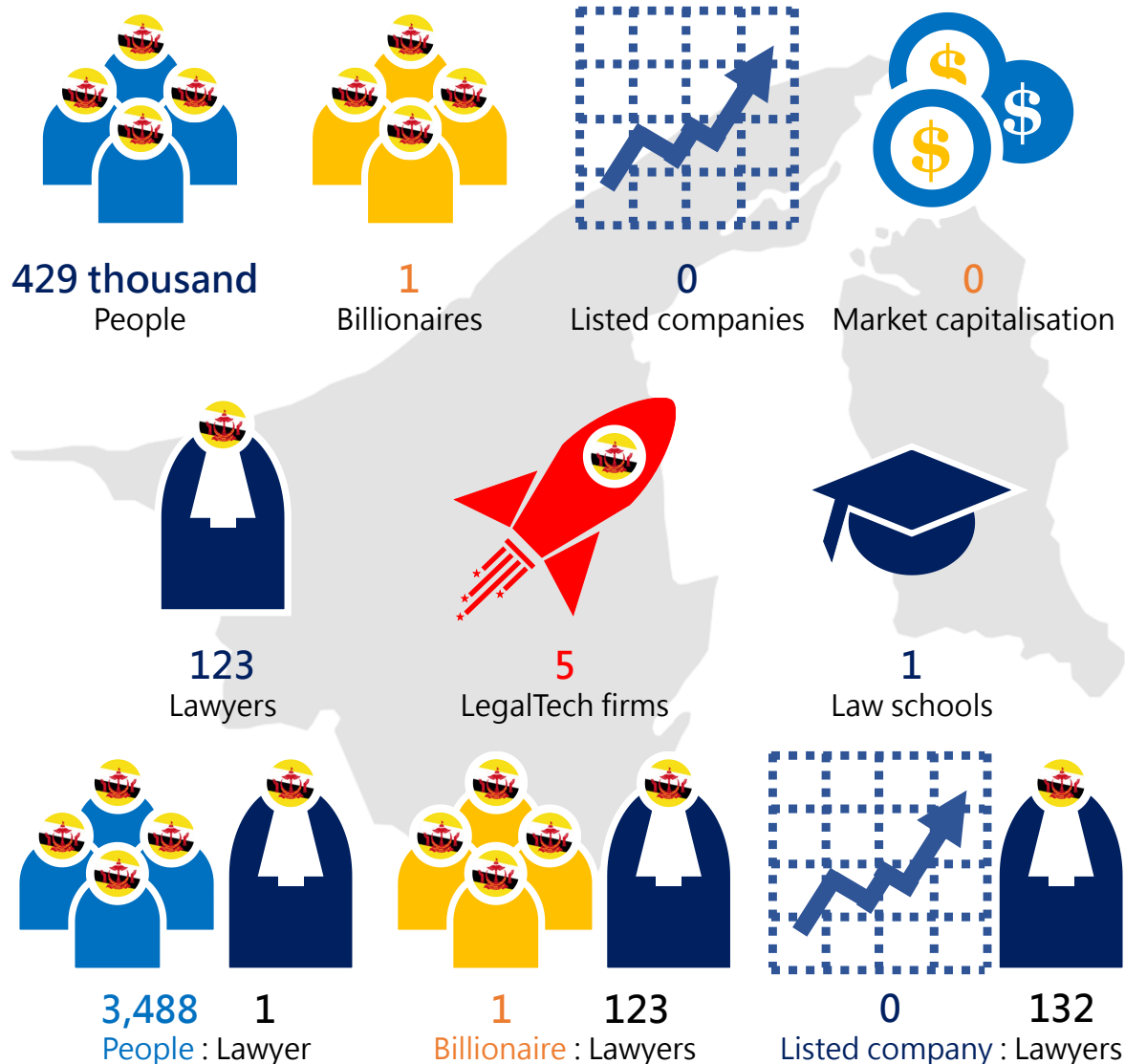


## 2. Snapshot of Brunei's LegalTech scene

By Rozaiman Abdul Rahman

# Brunei

# GDP \$12.74 billion



Research and analysis by



Brunei's \$12.74 billion economy is home to 429 thousand people and 123 lawyers. As a result, law firms in Brunei are relative small, ranging from sole practitioners to firms with approximately 8 to 9 lawyers. Due to the size of the market and the legal market's technology appetite, Brunei's LegalTech market is still at its infancy.

The primary LegalTech tools used by Bruneian law firms are legal research solutions like LexisNexis, Thomson Reuters and LawNet. Some firms have also started using practice management solutions to track clients and maintain balance sheet, in compliance with Brunei Darussalam's accounting standards. Dynamik Technologies' (previously BAG Networks) Cendana software is the most commonly adopted practice management solution amongst Brunei's law firms.



## Brunei's LegalTech market



Note: spheres represent the relative number of LegalTech companies in each category of solutions

Brunei's judiciary implemented e-filing as recently as 2015. They have also published past judgements online through [www.judiciary.gov.bn](http://www.judiciary.gov.bn), making it easier for Bruneian lawyers to conduct legal research on case precedents in the country.

As most Bruneian law firms have a regional presence through alliance and joint ventures, they would rely on their regional office in Kuala Lumpur and Singapore to access legal practice management solutions.

Cost is the main barrier of LegalTech adoption for Bruneian law firms. In a legal market where the larger firms have approximately 8 to 9 lawyers, the ability to capitalise on efficiencies are somewhat limited.

In comparison to other South East Asian markets, the largest law firms in Brunei would be considered a small or boutique firm. Due to the small lawyer population, this is also a market that has 1 lawyer for every 3,488 people.

Low technological adoption in the Bruneian legal market is also another factor for the LegalTech segment. Majority of law firms still adopt a conservative approach to the practice of law and the business of law. As a result, the preferred client interactions are usually face to face meetings.



Consumers of legal services in Brunei are also relatively conservative in how they buy legal service. Where the business case for technological adoption for law firms have most successfully been pushed by clients of legal services in other jurisdictions, Brunei's buyers of legal services still prefer the traditional approach.

In other words for the LegalTech market to develop, it is the lawyers who will have to drive the LegalTech adoption.

ASEAN LegalTech Association will be a useful platform for Bruneian lawyers to learn about the different LegalTech solutions in the market and how regulators are responding to technology in the legal industry. The skills and knowledge transfer will benefit smaller countries like Brunei.

The association can also be an introduction gateway for other LegalTech to thrive in the ASEAN market. While the LegalTech ecosystem in other parts of the world are a lot more developed in comparison to the South East Asian markets, having a regional LegalTech association will encourage other LegalTech ecosystems to bridge the connection with us.

International Bar Association, 2018, Directory of Regulators of the Legal Profession, [ONLINE] Available at: [https://www.ibanet.org/Legal\\_Regulators\\_Directory.aspx](https://www.ibanet.org/Legal_Regulators_Directory.aspx) [Accessed 16 January 2019].



# 3. Snapshot of Cambodia's LegalTech scene

By ASEAN LegalTech



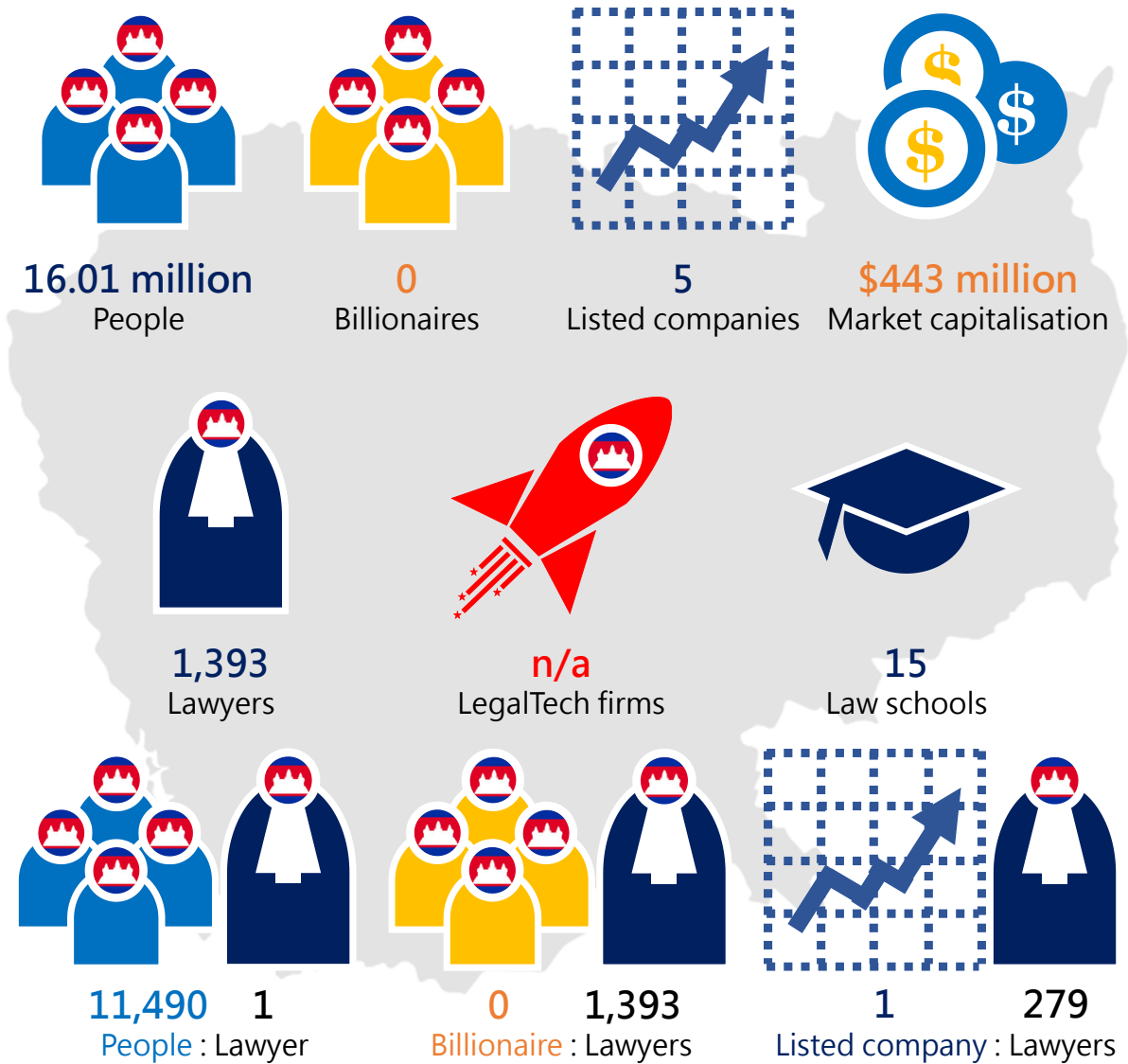
### 3. Snapshot of Cambodia's LegalTech scene

By ASEAN LegalTech

## Cambodia

## GDP

# \$22.74 billion



Research and analysis by



Cambodia's \$22.7 billion economy is home to 16 million people and 5 listed companies with a market capitalisation of \$443 million. Cambodia is also home to 1,393 lawyers. Statistically, this translates to 11,490 people for every lawyer and 1 listed company for every 279 lawyers. While the corporate market for legal services, measured by listed companies is competitive, the consumer market for legal services, measured by the country's population needs help to scale access to lawyers as it is second to only Laos on the population per lawyer measurement.



International Bar Association, 2018, Directory of Regulators of the Legal Profession, [ONLINE] Available at: [https://www.ibanet.org/Legal\\_Regulators\\_Directory.aspx](https://www.ibanet.org/Legal_Regulators_Directory.aspx) [Accessed 16 January 2019].

Cambodia has emerged in recent years as an open market to foreign investment except for restrictions on land ownership in the country, making it an attractive investment destination for both China and Japan<sup>14</sup>.

Its legal market is dominated by strong regional Mekong and ASEAN-based firms like Bun & Associates, DFDL, Tilleke & Gibbins, Rajah & Tann, VDB Loi, ZICO Law, and others.

While there is not a lot of information that we could glean on the LegalTech market in Cambodia. We get a sense that like most, there is usage of legal research and legal practice management solutions amongst lawyers.

In other words, the LegalTech market in Cambodia is still in its infancy.

A regional body like ASEAN LegalTech Association could help light the fire in the legal entrepreneurs and lawyers to develop Cambodian-specific LegalTech solutions to help improve lawyer and business efficiencies for the law firms in the country.

We are still on the hunt for potential LegalTech thought leaders and pioneers in the Cambodian legal market to establish an ASEAN LegalTech Association presence in the emerging legal market of 1,393 lawyers.

<sup>14</sup> Church, J. 2019. Learning to Fly. Vantage Asia [ONLINE] Available at: <https://www.vantageasia.com/learning-to-fly/>. [Accessed 10 April 2019].



# 4. Snapshot of Indonesia's LegalTech scene

By Arkka Dhiratara and Melvin Sumapung



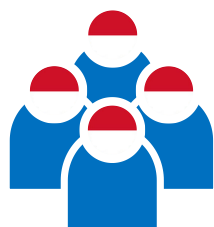
## 4. Snapshot of Indonesia's LegalTech scene

By Arkka Dhiratara and Melvin Sumapung

### Indonesia

### GDP

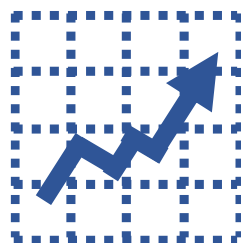
**\$1.01 trillion**



**261.12 million**  
People



**20**  
Billionaires



**600**  
Listed companies



**\$479 billion**  
Market capitalisation



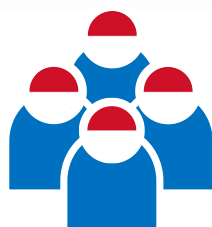
**60,000**  
Lawyers



**21**  
LegalTech firms



**78**  
Law schools



**4,352** **1**  
People : Lawyer



**1** **3,000**  
Billionaire : Lawyers



**1** **100**  
Listed company : Lawyers

Research and analysis by



Indonesia's \$1.01 trillion economy is home to 261 million people, 20 billionaires and 600 listed companies with a market capitalisation of \$479 billion. Indonesia also has the third largest lawyer population in the South East Asian region with 60,000. Statistically, this translates to 4,352 people for every lawyer, or 1 billionaire for every 3,000 lawyers and 1 listed company for every 100 lawyers. While the corporate market for legal services, measured by billionaires and listed companies is competitive, the consumer market for legal services, measured by the country's population needs help to scale access to lawyers.

Indonesia's LegalTech market has started to move to the mainstream consciousness of the legal industry but its impact in the general economy is not as significant as FinTech or AgriTech. The

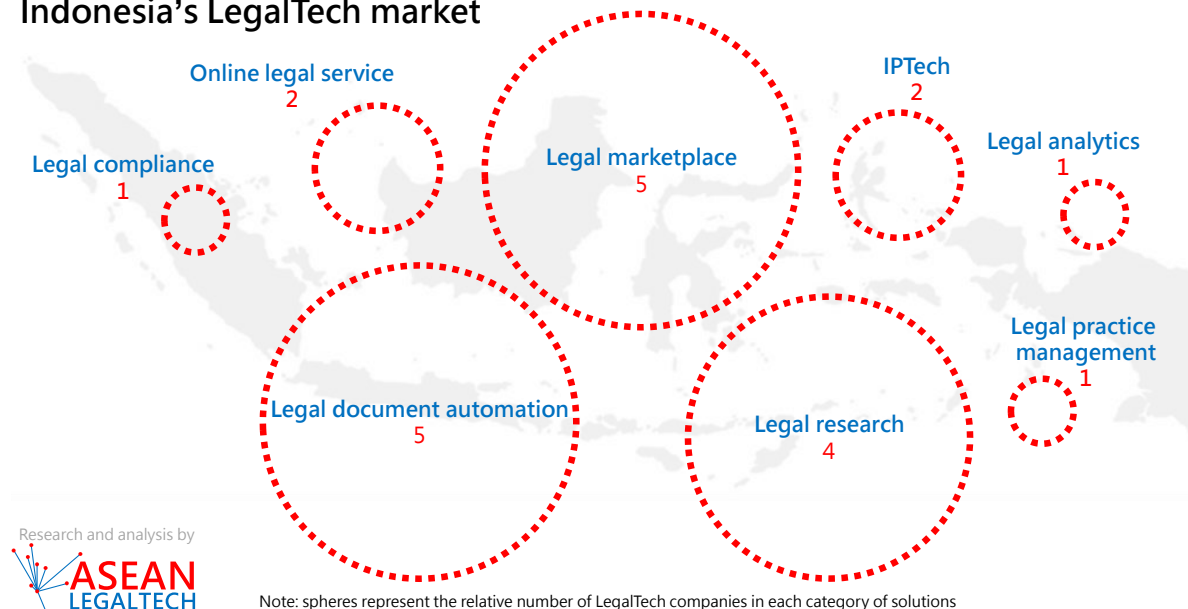




LegalTech market has seen a healthy number of LegalTech firms entering the ecosystem and this is also helped by attention showered by the media on this segment of the legal industry.

Some of Indonesia's LegalTech firms have also started to attract capital from investors. This creates a vibrant LegalTech ecosystem where stakeholders like law firms, lawyers, LegalTech entrepreneurs and LegalTech investors are engaged. Strong grassroots movements have also gave birth to Legal Hackers in Jakarta and Bali. While the Indonesian RegTech and LegalTech Association has ceased operation recently, there are discussions to resuscitate an Indonesian Legal Tech Association.

## Indonesia's LegalTech market



The megatrends shaping Indonesia's LegalTech market can be categorised into three broad categories below.

### Growth of the SME and startup market

More than half of Indonesia's GDP is driven by SME and startup companies. They are also the biggest job creators in Indonesia. The growth of the SME and startup market has encouraged the working population to explore entrepreneurship and in recognition of the economic potential, regulators are also lowering the barriers to establish a business in Indonesia

### Appetite for technology

The Indonesian market has been fixated by the potential and threats of new technologies like artificial intelligence and blockchain. While there is some merit to discuss the potential threats to jobs, the realities of the new technologies is that they are still in their infancy. There are big opportunities to leverage technology for positive impact like cyber security, hoax eradication and increasing consumer protection.

### Increasing legal literacy

As we enter election year in Indonesia, the population are increasingly interested in law and its application, in particular with regards to state affairs and how technology could impact them. Indonesian Corruption Eradication Commission has also attract a lot of interest amongst Indonesian on the intersection of law and technology.



International Bar Association, 2018, Directory of Regulators of the Legal Profession, [ONLINE] Available at: [https://www.ibanet.org/Legal\\_Regulators\\_Directory.aspx](https://www.ibanet.org/Legal_Regulators_Directory.aspx) [Accessed 16 January 2019].

The media and regulators will help further grow the LegalTech market in Indonesia.

With increasing media exposure, Indonesian LegalTech startups can introduce their solutions to a wider audience. At the same time the awareness also help change consumer expectation when they consume legal services. Like most countries, the Indonesian media tend to shine a light on the negative impacts of technology to sell clicks and views (e.g. news about Gojek drivers protesting). While it is important to cover those stories, technologies are also making positive impact like better access to justice in the legal industry.

Indonesia's regulators are looking into the regulation of data centres for technology startups due to national security issues, which may have a negative impact on startup cost.

For the legal profession, Legal regulators have not made clear whether lawyers participating in marketplaces are in violation of their advocate ethical code. Legal marketplaces of course, is a great way to help make legal services more accessible to the wider population.

In addition, Indonesia do not have a single advocate association, making this issue complex for lawyers when dealing with advocate ethical code.

ASEAN LegalTech Association will be a great platform to amplify Indonesia's LegalTech segment to the wider South East Asian region and the global LegalTech community. This will help create awareness of Indonesia's growing LegalTech segment and potentially connect us to buyers in the region and the globe.

Through the association, we could also see LegalTech firms engage in new partnerships between the different stakeholders in the market. ASEAN LegalTech Association will also be a great source of learning for stakeholders in the market on technology, regulation and business trends in the South East Asian region.



# 5. Snapshot of Laos' LegalTech scene

By ASEAN LegalTech



## 5. Snapshot of Laos' LegalTech scene

By ASEAN LegalTech

### Laos

### GDP

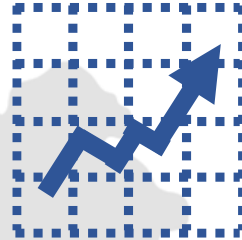
### \$16.75 billion



6.86 million  
People



0  
Billionaires



9  
Listed companies



\$1.20 billion  
Market capitalisation



243  
Lawyers



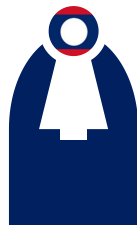
n/a  
LegalTech firms



6  
Law schools



28,222  
People



1  
Lawyer



0  
Billionaire



243  
Lawyers



1  
Listed company



27  
Lawyers

Research and analysis by



Laos' \$16.7 billion economy is home to 6.8 million people and 9 listed companies with a market capitalisation of \$1.2 billion. Laos is also home to 243 lawyers. Statistically, this translates to 28,222 people for every lawyer and 1 listed company for every 27 lawyers. While the corporate market for legal services, measured by listed companies is competitive, the consumer market for legal services, measured by the country's population needs help to scale access to lawyers as it tops the ASEAN region as the country with the highest population per lawyer measurement.



International Bar Association, 2018, Directory of Regulators of the Legal Profession, [ONLINE] Available at: [https://www.ibanet.org/Legal\\_Regulators\\_Directory.aspx](https://www.ibanet.org/Legal_Regulators_Directory.aspx) [Accessed 16 January 2019].

Laos is a landlocked country that is in transition as the government is trying to ease the process of doing business in the country with the implementation of new laws and regulation, which is in itself a long and complex process<sup>15</sup>.

Its legal market is dominated by strong regional Mekong and ASEAN-based firms like DFDL, Tilleke & Gibbins, VDB Loi, ZICO Law and others.

While there are a lot of information that we could find on the LegalTech market in Laos. We get a sense that like most, there is adoption of legal research and legal practice management solutions amongst lawyers, especially those with a regional presence. In other words, the LegalTech market in Laos is still in its infancy.

A regional body like ASEAN LegalTech Association could help light the fire in the legal entrepreneurs and lawyers to develop Laotian LegalTech solutions to help improve lawyer and business efficiencies for law firms in the country.

We are still on the hunt for potential LegalTech thought leaders and pioneers in the Laotian legal market to establish an ASEAN LegalTech Association presence in the emerging legal market of 243 lawyers.

<sup>15</sup> Church, J. 2019. Learning to Fly. Vantage Asia [ONLINE] Available at: <https://www.vantageasia.com/learning-to-fly/>. [Accessed 10 April 2019].



# 6. Snapshot of Malaysia's LegalTech scene

By Adeline Chin, Daniel Lui, Jenna Beh and June Low

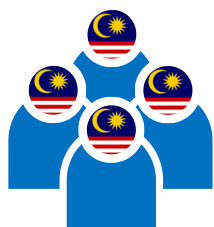


## 6. Snapshot of Malaysia's LegalTech scene

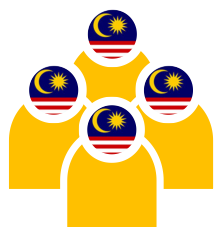
By Adeline Chin, Daniel Lui, Jenna Beh and June Low

# Malaysia

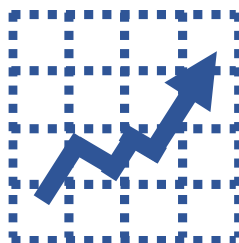
# GDP \$314.49 billion



31.62 million  
People



14  
Billionaires



800  
Listed companies



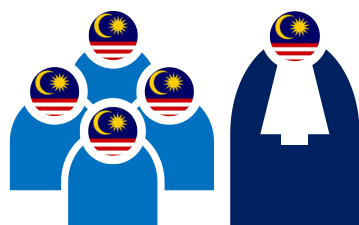
\$398 billion  
Market capitalisation



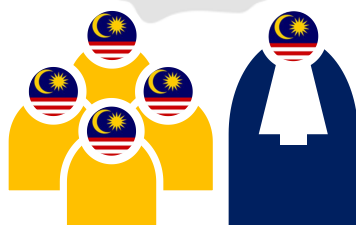
19,825  
Lawyers

15  
LegalTech firms

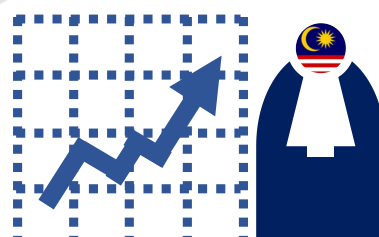
15  
Law schools



1,595  
People : Lawyer



1  
Billionaire : Lawyers



1  
Listed company : Lawyers

Research and analysis by



Malaysia's \$314 billion economy is home to 31 million people, 14 billionaires and 800 listed companies with a market capitalisation of \$398 billion. Malaysia is also home to 19,825 lawyers. Statistically, this translates to 1,595 people for every lawyer, or 1 billionaire for every 1,416 lawyers and 1 listed company for every 25 lawyers. While the corporate market for legal services, measured by billionaires and listed companies is competitive, the consumer market for legal services, measured by the country's population needs help to scale access to lawyers.

Though at its infancy, the LegalTech market in Malaysia has picked up momentum in recent years. Driven by a growing population of LegalTech companies (startups, scale-ups and corporates) and LegalTech ecosystem builders like LawTech Malaysia and Legal Hackers KL. Regulators have also



started to actively participate in the ecosystem by encouraging LegalTech innovation in the highly regulated legal market through amendments to the legislation.

The LegalTech market in Malaysia is now home to 15 LegalTech firms of which the biggest segment is in legal research, followed by legal practice management. Noting that most of the LegalTech solutions are geared towards enhancing lawyer productivity.

## Malaysia's LegalTech market



Note: spheres represent the relative number of LegalTech companies in each category of solutions

In recent years, the LegalTech grassroots movement was further expanded with LegalTech conferences and hackathons like the LexTech conference and LawTech Hackathon that builds the community and educates the market.

In fact, a local LegalTech organisation, LawTech Malaysia was established this year to formalise an institution that is geared towards building the LegalTech community. This adds to the grassroots meetups, events and roundtables that Legal Hackers KL organised.

As with most LegalTech markets around the world, regulator support is key to creating a more fertile environment for LegalTech innovation & growth.

The Malaysian Bar Council is also actively participating in the LegalTech market and this is formalised through the formation of the Innovation & Future of Law Committee. The goal of this committee is to push for a regulatory framework that identifies areas of legal work that LegalTech startups could apply their entrepreneurial talent.

In early 2019, the Malaysian Bar Council submitted to the Attorney General a proposed amendment to the Legal Profession Act 1976 (LPA) which includes provisions for the Malaysian Bar Council to regulate legal technology within its jurisdiction. The proposed amended LPA signifies a heightened level of LegalTech awareness amongst legal practitioners, and a more cautious approach taken by the professional body in navigating the LegalTech market.





Regulator  
**Malaysian Bar Council,  
Chief Judge of the High  
Court of Sabah  
and  
Chief Justice of the  
High Court of Sarawak**  
Disciplinary authorities  
**Malaysian Bar Council,  
Chief Judge of the High  
Court of Sabah  
and  
Chief Justice of the  
High Court of Sarawak**

International Bar Association, 2018, Directory of Regulators of the Legal Profession,  
[ONLINE] Available at: [https://www.ibanet.org/Legal\\_Regulators\\_Directory.aspx](https://www.ibanet.org/Legal_Regulators_Directory.aspx)  
[Accessed 16 January 2019].

For the budding Malaysian LegalTech market, increasing appetite to change by the legal service industry is the key driver to move the needle in the market. Education & knowledge sharing on LegalTech and its related subject matters fuels this progress.

A key marker for the LegalTech market in South East Asia is the launch of the Future Law Innovation Program (FLIP) by the Singapore Academy of Law in 2017 and the inaugural TechLawFest in 2018.

LegalTech markets in various ASEAN jurisdictions are growing at different pace because of the heterogeneous nature of the countries.

A regional LegalTech organisation like ASEAN LegalTech Association could help bring and build the community through cross-pollination of ideas and knowledge across borders. The regional association would also be a platform to connect the South East Asia's LegalTech ecosystems with the rest of the world.

Many a little makes a mickle and the combined strengths of each country in the ASEAN region can help with the development of the LegalTech market to play a bigger part in the global LegalTech narrative.



# 7. Snapshot of Myanmar's LegalTech scene

By ASEAN LegalTech



## 7. Snapshot of Myanmar's LegalTech scene

By ASEAN LegalTech

### Myanmar

### GDP

\$67.58 billion



53.37 million  
People



0  
Billionaires



5  
Listed companies



\$342 million  
Market capitalisation



11,553  
Lawyers



n/a  
LegalTech firms



18  
Law schools



4,620  
People



1  
Lawyer



0  
Billionaire



11,553  
Lawyers



1  
Listed company



2,311  
Lawyers

Research and analysis by



Myanmar's \$67 billion economy is home to 53 million people and 5 listed companies with a market capitalisation of \$342 million. Myanmar is also home to 11,553 lawyers. Statistically, this translates to 4,620 people for every lawyer and 1 listed company for every 2,311 lawyers. While the corporate market for legal services, measured by listed companies is competitive, the consumer market for legal services, measured by the country's population needs help to scale access to lawyers.



International Bar Association, 2018, Directory of Regulators of the Legal Profession, [ONLINE] Available at: [https://www.ibanet.org/Legal\\_Regulators\\_Directory.aspx](https://www.ibanet.org/Legal_Regulators_Directory.aspx) [Accessed 16 January 2019].

Myanmar is endowed with South East Asia's most strategic location, it borders Bangladesh, China, India, Laos and Thailand, and faces the Bay of Bengal, making it a key member of both ASEAN and Mekong-Ganga Cooperation.

Myanmar's infrastructure construction, domestic demand for power and strong foreign direct investment from China are driving the country's economy.

Legal reforms like the Myanmar Companies Law introduced by the Directorate of Investments and Company Administration (DICA) has created improved regulation on businesses in the country<sup>16</sup>.

Its legal market is dominated by strong regional Mekong and ASEAN-based firms like Allen & Gledhill, DFDL, Duane Morris & Selvam, Kelvin Chia Partnership, Tilleke & Gibbins, VDB Loi, ZICO Law and others.

While there is not a lot of information that we could find on the LegalTech market in Myanmar. We get a sense that like most, there is adoption of legal research and legal practice management solutions amongst lawyers, especially those with a regional presence. In other words, the LegalTech market in Myanmar is still in its infancy.

A regional body like ASEAN LegalTech Association could help light the fire in the legal entrepreneurs and lawyers to develop Myanmar's LegalTech ecosystem. We are still on the hunt for potential LegalTech thought leaders and pioneers in the Myanmar legal market to establish an ASEAN LegalTech Association presence in the emerging legal market of 11,553 lawyers.

<sup>16</sup> Church, J. 2019. Learning to Fly. Vantage Asia [ONLINE] Available at: <https://www.vantageasia.com/learning-to-fly/>. [Accessed 10 April 2019].



# 8. Snapshot of Philippines' LegalTech scene

By Jeifan Ira Dizon and Lorybeth Baldrias-Serrano



## 8. Snapshot of Philippines' LegalTech scene

By Jeifan Ira Dizon and Lorybeth Baldrias-Serrano

### Philippines

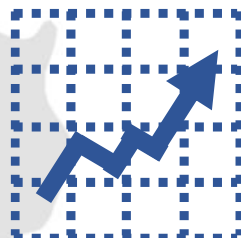
**GDP**  
**\$313.51 billion**



**104.92 million**  
People



**12**  
Billionaires



**267**  
Listed companies



**\$258 billion**  
Market capitalisation



**64,764**  
Lawyers



**12**  
LegalTech firms



**n/a**  
Law schools



**1,620**  
People : Lawyer



**1**



**1**  
Billionaire : Lawyers



**5,336**



**1**  
Listed company : Lawyers



**243**

Research and analysis by



Philippines' \$313 billion economy is home to 104 million people, 12 billionaires, and 267 listed companies with a market capitalisation of \$258 billion. Philippines also has the second largest lawyer population in the South East Asian region with 64,764 lawyers. Statistically this translates to 1 lawyer for every 1,620 people, or 1 billionaire for every 5,336 lawyers and 1 listed company for every 243 lawyers. While the corporate market for legal services, measured by billionaires and listed companies is competitive, the consumer market for legal services, measured by the country's population needs help to scale access to lawyers.

The Philippine LegalTech market is still in its infancy and is at the start of establishing its roots, admittedly lagging behind robust technology driven segments like e-commerce and FinTech.

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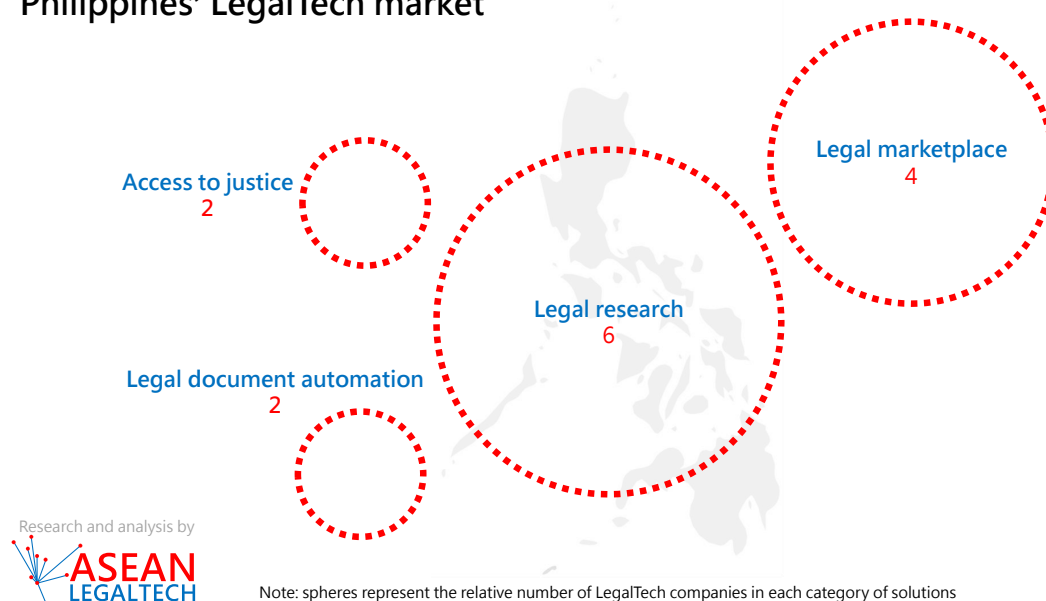
Philippines' LegalTech history can be traced to 1994 when CD Asia Technologies, an electronic publishing legal reference and search provider, was founded. This of course is before LegalTech was a term or even a concept.

Since its inception, other LegalTech software and platforms have come to the market, fuelled by the penetration and portability of internet. Lawphil Project backed by Arellano University has also launched PhilJuris to democratise legal information. All these of course, are legal research solutions. The launch of MyLegalWhiz in 2012 was also a marker in the Philippine legal research segment which revolutionised legal knowledge research and learning through optimised search function. Others in the legal research segment would follow.

Legal marketplace is also another big segment in the Philippine LegalTech market, connecting lawyers to potential clients. FindJustice.Ph is a location-based app that tells its users the location and information for trial courts and agencies offering pro bono legal service. Others include abogado.ph LegalEx, Legall.ph and LexMeet, differentiating on their target segment and offering. There is still a long market education process that needs to happen to enlighten the Filipino consumers of the different ways they can now access legal services.

CD Asia Technologies and MyLegalWhiz are the biggest LegalTech players in the Philippine market, having found success with government enterprises and private companies. The same success alludes the other newer platform as they enter the market.

## Philippines' LegalTech market





Regulators and the changing lawyer demographic will play big roles as drivers of growth in the Philippine LegalTech market.

Encouragingly, Philippine Supreme Court's digital transformation of the judiciary combined with the United Nations led initiative for electronic courts and digitisation of case dockets will set the tone for Filipino lawyers.

The Supreme Court's regulation partner, the Integrated Bar of the Philippines has also embraced LegalTech through the adoption of myIBP app. The digitisation of government agencies will further help grease the wheels for LegalTech adoption.

The changing demographic of Philippines' lawyer population will also contribute to growth of LegalTech as tech-savvy lawyers enter the workforce and move into senior roles. The composition of lawyers in the Philippines is getting younger, increasing their willingness to adopt LegalTech solutions. Complementing this is the availability of technology to the rest of the population.

International Bar Association, 2018, Directory of Regulators of the Legal Profession, [ONLINE] Available at: [https://www.ibanet.org/Legal\\_Regulators\\_Directory.aspx](https://www.ibanet.org/Legal_Regulators_Directory.aspx) [Accessed 16 January 2019].

ASEAN LegalTech Association will be a great platform to share best practices for LegalTech providers, LegalTech users and regulators to share best practice in the LegalTech market across the South East Asian region. The knowledge and skills transfer through the regional association will help fuel growth and innovation for the legal profession and the LegalTech ecosystem in all the countries involved.





# 9. Snapshot of Singapore's LegalTech scene

By Cherilyn Tan, Ivan Rawtaer and Michael Lew

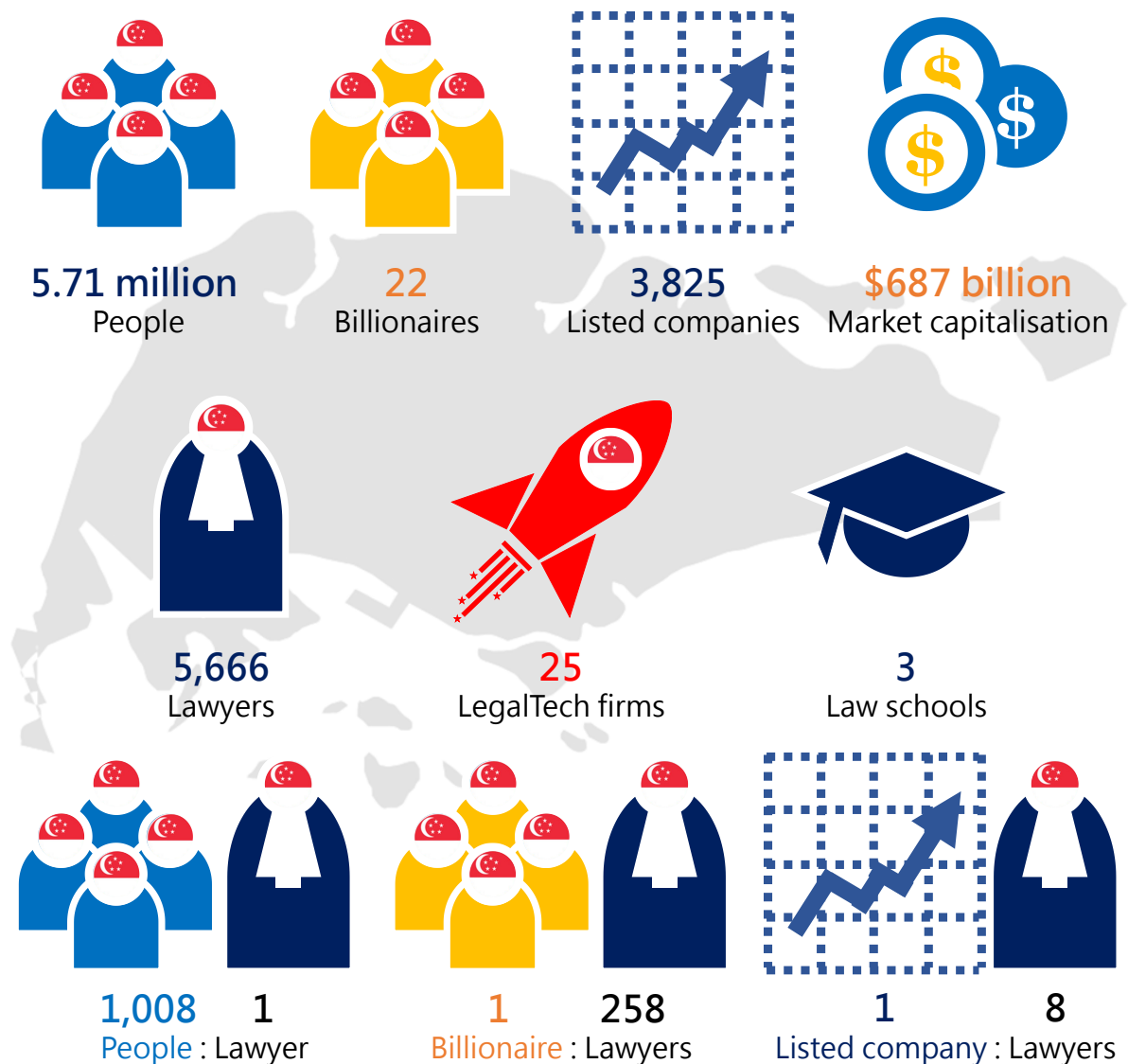


## 9. Snapshot of Singapore's LegalTech scene

By Cheryl Tan, Ivan Rawtaer and Michael Lew

# Singapore

# GDP \$310.45 billion



Research and analysis by



Singapore's \$310 billion economy is home to 5 million people, 22 billionaires and 3,825 listed companies with a market capitalisation of \$687 billion. Singapore also has 5,666 lawyers and one of the most international legal markets in the South East Asian region. Statistically, this translates to 1,008 people for every lawyer, or 1 billionaire for every 258 lawyers and 1 listed company for every 8 lawyers. While the corporate market for legal services measured by the billionaires and listed companies in the country is competitive, the consumer market for legal services, measured by the country's population needs help to scale access to lawyers.

Following launch of the Singapore Legal Tech Vision in 2017, a significant increase in activities in the local LegalTech scene can be observed, driven by enthusiasm from Singapore's LegalTech startup



community, engaged technology-savvy lawyers and unprecedented support from judges and regulators. Singapore is fast becoming an emerging LegalTech hub in the Asia Pacific region.

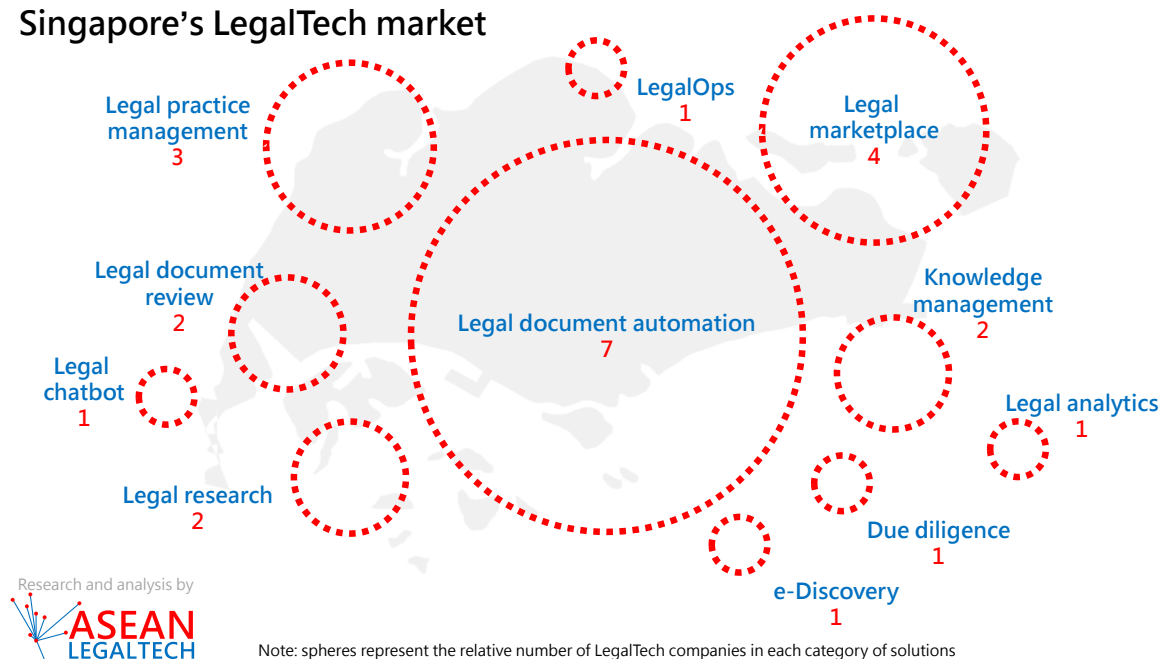
Fast forward to 2019, we now see stronger interest from the most significant consumers of legal services, the corporate counsels. Corporate legal departments are actively exploring LegalTech solutions to address their pain points in legal operations and legal services. While industry wide adoption of LegalTech solutions in the market is still in its early days, the enthusiasm in the corporate counsel community bodes well for LegalTech solution providers and forward thinking law firms that are investing in LegalTech.

Large Singapore law firms are also contributing to the growth of LegalTech in the city state as they pursue various build, buy or partners strategy through equity investments in LegalTech startup or develop and launch LegalTech solutions (or white-labelling solutions) in-house. These are strategic choices made in response to rising expectations of an increasingly LegalTech-savvy client group combined with the competitive pressures from international law firms importing ideas, innovation and solutions from mature markets like the UK, US and Australia.

Singapore also has a swelling grassroots movement as the lawyer demographic is changing, with increasing penetration of younger lawyers or legal professionals that are challenging traditions and boundaries by incorporating technology in their daily lives and legal practice. Legal Hackers and Singapore Academy of Law's Future Law Innovation Programme (FLIP) have successfully tapped into harnessed this grassroots movement.

As the LegalTech market continues to grow, capital are also being deployed to LegalTech startups. There has also been mergers and acquisitions of LegalTech firms in Singapore in the last 12 months, signalling a growing appetite from investors that are seeing greater return potentials in this evolving market.

## Singapore's LegalTech market





International Bar Association, 2018, Directory of Regulators of the Legal Profession, [ONLINE] Available at: [https://www.ibanet.org/Legal\\_Regulators\\_Directory.aspx](https://www.ibanet.org/Legal_Regulators_Directory.aspx) [Accessed 16 January 2019].

Singapore’s technical maturity and acceptance of advanced technologies like artificial intelligence, chatbots and blockchain are also drivers of the thriving LegalTech market.

As data is the bedrock on which technology driven solutions are conceived, the ability to convert implicit knowledge through explicit knowledge in the form of data points, that can be analysed, we may see ‘robo-lawyer’ and ‘artificial lawyer’ increasingly, a reality instead of fiction.

While the potential for LegalTech solution is boundless, the realities of any technology market is that products will develop through increasing adoption by local law firms and legal departments. We are still in the early stages of the growth cycle in the Singapore LegalTech market.

To accelerate this, the Singapore Law Society, together with the Ministry of Law and Enterprise SG have launched subsidy scheme, **Tech-celerate for Law** to encourage the adoption of LegalTech solutions.

The first round of Tech-celerate for Law was focused on increasing the adoption of practice management solutions while the second round will focus the scheme to enhance adoption of artificial intelligence and cloud-

based solutions amongst Singapore law firms.

Of course, the increasing adoption of LegalTech is only one part of the equation, there is a need for the right people and robust policies to ensure the continuous growth of the LegalTech market.

Singapore’s law schools also have a significant role to introduce practical cross-functional LegalTech courses to would be lawyers. In addition, Singapore’s regulators will ultimately shape the development of the LegalTech ecosystem through inclusive policies to encourage multidisciplinary teams into the legal industry.

In recent years, the surge in legal innovation and technology adoption has paved the way for a multidisciplinary team of legal engineers, technologists, data scientists and others joining lawyers in the legal profession. These are unprecedented times, which comes with new challenges and opportunities of bringing together a group of diverse professionals from varied background and culture under the LegalTech roof.

A regional association like ASEAN LegalTech Association will encourage cross-pollination of ideas, learnings and best practice in the region. With a unified voice, we will also be able to effectively connect, add value and be part of the global LegalTech ecosystem.



# 10. Snapshot of Thailand's LegalTech scene

By Athistha Chitranukroh, Andrew Stoutley and Suebsiri Taweepon



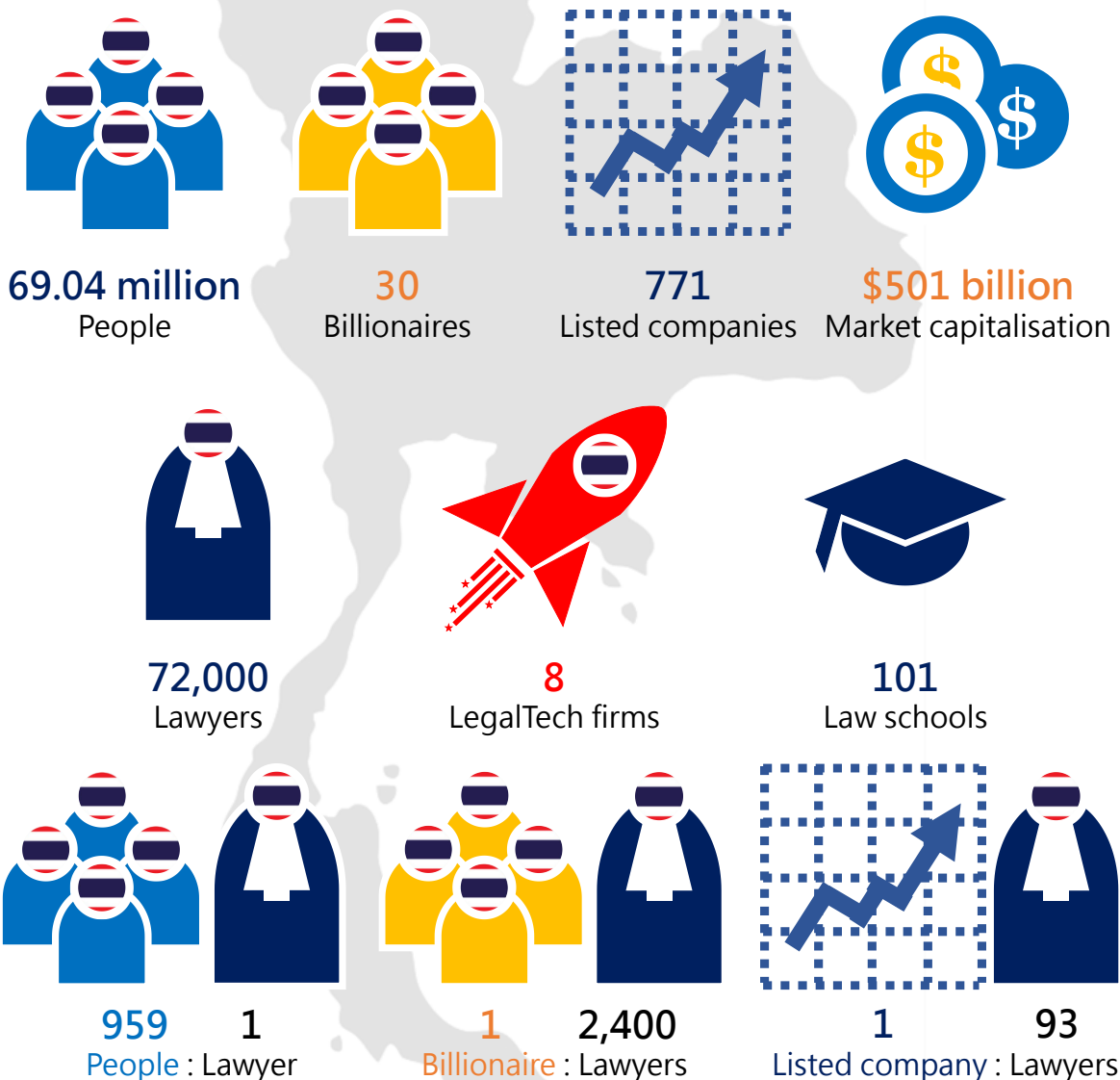
## 10. Snapshot of Thailand's LegalTech scene

By Athistha Chitranukroh, Andrew Stoutley and Suebsiri Taweepon

### Thailand

### GDP

\$450.04 billion



Research and analysis by



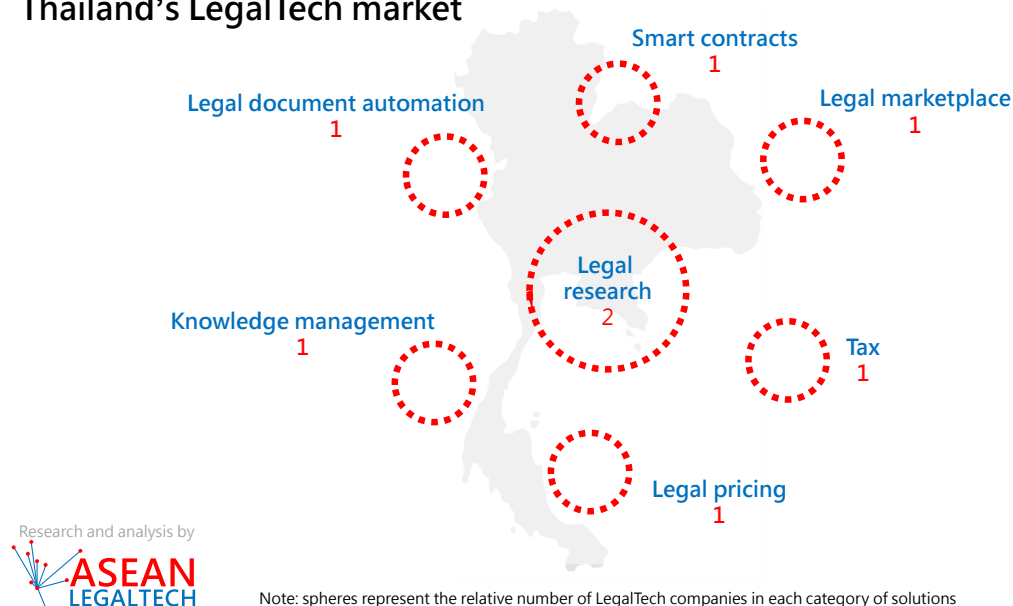
Thailand's \$450 billion economy is home to 69 million people, 30 billionaires and 771 listed companies with a market capitalisation of \$501 billion. Thailand also has the largest lawyer population in the South East Asian region with 72,000 lawyers. Statistically, this translates to 1 lawyer for every 959 people, or 1 billionaire for every 2,400 lawyers and 1 listed company for every 93 lawyers. While the corporate market for legal services, measured by billionaires and listed companies is competitive, the consumer market for legal services, measured by the country's population needs help to scale access to lawyers.

Thailand's LegalTech sector is at an early stage of development, with a few local companies seeking to break into the market with relatively simple offerings such as judgment archives and contract auto-fill software. These are still fairly primitive, but seem to be developing quickly.



As a result, the biggest LegalTech segment is in legal research. Most of the LegalTech solutions in the Thai market are focused on lawyer productivity, from legal research, document automation, knowledge management to smart contracts.

## Thailand's LegalTech market



However, there is definitely an appetite for LegalTech, as has been shown by several major international LegalTech solution providers entering the market. A number of Thai law firms are working with and/or contributing to document drafting software, complex practice management solutions are becoming increasingly popular, and at least one firm has implemented an artificial intelligence document analysis solution—all from international suppliers. The trend in legal practice is therefore to adopt international software, rather than to purchase home-grown solutions.

There are limitations of course to how local firms can depend on LegalTech solutions from overseas providers due to further customisation that are required for language and local legal requirements. Anecdotal evidence suggests that Thai software developers are drawn to “sexier” professional technology solutions—particularly FinTech, InsureTech, and RegTech—which makes recruitment of skilled technical specialists for LegalTech companies in Thailand very difficult.

Those professionals that do work in LegalTech tend to get quickly hired by law firms large enough to have in-house IT teams (of which there are only a few). To resolve this brain drain issue, the image of the legal sector needs to be substantially reformed among tech sector professionals.



There is also a lot more to be done in terms of demand for the software. While many of the larger firms are looking for tech solutions, smaller firms, which make up the vast majority in of the Thai legal profession, seem content to use much older techniques.

The changing Thai lawyer demographic will also be a driving force for the local LegalTech market. A younger generation of professionals entering the workforce that are more open to using technology is an encouraging sign. Engagement with LegalTech solutions will need to arise early in their careers, and possibly at the university level, to make an impact.

ASEAN LegalTech Association will be a platform for knowledge sharing between LegalTech companies, and relationship building between other tech suppliers in professional service sectors across the South East Asian region.

In addition, the ability for service users to share experiences with software, in a market where other service users might otherwise be hard to find, is invaluable.

International Bar Association, 2018, Directory of Regulators of the Legal Profession, [ONLINE] Available at: [https://www.ibanet.org/Legal\\_Regulators\\_Directory.aspx](https://www.ibanet.org/Legal_Regulators_Directory.aspx) [Accessed 16 January 2019].





# 11. Snapshot of Vietnam's LegalTech scene

By Laurent Tham Nguyen



# 11. Snapshot of Vietnam’s LegalTech scene

By Laurent Tam Nguyen

## Vietnam

## GDP \$223.63 billion



95.54 million  
People



4  
Billionaires



756  
Listed companies



\$169 billion  
Market capitalisation



12,500  
Lawyers



2  
LegalTech firms



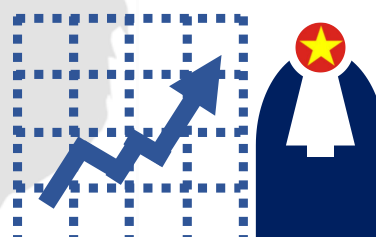
58  
Law schools



7,643    1  
People : Lawyer



1    3,125  
Billionaire : Lawyers



1    17  
Listed company : Lawyers

Research and analysis by



Vietnam is home to 95 million people, including four billionaires, has a \$233 billion economy, and has 756 listed companies with a market capitalisation of \$169 billion. Vietnam is also home to 12,500 lawyers. Statistically, this translates to one lawyer per 7,643 people, one billionaire for every 3,125 lawyers, and one listed company for every 17 lawyers. While the corporate market for legal services, measured by listed companies, is competitive, the consumer market for legal services – the country’s population – does not have adequate supply of legal services.

Industry 4.0 is a major theme in Southeast Asia in general, and in Vietnam in particular. First connected to the Internet in 1997, Vietnam is now ranked in the top 20 countries in the world for number of Internet users.

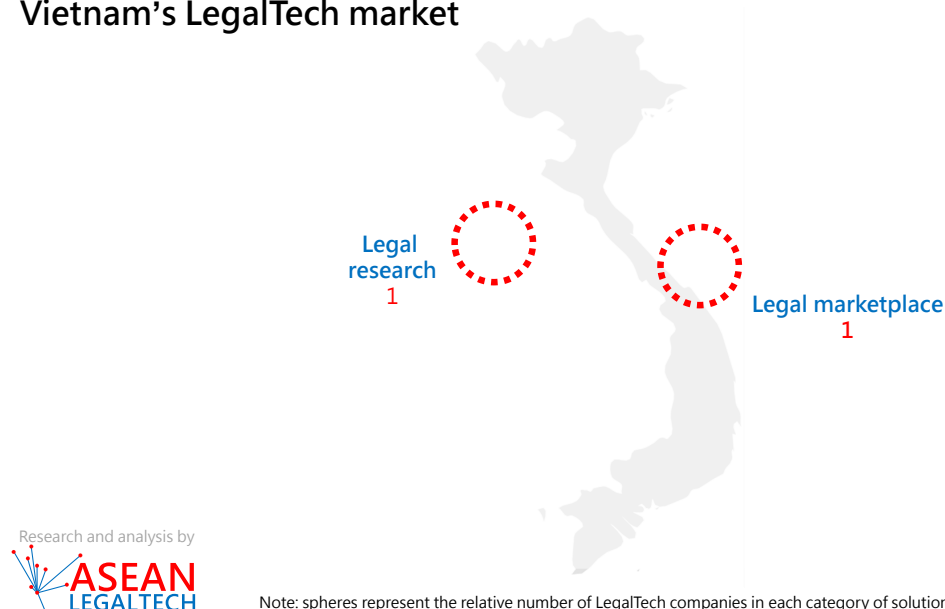


As one of the fastest growing economies in the region, Vietnam is intent on maximising opportunities presented by the Fourth Industrial Revolution, with e-government initiatives located at the heart of its public sector reform. As an example, the Vietnamese government has recently issued resolution no. 17/NQ-CP which aims to raise the country to a top four position in the United Nations' ranking of e-governments in ASEAN countries by 2025.

Thanks to joint public and private sector initiatives to promote entrepreneurship, and equipped with the government's commitment to innovation, Vietnam's start-up scene is thriving. Foreign investors are also turning their attention to Vietnam's start-up market as a means of introducing successful overseas models into the country.

The buzz around the Fourth Industrial Revolution has not yet touched the legal profession in Vietnam. The Big Four accounting firms, a handful of international firms and the rare regional law firm as an outlier, most of Vietnam's law firms still operate in a very traditional way and with limited reliance on technology. We were only able to find Thomson Reuters and IURA as the LegalTech firms in Vietnam.

## Vietnam's LegalTech market



Technology in the Vietnamese legal market today can be classified as Law 1.0 (basic practice management solutions, MS office, limited website, no social media...), but firms are displaying a rising willingness to move to Law 2.0 (the adoption of cloud-based document sharing platforms, software as a service tools, office 365, responsive websites...). Very few if any are approaching Law 3.0 (collaborative work and tools, customer relationship management, automation, analytics...).

To illustrate the state of technology in Vietnam's private practice segment, 21% of the 53 law firms ranked in Vietnam by The Legal 500, Chambers and IFR do not have a responsive website. The low adoption rates are driven by conservative and traditional lawyers and the partnership profit distribution model that often creates a hurdle to funding new technologies.

Comparatively, legal departments in Vietnam are more open to the adoption of LegalTech. About 80% of the in-house lawyers in Vietnam work in multinational companies. A survey by In House Community Congress in April 2019 showed that the biggest challenges faced by general counsels in Vietnam involved:

- Dealing with the appearance of smart contracts and AI
- Keeping up to date with the changes in technology that affect legal practice
- Adapting technology to reduce routine workload without human intervention



International Bar Association, 2018, Directory of Regulators of the Legal Profession, [ONLINE] Available at: [https://www.ibanet.org/Legal\\_Regulators\\_Directory.aspx](https://www.ibanet.org/Legal_Regulators_Directory.aspx) [Accessed 16 January 2019].

The Vietnamese regulators, sentiment towards digital trust in the legal market, competitive pressures, generational change and LegalTech champions all play an important role in helping the LegalTech market blossom in Vietnam.

In order to build a cohesive innovation-driven ecosystem that incubates new business models for delivering legal services in the future economy, the government could introduce a program similar to Singapore's Future Law Innovation Program (FLIP) could be promoted.

Building digital trust is also key to the adoption of new technologies. The considerable number of data breach incidents in the e-commerce, banking and finance and transportation industries in recent years, and ensuing commercialisation of personal information, highlights the urgency with which Vietnam must address online privacy if it is to successfully transition into a digital economy.

Competitive pressures from within the legal profession could also play a major role in Vietnam's LegalTech market. Foreign law firms in Vietnam, for example, may tomorrow leverage on their artificial intelligence and technology capabilities overseas to better compete for clients in the local market. Technology could also

automate some of the work that forms the bulk of smaller and boutique firms' practices; a threat to this part of the market. Finally, law firm clients may add additional pressure in Vietnam, as they are overseas, to firms adopting LegalTech.

Generational change in the legal profession is another possible trigger for earlier adoption of LegalTech in the Vietnamese legal market. Succession planning is a big issue for local small and mid-sized firms and it technology adoption could become a necessary enticement for firms looking to attract or retain talent.

Last but not least, finding a Vietnamese law firm to champion LegalTech would operate as a tremendous growth factor for LegalTech in the country. The Vietnamese legal market is opened to foreign law firms and it has witnessed an increasing level of competition amongst law firms. The local battle for clients and talents includes notably

- International firms (with international network or only local) often founded or led by foreign lawyers since the 1990's - Baker McKenzie, Freshfields Bruckhaus Deringer, Russin Vecchi, Frasers, Allen Overy, Mayer Brown, etc.
- Dynamic regional firms such as DFLD, Rajah Tann LCT, ZICO Law, Tilleke Gibbins, etc.
- Vietnamese market leaders VILAF and YKVN
- A new generation of dynamic Vietnamese law firms founded by Vietnamese lawyers with international background or coming from larger firms such as LNT, Lexcomm and this segment will increase in the future.

These firms and others are strong candidates to become a Vietnamese LegalTech champion. At the same time, a market like Vietnam could also see a LegalTech player disrupting the habits with some amazing technology at a low price.



An ASEAN LegalTech Association will bring together stakeholders from business, regulator and academia to collaborate on developing new models for the delivery of legal services in the future economy. Innovation for the Industrial Revolution 4.0 is a major theme in Vietnam, and we can use this platform to facilitate learning and growth in the legal and business sectors.

A regional association will also play an important role in educating the Vietnam legal ecosystem on the purpose and usage of technology for law students, private practicing lawyers, in-house lawyers and law schools.

Beyond technology, ASEAN LegalTech Association will also help change the mindset (collaboration, transparency and openness) of the legal market towards the adoption of technology through cross-pollination of best practice and success stories across the region and by working with regulators and other stakeholders to facilitate change.



# 12. About ASEAN LegalTech



## 12. About ASEAN LegalTech

The ASEAN LegalTech Association (ASEAN LegalTech) is an association of LegalTech firms, legal technologists, law firms, legal departments, regulators and individuals in South East Asia.

ASEAN LegalTech is a platform to connect LegalTech pioneers, thought leaders and enthusiasts to promote and build the LegalTech ecosystem in the South East Asian markets. ASEAN LegalTech's goal is to provide a voice to the emerging market to inform discussions with regulators in the ASEAN region by:

- Building, connecting and growing a community for LegalTech in the ASEAN region through an online platform and monthly events (meet ups, legal hackathons, industry presentations, etc).
- Starting the LegalTech dialogue in the ASEAN region and specifically in the region's legal industry.
- Building a platform to feature and cultivate the growth of the LegalTech scene in the ASEAN region.
- Promoting entrepreneurial culture amongst legal industry constituents, namely lawyers (private practice and in-house lawyers), technologists and regulators.
- Building the go-to platform for thought leadership initiatives on LegalTech in the ASEAN region.



**Vision**  
ASEAN Legal Technology  
Association future aims



**Mission**  
What ASEAN Legal Technology  
Association wants to do now

### ABC's of ASEAN LegalTech Association:

- **Advocacy:**
  - To be the leading **advocate** and voice of the LegalTech community in the ASEAN region.
  - To work with regulators to better understand and cultivate the LegalTech ecosystem in the ASEAN region.
- **Build:**
  - To **build** the LegalTech ecosystem and community in the ASEAN region.
  - To work with grassroots movements like Legal Hackers to amplify the culture of legal innovation.
- **Connect:**
  - To **connect** LegalTech community across the legal services industry value chain of lawyers, legal educators, regulators, law firms and buyers of legal services.
  - To connect LegalTech start-ups to financiers, investors and clients.

### ASEAN LegalTech's mission is to facilitate the growth of LegalTech in the region:

- To build, connect and grow a community for LegalTech in the ASEAN region through an online platform and monthly events (meet ups, legal hackathons, industry presentations, etc).
- To start the LegalTech dialogue in the ASEAN region and specifically in the region's legal industry.
- To build a platform to feature and cultivate the growth of the LegalTech scene in the ASEAN region.
- To promote entrepreneurial culture amongst legal industry constituents, namely lawyers (private practice and in-house lawyers), technologists and regulators.
- To be the go-to platform for thought leadership initiatives on LegalTech in the ASEAN region.

Come join us on this journey at [www.aseanlegaltech.com](http://www.aseanlegaltech.com)



Our founders are made up of a group of pioneers, thought leaders and enthusiasts in the LegalTech ecosystem across South East Asia.



We are still on the lookout for Country Founding Ambassadors in Cambodia, Laos, and Myanmar. If you're interested, please feel free to reach out to [eric@alphacreates.com](mailto:eric@alphacreates.com).





# 13. About the authors



## 13. About the authors

### 1. Adeline Chin, LawTech Malaysia and Law Asia 365



Adeline Chin is a Knowledge Management (KM) consultant specializing in knowledge management for the legal practice. In her capacity as a KM professional, she has designed, spearheaded and implemented innovative knowledge projects that humanizes the law through infusion of technology. Adeline is also a Co-Founder of LawTech Malaysia.

### 2. Andrew Stoutley, Tilleke & Gibbins



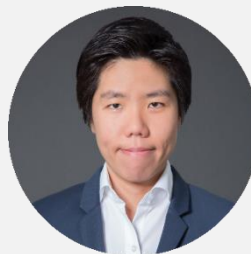
Andrew Stoutley is the Chief Operating Officer at Tilleke & Gibbins, a Southeast Asian regional law firm. He is responsible for overseeing the firm's operations, including strategic planning, practice management, marketing and business development, human resources, information technology, knowledge management, facilities, and related functions. Andrew plays an active role in all of Tilleke's innovation and technology projects, and his views on legaltech have been cited by Asian Legal Business and other industry publication.

### 3. Arkka Dhiratara, Hukum Online



Arkka is currently the CTO of [Hukumonline.com](http://Hukumonline.com), the forefront legal tech company in Indonesia founded since 2000. He spent most of his career working for the Executive Office of the President of the Republic of Indonesia. He successfully spearheaded several Open Government initiatives, such as National Complaint Handling System ([lapor.go.id](http://lapor.go.id)) and National Open Data Portal ([data.go.id](http://data.go.id)). As an MSc graduate from Technische Universiteit Delft (TU Delft) which conduct his research on Information Retrieval, he is passionate about the intersection between legal and technology, which currently uncharted field in Indonesia.

### 4. Athistha Chitranukroh, Tilleke & Gibbins



Athistha (Nop) Chitranukroh is a lead partner for the firm's technology practice. She serves as an advisory board member for the Insurtech Asia Association, and she is also the firm's representative for the Thai Fintech Association. The Bangkok Post has quoted Nop on her insights into the impact that legaltech will have to local business. Nop regularly gives presentations on legaltech and tech-related topics from a legal perspective, most recently at Startup Thailand 2018 – a national conference arranged by the Thai government, and attended by more than 60,000 people.



## 5. Cherilyn Tan, AsiaLawNetwork.com and Tesseract.io



Cherilyn is the CEO of Interstellar Group Pte Ltd and founded AsiaLawNetwork.com in Nov 2014 and subsequently Tesseract.io because of her personal frustration finding a suitable and affordable lawyer at a time she needed one the most. Trained and armed with knowledge in design thinking, accountancy and technology strategy, she has a proven track record to show what it means to shape the industry with an unorthodox way of thinking about problems.

Cherilyn is driven by her quest to provide more affordable LegalTech solutions, so lawyers can now serve more people, and in turn translates to greater access to legal services.

## 7. Eric Chin, Alpha Creates



Eric Chin is a Principal at Alpha Creates. He is a strategy consultant that works with law firms, listed law firms, LegalTech firms, NewLaw firms, Big Four accounting firms and corporate legal departments on strategy, M&A, market analysis, innovation and Asia. In 2013, Eric introduced “NewLaw” as a neologism that has since entered the legal industry lexicon. His experience spans across the Asia-Pacific region with work completed for law firms and Big Four accounting firms across Australia, China, Hong Kong, India, Indonesia, Japan, Malaysia, New Zealand, Philippines, Singapore, South Korea, Taiwan, Thailand and Vietnam. Eric’s work in the region has culminated in his induction as one of 30 people to watch in the business of law in Asia in 2015 by Asia Law Portal. Eric is also a co-founder and co-organiser of Legal Hackers Melbourne.

## 6. Daniel Lui, LawTech Malaysia and FuzzTrack Ventures



The focus of Daniel is providing commercial consulting in relation to scale ups and SMEs. Other than being a Senior Analyst/Legal Advisor in a private equity firm, he was a former corporate lawyer in Malaysia and a UK Barrister-at-law. Daniel is also a Co-Founder of LawTech Malaysia.

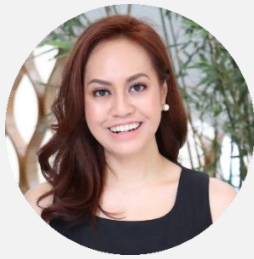
## 8. Ivan Rawtaer, Pactly



Ivan Rawtaer is the Co-Founder of Pactly, a Singapore-based startup building software to instantly analyse routine business contracts. Ivan holds an LLB from the National University of Singapore and was formerly a corporate/M&A lawyer at WongPartnership LLP. Whilst at WongPartnership, he was involved with various LegalTech initiatives including the evaluation of various AI and document automation systems. Since leaving practice, Ivan spends most of his time debugging python code and praying that his machine learning models get better.



### 9. Jeifan Ira Dizon, ClickCounsel and ZEN Rooms



Jeifan-Ira is a lawyer with eight years of PQE, with main practice areas in corporate and regulatory law. She graduated her bachelor and Juris Doctor degrees from the University of the Philippines, and has worked both in the private and public sectors—as an associate in the law firms.

In 2017, she embarked on her solo practice focused on assisting start-ups, as well as launched her collaboration, Dizon|Ross, with her childhood friend and US-based lawyer, Mardi Ross. Currently, Jeifan-Ira serves as Head Regional Legal of Rocket Internet-backed ZEN Rooms. Jeifan-Ira is a staunch advocate of legal technology and innovation in the legal practice.

### 10. Jenna Beh, LawTech Malaysia, Digital Ninja, MyMy



As one of the Top 100 Women in Fintech (Global), Jenna specialises in regulated tech, building ecosystems like fintech and lawtech and is a Fintech & Innovation expert. She was also an Advocate and Solicitor (Partner). Jenna is also a Co-Founder of LawTech Malaysia.

### 11. June Low, EasyLaw



June is the Founder of EasyLaw - No. 1 Legal App in Malaysia, with 1 out of 4 Malaysian lawyers using it. EasyLaw is also awarded as the top 3 Finalist in Global Legal Tech Venture Day in Spain in 2018. June has been featured in News Straits Times, BFM, Malaysia SME (cover), Oriental Daily, Channel W, 988 FM, CityPlus FM.

### 12. Laurent Tam Nguyen, Digital Mekong



Laurent is a senior business development and marketing specialist with 25+ years' experience leading marketing and business development strategy and operations. He is the founder of Digital Mekong, an innovative virtual marketing agency helping companies build their marketing foundations and grow their business in an alternative and price efficient way through CMO (Chief Marketing Officer) on demand services. Laurent was also the CMO of DFDL and ZICO Law over the last 7 years and currently CMO for firms across Asia and ASEAN for law firms that range from boutique to regional players. Laurent is also one of 30 people to watch in the business of law in Asia in 2019 by Asia Law Portal.



**13. Lorybeth Baldris-Serrano, TDG Ventures Inc**



Lorybeth Baldrias-Serrano is a lawyer, certified accountant and business development professional. She currently serves as Legal Counsel for TDG Ventures Inc, a company which provides information and communications technology services. In 2018, she was nominated as a finalist for Young Lawyer and Woman Lawyer categories for Asian Legal Business in the Philippines. She was previously a Partner for Insights Philippines Legal Advisors, wherein she worked on various ICT Law engagements. She is also a co-founder and co-organizer of Legal Hackers Manila.

**14. Melvin Sumapung, Justika**



Melvin was exposed to the sector when his company partners with HukumOnline, the first Indonesian legal tech firm in Indonesia. As a Product Manager, he attempts to apply basic NLP to parse, classify, and systematically relate Indonesian regulations and court decisions. Sensing the distance of the legal industry to Indonesians, he dedicates himself to the sector and is now building Justika.com, the only legal marketplace in Indonesia that aims to increase justice access to Indonesians.

**15. Michael Lew, Rajah & Tann Technologies**



Michael is currently the COO of Rajah & Tann Technologies and have been an avid legal technologist for over 17 years, consulting on technology risk management, digital forensics, e-discovery and, in recent years, legal artificial intelligence. Following his interest in the use of AI and predictive data analytics for the legal domain, he had a stint with the National University of Singapore (NUS) as a researcher in the field of AI and blockchain. In 2017 Michael founded LegalComet, an AI-driven legaltech startup that was acquired by Rajah & Tann Technologies in Oct 2018. In addition, he is a formerly the President of High Technology Crime Investigation Association (Singapore Chapter) and co-author of the book, A Practical Guide to E-Discovery in Asia.

**16. Rozaiman Abdul Raham, ZICO R.A.R.**



Rozaiman is the founder and managing partner of ZICO R.A.R, and has more than 20 years of experience in civil and criminal litigation, corporate commercial law, intellectual property and real estate matters. He has advised a wide range of clients ranging from large and mid-sized corporations, banks and financial institutions, government linked entities as well as high net worth individuals.

A former deputy public prosecutor with the Attorney General's Chambers (AGC), Rozaiman has also worked as legal adviser and corporate secretary for several of Brunei's largest banks and financial institutions, and is well versed in various banking and Islamic finance transaction and matters.



### 17. Suebsiri Taweepon, Tilleke & Gibbins



Suebsiri (Oil) Taweepon is a partner and co-head of the firm's technology industry group, with a focus on intellectual property and technology-related matters. He has a great deal of experience in a wide range of IP work, both contentious and noncontentious, including managing and registration of intellectual property rights. He is also a Co-Chair of the Emerging IP Rights Committee of the Asian Patent Attorneys Association. Oil is a prolific author of legal publications, and a regular speaker at several conferences.



# State of the LegalTech market in Southeast Asia

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