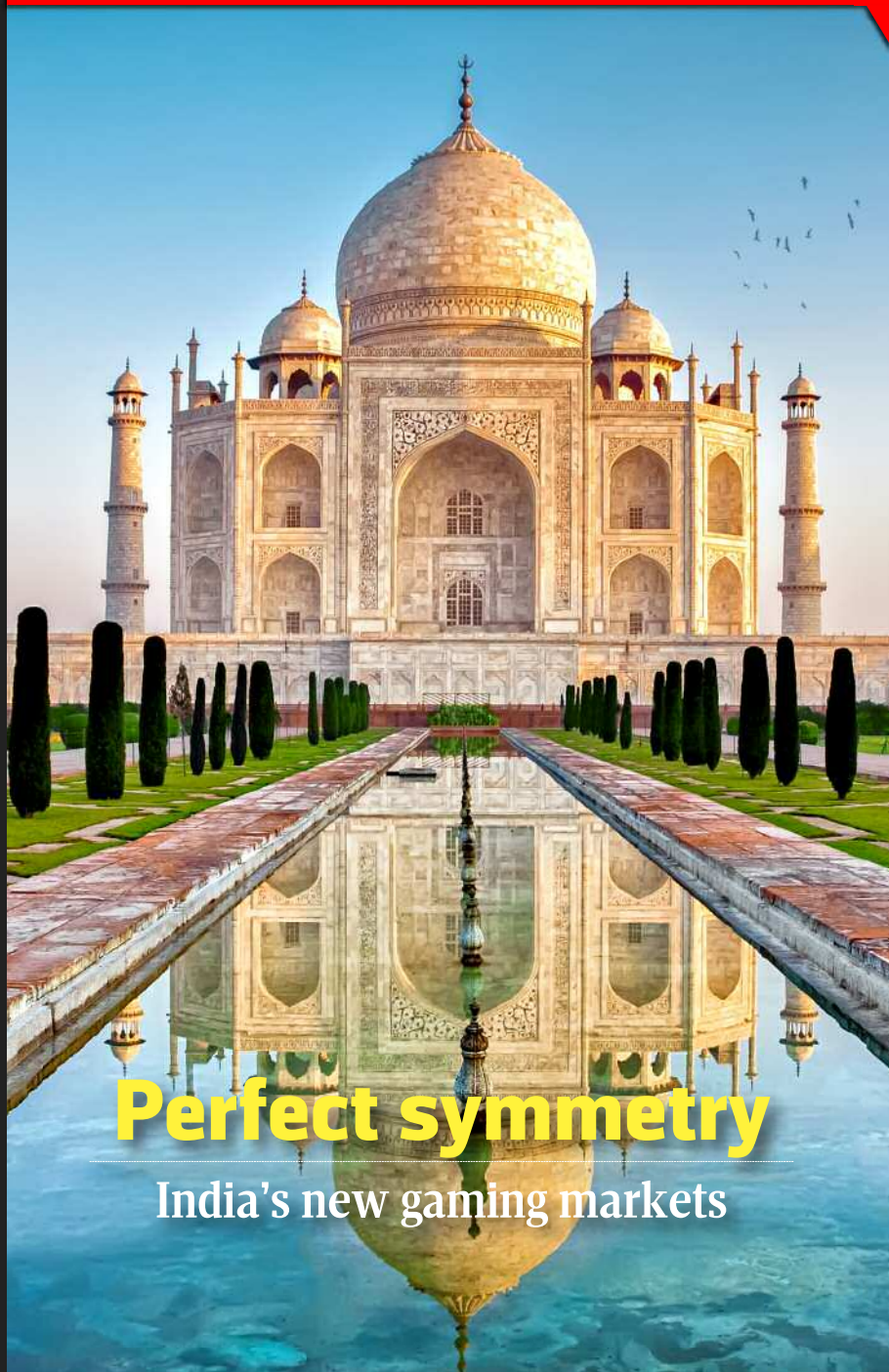




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Samson House,
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Comment

SEPTEMBER 2014



There's a scene in Jurassic Park in which the Paleontologist saves the theme park owner's grandson from a car stuck high up in a tree. Having extricated the boy from the vehicle, the car begins to fall down the tree towards them, until, at the bottom, the car engulfs the pair again. At which point the grandson states, matter of factly, "And we're back in the car."

It struck me, as I watched Gavin Isaacs leave Bally to join Shuffle Master, which was acquired by Bally, and then purchased in turn by Scientific Games, now headed by Mr. Isaacs, that there's a lot of cars falling on top of people right now.

It's really hard to ignore the consolidation story that's engulfing company after company in the gaming market at present. We're being told by analysts that the consolidation process is long overdue in the casino supplier sector, and that there will be huge benefits for those involved, but as the processes unfold, there's also huge uncertainty and anxiety for an industry that's fundamentally based on relationships and not the calculations of accountants.

I understand as a consumer that the complicated products that I purchase are expensive to design, source, build and supply. It's basic economics. But despite the synergies and the leveraged opportunities presented by the mergers, consolidations and obvious advantages of scale, breadth and depth of products – I still want choice and I'm pretty sure that operators do too.

**DESPITE THE
SYNERGIES OF
CONSOLIDATIONS
AND MERGERS, I
STILL WANT TO
SEE CHOICE AND
INDIVIDUALITY.**

I hope that as these giant companies are forged, the individuality of the brands and the people that work for them can still shine through and that we see dozens of start-ups form from the creative sparks that haven't had a car fall on them recently. While I completely understand the logic of the acquisitions and the new found abilities of the companies to present complete A-Z products to land-based and interactive customers, I'll keep my fingers-crossed that the relationships between suppliers and operators can remain as closely bonded as ever.

EDITORIAL

Editor
Lewis Pek
lewis@gamingpublishing.co.uk
+44 (0) 1942 879 291

News Editor
Phil Martin
phil@gamingpublishing.co.uk
+44 (0)161 236 6669

Associate Editor (MALAGA)
Karen Southall
karensouthall@gmail.com

Consultant
John Carroll (BILLERBECK)
carroll@carrollconsulting.de

Correspondent
James Morrison
jamesmorrison@gmail.com

Contributors
Daniel Lindsay
David Addison
Bepi Mottes
Mark Gibson
Rasmus Sojmark

ADVERTISING

Commercial Director
John Slattery
Email:
john@gamingpublishing.co.uk
+44 (0)7917 166471

Advertising Executive
James Slattery
Email:
james@gamingpublishing.co.uk
+44 (0)7917 166471

PRODUCTION

Sub Editor
Lisa Nichols

Senior Designer
Gareth Irwin

Production Manager
Paul Jolleys

Subscriptions Manager
Jennifer Pek

Commercial Administrator
John Pek

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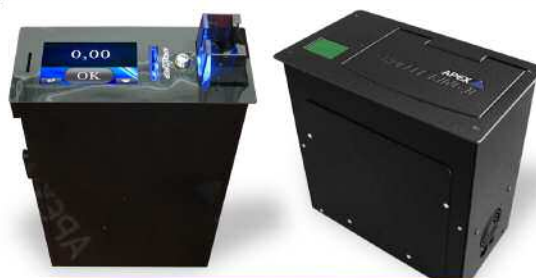
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UN JUZGADO DE CHILE HA PUESTO EN ESPERA EL

proceso de licitación para el casino en licencia de Chillán, después de que la empresa hispano-argentina Bold-Peralada interpusiera una reclamación en un juzgado local, en la que reclamaba que estaba cargada de irregularidades. La recusación legal ha alegado que el Gobierno Regional ha sobrepasado su jurisdicción al otorgarle cero puntos a éste, mientras que a Marina del Sol le otorgó 300 puntos.

UN GRUPO DE DIPUTADOS NACIONALES ESTÁ

intentando poner en vigencia nuevas leyes que aseguren que las máquinas de juego se sometan a un control y a unos impuestos de un modo muchísimo más eficiente, y están intentado terminar con la rápida proliferación del juego en toda Argentina.

A PESAR DE ALGUNAS CREACIONES POSITIVAS

recientes en la industria del casino de los últimos tiempos, entre las que se incluyen el anuncio de una apertura muy importante y en endurecimiento en materia de leyes para combatir el juego ilegal, crece la especulación de que el gobierno de Paraguay está intentando poner a la industria en manos del Estado.

ESTE AÑO SE INAUGURARÁ EN ENCARNACIÓN, LA

capital de Paraguay, uno de los casinos nuevos más importantes. Según las autoridades gubernamentales locales, el hotel y casino de seis millones de dólares incrementará el turismo en la capital y coincide con la reciente apertura de una serie de hoteles nuevos, a la vez que el sector turístico continúa mejorando.

EL GOBIERNO DE MENDOZA, ARGENTINA, HA

anunciado que este mes lanzará dos procesos de licitación separados: uno para empresas interesadas en proporcionar supervisión y control en línea en las máquinas de juego y el otro para recopilar en línea las apuestas de Quinela.

CADA VEZ PARECE MÁS PROBABLE QUE EL CONTROL

y la supervisión de todas las máquinas de juego actualmente previstas para abril de 2015, supondrán un gran cambio para el mercado del juego colombiano.

EL OPERADOR SUDAFRICANO SUN INTERNATIONAL

está encantado con el consentimiento por parte de la Gauteng Gambling Board de permitir la reubicación de su licencia y transferirla del Morula Casino y Hotel de Mabopane a Menlyn Maine, cerca de Pretoria.

EL CASINO MEDITERRÁNEO BENIDORM HA ABIERTO

en el resort de la Marina Baixa, con ello se convierte en el tercer casino del portafolio del grupo. La primera fase ha incluido la planta baja y la primera, las cuales albergarán el casino y una sala multiuso destinada a eventos y exposiciones.

GAMEACCOUNT NETWORK HA ANUNCIADO EL

lanzamiento en línea de China Shores en Estados Unidos en una asociación estratégica con Konami Gaming. Disponible en Foxwoods.com, China Shores ofrece a los jugadores la experiencia del jugar al juego original traducido en línea para Simulated Gaming.

POLITICIANS PUSH TO MONITOR SLOTS

A group of National Deputies are seeking new rules to ensure that slots are monitored and taxed far more efficiently

Argentina - Legislation

A group of National Deputies are seeking to put into law new rules which would ensure that slot machines are monitored and taxed far more efficiently and are seeking to end the rapid proliferation of gaming throughout Argentina.

Members of the Radical Civic Union Party, Ricardo Alfonsín and Miguel Bazze have introduced a new law which they say will help put an end to tax invasion when it comes to slot machines.

Describing the governments failure to sufficiently tax the industry as an unfair "stimulus" to growth, new laws will, they say, end the current state of 'disorder' currently affecting the industry.

The new law aims to ensure that "efficient collection mechanisms" based around "a reliable and safe control of operations" are put in place which will also prevent money laundering as well as tax evasion. The law will connect all slot machines in Argentina to a centrally controlled server which will allow the government to monitor and in real time all slot machine transactions when and as they are made. The body responsible for enforcement of the measure will be the Argentine tax office La Administración de Ingresos Públicos.



Talking to local press Mr. Alfonsín said: "It seems incredible that no existing technology is used to prevent possible cases of tax evasion or avoidance," and added that "one of the fastest growing economic activities has been gambling since 2003. In the province of Buenos Aires growth stands at 306 per cent while in the City of Buenos Aires the industry has grown by 219 per cent."

The new laws, which also has the support of fellow deputies Margarita Stolbizer, Mario Negri, Manuel Garrido and Ricardo Buryaile, are also designed to meet the requirements set out by the Financial Action Task Force (FATF) – an inter-governmental body aimed at develop policies to combat money laundering and terrorism financing.

Alfonsín has long been lobbying for change to Argentina's gaming laws. In 2013 he publicly criticised Christina Kirchner in a statement for the rapid spread of bingo halls and casinos during her term of office. Then in April this year he demanded that the government put an end to the 'indiscriminate' granting of casino and gaming licences.

Chile

A court in Chile has put the tender process for the casino in licence in Chillán on hold after Argentine Spanish company Bold-Peralada appealed to a local court claiming that it had been fraught with irregularities. The legal challenge claimed that the Regional Government had gone beyond its remit when awarding it zero points while awarding 300 points to Marina del Sol. Lawyers acting on behalf of the company claimed that the Regional Government had no right to award points on the basis of technicalities.

Panama gaming sector shows further growth spurt

PANAMA

The gaming market in Panama is showing signs of continued growth according to figures released by the Association of Gaming Administrators (ASAJA).

Currently there are 18 fully fledged casinos and 26 slot parlours nationwide. The boom has coincided with Panama's growing tourists industry and subsequent building boom – the largest of its kind in the history of Latin America.

In the past the industry has come under criticism as casinos have failed to attract tourists, attracting in the main locals instead, with the press being particularly critical of the fact that the industry was attracting locals from a lower socio economic back-

ground. By 2005 it was estimated that 85 percent of all those who visited casinos in Panama were locals. However, according to the latest statistics, although locals still make up for the majority of the market tourists now attracts a total of 35 per cent of the casino market and 65 per cent of the casino market is made up middle class or high income earners.

The market has also expanded significantly over recent years. In 2012, according to the ASAJA there were 5,500 Type A slot machines located in slot parlours with a further 4,600 located in casinos. Today this number has increased to 7,300 and 5,400 respectively. In Panama type A slot machines are those which do not have a payout ceiling.

This year has also seen the opening of one of the largest casinos in the city the hotel Sortis with three new large scale casino openings on the way later on this year all in the capital: the Aloft Hotel (Big Seven Casino), the casino at the Hilton (Ocean View Casino) as well as the Trump hotel, which is scheduled to open a month's time.

According to the latest statistics, annual earnings for the casino industry in Panama stood at U.S.\$ 105m while slot parlours earned US\$224m last year with the industry employing 7,000 people. Antonio Alfaro, President of ASAJA said that his organisation was urging the government to put in laws into place which would protect locals from gambling addiction. This would be via a new law which would stipulate that no slot parlour could be located within 10 km from Panama's poorest neighbourhoods.

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EVOLUTION GAMING HA ANUNCIADO QUE MECCA HA

lanzado Evolution Live Roulette dentro de su oferta de Bingo Mobile. Según Mecca, Mobile es su vertical de mayor crecimiento porque la mayoría de las adquisiciones de jugadores nuevos de la marca provienen de este canal.

EL REGULADOR DE JUEGOS DE AZAR LETÓN (IAUI) HA

elaborado una lista negra de sitios de juegos de azar sin licencia, en la que se incluyen PokerStars, Full Tilt, Bet365, Unibet y 888.com, y pide a los proveedores de servicios de Internet que los bloquee para los jugadores letones.

INSPIRED GAMING GROUP (INSPIRED), EL PROVEEDOR

líder de juegos de videolotería basados en servidor y productos de deporte virtuales, hoy ha anunciado que ha firmado una extensión de cinco años de su asociación a largo plazo con William Hill para suministrar máquinas de juego de videolotería basadas en servidor y deportes virtuales.

EL GOBIERNO DE CHIPRE HA ANUNCIADO QUE LOS

planes de emitir la primera licencia de la historia para un casino resort del sur de la isla de vacaciones mediterránea, avanzan a buen ritmo y que debería tardar menos de 12 meses.

BCN WORLD CADA VEZ ESTÁ MÁS CERCA DE LA

Costa Daurada. El gobierno ha admitido cuatro de las cinco solicitudes de formar parte del macrocomplejo de juegos y entretenimiento en el Turístico Recreatiu Centre (CRT) situado entre Salou y Vila-seca.

EL TURNING STONE RESORT CASINO EN VERONA,

Nueva York, ha actualizado toda su planta de máquinas de juego de 2100 juegos combinando los aceptadores de billetes MEI SC Advancev de CPI y EASITRAX Soft Count. La instalación se completó a principios de año, formando parte de una inversión de 15 millones de dólares hecha por la Oneida Indian Nation para actualizar todo el sistema operativo del casino y adquirir máquinas de juego con dinero en efectivo nuevas.

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EL CROWN RESORTS DEL MAGNATE AUSTRALIANO

James Packer ha pagado 280 millones de dólares australianos (260 millones de dólares estadounidenses) para tener un lugar privilegiado en Las Vegas Boulevard en un concurso público, y de este modo resquebraja el mercado de casinos americano de una vez por todas. El multimillonario y propietario de Crown Resorts se ha unido con Andrew Pascal, el anterior presidente de Wynn Las Vegas, en una aventura conjunta avalada por Oaktree Capital Management.

PARADISE CO. Y EL SOCIO JAPONÉS SEGA SAMMY

Holdings están preparados para abrir nuevos caminos en octubre en el primer casino resort integrado del país. Su proyecto Paradise City cerca de Incheon, el principal aeropuerto de Corea del Sur, debería abrir a principios de 2017, un año antes de que lo haga un proyecto similar planeado por la empresa con sede en EE. UU., Caesars Entertainment y Lippo de Hong Kong.

FEARS OF PARAGUAY STATE-CONTROL

There is growing speculation that the Paraguay government is now seeking to place the casino industry in state hands.

Paraguay - Government

Despite some recent positive developments in the casino industry of late, including the announcement of a major new opening in the next months and stricter laws when it comes to tackling illegal gaming, there is growing speculation that the Paraguay government is now seeking to place the industry in state hands.

Fears were sparked by Head of The Paraguayan Gaming Commission (CONAJZAR) Javier Balbuena after a meeting with President Horacio Cartes. After the meeting Mr Balbuena spoke of "changing the current model and giving the State major control over gaming income in order to increase profits and increase state investment in social spending."

In response to these statements members of the local gaming industry have warned that the state function is not to "participate" in gambling at all. Rather interest groups have warned that the government's role is simply to "create conditions for the private sector contribution to the state,



through the implementation of fees and taxes." They also argue that increasing state control could also jeopardise the industry which is now a major employer and could also have a negative effect on the tourist industry.

Illegal gaming is also widespread and local businessmen have warned that "greater state involvement" is not a guarantee of seriousness or formality." On the contrary, more state control could, they say, would only lead to the increase of the already "insatiable greed of our politicians."

While gaming has proliferated rapidly over recent years in Latin America, the local industry in Paraguay remains small scale. Although there have been a number of attempts of recent years to open up the market a number of bidding processes have been cancelled over claims of irregularities and the casino industry remains underdeveloped with little foreign investment in the industry.

Paraguay

This year will see the opening of a major new casino in Encarnación – Paraguay's capital. The six million dollar hotel and casino will, according to local government officials, increase tourism to the city and coincides with a number of new hotel openings of late as the local tourist industry continues to improve. The casino will compete with other casinos on the nation's borders specifically the casinos on Argentine soil in the province of Misiones. The casino will also be aimed at enticing Brazilian punters from across the border as for now casino type gaming is banned nationwide.

Plans progressing to monitor slots and Quinela in Mendoza

ARGENTINA

The government of Mendoza has announced that it will launch two separate tender processes this month: one for companies interested in providing online monitoring control over slot machines and the other for the online capture of Quinela bets.

The announcement by the Provincial Institute of Games and Casinos of Mendoza (IPJC), opened the tender processes up in August and will give the winning company in both cases just over a year in which to comply.

The announcement comes at a time when gaming is continuing to boom in the province with the industry becoming an increasingly vital source of tax income especially for the Health Sector. Located in the western central

part of Argentina the province of Mendoza is the heart of the winemaking industry and is one of Argentina's most popular tourist destinations. New controls will apply to a total of 2,500 machines operating in the ten privately owned and run casinos as well as the 3,700 slot machines located in the seven private casinos in the province.

According to official statistics, in 2013 slot machines in casinos generated total revenue of around \$1.8bn pesos (US\$220m) a year. Of this around 8 percent is earmarked for the health service. Plans to connect all slot machines to a centrally controlled server means that a total of 6,200 slot machines operating in both privately owned casinos and state owned casinos will be monitored online with the win-

ning bid for Quinela worth an estimated 348m pesos (US\$42m). Meanwhile, the bid for the online monitoring of slot machines will be worth around "half that amount" according to the President of the institute, Carlos Bianchinelli.

Ivisa, the company currently in charge of running quinela in the province, has a long history in the business locally and is linked to popular betting game "Telekino." The company has run the game for the last fifteen years and the IPJC had previously planned on renegotiating the contract. However, the offer will now be offered to other operators.

The move to monitor slot machines online comes after some controversy after tighter controls were called for by the local government with calls for more transparency when it came to the local government and its relationship with local gaming company Mendoza Central Entertainment (MCE).

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Tel.: +49 - 8165 - 647 89 0
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CHILE – SENATORS ATTEMPT TO EXTEND LICENCES

In what could be their last chance, lawmakers in Chile are attempting to extend the municipal casino licences for another 15 years.

A new bill introduced by Senators Francisco Chahuán, Carlos Bianchi, José García Ruminot, Ricardo Lagos Weber and Iván Moreira asks Chile's President Michelle Bachelet to put into law legislation which would allow the municipal governments an extension of their licences.

An extension is justified, they argue, because it would give local governments the time to plan and implement new ways to make up for the inevitable shortfall in tax income that will be lost once the casinos come under the supervision of the Chilean Gaming Control Board. However, the Senators face an uphill struggle as similar legislation was strongly rejected only in March in Chile's Lower House. This was after lawmakers claimed that it was unfair and that municipalities with local government run casinos had abused their rights.

The new law also seeks to protect the jobs of workers currently employed by the municipal casinos should the casinos eventually come under the control of private operator. According to the new bill, 9,000 workers are employed by the municipal casinos which also provide an additional 4,000 indirect jobs. In 2013 an agreement was made both in the Lower and Upper House which would have ensured that new operators would be legally obliged to hire at least eighty per cent of workers currently employed by the municipal casinos. However, no such agreement has been made under the present administration.

LATAM – GLI OPEN LATAM QUALITY COMPLIANCE UNIT

GLI has created a new dedicated unit within its Quality Assurance Department (QA) at its world headquarters in New Jersey. The new Latin America QA and Technical Compliance unit will focus exclusively on GLI's support for regulators and supplier clients throughout Latin America and Spanish-speaking jurisdictions.



GLI's Senior Director of Quality Assurance Diana Golda has been named to oversee the new unit. Longtime Technical Compliance staff member Maria Alessi has been named Manager of the dedicated team.

"There is a critical need for us as a company to deliver accurate and timely certifications and regulatory support for our Spanish-speaking clients in the region. We have been strongly committed to the gaming and lottery industries in Latin America for nearly two decades, and we will always do everything we can to provide the value, quality and services necessary for our clients to reduce risk and increase profitability. Establishing this new group fulfills on that promise," said Christine Gallo, Vice President of Technical Compliance & Quality Assurance (pictured).

"GLI is so much more than just testing, and with the creation of this Quality Assurance unit, we prove once again we are prepared to respond to the needs of Spanish-speaking suppliers and regulators. This unit is comprised of native Spanish-speaking personnel who speak the language and understand the culture and the needs of the region's jurisdictions," said GLI Director of Latin American Development Karen Sierra-Hughes.

GAMING BOARD HAILS NEW CHANGES

Wide sweeping changes to Colombia's gaming market look increasingly likely with online control and monitoring of slots

Colombia – Legislation

A wide sweeping change to Colombia's growing gaming market looks increasingly likely with the online control and monitoring of all slot machines now scheduled for April 2015. As reported in June, the connection of all slot machines online was first considered in 2008 when Colombia changed its gaming laws and was then passed into law in 2010. However, Colombia is the only country in the region which has legislation which allows for online monitoring of slot machines but is yet to put the law into practice. While the gaming board has been quick to point out the benefits an online monitoring of the industry local operators are less than keen saying that the it could cost the industry almost as much as US\$350m.

The head of Colombia's gaming control board Coljuegos, Cristina Arango, highlighted the positive impact the new online system would have on the industry. "The information which is going to be gathered at a central server is very important as up until now the casinos sector has reported its operational results made on an assumed basis. That is to say that the amount which has been destined for the health sector has depended on the number of machines that are in operation independently from the money which is paid into them. By connecting them online, we will profes-



sionalise the sector, increasing dependability and operational standards will improve."

The online monitoring of slots will involve a total of 54 operators and 396 gaming operations in all. According to the schedule now set out, operators must have all gaming equipment connected to the centrally controlled server but will be allowed to connect their gaming equipment gradually over a period of 15 months. However, operators will have until September 2015 to demonstrate 100 per cent compliance with the new regulations.

Although the new system might bring a greater level of accountability to the industry, local operators have been less enthusiastic with the move which they say will come with a multi-million dollar price tag. According to Rocío Albornoz Gaitán head of the Federation for Casinos and Bingo Businesses (Fecoljuegos) many slots currently in operation date back to before 2004. These would not be able to be adapted to the new system meaning that up to 30,000 slots would have to be replaced. Replacing these machines would cost an estimated US\$ 330m while implementing the necessary software in place for existing machines so that they may comply with the new online system could cost a further US\$17.5m.

Argentine politician calls for ban on ATM machines in casinos

ARGENTINA

National Deputy Guillermo Durand Cornejo (PCP-Union Pro Party) along with his fellow Deputies Federico Pinedo and Ricardo Spinozzi have presented a new law into the Lower House which could have important consequences for the gaming industry in Argentina.

Together the lawmakers have called for a ban on ATMs in casinos and in the vicinity of casinos, bingo halls and racetracks. The lawmakers have introduced a new bill which would ban ATMs from being within 300m radius of all gaming betting establishments as well as new laws which would limit opening hours.

The bill proposes that the National Lottery should be responsible for putting the new law into effect. Deputy Durand Cornejo proposals are aimed at guaranteeing the "right to health" and aimed at "diminishing the frequency" those addicted to gambling play.

When introducing the new bill, Durand Cornejo said that in Argentina there was a "direct link between the social economic crisis, the proliferation of drugs, casinos, slot machines and the growth of this addiction which can be equated with alcoholism or drug addiction." Lawmakers are also aiming at reducing opening hours in order to reach the same goal with Deputy Durand Cornejo claiming that the game rooms in Argentina are "usually open 24 hours 365 days a year." A reduction of opening hours could, he states, alleviate the problem.

Calls for new rules that would safeguard locals from gambling addiction are gathering momentum with cross party consensus growing on the issue nationwide. In the city of Gualaguaychú in the province of Entre Rios lawmakers met last week to discuss plans which would limit the amount of investment in casinos in the city and would restrict opening hours as well.

Puerto Rico

The President of the Commission for the Development of the Tourism Industry, Ángel García Matos, has announced that a raft of new games to enable casinos in Puerto Rico to remain competitive. He also announced that the casino in the Mayagüez Resort Hotel would remain open. Mr. Matos emphasised that new up to date regulations were needed for the industry. "I personally visited and held a meeting with the owner, who told us first hand of the challenges facing the casino when it comes to maintaining a 24-hour operation," he said. He went on to say that the new casino will, thanks to recent efforts made by the management, no longer have to lay off 90 employees, which had seemed imminent due to a fall in visitor numbers.

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MEDELLIN IN ALL THE RIGHT PLACES

AGI Gaming Colombia, a subsidiary of Novomatic Group, has reported great success following installs at two Colombian casinos owned by Sociedad Promotora Turística de Medellín; Gran Casino Medellin and San Remo Casino.

Novomatic has installed games such as Coolfire I, Coolfire II and Novoline Interactive platforms with a variety of cabinets that range from the classic Gaminator to modern upright machines such as the Novo Super-Vision or the revolutionary Dominator, to elegant Novo Star SL Slant Tops, offering the guests a sophisticated mix of games. The products at the new San Remo Casino already include the brand new Novostar VIP slant top with extra-large 46ins.-screens and its Crown VIP chair.

The first operation, El Gran Casino Medellin, is located in the so-called 'Golden Mile' in the most exclusive district of Medellin and is characterised by conveniently open spaces, premium equipment and a welcoming and friendly ambiance for its guests. It comprises a gaming offering of 10 live games and 156 video slots, among which are 60 Novomatic machines that account for 39 per cent of the game floor.

In May 2014 the second operation, San Remo Casino, was opened in the district of Aguacatala. With its lighter, modern and diversified concept and premium entertainment offering, it appeals primarily to an audience of the younger generation. It offers 12 live tables and 124 video slots, of which 46 are Novomatic machines (37 per cent of the slot floor).

In 2011 Novomatic's takeover of Octavian International gave it access to the former Colombian Octavian sales and service entity which was subsequently renamed AGI Gaming Colombia. With headquarters in Bogota, it offers a broad product range for the Colombian market

and first class sales and after sales, as well as technical support for the customers and partners in the region.

The Sociedad Promotora Turística de Medellín was founded on May 11, 2004 in Medellín, Colombia, and represents the realisation of the dreams of a group of investors who aimed to create new jobs in a city that is subject to constant development. Today the company employs some 200 staff and is renowned as a

"The gaming industry in Colombia is fortunate to be able to rely on professional and dynamic operators such as the Sociedad Promotora y Turística."

business that commits to its social responsibilities, the individual development of its employees and premium customer service.

The business relations of AGI Gaming Colombia and the Sociedad Promotora date back to 2008 and are based on the excellent experience the operator enjoyed with the mathematical concepts of the Novomatic products: this at a time when they were still widely unknown in the Colombian market. In the meantime it has evolved into a mutual strategic partnership with Novomatic products being strongly represented in the casinos of the Promotora Turística and

consistently finding great favour with their guests.

Novomatic has developed its NOVO LINE Novo Unity II range of products. Their unique asset is a multi-game functionality that eliminates the boundaries between electronic live games and video slot gaming. At a single player terminal, the guest can choose to play a whole range of electronic live games as well as a video slot offering of Novomatic C all-star-gaming hits. These games score with their highly popular free games. The majority of the games feature free games that can be re-won during the feature.

The latest products such as the NOVOSTAR VIP and the Dominator cabinets offer a highly attractive style, ergonomic design and the new NOVOLINE-based games that guarantee game thrills and great wins.

Juan Henao, Managing Director of the Sociedad Promotora y Turística, commented: "As an operator we constantly thrive for a greatly varied gaming entertainment offering for our guests. We set great store by state-of-the-art technologies, comprehensible concepts and innovative products, both in terms of aesthetics as well as in terms of their winning chances. All this is completed by premium service for our guests."

Manuel del Sol, Managing Director of Gaming Colombia, added: "The gaming industry in Colombia is fortunate to be able to rely on professional and dynamic operators such as the Sociedad Promotora y Turística. We would like to use this opportunity to say 'Thank you' for their trust in Novomatic as the best represented brand in their casinos and we congratulate the Sociedad Promotora y Turística on their beautiful new San Remo Casino."

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EIN CHILENISCHES GERICHT HAT DAS

Lizenzvergabeverfahren für das Kasino in Chillán gestoppt, nachdem das argentinisch/spanische Unternehmen Bold-Peralada Beschwerde vor einem lokalen Gericht eingereicht und behauptet hat, dass es zu Unregelmäßigkeiten gekommen sei. Das Unternehmen beklagt, dass die regionale Regierung ihre Kompetenzen überschritten habe, als sie ihm null Punkte und Marina del Sol dagegen 300 Punkte gab.

EINE GRUPPE NATIONALER ABGEORDNETER MÖCHTE

neue gesetzliche Regeln einführen, um dafür zu sorgen, dass Geldspielautomaten weitaus effizienter überwacht und besteuert werden können und um die rasante Verbreitung des Glücksspiels in ganz Argentinien zu stoppen.

TROTZ EINIGER POSITIVER ENTWICKLUNGEN IN DER

Kasinobranche in jüngster Zeit – darunter die Ankündigung einer größeren Neueröffnung in den nächsten Monaten und strengere Gesetze in Bezug auf das illegale Glücksspiel – häufen sich in Paraguay Spekulationen über eine Verstaatlichung der Branche.

IN DIESEM JAHR WIRD EIN GRÖßERES NEUES

Kasino in Encarnación, der Hauptstadt Paraguays, eröffnet. Das sechs Millionen Dollar teure Hotel und Kasino sowie die gleichzeitige Eröffnung neuer Hotels werden, laut Beamten der lokalen Regierung, den Tourismus in der Stadt fördern.

DIE VERWALTUNG DER ARGENTINISCHEN STADT

Mendoza kündigte für diesen Monat zwei separate Ausschreibungsverfahren an. Eines davon richtet sich an Unternehmen, die Dienstleistungen im Zusammenhang mit der Online-Überwachung von Spielautomaten anbieten, während es sich bei der zweiten Ausschreibung um die Online-Erfassung von Toto-Spielen handelt.

MIT DER JETZT FÜR APRIL 2015 GEPLANTEN ONLINE-

Kontrolle und –Überwachung aller Spielautomaten wird eine umfassende Änderung auf dem Wachstumsmarkt des Glücksspiels immer wahrscheinlicher.

DER SÜDAFRIKANISCHE GLÜCKSSPIELANBIETER Sun

International freut sich über die Neuvergabe seiner Lizenz für das nahe Pretoria gelegene Morula Kasino/Hotel in Mabopane an Menlyn Maine durch den Gauteng Gambling Board.

MIT DEM CASINO MEDITERRÁNEO BENIDORM WURDE IN

den Ferienresorts Marina Baixa das dritte Kasino der Gruppe eröffnet. Die erste Phase umfasste das Erdgeschoss, und die erste Etage, die für das Kasino vorgesehen ist sowie einen Mehrzweckraum, der für verschiedene Events und Ausstellungen konzipiert ist.

DAS UNTERNEHMEN GAMEACCOUNT NETWORK HAT

den Start von China Shores online in den Vereinigten Staaten im Rahmen seiner strategischen Partnerschaft mit Konami Gaming mitgeteilt. China Shores steht über Foxwoods.com zur Verfügung und bietet Spielern das Erlebnis des Originalspiels, das online für Simulated Gaming übersetzt wurde.

DAS FOXWOODS RESORT CASINO IN CONNECTICUT

wird in Zukunft die mobile Concierge-Plattform von Bally Technologies nutzen, um seinen Kunden eine funktionsreiche mobile App zu bieten.

GAUTENG BOARD SEAL MENLYN MOVE

The Gauteng Gaming Board in South Africa has approved the relocation of Sun International's casino licence to Menlyn

South Africa - Operations



South African operator Sun International is delighted at the approval by the Gauteng Gambling Board to permit the relocation of its licence at Morula Casino and Hotel in Mabopane to Menlyn Maine, near Pretoria.

Sun CE Graeme Stephens said that the decision, following a prescribed public participation process in terms of the Gauteng Gambling Act, would enable the company to build a R3-billion urban entertainment destination at Menlyn Maine.

"The relocation of the licence makes a lot of sense for everyone. Morula Casino and Hotel has for some time experienced a decline in revenues due primarily to its relatively inaccessible location and the growth of non-casino gambling activities in its catchment area," he explained. "Menlyn Maine is in an area that is closer to source markets and is well serviced by highway access. This will maximize the potential of the licence for all stakeholders, including employees, Sun International shareholders and provincial and national government in terms of gambling taxes. Importantly, Sun International's "Time Square at Menlyn Maine" will act as a major catalyst for the entire precinct and will bring to the area an urban entertainment facility on a scale that it warrants and deserves, to serve both local residents and visitors."

The company expects that in addition to significant job creation, the development will also generate considerably more revenue for both provincial and national government by way of taxes and gaming levies. It is anticipated that some R1.7bn in gaming taxes and VAT would be generated in the first five years of operation at Menlyn Maine and the total estimated revenue to Government from the project over a five year period is estimated at R2.7bn. The benefit for the City of Tshwane is immense. It will gain a new integrated entertain-

ment destination, one that will become an icon for the City and complement its development and growth objectives.

The multiplier effect of the R3bn investment far exceeds the impact that is generated by the current Morula casino licence and Sun expects the project to deliver cumulative contribution to GDP of as much as R19bn during construction and over the first five years of operations.

A primary concern for Sun with relocating to Menlyn Maine is for existing staff at Morula, and the impact the move could have on the surrounding communities of Mabopane and Soshanguve. The staff will be offered employment at the new facility, with appropriate transport arrangements implemented. As regards the community, the company will be establishing a Hotel School and Gaming Academy at Morula through a collaborative venture with local tertiary institutions, existing hotel schools and an international university.

Time Square at Menlyn Maine will offer a 5-star hotel and conference centre with 100 luxury rooms and 10 suites to cater to the diplomatic travel market, support the business traveller, encourage overnight stays in Tshwane and accommodate gambling patrons over weekends. It will also boast a world class indoor entertainment arena seating 8,000 people for international and local entertainment, concerts, sports events and provide a much-needed convention and exhibition facility for Tshwane residents.

In addition to the most recent innovations in gaming, the casino will open with 2,000 slot machines and 60 tables. Other attractions will include a diverse range of retail shopping, bars and restaurants that will draw visitors from around the Province, with parking for 2,785 vehicles.

GTECH and IGT merger to see creation of British company

UK

International Game Technology has received early termination of the required waiting period under the Hart-Scott-Rodino Antitrust Improvements Act of 1976 (HSR) with respect to the company's previously announced acquisition by GTECH S.p.A.

On July 16, IGT announced that it had entered into a definitive merger agreement with GTECH S.p.A. for the acquisition of IGT by GTECH for \$6.4bn, comprised of \$4.7bn in cash and stock and

the assumption of \$1.7bn in net debt. Under the terms of the transaction, IGT and GTECH would combine under a newly formed holding company organised in the United Kingdom (NewCo).

Termination of the HSR Act waiting period satisfies one of the conditions required to finalise the acquisition. The transaction is subject to additional conditions, including the receipt of foreign antitrust clearances, required gaming approvals and approval

by the IGT and GTECH shareholders. As previously announced on July 16, 2014, GTECH and IGT entered into a definitive merger agreement pursuant to which GTECH will acquire IGT in a transaction valued at \$6.4bn, comprised of \$4.7bn in cash and stock, and the assumption of \$1.7bn in net debt. The transaction, which has been approved by the boards of directors of both companies, is currently expected to be completed in the first or second quarter of 2015. The transaction is subject to the receipt of required regulatory and gaming clearances, approval by each of the GTECH and IGT shareholders, and other customary conditions.



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EVOLUTION GAMING TEILTE MIT, DASS MECCA

Evolution Live Roulette als Teil seines Bingo-Mobile-Angebotes auf den Markt gebracht hat. Laut Mecca ist Mobile das Produkt mit dem schnellsten Wachstum, bei dem die Mehrheit der neu hinzugewonnenen Spieler über diesen Weg kommt.

DIE LETTISCHE GLÜCKSSPIELAUFICHT (IAUI) HAT

eine schwarze Liste nicht lizenzierter Glücksspiel-Websites erstellt, in der auch PokerStars, Full Tilt, Bet365, Unibet und 888.com genannt werden und fordert Internet Service Provider dazu auf, den Zugang zu solchen Websites für lettische Spieler zu blockieren.

INSPIRED GAMING GROUP (INSPIRED), DER

führende Anbieter von Produkten in den Bereichen SBG Video Lottery und Virtual Sports hat jetzt mitgeteilt, dass das Unternehmen seine langfristige Partnerschaft mit William Hill im Zusammenhang mit der Lieferung von serverbasierten Video-Lotteriespielen und Virtual Sports um weitere fünf Jahre verlängert hat.

WIE DIE REGIERUNG VON ZYPERN MITTEILT,

verläuft der Prozess der erstmaligen Vergabe einer Lizenz für ein Kasinoressort im Süden der Ferieninsel im Mittelmeer planmäßig und wird nicht länger als 12 Monate in Anspruch nehmen.

BCN WORLD IST EINEN SCHRITT NÄHER ZUR COSTA

Daurada. Die Regierung hat vier der fünf Bewerbungen für die Beteiligung am Freizeit- und Glücksspiel-Makrokomplex im Turistic Recreatiu Centre (CRT) zwischen Salou und Vila-seca bewilligt.

JCM INNOVATION CORP., EINE Tochtergesellschaft von

JCM American, die ihr Geschäft unter der Bezeichnung JCM Global betreibt, hat einen Vertrag über den Erwerb der FL Group, die ihre Geschäfte unter der Bezeichnung FutureLogic führt, von American Capital unterzeichnet.

DAS TURNING STONE RESORT CASINO IN VERONA,

New York, hat seinen gesamten Automatenbereich mit 2100 Spielen mit CPIs Kombination aus MEI SO Advance Banknotenprüfgeräten und EASITRAX Soft Count erweitert. Die Installation wurde Anfang des Jahres im Rahmen einer Investition von \$ 15 Millionen durch die Oneida Indian Nation abgeschlossen, um das gesamte Betriebssystem des Kasinos zu erweitern und neue Cash-Play-Automaten zu erhalten.

DER AUSTRALISCHE MOGUL JAMES PACKER'S

Crown Resorts hat 280 Millionen australische Dollar (US \$ 260 Mio.) für eine Prime-Site auf dem Las Vegas Boulevard gezahlt, um den amerikanischen Kasinomarkt ein für alle mal zu knacken. Der Milliardär, der Crown Resorts betreibt, hat sich mit dem ehemaligen Präsidenten von Wynn Las Vegas, Andrew Pascal, in einem von Oaktree Capital Management gestützten Joint-Venture verbündet.

PARADISE CO. UND DER JAPANISCHE PARTNER

Sega Sammy Holdings wollen im Oktober den Grundstein für das erste integrierte Kasinoressort des Landes legen. Ihr Paradise City genanntes Projekt in der Nähe des bedeutendsten Flughafens Südkoreas – Incheon – wird Anfang 2017 starten – ein Jahr vor einem in der Nähe von der Caesars Entertainment und Hong Kongs Lippo geplanten Projekt.

BENIDORM'S MEDITERRÁNEO OPENS

The Mediterráneo Casino Group has opened its third casino in Spain, the new Mediterráneo Benidorm on the coast

Spain – New Operations

The Casino Mediterráneo Benidorm has opened on the holiday resorts' Marina Baixa, marking the third casino in the group's portfolio.

The first phase has included the ground floor and the first floor, which will house the casino and a multipurpose room geared towards events and exhibitions. The casino opened its doors after only eight months since construction company, Convalsa, laid the foundation stone. However, the casino has actually been a long time coming, as the first project to bring gaming to Benidorm 36 years ago stalled at the last minute when Vila Joyosa was chosen as the location instead.

The second phase, which will be completed in October, will include a restaurant and a large terrace area. The casino hosts American roulette, Black Jack, Punto Banco, as well as a sports betting area with betting terminals, TV screens and an area to watch sports events. In total, 3,600 sq. ft. has been dedicated to gaming.

The first floor includes a dedicated poker area and the 'Art Casino', which will regularly host exhibitions of local and national artists, as well as all kinds of cultural activities such as poetry readings, book presentations and conferences. Under the



building is a three-storey car park where 500 vehicles can be parked.

President of Casino Mediterráneo, Jesus Alamo, said: "Bendidorm was missing a casino. It has brought 70 jobs with another 80 to follow."

The council think it's a great attraction for the town, particularly as it is the main tourist centre for the whole Community of Valencia, and will bring even more tourists to the coastal resort. Benidorm's Mayor, Agustín Navarro, who cut the ribbon at the opening ceremony, added: "We believe the casino can be a big boost to revitalise the Rincon de Loix. We needed a casino in Benidorm."

The Mediterranean Casino group already operates two similar facilities in Orihuela and Alicante. The Casino will open its doors every day of the week between 10 am and 3am (4am at weekends) and entry is €3. Original photo identification is required also, preferably a passport and strictly no under 18s are allowed in the location.

UK

The Casino MK in Milton Keynes saw five customers scoop a combined jackpot total of £74,746.89 last month at the UK's second Super Casino. With another double Jackpot win this month, one lucky MK customer went home with £19,038.41, followed by a jackpot of £19,605.25, just over 2 weeks later, scooping a massive £38,640.66 in less than three weeks. "July saw an impressive number of Jackpot wins" said Group Operations Director Austin Graham. "The wins come at an exciting time for The Casino MK as we look forward to our first birthday in September and with the re-launch of our innovative Aspire loyalty scheme at the end of July."

GameAccount Network launch Konami's China Shores online

UK

GameAccount Network has announced the launch of China Shores® online in the United States under its strategic partnership with Konami Gaming. Available on Foxwoods.com, China Shores offers players the experience of the original game translated online for Simulated Gaming.

In 2014, the GAN will bring five additional KONAMI games online to complement China Shores. The company will also offer its GameSTACK Internet Gaming System to land-based casino operators utilising the KONAMI

SYNKROS gaming enterprise management system.

KONAMI Casino Slot Games locally deployed within the Internet Gaming System will join those available from Ainsworth, Incredible Technologies, Scientific Games, Reel Time Gaming, Gamomat and Multimedia Games to create one of the widest selections of Class III gaming content available online in Adobe Flash and mobile client applications coupled to the Company's proprietary range of casino table games and multi-player skill-based games.

GameAccount Network recently deployed its GameSTACK Internet Gaming System in New Jersey's newly-regulated Internet gaming market. GameSTACK manages all customer registration, verification and banking and also offers a wide range of Casino Table Games, integrated Poker and diverse Casino Slot Games offered for real money regulated Internet gaming or virtual credits-based Simulated Gaming via PC & Mac desktop personal computers and mobile devices.

Compatibility with the exacting regulatory regimes of New Jersey, Spain, Italy and the UK have made the GameSTACK Internet Gaming System a world-class regulated, certified and compliant solution for land-based casino operators seeking to move online.

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Jurgen de Munck, CEO DRGT Systems and the Simplific-e Gaming team of Kurt Roman, Arnie Moffat, Nick Ferguson, and Charl Geyser.

SOUTH AFRICA – DRGT & WILD COAST WINTER GAMES

The recent Wild Coast Winter Games (WCWG) that took place in July at the Wild Coast Sun Casino and Resort in Port Edward, South Africa was an excellent opportunity for DRGT to present even more systems innovations.

Exhibiting together with African partner Simplific-e Gaming, DRGT has found success in Africa thanks to its 'Duma' wide-area progressive. The 'Duma' WAP was a joint development between Sun International, Simplific-e Gaming, Gold Club and DRGT has proven to be enormously popular. Des Whitcher, Director of Gaming and Slots at Sun International, said of Duma "It's one of the best performing products we have ever had on our casino floors."

At the WCWG Sun International announced they will be expanding this WAP from a current 180 slots to in excess of 200. This exciting news was topped by the Sun's announcement that the latest DRGT WAP called 'Sun Striker' will be launched by the end of Q3 of this year on an initial 170 slots across all of Sun International's South African casinos.

DRGT is making a real name for itself in the field of wide-area progressives, while DRGT systems are gaining quickly in popularity as well. This serverless technology is particularly beneficial to operators in Africa as all information is contained in the drSMIB within the slot machine, so a central server is not necessary. This saves greatly on investment and running costs and makes the system's management simple to control for operators. The ticketing features gained much interest at the WCWG, as DRGT can offer ticket promotions that include random, mystery or turnover-driven prizes alongside jackpots that are generated at each gaming machine individually. Adding the ability to issue and accept non-redeemable credits according to operator parameters, operators see they have so much more choice to offer their players when implementing DRGT.

The WCWG was abound with positivity for DRGT and this was summed up by the announcement of the adoption of its ticketing and gaming management solution by Boss Gaming for bingo sites in Port Elizabeth (Cleary Park) and East London (Owethu House) connecting an initial total of 328 bingo devices. Said Dave Winter for Boss Gaming, "With its plug-and-play scalability and the proven reliability of the platform with tickets or cards in such diverse environments, we are looking forward to unleashing the power of the DRGT ticket-in, ticket-out promotions capability to deliver a truly outstanding guest experience". Installation of the DRGT system with Boss Gaming will be completed around the end of September 2014.

PROFIT UP £19M AT ASTRA GAMING

Novomatic subsidiary, Astra Gaming Group has published a set of positive financial results for the year to December 2013.

UK - Suppliers

The Astra Gaming Group (the wholly owned UK subsidiary of Austrian Gaming Industries GmbH, (AGI) part of the Novomatic Group) has published its financial results for the year to December 2013.

The combined figures, which show a gross profit of £44m against total revenue of £87m, include operating profit of £1.8m. Profit before tax for the year stood at £29m, up from £10m in 2012. The growth was assisted during the year by a significant dividend from group undertakings.

Trading at the Group, which comprises Astra Games, Bell-Fruit Games, Empire Games, Gamestec, Mazooma Interactive Games and RLMS Sales has been described by the board as 'satisfactory'. However, it noted that profitability has come at a price due to poor margins and the restrictive nature of the market, especially in relation to Gamestec's operations in the pub sector.

Group CEO Zane Mersich summarised the performance, said: "We are pleased to be able to deliver a financial report that shows a healthy profit against a backdrop of continued tough trading and an industry business model that is at best challenging. While the Group is evidently in a strong position, it is vital that we remain mindful of the exigent conditions facing the industry as a whole and ensure that we constantly seek to improve all areas of our business."



Among the key factors that contributed to a testing period of trading in 2013 were closures and falling revenues from the arcade and bingo sectors. The pub segment, also, came under pressure during the period.

Commenting on the outlook, Mersich stated: "The expectation is that 2014 will deliver better results than those of the preceding year as the general state of the economy improves and we begin to see some clear sky between the present economic conditions and those of the past few years."

"Adult gaming centres and bingo halls will still have difficulty competing with the much harder gaming offerings in the licensed betting office and online sectors, with far higher stakes and prizes; however, they may begin to regain some lost ground and smart operators will look to invest in their businesses in earnest. This coming year may herald some signs of the smaller but healthier market alluded to in previous reports."

Greece

Greek gaming and lottery operator Intralot reported a strong start to 2014 with the first six months of the year seeing an increase of 26.3 per cent reaching €905.5m in the first half of 2014 compared to €717.2m in 1H13. On a constant currency basis, net of a negative FX impact of €63.8m, revenues reached €969.3m, posting an increase of 35.1 per cent year-on-year in the first half of 2014. EBITDA in the first six months where shaped at €89.5m, compared to €97.7m in the same period in 2013. Net of a negative FX impact of €8.6m, EBITDA reached €98.1m in the first half of 2014, an increase of 0.4 per cent compared to the same period of 2013.

Evolution Gaming launches Live Roulette first on Mecca

UK
Evolution Gaming has announced that Mecca has launched Evolution Live Roulette as part of its Bingo Mobile offering. Mecca is Rank Group's community-gaming brand for the British market with 96 bingo clubs in the UK and one of Great Britain's most popular community gaming websites with associated Bingo Apps. According to Mecca, Mobile is their fastest growing vertical with the majority of the brand's new player acquisitions coming from this channel.

Commenting on the new digital

pairing of Bingo with real-time, live dealer Roulette, Alex Franklin, Head of Games at Rank Digital, said, "RNG games have always been popular with our Bingo players, with up to 80 per cent of our casino games' revenue generated by Roulette. Now, with Evolution's world-class Live Roulette, we are able to offer our players a fun, fresh and exciting alternative to RNG Roulette for the first time."

Sebastian Johannisson, Evolution's Head of Account Management, commented, "Online and Mobile Bingo is a

very social and community-orientated game with players chatting with each other while they play. Live Casino also offers this element with the ability to interact with the dealer through live chat and to hear the dealer's verbal responses and game commentary. Added to that, Roulette is an endlessly exciting numbers-based game just like Bingo, so there's a great deal of synergy between the two games."

Johannisson added: "Mecca is looking to replicate the success achieved by Rank Group's Grosvenor Casinos, who have benefited from a strong contribution to revenue and profits from their own Evolution-hosted Live Casino games and dedicated environment at our Riga studios."

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**SOUTH AFRICA – ZITRO BETS ON AFRICAN MARKETS**

Zitro recently took part in South Africa's most important gaming event: The Wild Coast Winter Games. The international sales team described as very successful Zitro's staging at this singular event where, in addition to establishing commercial relations, an important social network is created through the parallel activities held around the show: golf tournaments, sailing regattas, etc. Zitro continues its successful path towards international expansion, taking Video Bingo to all four corners of the world.

CZECH REPUBLIC – OVER 1,000 ILLEGAL SLOT HALLS

The Czech Republic currently has at Least 117 illegal gambling clubs according to a new online map launched by the Association of Central Lottery System Operators (SPELOS).

The map was created in response to the growth of illegal gaming in the Czech Republic. SPELOS admits the figure is wildly under-exaggerated, with perhaps as many as 1,000 illegal gambling rooms in the country, according to SPELOS. Petr Creak, the association's Managing Director, said that the illegal market is booming in locations where Town Halls went too far with their regulation of legalised gambling and is rife in areas that have a supposed 'zero tolerance' to legalised gambling. "At the same time the districts are dealing with rising unemployment and crime, plus shortfalls in public budgets, explained Mr. Creak of a local government policy that is back-firing spectacularly.

The Finance Ministry registered 59,000 technical gaming devices at the end of March, a drop from 61,026 at the end of last year. Another 1,500 administrative proceedings are under way seeking to revoke the legitimate licenses of operators of VLT facilities, and this applies to over 10,000 current locations according to government figures.

LATVIA – REGULATOR BLACKLISTS ONLINE SITES

The Latvian gambling regulator (IAUI) has drawn up a blacklist of unlicensed gambling sites that includes PokerStars, Full Tilt, Bet365, Unibet and 888.com, and is demanding Internet Service Providers block them from Latvian players.

"Internet providers now have obligation to restrict access to illegal online gambling sites," said IAUI in a statement. In total, 20 online gambling sites have been singled out for the blacklist, with more expected to be added at a later date. The list has been drawn up in accordance with the country's 2011 Gaming Law which permits the blocking of unlicensed sites.

The regulator has also ordered financial institutions to block online gambling transactions between customers and offshore sites. Under the current regulations, for example, a company applying for a license is not permitted to be majority-owned by foreigners. The Latvian Gaming Business Association (LGBA) stated recently that Latvia's unlicensed online gambling market was worth €17.4m (\$23.3m) per year.

PREFECT SEIZES CONTROL OF B PLUS

The Prefect of Rome has exercised the terms of B Plus' gaming licence to appoint a new board of directors to run the firm

Italy – VLT Operations

In a notice to operators on August 7th, the Prefect of Rome ordered 'Extraordinary and Temporary Measures' as per the terms of its concession, to put the control of B Plus Giocolegal under state control. B Plus is now being administered by Dr. Vincenzo Suppa, Dott. Luca Cristini, Ing. Stefano Sestili.

The new directors issued the following statement: "As the new directors of B Plus, we would like to reassure you [the operator] that our primary goal is to ensure the continuation and development of activities, according to those plans of the Company, which has been shown over the years a great capacity to successfully carry out the business in which it is involved. We are confident that with the contribution of all the staff and our partners we will continue the journey of B Plus."

The move is in accordance with a recent law approved by the Italian Parliament, which states that if there is a pending judicial proceeding against a company holding a public license, such as a gaming license, the head of the anti-corruption office can require the head of the police to appoint commissioners in order to temporarily run the company. Dr. Vincenzo Suppa, Dott. Luca Cristini and Ing. Stefano Sestili have been



appointed to fulfil this role, preserving the assets of the company that has over 300 employees and generates over €1bn in tax for the state annually.

This new episode of the dispute comes after B Plus brought a claim against the Ministry of Home Affairs and the Prefect of Rome for €530m in damages due to the harm suffered by the company because of the measures previously adopted against them. A measure that has spectacularly back-fired.

It is clear that the state simply cannot afford to jeopardise the tax generated by B Plus. It is now increasingly likely that this temporary board of directors will re-assign the company's 12,000 VLT licences to other concessionaires, or to a potentially new concessionaire that would seek to acquire B Plus outright.

An acquisition would be favoured by AAMS, the Italian gambling regulator, and the Government, since it would avoid a new tender process and instead transfer a going concern, so that the purchaser might acquire only the assets of the company that are of its interest limiting the liabilities potentially transferred.

UK

London's Ritz Casino has won a court case forcing Noora Abdullah Mahawish Al-Daher to pay £1m plus interest from a gambling debt she owed with a judge ruling it was significant that she and another family member racked up losses of £3m in Las Vegas, just a few months later. Mrs Al-Daher, wife of the foreign minister of Oman, only paid half of her £2m total to the Ritz with cheques written on April 3 2012 dishonoured. She claimed that the casino had been 'under a duty of care' knowing she was a problem gambler. High court deputy judge Seys Llewellyn QC said though there was no legal authority that backed up her case and ruled in favour of the casino 'in the sum of £1m, as claimed.'

GTECH to provide Intelligen VLT system for Greece's OPAP

GREECE

GTECH S.p.A. has announced that its wholly-owned subsidiary GTECH Canada has been selected to provide its INTELLIGEN VLT Central Information System to Greek lottery operator OPAP, one of Europe's largest listed gaming companies. GTECH was chosen from among four vendors in an open competitive procurement process to provide OPAP's VLT Central Information System to monitor and control up to 35,000 VLTs in OPAP's new network.

GTECH is expected to connect INTELLIGEN to OPAP and concessionaire VLTs beginning in late 2014, following system certi-

fication by the Hellenic Gaming Commission.

"GTECH's extensive experience deploying large-scale, open standards-based VLT Central Systems for World Lottery Association customers around the world will help OPAP maximise the benefits of its new VLT program," said Walter Bugno, President and CEO, GTECH International. "INTELLIGEN's open-standards architecture and foundational features, including its integrated Responsible Gaming solution, will ensure the program's success and long-term sustainability, which ultimately benefits the people of Greece."

GTECH's Central Information System will provide OPAP with the ability to connect to the world's largest VLT manufacturers' machines through the Game to System (G2S) protocol; advanced network functionality, including multi-level jackpots and remote game downloading; an integrated responsible gaming solution; advanced business analytics; player services management; and proactive diagnostics.

OPAP became a valued GTECH customer in March 2014 when it selected GTECH as the strategic partner for OPAP's online sports betting operations in Greece. The solution was launched in three months, providing players with an optimal betting experience and allowing OPAP to benefit from the new technology in time for the 2014 FIFA World Cup.

Zitro bets on Las Vegas



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**CYPRUS - FIRST CASINO LICENCE IN 12 MONTHS**

Cyprus's government has stated that plans to issue a first-ever licence for a casino resort in the south of the Mediterranean holiday island is moving at pace and should take less than 12 months.

"Procedures are moving fast, and the aim... is to award a licence for an integrated resort casino in less than a year," government spokesman Nicos Christodoulides said in a statement. There have long been casinos in the Turkish Cypriot north, but opposition from the influential Orthodox Church and concerns among many Greek Cypriots about the social dangers of gambling have kept them out of the south. A plan approved by the cabinet last year foresees a single super-casino resort, intended to attract big spenders to a country more dependent than ever on tourism after its once lucrative banking sector was ravaged by the eurozone debt crisis.

State lawyers are fine-tuning the proposed legislation before it is submitted to parliament for approval, which is expected despite objections from the main opposition party Akel. It remains unclear when the first casino would actually open but the investor would get to choose the location of the complex.

The licence would be valid for 30 years, with the successful bidder getting an exclusivity agreement for 15 years, and the state would charge a 15 percent tax on gross income from gambling, Christodoulides said.

FRANCE - GTECH FORMS FRENCH SUBSIDIARY

GTECH is building direct contact and communication with French gaming operators through the creation of its new French subsidiary, GTECH France S.F.M.

Based in Paris and lead by its Director Marc Attal, GTECH France S.F.M. will directly provide sales, service and maintenance of gaming machines for the French gaming market.

The transition from GTECH's former French partner and distributor Ludi S.F.M. to the newly founded GTECH French operations is in progress, and will be seamless for customers.

GTECH has been doing business in France for 20 years, and has a solid understanding of the French market and its specific requirements. French operators will now directly benefit from GTECH's long-standing experience across all gaming segments and channels, including machine gaming, systems, interactive, sports betting, and lotteries.

Marc Attal, GTECH France S.F.M. Director, said: "GTECH's direct presence in France, one of Europe's biggest gaming markets, will bring even greater benefits to our customers. Sales Manager Didier Tomas and our team look forward to developing these relationships. We are grateful to our previous distributor in the French market, Ludi S.F.M., for two successful decades of business together, and wish them all the best and great success for the future."

**OPENING FOR RANK IN SOUTHEND**

A consortium has bought a huge area of Athens waterfront with plans to develop the area into a massive luxury resort

Greece - New Licences

Rank Gaming has earmarked September 18 for the opening of its Grosvenor Casino and Mecca bingo hall, which is set to open underneath the Park Inn Palace Hotel.

The £6m casino will boast a 100-seat poker room, along with slot machines, electronic gaming and a VIP room for high-stakes games. It will also have a restaurant and bar and a separate sports lounge with betting terminals, showing Premier League football, rugby, cricket, boxing and motor racing.

Tom Docherty, general manager of Grosvenor Casino Southend comments: "Southend is a popular seaside town that has a long established association with entertainment and innovation, mak-

ing it the ideal location for our new casino. We're confident that our new casino will attract both new and existing gamers into Southend with its state-of-the-art facilities and will grow further interest in the area as a key tourism destination.

"Through the opening of the casino, not only will we provide the local area with a stylish new venue where you can enjoy the thrill of gaming and live sports around the clock, but we will also support employment in the local area through the creation of over 100 jobs.

"We look forward to welcoming customers into the casino when the doors open in September bringing a new and exciting venue to Southend that's perfect for serious gamers or those just looking for a fun, alternative night out. We're hugely excited about our casino sports lounge and sports betting facilities as this will be only the second Grosvenor Casino in the UK to have such facilities and so the people of Southend are getting a unique Grosvenor experience."

Inspired sign five year extension with William Hill's 2,400 LBOs**UK**

Inspired Gaming Group (Inspired), the leading supplier of SBG Video Lottery and Virtual Sports products, today announces it has signed a five-year extension to its long-term partnership with William Hill for the supply of server-based video lottery gaming machines and Virtual Sports. The new contract also includes over 4,000 additional Eclipse cabinets in William Hill's 2,400 licensed betting offices.

The premium four-screen Eclipse cabinet comes complete with a digital topper and an interactive touch and swipe SmartDeck player panel with OpticV video buttons, in addition to the two primary HD widescreens. Inspired has already deployed over 10,000

Eclipse terminals in under 12 months with major operators including William Hill, Paddy Power and Betfred.

Luke Alvarez, Founder and CEO of Inspired, said: "William Hill is one of the world's leading gambling companies and it's a testament to the quality of Inspired's innovation and operational services that we have renewed and extended our long-term partnership for a further five years. We recently announced a new desktop and mobile content deal with William Hill's Online business and look forward to innovating across all of William Hill's channels to provide its players with more entertainment, whilst using new technology to identify and protect vulnerable players."

Gibraltar

NYX Gaming has been granted a Gibraltar license. The news follows the recent announcement that SNG Interactive, NYX Gaming Group's joint venture with Sportech PLC, has entered into an agreement to provide a new online gaming platform to the Atlantic City-based Resorts Casino Hotel following the November 2013 decision by the state of New Jersey to legalise online gaming in the State. NYX Gaming Group's expansion into regulated markets worldwide continues with the announcement that the group has been granted a Gibraltar B2B license to provide remote gambling services.



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**UK - ASPERS LAUNCHES NEW ASPIRE LOYALTY CARD**

Aspers Casinos has launched a revolutionary new loyalty scheme that will see customers rewarded with instantly transferable 'freeplay' balances for the first time ever in the United Kingdom.

Thanks to innovative new technology, which is exclusive to Aspers and developed in partnership with International Gaming, all four of the group's casinos are now able to offer customers instant point of play rewards, rather than having to rely on the traditional two-staged points to voucher based systems offered by other UK casinos.

Every time a customer plays on Aspers' slot machines and electronic roulette machines using an Aspire Xtra card, Freeplay Xtra will automatically be earned and added to the customer's balance. Once a minimum £5 rewards balance has been reached, the customer can instantly chose to add this to their gaming credit through advanced technology within the machines.

What's more, there is no limit to the amount customers can earn with the Aspire Xtra card with the opportunity to cash out anything from £5 to £50.

UK - CAESARS ENTERTAINMENT UK'S NEW CFO

Caesars Entertainment UK, one of the most established and innovative operators in the casino industry, appoints Alex Oswald as its new Chief Financial Officer.



Formerly Group Head of Planning and Analysis at Caesars Entertainment UK before joining the Aspers group as Head of Business Intelligence in 2013, Oswald has strong experience of the gaming industry.

Mr. Oswald says: "Caesars Entertainment enjoys a unique position in the UK casino market. We have the scale and authenticity that our Las Vegas credentials give us yet we're able to offer a 'tailor-made' service and environment in each of our venues. This enables us to offer the best gaming experience in the market. There is also a real commitment from the top to innovate and grow, I can't think of a more thrilling place to be in the gaming world and I'm excited by the prospect of driving the business forward."

Mike Rothwell, Caesars Entertainment UK CEO says: "Caesars Entertainment has always been a market leader, driving innovation and change to the casino and gaming world. I am focused on building the best team around me so that we can continue to deliver the very best experience for the discerning gamer."

FOUR BCN WORLD LICENCES PROGRESS

The BCN World project in Barcelona is progressing to the second phase with four applicants selected for the next stage

Spain - New licences

BCN World is one step closer to the Costa Daurada. The Government has admitted four of the five applications to participate in the leisure and gaming macrocomplex in the Turistic Recreatiu Centre (CRT), between Salou and Vila-seca.

Proposals submitted by companies Grup Peralada and Melco (both solo bids), and cooperations between Veremonte-Hard Rock and Melco-Veremonte, have advanced to the second round of the competition; and, if no last minute changes occur, the best tenders will move forward with four resorts, two short of the initial forecast.

The fifth proposal, wholly owned by Veremonte, has been dismissed: "for failure to demonstrate technical competence or five years experience in operating casinos," according to the Department of Finance. World BCN sources emphasise that this was a proposal made by the company Caesars Entertainment, but the Government insists that the bid only appears individually from the applicant Veremonte.

The choice of companies has been borne by the Tècnica Comissió Casino, which was responsible for analysing the documentation in accordance with the rules of the competition, along with objective criteria to check whether applicants meet the requirements to participate in the auction. This is the verification of the technical competence and experience in the management of

casinos over the past five years; and it also checks whether the investors have enough financial backing to meet a minimum initial investment of €300m for each authorisation and for hotels, commercial and recreational activities that complements the individual projects.

They officials also found that none of the participants has a criminal record or penalties for non-compliance in the prevention of money laundering, in addition to requiring that they meet their current tax obligations for the presentation of certificates and declarations.

The next step will be the second phase. It will start once the resolution is published with the final list of those admitted. This qualification will focus on the evaluation of the projects submitted. But this step will be subject to planning conditions. The stage ends, as provided by law, with the award of up to four casino licenses, one for each of the applications that have been submitted.

Legislative change has been one of the main requirements imposed by the main promoter of mega resort, Veremonte to maintain its investment in the Costa Daurada. Among other things, the amendment that this project hinged upon, was that the law should provide tax incentives for casinos at 10 per cent of GGR, a fact that has generated controversy in the gaming industry, in politics and in wider social circles.

Croatia Finance Ministry appoint NMi to perform games testing

CROATIA

NMi is proud to announce its accreditation by the Ministry of Finance to perform online and land-based games testing in the Republic of Croatia. As part of a continuous commitment to gain coverage in all regulated gaming markets across the world, NMi has been leveraging a long history of working with regulators and customers in the Balkans to expand services as needs present themselves. The Croatian approval follows the recent appointment of NMi by the Bulgarian State Gambling Commission (SGC) as one of their few approved labs.



for the NMi Gaming Division said "The Balkans are an important area for NMi, working with our customers, consultants, and government contacts to extend our reach in these key markets is why our customers align themselves with NMi to begin with"

Speaking after his recent contribution to the 7th Expert Convention in Serbia organised by JAKTA, Julian Borg-Barthet, Business Development Manager

NMi is an accredited gaming laboratory with almost 40 years serving the gaming industry in Europe, offering global service to their customers from labs situated across the world.

Cyprus

Despite speculation to the contrary, Buena Vista Hospitality Group has insisted that its interests in refurbishing Nicosia's Ledra Palace hotel do not amount to turning it into a casino. The company, which is planning a massive health resort in Kalavassos, said its preliminary proposals concern a joint venture with the Church, the majority shareholder, for the refurbishment of the hotel and operating it under Buena Vista's management. Local media reports had claimed that BVHG was intent on creating a casino at the site, but in response the Group said none of the hundreds of projects funded by the company include the operation of a casino.

CASINOS AUSTRIA SHAKEN BY LICENCE LOSSES GOES ON ATTACK

The €50m redevelopment of the Palais Schwarzenberg by Swiss Casino Baden and the Gauselmann Group has been challenged and delayed by Casinos Austria

Analysts in Austria have speculated that the failure of Casinos Austria to secure any of the three new casino licences from the Ministry of Finance, could have halved the value of the business. In the months prior to the decision to award the licences to Swiss Casino Baden and the Novomatic Group, an advisory committee of experts had consistently ranked Casinos Austria's bid as the outright winner. Not only was the Casinos Austria out in front, but it was forecast that the company would retain its monopoly position by winning all three licences.

It was with some shock that Casinos Austria received the news that it had failed to win any of the concessions. Two days before the Ministry made its decision, one Austrian analyst stated that the Gauselmann bid had been thrown out completely, only for its joint bid with Swiss Casino Baden to win one licence, with Novomatic racing in to win licences two and three. Upset at the decision, Casinos Austria has vowed to use every means available to challenge the Ministry of Finance's allocation of the licences.



The Austrian press has already leapt upon the story, claiming that Casinos Austria is likely to scale back its charitable donations and sponsorship of sports and good causes as a response to the snub from the Ministry of Finance; claims the company vehemently denies. However, more worrying are the issues Casinos Austria faces at the shareholder level as the calculated value of the company at €800m-lbn has been seriously shaken by the failure to win any of the new concessions.

Spurred on by the dire financial ramifications, Casinos Austria has temporarily halted the development of the Swiss Casino Baden/Gauselmann Group Casino at the Palais

Insight
AUSTRIA

Schwarzenberg, jeopardising the planned opening of the project on July 1, 2015. According to Hubertus Thonhauser, formerly of Casinos Austria International and now Chairman of Grand Casino Wien, the operating company two thirds owned by Casino Baden AG, the rest Germany's Gauselmann Group, said of the Casinos Austria's objection that it: "Serves only to gain time. We are sure to keep the license. It is really Much Ado About Nothing."

Casinos Austria's lawyer, Gabriel Lansky, maintains that the Swiss/German Group does not have a valid building permit to commence construction, a tactic Mr. Thonhauser describes as 'a delaying tactic.' Preparatory work for the casino continues, but construction work on the building, a palace that is part of the Liechtenstein Family Foundation of Schwarzenberg, cannot continue until the license is made final. How long that will take and whether the dispute goes before the highest courts in Austria, currently no one can estimate.

"Now everything is in a queue," stated the Foundation's lawyer Maximilian Schaffgotsches, angry over the opposition of Casinos Austria. "They have a monopoly-like thinking that's in the Stone Age. This is EU law."

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LOGISTICALLY SPEAKING

The Gauselmann Group's latest building project in Lübbecke Germany is the largest the company has ever undertaken and a hugely impressive feat of precision German engineering.

The biggest building project in the history of the Gauselmann Group – building a new logistics centre at their development and production location Lübbecke – took 15 months and is now finished. The Gauselmann entrepreneurial family celebrated the completion of the new logistics centre together with numerous political and business notables on 15 July 2014.

"Our development and production location in Lübbecke now features a state-of-the-art logistics centre that didn't take long to build" said the group's founder and host Paul Gauselmann in his speech, welcoming the 150 guests present. "It was a pleasure to watch the project's progress". The 151 by 74 meter centre is 17 meters high and has a usable area of 21,000 square meters – plenty of space for the Gauselmann group's innovative products. In the new centre there is storage space for logistics as well as additional space for development, production and service.

The group's founder considers the location only natural. After all, the group's home is in this region. This is where what was once a one-man operation started up. Initially it was based in Espelkamp, the production site in Lübbecke was built in 1977. The whole group is now a multinational selling its products all over the world. This investment in Lübbecke is a more than emphatic acknowledgement by the group of its roots.

The host also thanked everyone concerned for their active support. "Mastering this mammoth task in addition to the normal daily workload was a real challenge, only surmountable by a team effort. I'd like to express my sincerest thanks to all involved, particularly our colleagues and the 48 local companies who helped carry out the work".

There was plenty of praise from the guests of honour, too. Eckhard Witte, mayor of the city of Lübbecke, praised the entrepreneurial family's



loyalty to his city. "As a family-owned company the Gauselmann Group is not solely concerned with commercial success but also acts with strategic foresight, creates a lot of jobs and training opportunities and involves itself with its

"Family run companies such as the Gauselmann Group are the economic backbone of our region. Without them the region would be very much the poorer."

home region long term. It is a major prop of this city's economic strength". Espelkamp's mayor Heinrich Vieker agreed. "The Gauselmann Group ensures quality of life and prosperity in our home town. Building the new logistics centre is hence a trendsetting example for the entire region". Hartmut Heinen of the Economics and Finance department of the municipality of Minden-Lübbecke added that "family run companies such as the Gauselmann Group are the economic backbone of our region. Without them the region would be very much the poorer".

Thomas Niehoff, managing director of the Ostwestfalen chamber of commerce in Bielefeld,

In his welcoming speech group founder Paul Gauselmann thanked everyone involved in realising the building project.

pointed out the prevailing lack of trained staff in the area in his brief welcoming speech. "We must persuade new trainees and apprentices to come to live in the region and ensure they will want to stay here. The Gauselmann Group sets a good example here by promoting our region's attractiveness with a variety of training opportunities, entrepreneurial commitment and not least with the investment in this new logistics centre".

How important entrepreneurial commitment is to the strength of any business location was also emphasised by Dr. Günther Horzetzky, State Secretary of the Ministry of Economics of the province of North Rhine-Westphalia. "This region is one of the strongest economically in the entire province" he stated. He shovelled the first spadeful of earth on the site of the new centre in March 2013 together with Paul and Armin Gauselmann and mayor Eckhard Witte. "Only through investment this situation can be maintained in the long term. This is not an easy decision to make, particularly in difficult political times, such as those the Gauselmann Group is currently going through. To invest despite dark clouds being evident on the horizon takes courage and steadfastness. This earns the group our respect".

Jürgen Stühmeyer, sales director of the

Ceremonial opening. (Left to right). Thomas Niehoff, managing director of the Ostwestfalen chamber of commerce in Bielefeld, Dr. Günther Horzetzky, State Secretary in the North Rhine-Westphalia Ministry of Economics, Eckhard Witte, mayor of the city of Lübbecke, Karin and Paul Gauselmann, Heinrich Vieker, mayor of the city of Espelkamp, and Hartmut Heinen of the Economics and Finance department of the municipality of Minden- Lübbecke, officially opened the new logistics centre.

Insight
GAUSELMANN GROUP



Gauselmann Group, and Hans Martin Grube, managing director of adp Gauselmann GmbH, detailed the reasons for building the new centre and the benefits it brought. This expansion of works is intended primarily to optimise internal and external processes. To cut unnecessary expense and improve overall time management, all working procedures must be made as efficient

The new logistics centre replaces over 20,000 square meters of rented storage space in seven locations all over the Lübbecke region.

as possible and constantly optimised. The new logistics centre has a major role to play here. It replaces over 20,000 square meters of rented storage space in seven locations all over the Lübbecke region. This in itself greatly contributes to centralising logistics processes and cutting the costs of managing and using external storage space.

Process optimisation and cost savings must also be viewed from a political standpoint. The legal situation in Germany is uncertain. To ensure they are as well prepared as possible, the Gauselmann



Sven Brüninghoff (r.), managing director of the general contractor of the same name, ceremonially handed over the key to Paul Gauselmann

Group decided to concentrate on rationalisation on their core market in Germany after a phase of growth and expansion on that market. The group also intend to increase the foreign share of their business from over 40% currently to over 50%.

After the guests of honour had given brief speeches of welcome, Sven Brüninghoff,

managing director of the general contractor of the same name, ceremonially handed over the key. Brüninghoff realised the project together with about 50 regional handicraft and trade businesses. The new logistics centre officially opened for business after the ceremonial tape had been cut. All present were then invited to view the new premises.

In 2016, a theme park dedicated to Ferrari will open in the style of Abu Dhabi's Ferrari World.



RACING AHEAD IN BARCELONA

Advisory and Consultancy firm, Ficom Leisure, looks at the unfolding investment opportunities taking place in Spain at the BCN World leisure resort project on the outskirts of Barcelona

The Government of Cataluña, has admitted four of the five requests to participate in the tender to install and operate casinos in Tarragona, north of Barcelona, where the project is expected BCN World. These are the Catalan Casino Peralada Group, Melco Crown, BCN IR3 (a joint-venture between Veremonte the project promoter and Hard Rock International) and BCN IR2 (a joint-venture between Veremonte and Melco Crown).

The fifth proposal, presented by the promoter Veremonte as a stand alone proposal has been discarded, for not being accredited with the requested technical expertise and experience of five years in operating casinos; even though according to his boss Enrique Bañuelos this proposal included a partnership with Caesars Entertainment Group. (this partnership news is still to be confirmed).

The second phase of the tender will begin when the resolution of the four proposals accepted is published, and will end with the awarding of up to four casino licenses, one for each of the proposals accepted.

A month and a half ago the Government of Cataluña launched a public tender for the development and operation casino resorts in a recre-

ational macro complex, which included the possibility of up to six casino licenses in the Tarragona province, in the towns of Vila-Seca and Salou, about 80km south of Barcelona. July 25, was the deadline for the submission to the first stage of the tender.

The requirements to opt for the selection, are the technical expertise and experience in the

The investor groups are "reluctant" to announce investments until the Parliament has approved the law that would allow BCN World to start the development.

management and operation of casinos over the past five years and to provide evidence of having the financial resources for a minimum initial investment of €300m for each casino resort, requested for the operation of casinos and hotels and also for commercial and recreational areas or any activity that complements the project applicant.

Once the Government of Cataluña resolution is published with the list of the proposals admitted and when urban ordinance conditions are established, will begin the second phase of the tender, more as a full Qualifying compliance, which will evaluate the projects submitted. This second phase will end as provided by law, the award of



Christian Tirabassi,
Senior Partner at
Ficom Leisure

Ficom Leisure is an advisory and Consultancy Company specialised in the offline and online betting and gaming industry since 1996, with more than 65 years of combined experience and expertise. Ficom Leisure is active in all sectors of the international gambling industry, land-based gaming and gambling, igaming and online gaming, gaming advisory and gaming consultancy.

up to four permits gambling casinos, one for each of the applications accepted.

Regarding urban conditions, and as established by the Law 6/2014, on Tuesday July 29th, the Commission of Urban Planning and Catalonia agreed to begin the process of formulation of the Urban Master Plan (PDU) for reorganizing the field of tourism Recreational Center Vila-Seca and Salou in Tarragona. The aim is to allow the introduction of new activities related to business tourism, conferences, conventions, trade, gambling and gaming activities in the field of CRT. PDU is expected to be completed within a period not exceeding one year.

The investor groups are "reluctant" to announce investments until the Parliament has approved the law that would allow BCN World to start the development, upon regulating the urban planning approach and the gaming activity in the area.

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Content is still very much King

GameAccount Network's Daniel Lindsay explores the question of what exactly constitutes a successful casino slots game, both in the land-based and online gaming space.

It goes without saying that the online market for operators is exceptionally competitive and whilst it's a very large marketplace, it's important to remember what differentiates one product from another.

My experience in the land-based market, both in table games and slots, provided me with some really important insight, especially during the time when multi-game products were emerging and very quickly, players had a choice on a single machine of not only four or six games, but in some markets, with some products, they could choose to play one of over 50+ games – pretty overwhelming for the player: but did such a vast number of games drive incremental revenue or did the 80/20 rule apply?

Content (games), no doubt, is critical to player enjoyment; if you take the satellite TV market as a comparison, in many countries, there are only a couple of choices, so assuming the technology works and is reliable, then what sets one provider apart from the other – content! There's no point having the best system if the programmes you want to watch aren't available.

In the same way, what's absolutely crucial for online operators is the ability to engender a feeling of trust, integrity and familiarity with the games offered. In this way, when players scroll through what could be a very long list of games, they might be naturally drawn to games they have played before in the land-based environment, be that a street machine or a jackpot machine in a casino.

In my mind, the marketplace for content is cur-

rently split between the very well established land-based manufacturers who all have enormous experience and expertise in developing great games, proven performers, titles that players love and have played in a variety of gaming venues. Not necessarily big brands and licensed themes, but quite often proprietary products that are the result of years of Research & Development and some very clever peoples' work. Graphically, these games might not be anything like other

I'm often asked what makes a good slot game. I'm not a game developer, but clearly what's more important is that an operator can offer the right game mix on their virtual gaming floor.

gaming experiences such as Xbox and Playstation products, but what drives their success and the retention of players is the maths. On the other side of the marketplace is the plethora of companies who only produce games for the online market – their products also have their fans who love the modern graphics, sounds and gameplay.

I'm often asked what makes a good slot game, or which games are popular at the moment. I'm not a game developer, but clearly what's more important is that an operator can offer the right game mix on their virtual gaming floor. In that respect ensuring there is a range of products with a vari-

ety of features, game volatility, hit rates and interactivity is crucial. It's also important not to get hung up on how good game graphics are, or how powerful block busting brand names can be – ultimately (and there are plenty of examples to draw on), while such things might be a useful acquisition tool, players very quickly get a feel for the maths driving the game and will leave the game as quickly as they arrived if they feel it's not providing the experience they want.

As a totally agnostic content provider, we are able to provide our operator partners with the pinnacle of slot games that are currently available from the leaders in the land-based market. With over 200 titles to choose from with a vast array across the game category, volatility and feature matrix, we believe that it's vital to work with our partners to ensure the very best games are available and the right product is offered for the right market – the basic rules of commerce.

By knowing the market we have become the 'go to' option for land-based slot manufacturers who want to move into the online market, but don't have the experience, knowledge and skills to do so. In a complex and crowded marketplace you need to quickly and cost effectively move content into that space and then realise the potential of a strong network of operators to drive revenues for the entire value chain.

It would be unfair of me to highlight any particular manufacturers or specific game titles, but in a marketplace where acquiring and retaining players is what drives business, then Content always has, and always will be King.



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THE RAMIFICATIONS OF LOTTERY PRIVATISATION IN SERBIA

Vladimir Djukanovic, President of the National Lottery of Serbia, explores the legal and economic aspects of the potential privatisation of the State Lottery of Serbia

For many years now, the State Lottery of Serbia has been the subject of interest, attracting both potentially serious investors and those who would like to enjoy the privilege that allegedly comes out of the operations related to lottery. Their common characteristic is the insufficient knowledge of the local market of the games of chance and the prevailing regulations so that they are often ready to believe that, as potential owners, they would make millions of Euros out of it. Let us make it clear from the start: big money is no longer made in the lottery business as there is an obvious drop of interest in the lottery games worldwide. For the most part, young people today prefer to play a ticket in the betting shop and the only real consumers of the lottery games remain the elderly, whose life span is slowly but inevitably drawing to the end. The problems that state lotteries around the world face today are very much alike. Regardless of the discussions on how to increase the interest in lottery games, no adequate solution has been found yet. On the other hand, the fact is that there is practically no country that decided to privatize the national lottery. The income, though being on the decline, remains safe and the adventure in the form of sale is out of the question for the time being.

The problem with the State Lottery of Serbia is reflected in the fact that many would like to enter the business with it, whether through tendencies to privatize the company or through some kind of public-private partnership. Whatever the case, the essence of the story is that they would like to get it for free. Especially if the potential public-private partnership is in question, all possible investors come with a vibrant story that they will improve the operations and the marketing, but when asked how much they are ready to pay in advance and thus guarantee that they are serious about it, they suddenly withdraw and never ever continue the discussions.

The topic of this paper is whether the State Lottery of Serbia can be privatized at all so let us start with the account of the way the State Lottery of Serbia generally functions in order to come to a genuine conclusion.

The problem with the State Lottery of Serbia is reflected in the fact that many would like to enter the business with it, whether through tendencies to privatize the company or through some kind of public-private partnership. Whatever the case, the essence of the story is that they would like to get it for free. Especially if the potential public-private partnership is in question, all possible investors come with a vibrant story that they will improve the operations and the marketing, but when asked how much they are ready to pay in advance and thus guarantee that they are serious about it, they suddenly withdraw and never ever continue the discussions.

STATUS OF A LIMITED LIABILITY COMPANY

The most common delusion created in the discussions about the State Lottery of Serbia is the belief that it would be good to privatize it as the state can no longer finance the operations of public companies. Especially so, if we remember the fact that the company ended the year of 2012 in the red.

Anyone who is uninformed will agree with this thesis. However, when we consider the operations of the State Lottery of Serbia more profoundly, it becomes obvious that things are not black and white.

First of all, the State Lottery of Serbia is not a public company. On 24 May 2012, the Serbian Government by its Decision on changes of the Memorandum of Association of the State Lottery of Serbia defined this company as a single-member limited liability company whose founder was the Government of the Republic of Serbia. The Serbian Government performs foundation rights related to the State Lottery of Serbia. The Serbian Government is the 100 % owner of the State Lottery of Serbia with paid-in entered

startup capital of the company amounting to 79,341,000 dinars. The Company possesses no non-monetary capital.

The State Lottery of Serbia was founded with the aim to contribute to the budget and the Republic of Serbia, apart from the startup capital for the foundation of the company, has never paid anything to the State Lottery of Serbia. On the contrary, the State Lottery of Serbia is the one who contributes to the budget and the reason of its existence is to make money for the state and provide its own financial support from the percentage defined by the law, which at this moment is not profitable for the State Lottery of Serbia. Namely, under Article 34 of the Law on Games of Chance, the minimum prize fund from the money realized by operation of the basic classic games of chance is 50%. For some games, the prize fund amounts to 70%, but it cannot be less than 50% of the money realized by payments for a particular game. The rest of the realized money is divided between the state and the State Lottery of Serbia, which is defined by Article 35 of the Law on Games of Chance. According to this article, the state takes 60% from the rest and the State Lottery of Serbia gets 40%. After the calculation, 18% of the total income realized by the State Lottery of Serbia is left for the financing of its operations, which is insufficient according to the parameters and the State Lottery of Serbia does have problems to maintain current finances with these funds. Anyone who enters into any kind of business with the State Lottery of Serbia will surely require changes in the percentage in these articles, but it remains unclear why this change is not under its way while the State Lottery of Serbia is in this status as this would enable its better operation and it could provide the funds for further improvement of its operations and thus the state would have more benefits. However, in the conclusion of this part of the text, it is most important to point out that the state is not financing the State Lottery of Serbia at all, but it only realizes income for the state budget from the organization of the games of chance, the income tax, the pension and social contributions, etc. Therefore, the question is what would be the



motive for the state to sell such a company or to enter the public-private partnership as it in any case realizes certain amount of income from the State Lottery of Serbia without paying anything for its financing. Except if the potential investor would guarantee considerable improvement of operations and therefore more income for the state budget by a lump sum of money paid in advance?

MONOPOLY VS. CLASSIC GAMES OF CHANCE (PRIVATISATION ISN'T POSSIBLE)

Article 87 of the Constitution of the Republic of Serbia defines the state property and it emphasizes the following:

"Natural wealth, goods defined by the law as being of general interest and the property used by the agencies of the Republic of Serbia are the state property. Other things and rights may as well be the state property, in accordance with the law.

Physical and legal persons may acquire certain rights over certain goods that are in general use, under conditions and in the manner prescribed by the law "

Article 7 of the applicable Law on the Games of Chance defines the general interest and paragraph 1 says:

"Operation of the games of chance represents an activity of general interest for the Republic of Serbia and is an exclusive right of the Republic of Serbia, if not otherwise defined by this law."

Article 8 of the same Law defines the transfer of rights on operation of the games of chance:

"Republic of Serbia may, in accordance with this law, transfer the right on operation of the games of chance to legal persons and entrepreneurs with the seats on the territory of the Republic of Serbia.

The right on operation of the games of chance from paragraph 1 of this article, in accordance with this law, is transferred on the basis of:

1. license
2. permit
3. concession

The license, permit or concession from paragraph 2 of this article may not be transferred to the third person."

These three articles are crucial for understanding the question whether the State Lottery of Serbia can be privatised. Namely, Article 13 of the Law on the Games of Chance defines the kinds of games of chance existing in the Republic of Serbia. They are:

1. Classic games of chance
2. Special games of chance
3. Prizes in goods and services

The Law in its Article 19 points out that the State Lottery of Serbia has the exclusive right to operate the games of chance! The previous Article 14 defines the classic games of chance as 1) basic games of chance (lottery, instant lottery and other similar games that has lottery as their base: sports betting, lotto, keno and similar games, tombola, bingo and other similar games that have tombola as their base) and 2) other classic games of chance (phonto, SMS lottery, other games of chance in the sense of this article, contained in the catalog of the games of chance). By the previous Article 10, that defines prohibitions in points 20 and 21, the state prohibited the use of words lottery, lotto, bingo and names of other classic games of chance in the name of a legal person or an entrepreneur as well as in the names of the games of chance operated by an entrepreneur or a legal person, which is not the State Lottery of Serbia.

As far as special games of chance are concerned, meaning sports betting, slot machine games, games operated in game parlours such are games with pellets, cubes, cards, etc., they can be operated by any legal person or entrepreneur to whom the state has transferred the right of operation of these games of chance.

Also, the games of chance in goods or services can be operated by private entrepreneurs or legal persons if the state gives its consent.

Such a definition of the games of chance clearly shows that the only owner of operation of all games of chance, as an activity of general importance, is the State Lottery of Serbia. The law clearly defines who can be the only operator of the classic games of chance – and this is the State Lottery of Serbia – founded specially for these games. Therefore, nobody else but the State Lottery of Serbia, as a state-owned company, can operate the classic games of chance, because the State Lottery of Serbia, that is the Republic of Serbia as its founder, has the monopoly rights over these games! Hence, it is senseless to think about the sale of the State Lottery of Serbia, because prior to this the state would have to give up the monopoly and then the State Lottery of Serbia would no longer be the only one who can operate the classic games of chance but they would become free on the market and anyone could operate them, which would be the end of the lottery games as even in the situation when the state has the monopoly over them the subject of business of the State Lottery of Serbia is on decline because of the decreasing interest in these games.

Therefore, the privatization of the State Lottery of Serbia within the present legal framework is impossible. For it to happen, the law would have

to be changed and the state would have to give up the monopoly over the classic games of chance, which is senseless as the state would by that give up its income, which however little does exist. As there is hardly a European state that has sold the state lottery – on the contrary, in many states the monopoly has been additionally strengthened regardless of the directives about the free market coming from Bruxelles, there can be seen no reason why Serbia should sell its lottery and give up the secure income. Also, the potential buyer of the State Lottery of Serbia, even if the state decided to give up its monopoly over the classic games of chance, would not profit much out of this business as these games would become free on the market and it would be realistic to expect that someone would eventually appear to organize lotto, bingo or instant lottery. In the competition, taking in consideration the conspicuous decline in interest for the lottery games, these games would probably completely disappear and the potential buyer would fail financially and the state would lose its income. However, again it must be underlined that within the present legal framework the privatization of the State Lottery of Serbia is not possible!

OTHER MODALITIES

The Law on the Games of Chance has defined certain modalities which someone can realize in cooperation with the State Lottery of Serbia and a solution could be found within the framework if there is an interested investor that would enter the potential business.

Namely, Article 19, which lays down that it is only the State Lottery of Serbia that can operate the classic games of chance also defines the concept of the operator:

"The State Lottery of Serbia may, with prior consent of the Government, engage certain legal persons – operators for the operation of certain classic games of chance.

The operators, in the sense of this law, are considered to be the legal persons who, in the name and for the account of the State Lottery of Serbia, operate certain classic games of chance "

The State Lottery of Serbia has considerably used this possibility in organizing tombola, when certain entrepreneurs (operators) in the name and for the account of the State Lottery of Serbia in their premises organized tombola. Of course, it is almost impossible to find an adequate operator for lotto or bingo, or for instant lottery, as the manner of organization of these games does not require the existence of an operator, but this method was used for tombola, although tombola declined considerably because of the enormous development of the black market. In any case, it

is important to have on mind that if you wish to enter this business with the State Lottery of Serbia as an operator, you practically agree to operate certain classic games of chance in the name and for the account of the State Lottery of Serbia and not in your own name.

The same article defines the existence of the so-called agents that the State Lottery of Serbia can hire for the sale of lottery tickets. They can be entrepreneurs, legal or physical persons. The possibilities for cooperation may be found in the field of the selling network, which the State Lottery of Serbia could enlarge or even surrender. At any rate, it is desirable that a good estimation should be made, as the State Lottery of Serbia once before did sell its complete selling network and came out of this business enormously damaged, and the damage was even worse as at the beginning of realization of this business no guarantee on the part of the buyer was given and all measurements before the business realization indicated a fiasco. Nevertheless, the business was realized, it failed and the selling network was returned to the State Lottery of Serbia, but the consequences were unobservable.

Mutual rights and obligations of the State Lottery of Serbia and the operator that is the agent are according to the law regulated by mutual contracts and the Government of Serbia is the one who determines the manner and conditions of engagement of the operator or agent from this article.

Article 20 of the Law on the Games of Chance defines the "Operation of the games of chance with foreign organizers" and through this article solutions can be found for potential investors in the State Lottery of Serbia. The article says:

"The State Lottery of Serbia may, with previous agreement of the Government, organize games from Article 14 of this law (classic games of chance, author's comment) in cooperation with foreign organizations for operation of the games of chance to which a foreign country has ceded the right of operation of the games of chance.

With the application for consent from paragraph 1 of this article, a draft contract on joint organization of the games of chance containing the basic contract elements is enclosed.

Mutual rights and obligations between the State Lottery of Serbia and the organizer from paragraph 1 of this article are regulated by a contract, for which the Government's consent is required."

This article practically defines a partnership that the State Lottery of Serbia could realize with a



renowned company dealing with organization of the games of chance. For example, this would improve the organization of the game of lotto and the state decides the State Lottery of Serbia to enter into a partnership with certain company by giving this company a license to operate lotto for a number of years. Such a job is reasonable but only in the case that the potential investor pays in advance for this job and that both sides submit projects on the basis of which it will be clearly show that this will rise the level of the game for which the license is sought from the State Lottery of Serbia. Most often, this is the point of divergence as no potential investor ever showed the desire to pay in advance. As a matter of fact, no potential investor has ever submitted a project clearly showing that business operations will be improved in this particular segment. It all remained on firm promises, which is by all means not serious. Of course, it goes without saying that such dealings must be performed transparently, with a call for tenders. No potential investor ever wanted to consider tenders, but they all wanted to make *tete-a-tete* deals with details representing business secret about operations of the State Lottery of Serbia delivered without objection.

The third segment of the cooperation may be recognized in the fact that the State Lottery of Serbia has the possibility to organize special games of chance, besides the classic games of chance. The State Lottery of Serbia has the monopoly over them but it can operate them. In the present circumstances, the State Lottery of Serbia has no economic interest to do this

because it is not easy to endure the competition of betting companies and casinos. In order to run a serious betting company, it is necessary to have a serious risk management department, which the State Lottery of Serbia cannot finance and without such a department there is a risk in each round to end up in a fiasco. Practically, if someone wants to operate sport betting through the State Lottery of Serbia, it can be enabled if the operator consider it profitable. Of course, the Government of Serbia gives its consent for this, from the contract to the game itself. The State

Theoretically, the State Lottery of Serbia should be a gold mine for the state. Practically, it is not so, because in the lottery operations there are many problems, both administrative and those related to general drop of interest in lottery games. Even if the law is changed and the state gives up the monopoly, the question remains how purposeful and wise it would be and who would profit from it?

Lottery of Serbia used to run internet betting organized by the company of "Sportingbet". However, this was a profitable business as long as the State Lottery of Serbia had exclusive monopoly over organization of the internet games of chance. As the organization of the internet games of chance has been allowed to

private legal persons, the question of interest of a company to do this through the State Lottery of Serbia, and pay it for certain services, emerged as any company can do it alone on the interactive skies. The situation is similar with the slot machines, poker machines and roulette. It can all be organized in cooperation with the State Lottery of Serbia but the risk, software maintenance and all other things related to the business cannot be borne by the State Lottery of Serbia but by the potential organizer of such games. Particularly with the casino games being on decline as well.

CONCLUSION

In short, the conclusion could be reduced to the proverb - not everything that shines is gold. Theoretically, the State Lottery of Serbia should be a gold mine for the state. Practically, it is not so, because in the lottery operations there are many problems, both administrative and those related to general drop of interest in lottery games. All in all, the privatization of the State Lottery of Serbia within the present legal framework is not possible. Even if the law is changed and the state gives up the monopoly, the question remains how purposeful and wise it would be and who would profit from it? Other ways of cooperation may be realised but, before that, it would be good to have the projects, perform adequate estimations about how beneficial it is for the state and ask for the guarantees in advance for each particular job. It would be no good at all to lose income that is secure, however low, as each dinar contributed to the budget is extremely important and valuable.

PST TABLES ITS MOVE INTO NEW MANUFACTURING SECTOR

Two years shy of its 50th birthday, renowned chair manufacturer PST has embarked on a new chapter in its history with a name change and a move into table manufacturing.

A raft of table orders have already proven the casino sector is serious about the newly named PST Gaming Furniture with table orders flowing in from prestigious names such as The Hippodrome, Genting and Poker Stars. The Rainbow Casino in Aberdeen has just become the first casino though to order its entire range of traditional gaming furniture from the South Shields-based manufacturer, closely followed by the Time Out casino in Limerick.

Operations Director Gareth Treharne said: "It's taken us five years of meticulous research and development to get to this stage. We're delighted that the Rainbow Casino, operated by Double Diamond, has ordered its full range of tables from PST. Following on from us manufacturing 40 odd tables for the Poker Stars' international tour as well as the poker tables in the Hippodrome and another well-known London casino, the Rainbow deal really is a landmark achievement for us. We've followed it up with an order for the entire range of tables, chairs and live gaming accessories at the Time Out casino in Limerick, which has included 15 tables for blackjack, roulette and poker. Alongside these deals, we've recently supplied all the poker tables as part of the Genting refurb in Reading as well as the punto banco tables for Napoleons in London, operated by A&S Leisure. York Place in Edinburgh has just received delivery of roulette and blackjack tables."

Managing Director Steve Treharne said: "We changed our name and logo in January to better represent the products we manufacture and the sectors we service going forward. We have two



markets; gaming and betting and the leisure sector. Last year, I'd say the Licensed Betting Office sector provided us with the most business with some notable deals with BetFred, Coral, Boyle Sports and Jennings. The casino sector really comes alive with refurbishments or new openings. I'm delighted to say we are currently working on seating for Genting's eagerly awaited 'large' casino in Solihull; Resorts World Birmingham, which needs 500 chairs spread over three floors of gaming and entertainment. We've worked with all the major groups over the last 12 months though including A&S Leisure, Aspers, Double Diamond, Hippodrome, London Clubs International and Grosvenor."

The company has also worked with some esteemed names in the leisure sector including McDonalds, Revolution Bar, Beer Kellar and Frankie and Bennies in various parts of the UK as well as St Georges Hill Tennis Club in South London. It also recently supplied the seating for Casino Gran Via in Madrid, where the property and the chairs were designed by Paul Steelman.



Following the recession in 2008, the company's move into markets such as Holland, Belgium, Germany and France, the latter of which was through a distribution deal with Caro, saw the company's export business account for 70 per cent of its sales. Despite business not dropping off on foreign soils, export now only accounts for 35 per cent of the business.

"This is all down to the surge in popularity of the Fixed Odds Betting Terminals," Stephen Treharne explained.

Everything about the PST setup is geared towards efficiency. "We're based in the former 'shipyard county' where there is an abundance of extremely skilled workers," Stephen Treharne explained. "Every material we use is sourced ourselves and every procedure in the entire manufacturing process from cutting, shaping, bending, welding, chroming and upholstery takes place in-house. We're in control of everything so can ensure everything is done to the highest quality. It also means we're not limited to anything when it comes to the design of bespoke furniture. We can for example provide bases of any size for our stool range. Our lead time is just three weeks for bespoke furniture."

The PST attention to detail was also exemplified with a recent order from BetFred who wanted its seating options matched to the exact colour of its 'BetFred red.'

"We matched the exact composition of the 'BetFred red' which has led to a lot of repeat business with the betting company," Gareth Treharne explained.



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AU CHILI, UNE COUR A SUSPENDU LA PROCÉDURE

d'appel d'offres pour l'attribution de la concession pour l'exploitation d'un casino à Chillán après que la société hispano-argentine Bold-Peralada a interjeté appel auprès d'un tribunal local arguant que celle-ci avait été entachée d'irrégularités. Le recours juridique affirmait que le gouvernement régional avait outrepassé ses compétences en lui attribuant zéro points tout en en attribuant 300 à Marina del Sol.

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d'instaurer de nouvelles règles qui assureraient que les machines à sous soient contrôlées et taxées de façon sensiblement plus efficace, visant à mettre un terme à la prolifération rapide des jeux de hasard en Argentine.

MALGRÉ QUELQUES ÉVOLUTIONS POSITIVES

récentes dans l'industrie des casinos, et notamment l'annonce de l'ouverture d'un nouvel établissement majeur au cours des prochaines mois et des lois plus strictes dans le domaine de la lutte contre les jeux de hasard illégaux, des rumeurs toujours plus persistantes prétendent que le gouvernement du Paraguay chercherait maintenant à nationaliser l'industrie.

CETTE ANNÉE SERA MARQUÉE PAR L'OUVERTURE

d'un nouveau casino majeur à Encarnación, dans la capitale du Paraguay. Selon des sources officielles du gouvernement local, le complexe d'un coût de six millions de dollars, comportant un hôtel et un casino, stimulera le tourisme dans la ville et coïncide avec une série de nouveaux hôtels ouverts récemment, illustrant l'amélioration continue de l'industrie locale du tourisme.

EN ARGENTINE, LE GOUVERNEMENT DE MENDOZA A

annoncé qu'il lancera deux procédures d'appel d'offres séparées ce mois-ci : un s'adressant aux sociétés intéressées par la fourniture d'un système de contrôle en ligne des machines à sous et un autre pour la prise de paris Quinela en ligne.

UN CHANGEMENT EN PROFONDEUR SEMBLE DE PLUS

en plus probable sur le marché colombien des jeux de hasard en pleine croissance avec le déploiement du système de contrôle et de suivi en ligne de l'ensemble des machines à sous, actuellement prévu pour avril 2015.

L'OPÉRATEUR SUD-AFRICAIN SUN INTERNATIONAL

se réjouit de l'autorisation accordée par le Gauteng Gambling Board de transférer sa licence du complexe Morula Casino and Hotel à Mabopane vers Menlyn Maine, près de Pretoria.

LE CASINO MEDITERRANEO BENIDORM A OUVERT AU

sein de la station touristique de Marina Baixa, inaugurant ainsi le troisième casino du portfolio du groupe. La première tranche comprenait le rez-de-chaussée et le premier étage, qui accueilleront le casino ainsi qu'une salle polyvalente destinée à servir à des événements et des expositions.

GAMEACCOUNT NETWORK A ANNONCÉ LE lancement de China Shores en ligne aux Etats-Unis dans le cadre de son partenariat stratégique avec Konami Gaming. Disponible sur Foxwoods.com, China Shores offre aux joueurs la possibilité de jouer le jeu original traduit en ligne pour Simulated Gaming.

JCM BUYS FUTURELOGIC FOR \$72M

In a summer of industry corporate buyouts, JCM Global is to add FutureLogic to its portfolio for US\$72.2m

Nevada - Suppliers

JCM Innovation Corp., a subsidiary of JCM American, doing business as JCM Global, has entered into a definitive agreement to acquire FL Group, doing business as FutureLogic, from American Capital.

The acquisition adds to JCM's exceptional line of peripheral component products, including bill validators, printers and digital media.

FutureLogic printers and couponing solutions, such as Ticket2Go, TableXchange and PromoNet systems products, provide key technology platforms for growth initiatives and recurring revenue. The products will strengthen and diversify JCM's peripheral portfolio to the marketplaces and industries it serves globally, such as banking, gaming, kiosk, retail and transportation.

In addition to the FutureLogic line of products, JCM will continue to market, sell, service and sup-

port the Nanoptix line of printers, including the PayCheck 4 thermal printer.

"We are very pleased to add FutureLogic's excellent line of printers and coupon solutions to the award-winning line of JCM's peripheral products. Since the beginning, JCM has operated with a philosophy of 'customer first,' and this acquisition will allow us to service our customers with more freedom of choice with unique and innovative peripheral solutions," said JCM Global President Akiyoshi Isoi.

"We are fortunate to be in this position to capitalise on opportunities, such as the acquisition of FutureLogic. By maintaining our focus on 'best-in-class' components and continual dialog with our key customers, JCM will continue to deliver 'value-added' solutions that the marketplace desires," Mr. Isoi added.

"We look forward to the next phase of development for FutureLogic as it brings innovative technology and world class customers to help fuel the growth of JCM," said FutureLogic Chief Marketing Officer John Edmunds. "The combination of JCM and FutureLogic product portfolios will provide a compelling offering in a variety of markets."

Nevada

Boyd Gaming has reported second-quarter 2014 net revenues of \$722.5m, compared to \$738.7m during the same quarter in 2013. Keith Smith, President and CEO said: "Our second-quarter results were below expectations, principally due to continued weakness in casual play. We are actively addressing this on several fronts, including strengthening our senior management team, refining our marketing strategies, and repositioning targeted non-gaming amenities. We also continue to strengthen our balance sheet, and are on track for \$200m in additional debt reduction in 2014. Despite a tough operating environment, we remain diligently focused on improving our performance and generating long-term growth."

Genting is lobbying hard to secure its Florida casino resort

FLORIDA

Malaysia's Genting Group is lobbying hard in Florida's election year as it seeks to secure the foothold it needs to build a Miami casino resort. The company, which bought the Miami Herald building in downtown Miami with US\$236m in cash in 2011 and tried unsuccessfully to gain approval for a destination resort casino from lawmakers, having spent US\$1.3m in the 2012 election cycle, has embarked on a two-pronged political strategy.

Half of its money has been steered into a petition drive for a pro-casino amendment to the state Constitution that would bypass the Legislature to bring casinos to Florida. It's remaining contribution has been split – \$486,000 to the Republican Party of Florida and \$111,000 to the Florida Democratic Party. "This is probably the most chal-

lenging election cycle in the last 40 years and maybe for the next decade," said one Florida lobbyist. "The out-of-state casino folks are causing everybody to focus a lot more resources into the issue and everybody has to step up to the plate and be competitive."

Storefront Internet cafes continue to grow in numbers across Florida, virtually unregulated, creating a new breed of political committees designed to protect their interests. Meanwhile local pari-mutuels are trying to exploit an untested loophole in state law that would allow them to install slot machines at their dog tracks.

Pressure is also mounting to re-open a key provision of the state's gaming compact with the Seminole Tribe before it expires in 2015, in part a defensive attempt to counter the push by Genting, Las Vegas Sands and

other casino operators to bring destination resort casinos to its backyard. The compact requires the Seminoles pay the state \$233m annually.

Aside from the lobbying, Genting is going directly to voters with a constitutional amendment on the 2014 statewide ballot and could start gathering signatures at polling sites for both the primaries and general election.

Among the issues to be decided: How many casino sites should be allowed? Should it be limited to Miami-Dade and Broward, which would forfeit the revenue sharing from the Seminole tribe's operations in those counties. And will Genting move forward with a ballot amendment in the same year the governor seeks re-election, potentially drawing casino supporters to the polls in a dicey election year? Whatever the company decides, observers say the threat of the amendment gives Genting added leverage against a recalcitrant Legislature and a reluctant governor.

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EVOLUTION GAMING A ANNONCÉ QUE MECCA AVAIT

lancé Evolution Live Roulette en l'intégrant dans son offre de bingo mobile. Selon Mecca, Mobile est son activité connaissant la croissance la plus rapide, la majorité des nouveaux joueurs recrutés par la marque provenant de ce canal.

L'AUTORITÉ DE RÉGULATION DES JEUX DE HASARD

de Lettonie (IAUI) a dressé une blacklist de sites de jeux ne disposant pas d'une licence comprenant PokerStars, Full Tilt, Bet365, Unibet et 888.com, et demande aux fournisseurs d'accès à Internet de bloquer l'accès à ces sites aux joueurs lettons.

INSPIRED GAMING GROUP (INSPIRED), LEADER DANS

la fourniture de loteries vidéo SBO et de produits de sports virtuels, a officialisé aujourd'hui le renouvellement, pour cinq ans, de son partenariat à long terme avec William Hill pour la fourniture de machines, sur serveur, de jeux de loteries vidéo et de sports virtuels.

LE GOUVERNEMENT DE CHYPRE A DÉCLARÉ QUE LE

projet d'accorder une toute première licence d'exploitation pour un resort casino dans le sud de l'île touristique de méditerranée progresse à une allure sans précédent et devrait aboutir dans moins de 12 mois.

BCN WORLD SE RAPPROCHE DE COSTA DAURADA. LE

gouvernement a admis quatre des cinq soumissionnaires à participer au macrocomplexe dédié aux loisirs et aux jeux dans le Turístic Recreatiu Centre (CRT), situé entre Salou et Vila-Seca.

L'ÉTABLISSEMENT TURNING STONE RESORT CASINO

à Verona, New York, a mis à jour l'ensemble de ses machines de jeu comptant 2 100 jeux en y intégrant une combinaison CPI de lecteurs avancés de billets MEI SC et le système EASITRAX Soft Count. L'installation a été réalisée plus tôt cette année dans le cadre d'un investissement de 15 millions de dollars US de la nation indienne Oneida pour mettre à jour l'ensemble du système d'exploitation du casino et mettre en place de nouvelles machines à sous fonctionnant avec des espèces.

FOXWOODS RESORT CASINO AU CONNECTICUT utilisera la plateforme « concierge mobile » de Bally Technologies pour offrir à ses clients une appli mobile riche en fonctionnalités.

LE MAGNAT AUSTRALIEN JAMES PACKER, propriétaire du Crown Resorts, a déboursé 280 millions de dollars australiens (260 millions de dollars US) pour un site de choix sur Las Vegas Boulevard lors d'une enchère pour s'implanter une fois pour toute sur le marché américain des casinos. Le milliardaire, exploitant le Crown Resorts, s'est associé, dans un joint-venture, avec l'ancien président de Wynn Las Vegas, Andrew Pascal, soutenus par Oaktree Capital Management.

PARADISE CO. ET SON PARTENAIRE JAPONAIS SEGA

Sammy Holdings vont se lancer en octobre dans la construction du premier resort casino intégré du pays. Leur projet baptisé Paradise City près du principal aéroport de Corée du sud, Incheon, devrait être inauguré au début de l'année 2017, un an avant celle d'un projet similaire conçu par la société Caesars Entertainment, basée aux États-Unis et le Lippo de Hong-Kong.



TURNING STONE IS TAKING IT EASI

Turning Stone Resort Casino has upgraded its slot floor with CPI's MEI SC Advance and EASITRAX Soft Count

New York - Casino suppliers

Turning Stone Resort Casino in Verona, New York has upgraded its entire slot floor of 2,100 games with CPI's combination of MEI SC Advance note acceptors and EASITRAX Soft Count. The installation was completed earlier this year as part of a \$15 million investment by the Oneida Indian Nation to upgrade the casino's entire operating system and provide new cash-play slot machines. Now guests can enjoy an enticing slice of Vegas right in the heart of Upstate New York.

"Our goal is to provide a world-class leisure experience for our visitors," said Guy Renzi, Vice President of Gaming at Turning Stone. "When our guests requested the convenience to play with

cash, we turned to the CPI portfolio for a reliable and secure cash handling solution."

Turning Stone first opened its slot floor in 1995 with an account-based system that required guests to load money onto cards prior to game play. "Sometimes they had to wait in line or get up from the machine to reload," Renzi continued. "It was disruptive, whereas now they can just walk in our doors and go straight to the game – and with SC Advance, there are no more interruptions."

"We're proud to have helped Turning Stone achieve their goal for a Vegas-style cash-based operation," said Eric Fisher, CPI president of Gaming. "Their experience reflects CPI's focused approach to providing meaningful solutions that enhance the player experience, drive newfound cash management efficiencies and, ultimately, increase operator profitability. We look forward to extending our relationship with Turning Stone and providing more support into the future."

AGEM Index

The AGEM Index declined in July 2014 after increasing 6.41 points in June 2014. In July, the composite index fell to 183.61, which is down 1.73 points or 0.9 per cent from the prior month. Compared to the same month of the prior year, the index is up 3.6 per cent.

The AGEM Index witnessed month-to-month declines in five of the first seven months of the year. During July 2014, 11 of the 17 global gaming equipment manufacturers reported decreases in stock price when compared to June 2014, with five down by more than 10 per cent. Of the six companies that reported month-to-month gains in stock price, three were up by more than five per cent.

Bally Technologies to develop mobile app for Foxwoods Resort

CONNECTICUT

Foxwoods Resort Casino in Connecticut will utilise the mobile concierge platform from Bally Technologies to offer its customers a feature-rich mobile app.

The agreement is part of a continuing partnership between Bally and Foxwoods. One of the Northeast's premier gaming and entertainment destinations, Foxwoods, in Mashantucket, Connecticut, features six casinos along with hotels, restaurants, spas, golf, theaters, and shopping.

"We are excited to use Bally's mobile platform to offer outstanding new benefits to our customers," said Brian Charette, Foxwoods' Vice President of Information Technology. "Bally is a great partner that worked with us to create a custom app that will

enable us to engage and market to our patrons before, during, and after their visit."

Bally's cloud-based mobile platform enables casino operators to create and easily update special content and offers, and immediately distribute the information to targeted potential customers. Bally has created more than 150 features for casino operators to incorporate into their apps, allowing them to entertain, educate, interact, market, and learn from their guests and players.

Guests at Foxwoods can use the cloud-based mobile app to book shows, make restaurant reservations, check player club point balances, view promotions, and much more. The app is available for iPhone, iPad, Android BlackBerry, and other devices.

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US – REVEL CLOSES ITS DOORS THIS MONTH

The opening of the \$2.6bn Revel Casino Hotel was heralded as the start of the transformation of Atlantic City, but instead, as the resort closes its doors and lays off all employees no later than September 10, it has instead dealt a massive blow to the New Jersey seaside resort.

Five years after the longest recession since the 1930s, hotel rooms sit vacant and revenue keeps falling in what was once the second-largest US casino market. New Jersey Governor Chris Christie's turnaround plan for the municipality, begun in 2011 and hinged on Revel's success, hasn't delivered. Despite the scheduling of a bankruptcy auction in August, the plug was pulled on the bidding after Revel failed to attract any qualified offers. "Despite the effort to improve the financial performance of Revel, it has not proven to be enough to put the property on a stable financial footing," said Revel Entertainment Group, the casino's parent company.

Revel employed 3,187 workers as of June, according to state figures. It was the fourth-highest casino employer in Atlantic City among the 12 casinos at the time. In a letter sent to employees when it filed for Chapter 11 protection in June, Revel warned that without a buyer it would be forced to shut its doors and all employees would be let go. It joins The Atlantic Club, which closed in January; and the planned shutting of Caesars' Showboat on Aug. 31 and Trump Plaza Hotel & Casino Sept. 16. The moves affect 7,800 employees. The closings would leave the city with eight casinos, down from as many as 12, and may increase the jobless rate from June's 13.1 per cent level, about double the state average. Gambling venues account for almost half the city's jobs: 5,883 positions in a workforce of 13,500.

US – HUNSBERGER LEADS US SALES AT WMS GAMING

Scientific Games has appointed Deron Hunsberger as the new Senior Vice President, North America Sales, for WMS Gaming. In his role, Mr. Hunsberger will lead sales, participation and leasing, sales support, and marketing for WMS Gaming throughout the US and Canada.



Mr. Hunsberger is a talented leader in the gaming industry with more than 20 years of sales and marketing experience. He served as Senior Vice President of Sales, Americas at SHFL entertainment, Inc., now Bally Technologies, Inc., from 2011 to July 2014 after joining the company as Vice President of Sales and Marketing, North America in 2010. Previously, Mr. Hunsberger served as Senior National Manager of Gaming Operations at Aristocrat Technologies, Inc. from 2008 to 2010. Before joining Aristocrat Technologies, he served as Director of North American Sales at Konami Gaming, Inc., and held progressively responsible positions as an account executive in the gaming industry.

PACKER ACQUIRES LAS VEGAS SITE

Crown Resorts has purchased a parcel of land once occupied by the famous Frontier Casino on the Las Vegas Strip

Nevada – New operations



Australian mogul James Packer's Crown Resorts has paid A\$280m (US\$260m) for a prime site on Las Vegas Boulevard in a bid to crack the American casino market once and for all. The billionaire, who runs Crown Resorts, has teamed up with former Wynn Las Vegas President, Andrew Pascal, in a joint venture, backed by Oaktree Capital Management.

The new resort company, which is majority-owned by Crown, has bought a controlling interest in a 34.6-acre vacant site on the world-famous gambling strip formerly occupied by the New Frontier casino.

"You can't be in the gaming industry and not have a special reverence for Las Vegas – that's where it all began," said Mr. Packer, who is co-chairman of the new venture.

"As we have built Crown Resorts into a thriving international company with successful casino ventures in Australia, Macau, and London, we've

always kept our eye on Las Vegas. And while we fell short in past attempts to enter that market, we now have the ideal opportunity with a great local partner in Andrew, a leading financial investor in Oaktree, and the perfect piece of property."

The new resort company hopes to start development in late 2015 and complete the project in 2018.

"For over 25 years, I've studied the ever shifting Las Vegas landscape," said Mr. Pascal, the other co-chairman. "I've always been inspired by this city's capacity for reinvention. I'm excited to have my hand in crafting something new and fresh for the resurgent Las Vegas market."

Packer, the son of late media baron Kerry Packer, is one of Australia's wealthiest people, with a personal fortune estimated at A\$7.2 billion.

As well as casinos in Melbourne, Perth, Macau and London, he is also planning one in Sydney and has his eye on the Japanese market.

California

Gaming Laboratories International has successfully completed a World Lottery Association Security Controls (WLA-SCS) and ISO 27001 Information Security Management Certification audit for the California Lottery. The audit and certification were conducted by GLI's Professional Services Division. With the successful audit and certification, the California Lottery becomes the only lottery in the United States to hold the WLA-Security Control Standard (WLA-SCS) and ISO 27001 Certifications.

Rumours circulate at troubled Isle of Capri over possible sale

US

US operators without the international benefits afforded by Asian market operations, Boyd Gaming, Caesars, Penn and Isle of Capri, are continuing to feel the pinch from national market pressures. While Las Vegas Sands' last quarter revenues were 85 per cent non-domestic, national operators relying solely on State revenues from the slowly recovering Las Vegas and tanking Atlantic City markets are the source of constant rumour right now.

Speculation has been rife in the US for several months that Isle of Capri is for sale. However, last week the St. Louis-based company announced a management shake-up at the corporate level, eliminating the executive chairman role with the board of directors and the chief strategic officer

position. Isle of Capri also eliminated several other senior positions in the corporate office.

The moves are designed to cut corporate expenses by roughly \$2.5m a year, the company said in a statement, which has split analysts' views, with either Isle of Capri looking to forge a new path with its restructured team, or it's tidying up its books in further preparation for a prospective buyer.

Isle of Capri currently operates 15 casinos and racetracks in seven states worth approximately US\$1.2bn, and has been in talks to be acquired by Gaming and Leisure Properties Inc., a real estate investment trust controlled by rival Penn National Gaming.

However, the management

shake-up may have put the merger speculation to rest as it makes an imminent sale much less likely. Analysts have also speculated that the recent bids for Isle of Capri may have been lower than anticipated by the Goldstein family, which owns 40 per cent of the company's outstanding shares.

In the company's most recent conference call, Isle of Capri said it was looking to save \$12m annually in expenses. "Through our ongoing profit improvement program, we continue to streamline our operations and look for more efficient ways to operate our business," Isle of Capri CEO Virginia McDowell said in a statement.

Whatever the speculation as to the ownership of Isle of Capri, the near future is likely to be very tough for the US' traditional domestic casino operators. Without Asian profit-centres or new domestic state licences, the returns are continuing to diminish for these household names.



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US – HARD ROCK SIOUX CITY OPENS WITH TRANSCAT

Hard Rock Hotel & Casino Sioux City, Iowa opened its doors in August with Transcat's Epic 950 printer installed in all of the new property's 850 slot machines. Owned and operated by Sioux City Entertainment, a subsidiary of Warner Gaming, the Hard Rock Hotel & Casino Sioux City is a new fully-integrated gaming resort featuring slot and table gaming options, a Hard Rock Hotel, live entertainment venue, and food and beverage options in downtown Sioux City, Iowa.

Bart C. Shuldman, Chairman and CEO of Transcat Technologies said: "The Epic 950 continues to set the industry standard for quality and reliability and our customers recognize the strong return they can generate on their investment in this printing solution. This combination has enabled Transcat to grow its global casino market share and win new business such as this exclusive agreement with Sioux City Entertainment, and we are excited to play a role as the Hard Rock Hotel & Casino brand comes to downtown Sioux City."

Todd Moyer, General Manager of Hard Rock Hotel & Casino Sioux City, added, "As we evaluated TITO printing options for our gaming floor, the technology and advanced functionality of the Epic 950 clearly differentiated it from the pack. We are excited to work directly with Transcat to bring their best-in-class gaming printer solution to our new facility in downtown Sioux City as we seek to deliver a guest experience never before seen in the market. The Hard Rock Hotel & Casino brand is synonymous with leading-edge entertainment and we believe the Epic 950 will assist our gaming operations teams as they deliver on that promise to our customers."

US – PARX CASINO SELECTS GAMEACCOUNT

GameAccount Network has signed a partnership deal with Parx Casino to launch a Simulated Gaming online experience for new customers and existing patrons.

Parx Casino is owned by Greenwood Racing, Inc and comprises a major thoroughbred racetrack & casino property in Bensalem, Pennsylvania. Parx is the market leader in Pennsylvania with a 30 per cent share of the five-property eastern Pennsylvania casino market. It is expected that GameAccount Network and Parx Casino will launch a Simulated Gaming website in the fourth quarter of 2014 subject to customary approvals.

Dermot Smurfit, CEO of GameAccount Network commented: "2014 saw the launch of Simulated Gaming™ in the United States and Parx' selection of our unique Internet gaming service is further validation of the monetisation model, the underlying strength of our regulation-ready Internet Gaming System, the promotional capabilities of our back office and relevant appeal of our widening gaming portfolio. We are delighted to have been chosen as the iGaming platform provider by one of the leading Management Teams in the United States' casino industry."

John Dixon, CTO of Greenwood Entertainment & Racing, Inc commented: "GameAccount has demonstrated its Regulated Gaming capability in New Jersey and the merits of Simulated Gaming when integrated with a casino management system. By deploying their system on-property Parx Casino will have the opportunity to launch Simulated Gaming nationwide before year's end and be well prepared in the event regulation of real money Internet gaming emerges in the State of Pennsylvania."

MGM SHIFTING INTO GEAR WITH IPT

Shift Interactive has signed a multi-year deal with MGM Resorts to launch the InteractivePro Table into Vegas market

Nevada – Casino Suppliers

SHIFT Interactive, a division of Suzo-Happ Group (SHG), and MGM Resorts International (NYSE: MGM) announced that a multi-year agreement has been signed to support the launch of the highly anticipated, InteractivePro™ Table (IPT). The initial 20 InteractivePro™ Tables will be installed during this initial market-testing phase beginning July 28, at two of Las Vegas' landmark casinos: MGM Grand and The Mirage.

The new InteractivePro™ Table offers a unique 10-point multi-touch experience suitable for a wide range of applications, excellent for television, video and interactive entertainment in bars, casino floors, hotel suites, restaurants and lounges. Each IPT operates with the proprietary InteractiveProVision™ Platform and Application that allows up to four user screens at the same time. The IPT comes in three configuration models which are bar, lounge and dining height. All are manufactured from industrial grade components, ensuring high reliability and suitability to withstand harsh public environments.

Tom Mikulich, Senior Vice President of Business Development for MGM Resorts, said, "We have invested a great amount of effort in reaching the younger demographic and we believe that including the InteractivePro™ Table in our strategic initiatives will revolutionize how generation X and Y experience MGM properties. If all goes to plan, we are looking at additional units across multiple MGM properties in the next year. This will enable us to have a stronger



integration with customers using our current interactive platforms."

The launch of InteractivePro™ Table fortifies a long-standing relationship between MGM Resorts International and the Suzo-Happ Group. Jim Brendel, CEO and President of Suzo-Happ, shared his appreciation for MGM's continued trust in the company. "MGM is a recognized authority in gaming and hospitality and we have been fortunate to have unceasing opportunities to work alongside them for more than a decade," he said. "Introducing our InteractivePro™ Tables at their properties supports both our plans for the future."

Darren White, Executive Vice President & General Manager of SHIFT Interactive, added, "We are elated with this continued partnership with MGM through our new division. We endeavored to develop new capabilities and solutions for our customers and we are glad to be at the forefront of this innovation."

The InteractivePro™ Table was originally developed for the Australian sports betting and wagering market, allowing its players to watch sports and access their betting account while at the IPT. Since its inception the table has evolved to a more sophisticated interactive entertainment product. To find out more go to www.shiftinteractive.info.

IGT and LT Game partnership to expand game distribution

US

Two gaming powerhouses are joining forces to expand distribution in Macau and North America, in a three-year agreement between IGT and Paradise Entertainment subsidiary, LT Game. Under the terms of the agreement, IGT will distribute LT Game's live and electronic table game systems in the US and Canada, while LT Game will serve as distributor for IGT's slot machines in Macau.

As IGT and LT Game each seek to expand their global market share and product portfolio, this partnership provides the unique opportunity to leverage existing sales, service and compliance

infrastructures to drive revenues from incremental product segments. The terms of the agreement specify that IGT will distribute LT Game products on an exclusive basis across jurisdictions in the US and Canada. IGT is also granted right of first refusal for distribution of LT Games to Europe, the Caribbean, Mexico, S. America and Central America.

"This alliance is unique to the gaming industry, combining the storied IGT legacy with the market intuition of LT Game to deliver a broader and more relevant product portfolio to our collective customers in North America and Macau," said Eric Tom, IGT EVP of Global Sales. "We will work

alongside our partner, LT Game, in both markets to ensure that an exemplary level of customer care is maintained, while we also continue our direct sales and support for systems products in Macau."

"The agreement unlocks enormous potential for LT Game in the international market and marks a significant milestone in our history. It signals an important cooperation that will generate synergies for both IGT and LT Game. As a market leader in Macau, LT Game is well-positioned to assist IGT in their penetration in the domestic Macau market. Conversely, I believe the collaboration with IGT will enable LT Game to accelerate its expansion of global presence and distribution," Jay Chun, Chairman and Managing Director of Paradise Entertainment Limited commented.



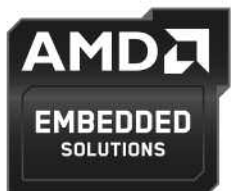
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MALAYSIA – FIGHT FOR SECOND CASINO LICENCE

Property developer Low Yow Chuan (pictured) says he was given a "first right of refusal" for a second casino licence in Malaysia and plans to use it to build a casino resort, if the government allows new operators into the market. Malaysia currently has just one casino operator: Genting Malaysia Bhd. Mr Low has said that he was given the right to build a casino by the Malaysian government in 1970. The right was later transformed into a "first right of refusal" for a second casino licence.



The octogenarian said the initial casino licence was offered as part of a deal with the government to build a hotel and country club in Langkawi, an archipelago to the north of the country, which were completed in 1973. He added that eventually the casino plan did not go ahead because of lack of financing and supporting facilities for this kind of project in Langkawi. A plan to build the casino instead in Penang also fell through due to land issues, he said.

Mr Low, however, claims that the casino project was never dropped. He said that in 1993, he received a letter from the Malaysian authorities stating that "the government has no intention of issuing a casino licence presently, but if however, a reverse decision is made, Yow Chuan would be given an opportunity for 'a right of first refusal'."

The Malaysian tycoon said he is ready to use this prerogative to build a casino resort, if the government approves a second casino licence. The report says the project would involve an investment of up to MYR4 billion (US\$1.26 billion).

Malaysian billionaire Vincent Tan announced last month that his company Berjaya Corp Bhd would re-apply for a licence to operate a casino at Berjaya Hills, a resort area in the state of Pahang. Mr Tan had applied for a licence to operate a casino at Berjaya Hills more than 10 years ago but it was rejected amid protests (see story opposite).

The Malaysian government has not announced any plans to grant a second casino licence.

PHILIPPINES – PAGCOR CLOSURE HURTS HOTEL

The Grand Plaza Hotel Corp., the company behind Heritage Hotel Manila, barely eked out a profit in the first half of the year amid strong competition and lower rental revenues. In a regulatory filing, the hotel operator said as a result of lower revenue, net income slumped 96 per cent to P2.9m from P84.7m a year ago.

"Total revenue sank 29 per cent to P245.88m from P349.43m due to lower revenue in all segments especially in rental income," Grand Plaza said. In July 2013, Philippine Amusement and Gaming Corp. (Pagcor) closed its casino that previously occupied 4,745sq.m. of the hotel with a monthly rental of P10.72m.

"The management of the corporation is in the process of exploring various options on how to develop and utilise the area covered by the leased premises," Grand Plaza said. Pagcor is winding down its operations south of Metro Manila as mega-casinos start operations in the Entertainment City, the country's answer to gaming hubs in Macau and Singapore.

TAKE ME DOWN TO PARADISE CITY

Paradise and Sega Sammy have outlined their plans for the South Korean resort both companies plan to launch in 2017

South Korea – Casino Operations

Paradise Co. and Japanese partner Sega Sammy Holdings are set to break ground in October on the country's first integrated casino resort. Their Paradise City project near South Korea's main Incheon airport should open in early 2017, a year ahead of a nearby project planned by US-based Caesars Entertainment and Hong Kong's Lippo.

The company is banking on South Korea's proximity to northeast China and the popularity of Korean culture as a draw for Chinese gamblers. The number of Chinese tourists to South Korea grew nearly 53 per cent last year. South Korea's total casino revenue was about \$2.5bn in 2013, less than six per cent of Macau's.

"There will be more rich people in China, and they will need to travel," says Choi Jong-hwan, CEO of Paradise Sega Sammy Co. "This is a megatrend."

Investors have sent Paradise shares up more than sevenfold since the start of 2011, the year the Seoul-based company tied up with Sega Sammy. Last month, Paradise raised 285.8bn won (\$276.54m) in a sale of treasury shares.

The joint venture plans to open the first phase of the resort with casino, hotel, shopping, entertainment and convention facilities, at a cost of about



1tr won. The phase will include 120 tables, 400 slot machines and 300 electronic gaming tables. Mr. Choi said the company will also rely on junket operators to bring in 20-30 percent of its business, compared to the current 5 percent at its other casinos. Junket operators bring in high-rollers from China.

The conservative Korean culture at the moment has mostly kept South Koreans from fully enjoying gambling. The country's only "open" casino at which Koreans can gamble is in a remote ex-mining town three hours from Seoul.

But the casino, operated by Kangwon Land earned 1.28tr won (\$1.24bn) in revenue last year, nearly equal the 1.37tr won earned in the country's 16 smaller foreigner-only casinos. South Korea also faces potential competition from neighbouring Japan, which may open the country to casino gambling by 2020. "Many of the Koreans will be travelling into Japan to play the casinos and at that time, maybe the Korean government could be thinking of putting in an 'open' casino," Choi said.

Mr. Choi said Paradise City is not planned with the expectation that South Korea will eventually allow locals, but others say they see little chance the conservative country will ease the ban.

Taiwan trouble for Packer's Macau casino joint venture

TAIWAN

Taiwanese prosecutors have charged a subsidiary of James Packer's Macau casino joint venture over the alleged illegal channeling of hundreds of millions of dollars between Taiwan and the gambling enclave.

The Taipei District Prosecutors Office indictment said the Taipei branch of Hong Kong-based MCE International transferred more than NT\$5.4bn (\$194m) in deliberate violation of foreign exchange controls and financial oversight. It is understood the funds were transferred on behalf of high-rollers looking to gamble at Melco Crown's City of Dreams and Altira casinos.

"The illegal conduct of the defendant MCE International and the other defendants is suspected to have harmed this country's financial order," stated the Taiwanese indictment.

The transfers in question took place between July 2009 and January 2013, when Rowen Craigie, Crown Limited's CEO, was a director of MCE International, which is a subsidiary of Melco Crown. Mr Packer's Macau joint venture with Hong Kong gaming tycoon Lawrence Ho.

Prosecutors have also applied to the court to confiscate \$NT3bn in MCE funds that have been frozen since raids on its premises and other companies were executed in January 2013. The indictment from the Taipei District Prosecutors Office implicates four present and former employees including the branch's current "responsible official" Wang Yen-sheng, and his predecessor Sung Hou-shuan.

Also named in the indictment were Taiwanese husband-and-wife management team who "set up" the Bo Ying VIP room at City of Dreams.

Vietnam

Vietnam's Ministry of Finance has finalised a draft decree aiming to allow Vietnamese to play in the country's casinos although it will now have to be approved by Prime Minister Nguyen Tan Dung. If approved, gaming floors will be open to Vietnamese citizens aged 21 and up who have met financial criteria to be outlined at a later date. The decree suggests that the Prime Minister will choose which properties will become accessible to local players. The draft decree also suggested a loosening of the laws regarding investment in casinos in Vietnam with the amount of experience needed being reduced from ten to five years. The investment limit would be kept at US\$4bn with a maximum of 200 tables and 2,000 slots allowed.

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MALAYSIA – BERJAYA GROUP SEEK GAMING LICENCE

The founder of the Berjaya group plans to operate a Casino de Berjaya Hills Resort in order to attract Malaysian gamblers otherwise opting for Macau or other destinations

Vincent Tan (pictured) founder of the Berjaya group, will apply for a licence to operate a casino in Berjaya Hills Resort in Pahang, Malaysia. Berjaya will invest the equivalent of 3bn patacas in order to set up the gambling complex that will have as its goal direct competition with other tourist destinations such as Macau and Singapore.

Mr. Tan plans to transform Berjaya Hills Resort into a world-class destination and Malaysia's biggest tourism development. The complex will include a gaming centre, indoor and outdoor theme parks, food outlets, a retail mall, hotels, a convention centre and holiday homes.

More than 10 years ago, Tan applied for a licence to operate a casino in the same place but was rejected. Now the tycoon expects to succeed, as the casino complex will benefit Malaysia in terms of foreign exchange gain and economic spillover. According to his calculations, Mr. Tan will employ about 10,000 locals if he succeeds in getting a licence.

"We will re-apply for the licence. Malaysia should not stick to one operator. It should be shared with other operators as tourism developments can generate a lot of income for the country," he reasoned. "We'll market Berjaya Hills as a new casino destination globally. I have 4,600ha in Berjaya Hills and there's a lot that can be done with such a licence."

Currently, Berjaya Hills, which is just minutes away from the country's only casino in Genting Highlands, has a permit to operate slot machines.

INDIA – DELTA CORP EXPANDS LAND-BASED CASINO

Indian businessman, Jaydev Mody, whose Delta Corporation operates as fleet of casino ships, including India's biggest floating casino, the Deltin Royale, is looking to expand in the land-based sector. Having initially bought and operated the Deltin Jaqk, Mr. Mody expanded the business with the Caravela gaming ship, which later became the Deltin Royale, which is often present on the Mandovi River. Today, Mr. Mody claims a fleet of three ships that constantly run casino operations across India's waterways.

In order to help facilitate the immense demand for gaming in India, Delta Corp. has diversified its investments to include hotels and resorts. The company currently operates three hotels that provide accommodation for its gambling clients. However, Mr. Mody has expressed his dislike towards hotels, though he admits they are an essential part of the overall service. He has been quoted as saying "I hate the hotel business, but you cannot separate the two."

Delta's most recent project is a casino-hotel in Daman, which will feature a lavish casino spread over a large gaming floor and 176-room hotel. The company is expecting great results from the casino and hope to build on this momentum to expand business further. Mr. Mody has one eye set on the far East Indian state of Sikkim, where plans for similar facilities are to be announced imminently. Once the opening of Deltin Daman Casino proves fruitful, Mr. Mody intends to head overseas to Sri Lanka where another casino is on the agenda.

NAGA AIRCRAFT SET TO TAKE FLIGHT

Nagacorp, owner of Cambodia's largest casino, NagaWorld, is to begin flying in Chinese hi-rollers on its own jet fleet

Cambodia – Operations

Nagacorp, owner of Cambodia's largest casino, NagaWorld, is on track to begin flying in high-rollers from China on a fleet of its own commercial aircraft, according to the company's latest earnings statement and government officials.

NagaCorp has purchased a number of Airbus A320s to fly VIP junkets between Phnom Penh and China. The move is part of the gaming operator's long-running efforts to boost the high-roller patronage at its casino. "The Group is also focused on developing the China market by improving accessibility to Phnom Penh, using its recently acquired Airbus A320s and collaborating with key outbound Chinese travel agents, citing a 19 per cent increase in Chinese tourist arrivals to the Kingdom during the first five months of this year.

Despite the fact that NagaCorp's aircraft will be used only to service casino customers, Ang Kim Eang, president of the Cambodian Association of Travel Agents, said any new flights stand to benefit the wider economy.

Cambodia

Nagacorp, operator of the NagaWorld casino hotel in Cambodia, said its \$350m gaming and resort project in Russia will not be operational before 2018. It added in its financial statement that the number of mainland visitors to Cambodia rose nearly 20 per cent on-year in the first five months to more than 240,000.



News of NagaCorp's foray into the aviation industry came as the firm announced a 61 per cent rise in VIP gaming revenue for the first half of the year.

Citing interest from neighbouring, "gaming-centric" nations such as Vietnam and China, NagaCorp's mid-year earnings statement says the company made \$86 million from VIP gaming operations between January and June, up from \$53.3 million during the same period in 2013.

"Continued visitor growth from these gaming-centric countries is a driver of the Group's business growth," the statement reads.

Overall, NagaCorp, which now has more than 1,500 electronic gaming machines and 169 gaming tables at its NagaWorld casino, posted a 27 per cent increase in gaming revenue, totalling \$180 million as of June 30. Net profit for the firm increased 8 per cent year on year to \$67.9 million.

Macau casinos workers and builders threaten strike action

MACAU

As the Chinese territory races to build eight new resorts in the next three years, labour strains look set to intensify: workers are demanding higher pay and threatening strikes at a time when operators face a labour shortage. China's special administrative region boasts 35 casinos and relies on gaming taxes for more than 80 per cent of government revenues. Rigid regulations prohibit foreigners from working at the gaming tables, leaving operators little choice but to raise wages to attract and retain staff.

Workers at Galaxy have been planning protests at the company's resort after a Macau trade union submitted a petition alleging its salaries were 'disrespectful' to some employees.

More than 1,000 workers

protested in August outside the Venetian, accusing the company of poor wages and unfair promotions. Sheldon Adelson of Las Vegas Sands and Steve Wynn of Wynn Resorts together reported unexpected costs of US\$50m (\$62m) last quarter for labour-related compensation at their Macau casinos.

Both Galaxy and Sands China have expressed concern and vowed to resolve the problem.

"For both Galaxy and Sands we are not ruling out a strike," said Mr Leong Man Teng, a baccarat dealer and president of Forefront of Macao Gaming, the labour group behind the recent protests.

Dealers in Macau earn an average of 17,000 to 18,000 patacas (\$2,650 to \$2,800) a month, about half the US\$4,000 of a



typical Las Vegas dealer. Macau's labour unions have been rapidly gaining strength over the past year, garnering support from young people who have grown accustomed to job security and government handouts. Last October, more than 10,000 casino dealers took to the streets in one of the territory's biggest protests. They called on the government to safeguard local workers after casino operators publicly despaired at the difficulty of expanding while adhering to Macau's labour conditions.

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SRI LANKA – PLANNING ITS OWN MINI LAS VEGAS

John Keells Holdings, Sri Lanka's largest listed conglomerate, is presently at work in Colombo preparing the foundations for its new \$650m resort, the largest investment by a domestic company in Sri Lanka. The resort, which is due to open in 2018, will include an 900-room luxury hotel, conference venues, a shopping mall, residential apartments, an office complex and, potentially, a casino. It will be built in the land owned and occupied by the JKH subsidiaries, Ceylon Cold Stores (CCS), John Keells PLC, John Keells Properties and Waterfront Properties in Slave Island in Colombo.

To attract development, Sri Lanka is offering 10-year tax breaks on income generated from visitors. The casino section of any integrated projects will be taxed, but the project will still benefit from massive tax exemptions from Customs Duty, Construction Industry Guarantee Fund Levy, Port and Airport Development Levy, V.A.T, PAYE tax for foreign employees (five years), Withholding Tax on foreign loan interest and Tax on Dividends for 11 years. Operators will also only pay six per cent tax for 12 years after the 10 year income tax holiday has ended. To further attract investment the government has also designated a street along Lake Beira for new casinos, creating Sri Lanka's own Vegas Strip.

Since the end of the civil war in 2009, tourist figures have been on the rise in Sri Lanka. Arrivals grew more than 20 per cent a year from 2009 to 2012, versus five per cent from 2004 to 2008. Last year arrivals hit 1.3 million in the year ending in March, with Chinese visitors rising rapidly, though India remains the largest source of visitation. John Keells is targeting the newly affluent rich in both of these countries and a casino is crucial to its plans.

Investment promotions minister Lakshman Yapa Abeywardene said the Keells resort will be allowed to operate a casino if the government issues them with a license, adding that said the project hopes to raise \$300m from overseas investors. However, Sri Lankan President Rajapaksa, when questioned in June, stated that no new casino licenses would be issued, but that he, "didn't rule out the possibility of operators securing a previously issued licence. As a result, John Keells is in talks to attract in an international gambling operator to work with the company to secure a licence from the holders of the existing five Sri Lankan gaming licences.

Ravi Wijeratne is chairman-owner of conglomerate Rank Holdings, whose interests include a port, real estate, waste-reclamation and hydro and wind energy plants. He also holds two of the five casino licenses in Sri Lanka. The other three are held by domestic counterpart, Dhammika Perera, whose personal fortune is estimated at \$550m.

At present, Dhammika Perera, one of the richest men in the country has his own gambling resort in the works in the government-designated strip. (The Keells layout, which sits on land it has owned for several years, is nearly a mile away but received special permission). Perera's project, Queensbury Integrated Resort & Casino, includes a 500-room hotel, a mini convention centre and its own shopping mall.

James Packer's Crown Colombo, in partnership with Mr. Wijeratne, is priced at \$400m and is said to be targeting hi-rollers and will include a casino, a 400 room hotel, restaurants and convention facilities. Crown Colombo is set to open in 2016.

RESORTS GAMBLE ON CASINO SURGE

More operators are interested in investing in the Vietnam despite a marked slowdown of visitors from China

Vietnam – Operations

Vietnam's still youthful gaming market is showing signs of maturity with a number of hospitality developers asking for licences to build casinos as upcoming wide-ranging measures would help legitimise the industry and streamline investment.

The latest proposal came from Singapore's resort developer and operator Banyan Tree Holdings, which wants to build a casino at its existing \$800m Laguna Lang Co integrated resort in the central province of Thua Thien-Hue.

According to Laguna Lang Co, a subsidiary of Banyan Tree Holdings and also the operator of the integrated resort, a casino will 'further enhance' its guests' experience and position the resort as 'a strong competitor' in the region.

Although Banyan Tree Holdings has to wait for the Vietnamese government's permission, local authorities have already given a thumbs-up to the project. In the coming years the number of casinos in Vietnam is expected to double because developers like Banyan Tree Holdings are keen to gain access to the market.

Not far from the Laguna Lang Co resort, another Vietnamese private developer, Sun Group, has asked government permission to open casinos at its two existing resorts in Danang – Ba Na Hills and Son Tra Intercontinental Resort.

The Vietnamese government is also calling on pri-



vate investment for developing two integrated casino-resorts in the Phu Quoc Island and Van Don Island. Currently Vietnam has seven casinos licensed nationwide that serve only foreigners, as Vietnamese are not allowed to enter gaming establishments. The biggest is the Grand Ho Tram in the southern province of Ba Ria-Vung Tau. It has 90 gaming tables and 1,000 slots. When Canada's Asia Coast Development Limited Company – the owner of the Grand Ho Tram – completes the ongoing second phase of the project, it will be expanded to 180 tables and 2,000 EGMs.

Donaco International, which holds a 95 per cent stake at five-star casino and hotel Lao Cai International Hotel in the northern mountainous province of Lao Cai, last month announced that its brand-new, five-star Aristo International Hotel, had seen strong results since its soft opening on May 19. "The opening of the new property has attracted strong interest from players and junket operators. Total visits to the gaming floor since the soft opening are up 41 per cent against the old property," according to the casino operator.

Donaco gained approval from the government last year for increasing its total gaming tables to 50, from eight, in order to serve the rising demand of players coming from China. The casino operator said that the current tensions between Vietnam and China over the East Sea had slowed overall Chinese tourism to Vietnam, and deterred some major players from visiting the property.

New law attempts to regulate online gaming in the Philippines**PHILIPPINES**

Internet-based gambling in the Philippines is lawful, as there is no existing law that declares or prescribes punishment for engaging in online gambling or real money online casino betting.

However, House Representative Samuel D Pagdilao Jr. the lone representative of the Alliance of Concerned Teachers and Anti-Crime and Terrorism Community Involvement and Support (ACT-CIS) Party-List, has introduced House Bill 4540 or The Internet Gambling Regulatory Act of 2014, which aims to regulate online gambling in the country.

Representative Pagdilao has raised concerns that online gambling remains unchecked due to the absence of related laws governing

it. He states that the absence of a safety net preventing minors and those susceptible to the harms posed by gambling, has meant that the Philippine gambling market has attracted unscrupulous online gambling operators and cyber-crime syndicates using the country as haven for illegal operations.

Mr. Pagdilao cites as example the many cases filed by the Criminal Investigation and Detection Group (CIDG) during his tenure as CIDG Director, which were dismissed by the courts, simply because there is no law that penalises online gambling operations in the country.

"The popular basis for the court rulings is on the premise that 'there is no crime when there is no law penalising it,' stated Mr. Pagdilao.

Tahiti

The French Polynesian government has approved a proposed hotel and resort complex on Tahiti, which will cost nearly US\$3bn to realise. A jury has picked the project by a Hawaiian company, Group 70 International, to develop the Tahiti Mahana Beach Resorts and Spa on 52 hectares on the island's west side. The president, Gaston Flosse, says he will find the investors to finance the development, which is to include five hotels, a casino, a convention centre, cinemas, an aquatic park as well as luxury shops. The resort project is a key plank in the government's plan to create jobs and revive tourism as visitor numbers are well below what they were 15 years ago.

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G3-247 Report

INDIA

Searching for symmetry

India is one of those places on the map that in theory could be the next gambling hot spot. In reality restrictions and an irrational attitude to gambling has meant a lukewarm offering to date.

In the past India has been tightly controlled and legally has only been able to provide lotteries and horse racing. However the country is now eager to expand its gaming smorgasbord.

The various scandals surrounding the Indian Premier League cricket tournament has meant a huge push to introduce legalised sports betting, and with casinos only permitted in three states, there is also an air of expectation for growth in this sector. Whether it will get the green light to grow however is another thing entirely.

Historically, India is one of the oldest civilisations in the world and offers a diverse range of landscapes and cultural traditions. It is a country which manages to offer the unexpected

The name India is derived from Indus originating from the Old Persian word Hindus. The geographical term Bharat comes from a theological figure who was a legendary emperor of ancient India.

India is located in South Asia and is the seventh largest country by area and the second most populous country with over 1.2 billion in population. It stands apart from

Asia separated by its Himalayan Mountains and sea borders.

It is enclosed by the Indian Ocean in the south, the Arabian Sea in the south west, the Bay of Bengal in the south east and it shares land borders with Pakistan to the west, China, Nepal and Bhutan to the north east and Burma and Bangladesh to the east.

Four world religions originated from Indian – Hinduism, Buddhism, Jainism and Sikhism – whilst other religions arrived in the first millennium CE and helped shape the regions diverse culture.

By the early 18th century the lines between commercial and political dominance were blurred and several European trading companies had established coastal outposts. The English East Indian Company was one and its control of the seas, resources, military and technology made it very attractive to the Indian elite. By 1765 it had gained control of the Bengal region and by the mid 1800s most of India was administered by the UK Company. India then primarily supplied the British Empire with raw materials and this was really the onset of India's colonial period.

01 The 486.6 million workforce is the worlds second largest and the service sector makes up around 55 per cent of the GDP, the industrial sector 26 per cent and the agricultural sector around 18 per cent.

02 Although some 431 million Indians have left poverty since 1985, the country still continues to have problems such as poverty, corruption, terrorism and malnutrition.

03 Last year saw a 4.3 per cent rise in the number of foreign tourists into India which reached 6.8 million. Domestic tourism visits grew by almost 20 per cent to just over one billion and earnings from tourism reached US\$17.7bn.

India's modern age began somewhere between 1848 and 1885 when changes began to take place, including construction, education and technology. Some changes, such as land taxes and social reforms, were massively influenced by the British, and these caused resentments and rebellion. Finally the East India Company was dissolved and the British government took over the administration.



With growth came problems for small companies and farmers and there were large scale famines. After World War I changes began and the Indians called for self rule which finally led to India becoming an independent nation in 1947 after a struggle for independence led by Mahatma Gandhi.

The constitution was completed in 1950 which put in place a secular and democratic republic and over the last 60 years the country has seen highs and lows.

Economic liberalisation began in the 1990s which has created a large urban middle class and yet it still has huge amount of poverty, violence, religious insurgencies and unresolved territorial disputes with China and Pakistan.

India is a federal constitutional republic governed under a parliamentary system consisting of 28 states and seven union territories. All these states, and two of the union states (Puducherry and National Capital Territory of Delhi), have elected legislatures and governments whilst the remaining five union states are directly ruled by the centre through appointed administrators.

Tourism is a huge growth sector and a major part of the country's economy. It grew substantially in the 1980s, which was later followed by other plans and promotions to boost the sector

The Indian economy is the world's 11th largest by nominal GDP and following economic reforms in 1991 it became one of the fastest growing major economies and is now considered as a newly industrialised country. It is worth around US\$1.7 trillion with an average annual GDP growth rate of 5.8 per cent reaching 6.1 per cent in 2012.

The 486.6 million workforce is the world's second largest and the service sector makes up around 55 per cent of the GDP, the industrial sector 26 per cent and the agricultural sector around 18 per cent.

Major products include textiles, telecommunications,

pharmaceuticals, food processing, petroleum and software. India's consumer market is said to be 11th in the world whilst the telecommunications industry is the fastest growing surpassing Japan to become the third largest smart phone market in the world.

Although some 431 million Indians have left poverty since 1985, the country still continues to have problems such as poverty, corruption, terrorism and malnutrition.

Tourism is a huge growth sector and a major part of the country's economy. It grew substantially in the 1980s following a National Policy on Tourism which was later followed by other plans and promotions to boost the sector with 'Incredible India' branding being launched during the Olympics in 2012.

Cruise shipping is one of the fastest growing sectors alongside adventure tourism and medical tourism.

Last year saw a 4.3 per cent rise in the number of foreign tourists into India which reached 6.8 million. Domestic tourism visits grew by almost 20 per cent to just over one billion and earnings from tourism reached US\$17.7bn.



THE INDIAN GAMBLING MARKET

Gambling in India is very much part of the culture and history and the ancient kingdoms took part in gambling activities regularly, so much so it became an important feature of the Hindu religion. History shows gambling dates back as far as 2000BC with the Ramayanas making reference to it.

Legend has it that in 1500BC Yudhishtira gambled away his kingdom, his wealth, his brother and eventually his wife during a game of dice with King Shakuni. The King had loaded the dice and so continually won unbeknown to poor Yudhishtira.

The urge to gamble amongst Indians is strong. Dice has been passed down through the ages, much like cock fighting and ram fighting. By the 15th century a well structured and legislative system was in place regarding gambling and gambling houses were legalised and the King took his cut of any profit.

By the 18th century cricket took off alongside a gambling boom. But this took its toll on society and despite the tax gains, the British Empire believed that by banning gambling the Indian economy would strengthen.

01 In 1949 the constitution of India gave states the right to legislate and make policies relating to gambling. To date most state have only made laws against gambling. But 13 states have legalised the lottery and three states (Goa, Sikkim and Daman) have legislation in place for other types of gambling.

02 Many in India say that most newspapers are filled with stories about cricket betting scandals or betting house raids. Cricket is of course the favourite sport and a large portion of the community continues to partake in sports book betting despite the fact it is illegal.

So they outlawed gambling via the 1867 Public Gaming Act which still exists today. This banned all forms of gambling except horse racing, rummy and lotteries.

In 1949 the constitution of India gave states the right to legislate and make policies relating to gambling. To date most state have only made laws against gambling. But 13 states have legalised the lottery and three states (Goa, Sikkim and Daman) have legislation in place for other types of gambling.

The restraints under the Public Gaming Act has otherwise merely driven gambling underground and the mafia saw it as an opportunity to make vast amounts of money and began to offer Matka style games.

It's a tough mould to break. Mahatma Gandhi spoke out against gambling and his social and cultural influence still has an effect today whilst the government also believes it has a responsibility to live up to the tradition and therefore policy makers have always been unwilling to make any changes.

The Indian gambling market is said to worth up to US\$60bn per year (Rs300,000 crore), which is around two per cent of India's GDP, of which around \$40bn of this is illegally bet. For a long time lotteries and horse racing have been the main two popular and legal forms of gambling in India. They have persisted through legal changes over the last 200 years and provide a top up for government coffers.

More recently gambling began to emerge in Goa and Sikkim. These states have been pioneers of the gambling world in India and both set up online gambling and casino operations.



Goa today has a number of offshore and land based casinos, whilst Sikkim has set up the only legal betting website in India via Playwin lottery.

It's a paradox and many are now baffled as to where the law really stands. Back hander is a word branded around. If you have enough money to buy your way in, then you can probably do it.

Many in India say that most newspapers are filled with stories about cricket betting scandals or betting house raids. Cricket is of course the favourite sport and a large portion of the community continues to partake in sports book betting despite the fact it is illegal.

Sports betting is not permitted although there are continual calls to allow it saying funds merely go to underground bookies and this is then used for terrorism and drugs.

It's a grey area. Many bookmakers have been arrested but not the bettors. And there aren't any actual laws that prohibit sports betting. The Public Gambling Act makes casino gaming illegal, however on the other hand as a skill game horse race betting is permitted. Some argue

The Public Gambling Act of 1867 basically prohibits the running of public gaming houses. It's an archaic document created during British rule

sports betting is also a skill game.

The Public Gambling Act of 1867 basically prohibits the running of public gaming houses. It's an archaic document created during British rule. Pakistan has since abolished this rule whilst the Indian government continues with the same restrictions.

The law is 145 years old and basically bans gambling houses being operated or visited. The penalty is up to Rs200 or up to three months imprisonment for anyone found operating such a venue. Visiting gambling houses is also prohibited with up to Rs100 fines and one month imprisonment. Apparently no one has ever been found guilty of betting.

Skill games are however allowed. The situation is slightly vague, however in 1996 the Supreme Courts defined games of skill as the following: 'The competitions where success depends on substantial degree of skill are not gambling and despite there being an element of chance if a game is preponderantly a game of skill it would nevertheless be a game of mere skill.'

In 1968 Rummy was determined to be a skill game. Poker is a grey area. Horse racing is legal and declared a skill game. Cricket betting is banned.

The illegal gambling sector can be extremely damaging. Criminal rackets run the show and over the years these have become semi professional set ups with cutting edge technologies to run their systems. There is a constant battle between the police and bookmakers. Time and money is spent trying to track down illegal gambling set ups and as these operations in all reality don't impose any imminent problems to the public many Indians believe money would be better spent elsewhere.

But of course money from illegal gambling is then used in criminal circles and so the problem continues.



It is said if legal gambling was introduced in India the government could see Rs12,000 to Rs19,000 crore of revenue to the government via the Rs3bn crore illegal betting market alone.

The most popular game in India is Matka and because this is not subject to taxation the bookmakers can then offer better value payouts. Matka is very popular particularly in Mumbai and Gujarat and originated as a game called Ankadar Jugar where people bet on the closing price of cotton in the New York stock exchange.

It grew in popularity in the 1970s when Rathan Khatri ran the Matka racket in Mumbai. He was an honest and popular man and there was even call to make him Prime Minister when Indira Gandhi died. Khatri retired in the late 1990s and there has been a drop in Matka since the mafia has now taken control of the game and punters don't know if the game is fixed or not. Invariably it is.

The game is similar to the lottery and there are two draws of three numbers per day drawn from a pack of cards with numbers zero to nine. The numbers from the draw are added up and the last number is also included in the line up. A second draw is held and these numbers are all put together.

LOTTERY IS LEGAL

The lottery dates back to nearly 300 years in India and was introduced in Goa during Portuguese rule and later in Calcutta during British rule.

Lotteries helped fund development work back in the 17th century and after independence Kerala became the first state to introduce a state lottery.

01. There are 12 states which have legalised lottery – Maharashtra, Punjab, West Bengal, Kerala, Goa, Sikkim, Manipur, Meghalaya, Tripura, Mizoram, Arunachal Pradesh and Nagaland – and these governments run lotteries to primarily increase their revenues however they are also banned in some states, whilst there are cases where one state has banned lotteries run by another as they compete with each other for a share in the market.

Up until 1998 there was no law in respect to state lotteries and many states ran lotteries after obtaining Presidential Orders which entrusted each state with the power to operate lotteries.

Then Parliament enacted the Central Lotteries Act of 1998 which governs the lotteries and gave state governments the authority to run such gambling restricting it to a maximum of one draw per week.

This act covers the whole of India and enables the state governments to organise and promote lotteries and sell via distributors and agents.

There are 12 states which have legalised lottery – Maharashtra, Punjab, West Bengal, Kerala, Goa, Sikkim, Manipur, Meghalaya, Tripura, Mizoram, Arunachal Pradesh and Nagaland – and these governments run lotteries to primarily increase their revenues however they are also banned in some states, whilst there are cases where one state has banned lotteries run by

another as they compete with each other for a share in the market.

Key benefits of these lotteries include welfare initiatives, employment, funding for social development and tax revenue.

Later the Lotteries (Regulation) Rules 2010 was introduced to further regulate the industry and make the lottery operations become more transparent and disciplined.

Kerala introduced its lottery in 1967 and today revenues in this state are Rs2,778 crore with revenues used for assisting patients with serious illnesses. Net gaming revenue was Rs682 crore last year. There is a distribution network with more than 35,000 agents and 100,000 retailers.

Currently the Finance Ministry lists around 17 lotteries run in traditional format and 241 online ones (2011). There are said to be 168 online lotteries in Goa and 63 in Sikkim.

The lottery can be played for as little as five Rupees or up to 50 Rupees and tickets are sold by vendors located around most markets.

The largest illegal lottery is Matka. Today this type of gambling is run by small time bookies primarily in the Kalyan and Mulund areas and is an underground operation often run with criminal involvement. It is estimated that there are around 400 Matka bookies in the city and around 1,000 across the state.

Apart from the state government lotteries, the land-



INDIA: Vital Statistics

Capital: New Delhi
Population: 1,220,800,359
Land Area: 3,287,263 sq.km
Currency: Indian Rupees (Rs)
Median age: 26.7 years
Languages: English, official (91.2%), Maori (3.9%), Samoan (21%)
Ethnic Groups: Indo-Aryan (72%), Dravidian (25%), Mongoloid, other (3%)
Government:
 Federal Republic
Chief of State:
 President Pranab Mukherjee
Head of Government:
 Prime Minister Manmohan Singh
Elections: President elected by an electoral college for a five year term. Last election held in 2012. Prime Minister chosen by parliamentary members of the majority party following elections. Last elections held in May 2009. Next due in May 2014.

locked country in South Asia, Bhutan, is also allowed to run lotteries in India. The central government is in pro-lottery business which is said to be a Rs50,000 crore industry.

Today in most Indian states there are lottery terminals available and some lotteries are drawn every 15 minutes. There is a high proliferation of illegal lotteries throughout the country and it is said the government is losing revenue and credibility.

A good example of a state run popular lottery is in Sikkim which introduced its system in 2001. Sikkim licensed PlayWin Lotto which is very popular and tickets are bought online or via a terminal. It was one of the first such lotteries and established in 2001. Tickets cost 10 Rupees and can produce massive payouts.

It has operations now in many Indian towns and is the gaming brand of Pan India Network Ltd which is part of the US\$2.4bn Essel Group. PlayWin is also India's first and largest online gaming company providing an online lottery network.

The Essel Group has been in existence for the last 30 years and is a leading business conglomerate working in media, entertainment, infrastructure, education and technology.

In the entertainment field alongside PlayWin, the company also operates the Fun Cinema chain which has 81 screens in 19 cities plus two amusement parks called Essel World

Playwin offers three big lotto games – Thunder Ball (drawn every Tuesday), Thursday Super Lotto and

Horse racing is entirely legal and one of the most popular forms of gambling in India. It is grown in popularity due to a decision by the Supreme Court found that betting on horse racing was a matter of skill.

Saturday Super Lotto plus smaller games Jaldi 5 and Jaldi 5 Double and after 10 years in operation the games can be played on various platforms in retail outlets, internet and via the SMS platform.

Meanwhile Sugal and Damani, which is primarily involved in the lottery business (amongst other businesses in tourism, hospitality and engineering) has recently opened a casino via its subsidiary company Sol Entertainment (Crown Casino) in Goa.

Sugal and Damani has 40 years experience in operating government lotteries in India and has developed its own in house software whilst its subsidiary Skill Lotto Solutions runs lotteries in Punjab, Maharashtra, Sikkim, Goa, West Bengal and Mizoram amongst others. The company has rolled out over 20,000 computer based online lottery terminals in various states.

The company's lottery application branded Complot/Playsmart is now running in over 30,000 point of sale terminals generating over five million transactions a day.

The application supports traditional distribution channels such as retail agents and equips them with lottery terminals.

Sunny Group is an authorised distributor of the Sugal and Damani systems in the Mumbai region and provides the Complot/Playsmart and Smartlot lottery systems.

HORSE RACING

Horse racing is entirely legal and one of the most popular forms of gambling in India. It is grown in popularity over the last 20 years or so mainly due to a decision in 1996 when the Supreme Court found that betting on horse racing was a matter of skill, so neither the 1888 Police Act or the 1930 Gaming Act could be applied to horse race betting and it was not considered as gambling per se.

Today, Pari Mutual horse races are organised by five Turf Authorities who between them operate eight race tracks. It is a very popular sport and has expanded greatly throughout the country. It is a cheap sport to attend and costs between Rs20 and Rs200 so attracts large crowds. Races are run on flat tracks and the courses are relics of the British colonial era.

At the moment people can only bet on local races at the track via bookmakers who offer prices from white cages in the betting rings. There are also on course tote bookmakers who run a pool betting system. For large bets bookmakers open up credit accounts. In addition bets can be made off course via betting shops and overseas racers can be bet on at foreign online bookmaker sites. But there is no online betting on horse racing for the Indian races. Indians can of course bet on international sites for international races.

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Legal wagering on the tote is estimated to bring in around Rs2bn (US\$45m) each year plus an equivalent amount staked with licensed bookmakers.

Taxes, in relation to on course betting, are currently set at 30 per cent on stakes which is high. This was increased from 20 per cent in 2010.

Today the Turf Authorities of India manage and host events through eight different racecourses including:

Bangalore Racecourse is operated by the Bangalore Turf Club which was founded in 1920. Horse racing in Bangalore began some 150 years previously but between wars it was difficult to access good racing horses. Today the track is very popular and has a capacity of 1,500 visitors. The track is a 1,950 metre oval with four curves.

Hyderabad Racecourse is run by the Hyderabad Race Club which was set up in 1968 by the Nizam's. The club switched venues and ended up moving from Moula Ali racecourse to Malakpet and constructed in palace of Nawab Mir Mahboob Ali Khan Nizam VI. A grandstand was later added and it is the most modern in India. There are two different race tracks to cope with two seasons the monsoon and the dry season.

Royal Calcutta (Kolkata) Racecourse is operated by the Royal Calcutta Turf Club where the race track was first built in Kolkata in 1820. Races at first were held in Akra. In the early 1800s the Bengal Jockey Club took over and

Due to the problem with the Indian banking system there are only a small number of bookmakers who can properly service the market and these include Bet365, William Hill, Ladbrokes and Betfair

a few years later it was moved to the Miadan area which is in the centre of the city and where it sits today.

Mumbai (Mahalakshmi) Racecourse is operated by the Royal Western India Turf Club and is among the best in the world and was initially created from marshy lands known as the Mahalakshmi Flats. The Turf Club controls racing in Mumbai, Pune and New Delhi. The track was built in 1883 and spans 225 acres whilst the track is a 2,400m oval track. There are around 1600 horses in training in Mumbai. The Mumbai-Pune betting totalisator was set up in 1967.

Pune Racecourse was built in 1830 and is located in Pune Cantonment and was built on land that was controlled by the Indian Army. The total area is around 118 acres and it is also operated by the Royal Western India Turf Club which hosts many events such as the Pune Derby. The track is a 3,200 metre oval turf track.

Madras Racecourse is also known as Guindy Racecourse and is one of the oldest racecourses in India. The track was first built in 1777 in Guindy. It is operated by the Madras Race Club.



Ooty Racecourse is located in Ooty and is also operated by the Madras Race Club which hosts many events at this track. It is a highland racecourse so the altitude is much higher. It is also one of the smaller tracks and takes up 55 acres and the track is 2,400 metres.

Mysore Racecourse is located in the Mysore district and is used by people from the Karnataka area. It is said to be the most picturesque race track in India as it is located in the foothills of the Chamundi Hills. It is operated by the Mysore Turf Club and is very exclusive and only allows 250 members in each year. It is oval shaped and extends to around 2,000 metres.

SPORTS BETTING

India is regarded as the hotbed of global betting syndicates with gamblers and bookmakers all involved in a network of illegal 'spot fixing'. The latest scandal last year saw several bookmakers arrested and the idea now is to ascertain whether legalised betting can exist in India without the stigma attached and whether it can then eradicate illegal betting.

Although internet gambling is technically illegal (bar via Sikkim's PlayWin Lotto) there is nothing stopping

players betting online with offshore bookmakers.

Sports betting falls under state jurisdiction. Although the sports minister can propose a bill, sports betting cannot be legalised nationally.

Due to the problem with the Indian banking system there are only a small number of bookmakers who can properly service the market and these include Bet365, William Hill, Ladbrokes and Betfair

Up until the year 2000 India's online gambling sector managed to avoid restrictions mainly because there was nothing in state legislature which deemed it to be illegal.

The Information Technology Act 2000 did regulate the online sector but only prohibited publication of information online that can 'corrupt' people which although includes online gambling information does not stop Indian gamblers from betting over the internet. The penalty for online gambling is up to Rs100,000 fine or up to five years imprisonment.

In May 2011 the Federal Information Technology Act was introduced which was intended to restrict online gam-



bling activities by holding the ISP responsible for blocking offshore betting sites.

However despite this there is extensive online illegal gambling throughout the country as it did not prohibit Indian residents from accessing online betting operators internationally which either accept Rupees or offer e-wallet deposit options. The majority of sports bettors use Moneybookers or Neteller to deposit to online bookies.

The only site which apparently accepts Rupee deposits directly is Bet265.com. This site enables players to register with their home address, deposit, and wager and withdraw in Indian Rupees.

Otherwise Indians can deposit money via Skrill (Moneybookers) or Neteller – e-wallets set up in Rupees linked to player's home bank accounts or credit or debit card. EntroPay is another system similar to e-wallet but funds are loaded to the player's account via virtual debit card number. This means players can deposit and withdraw anonymously.

NETeller say there are 1,565 websites for casinos games,

"Criminal law should be invoked only where a guilty intent is proved and players should not be liable of match fixing and doping on mere presumption. At the same time legalising betting would be a step in the right direction as this will ensure transparency and lead to removal of corruption from sports, which is the need of the hour."

KTS Tulsi, Senior Advocate of Supreme Court of India.

poker, bingo and sports which will take money from India. Monkeybookers list 1,475 such sites whilst Visa and Mastercard report 1,898 and 1,813 respectively. Approximately 40 per cent of internet users in India have admitted to visiting gambling sites and betting.

Raj Patel of blog site Sportsbetting.net.in said: "Moneybookers for example is famous in India and used by many website programmers, consultants and freelance writers to take payment from their clients. Indian banks deal with them regularly for transactions that have nothing to do with gambling.

"While your bank might ask you for a purpose code when doing large deposits or withdrawals ultimately there isn't too much concern they will have an issue with these transactions. This is because the name of the gambling site never appears."

The IPL 2013 spot fixing scandal brought the whole sports betting issue back to the surface again and there are calls to re-evaluate the current legislation and legalise sports betting in a bid to curb fixings on sports.

The Indian Premier League, India's most successful and profitable professional sports league came under fire in May 2013 when three Indian cricketers from the Rajasthan Royals were said to have been involved in spot fixing during certain league cricket matches. It blew up when the owner of the Chennai Super Kings team, Gurusath Meiyappan, was also interrogated regarding his role.

What emerged was that there were strict limitations within the existing legal framework to charge or prosecute alleged sporting fraud offenders in India. This is partly due to the archaic laws and the absence of any law governing fraud in the field of play.

At a Federation of Indian Chambers of Commerce and Industry (FICCI) conference late last year it was argued that the government could earn substantial revenues from taxing such activities, it would help remove illegal gambling, it could support some grass root sports programmes from revenue and help prevent criminal activity funded by illegal betting.

A tax rate of 20 per cent has been suggested. At the moment the betting market in India is said to be worth US\$600m. There have been extensive discussions between the Law Ministry and Ministry of Youth Affairs and Sports about the drafting of a modern law on sports. The Prevention of Sporting Fraud Bill 2013 (anti-fixing

bill) is a step in the right direction and will help combat fraud in domestic and international sporting events.

This was drafted last year by the Ministry of Youth Affairs and Sports and has been based around other laws in the EU and the bill has a provision of monetary fines of Rs1m up to Rs5m which is dependent on the economic benefit the guilty party has derived from sporting fraud.

Mr KTS Tulsi, Senior Advocate of Supreme Court of India said: "After the IPL fiasco there is a big hue and cry regarding the amendments in the sports law and inclusion of issues such as criminalisation of sports, invoking criminal law for match fixing and betting and strengthening of anti-doping laws, but in an effort to clean up sports, sportsmen should not be made a scapegoat.

"Criminal law should be invoked only where a guilty intent is proved and players should not be liable of match fixing and doping on mere presumption. At the same time legalising betting would be a step in the right direction as this will ensure transparency and lead to removal of corruption from sports, which is the need of the hour."

For a bill to be passed by Indian Parliament it needs to be introduced before both the houses. After it is passed here it is signed into effect by the President of India. It has yet to go through the first two houses.

Meanwhile in July 2013 the National Sports Development Bill 2013 was drafted in a bid to bring reforms in regarding the management and governance of sports. But since sports is a state subject, both the anti fixing bill and the sports bill will need to be introduced before the parliament and will require the support of the states as well as the lawmakers. It was open to public consultation under December 2013.

For a bill to be passed by Indian Parliament it needs to be introduced before both the houses (the Rajya Sabha and the Lok Sabha). After it is passed here it is signed into effect by the President of India. It has yet to go through the first two houses.

However many say the question is not whether sports betting in India should be regulated but more when it will be regulated? It has taken seven months for the draft bill to be introduced after the IPL scandal and it has not yet been finalised so it could take some time yet.

The central elections in India are scheduled for April 2014 which could mean the anti fixing bill may be shelved until the monsoon session of parliament bringing further delays.

In October last year the FICCI launched a paper, Regulating Sports Betting in India, during a conference on the issue which followed on from a previous paper published in June 2012.

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01 The Goa, Daman and Diu Public Gambling Act 1976 plus the Sikkim Casino Games (Control and Tax Rules) 2002 authorise gambling via casinos. The Sikkim Regulation of Gambling (Amendment) Act 2005 gives the Sikkim government the authority to authorise gambling on certain days and make certain gambling houses legal whilst the Sikkim Online Gaming (Regulation) Act 2008 permits online gaming in Sikkim to include casino games. In August 2009 it was amended to make online sports betting in Sikkim legal.

Research for the paper showed that 83 per cent of respondents believed regulating sports betting in India was better than banning it whilst 74 per cent believed legalising sports betting would curb match fixing.

It is estimated that the online gaming market in India could grow to Rs46bn by 2016. There are basically now two options for India

1. Keep the status quo and according to the FICCI continue to lose around Rs12,000 to Rs20,000 crore annually in tax revenue. Also enable match fixing to continue and illegally activities financing drugs and terrorism.
2. Legalise and regulate sports betting. India is looking toward the US in terms of its legalisation mainly because of the nature of democracy and division of powers between central government and state governments.

CASINOS AND ONLINE GAMING

At the moment there are a handful of casinos in India. Only two Indian states, Goa and Sikkim, plus the Union Territory of Daman and Diu, allow gambling.

The Goa, Daman and Diu Public Gambling Act 1976 plus the Sikkim Casino Games (Control and Tax Rules) 2002 authorise gambling via casinos. The Sikkim Regulation of Gambling (Amendment) Act 2005 gives the Sikkim government the authority to authorise gambling on certain days and make certain gambling houses legal whilst the Sikkim Online Gaming (Regulation) Act 2008 permits online gaming in Sikkim to include casino games. In August 2009 it was amended to make online sports betting in Sikkim legal.

At the moment there are two casinos operational in Sikkim and a dozen or so in Goa. It is estimated that Rs1.35 trillion (around US\$30bn) is spent annually on casino type gambling in India.

SIKKIM

Sikkim is a landlocked Indian state located in the Himalayan Mountain bordering Nepal, China's Tibet



and Bhutan and West Bengal.

It has around 610,000 inhabitants and is the least populous state in India and the second smallest state after Goa in terms of total area.

It is however a popular tourist destination due to its culture, scenery and biodiversity. It also has the only open land border between India and China and is the only state with an ethnic Nepali majority.

Its economy today is dependent largely on agriculture and tourism and its GDP is around US\$1.5bn.

In the last few years the government has made huge strides to promote tourism and the state revenue has increased 14 times since the mid 1990s. A large amount of investment both from domestic and international organisations has been put into the region bringing economic power.

Now although Sikkim plays second fiddle to Goa in terms of gambling locations, it was however the first Indian state to offer gambling and opened the state's first casino in March 2009.

In this year the government of Sikkim issued the Sikkim Online Gaming (Regulation) Act 2008. The act was notified and is now operational in the state of Sikkim. This made games such as roulette, blackjack, poker, keno and other casino games legal for online play. Any operator offering such games must start by paying a 500 Rupee application fee. If this is approved a one year licence is issued on receipt of approximately \$2,000, which is then renewable annually. Monthly taxes are one per cent of the GGR.

At the time the Online Gaming Act saw nine Letter of Intent (LOIs) issued by the government whilst only four of these nine procured provisional licences for setting up an operation. However none had the necessary requirements for set up.

At the time it was thought cricket betting sites and online casinos would jump at the chance to run sites. But this never happened. The only gambling site operating from Sikkim at the moment is PlayWin Lotto.

Around the same time the Central government also issued the Information Technology Rules 2011 which looked at internet companies and how to prevent the



spreading of socially unacceptable material which included anything relating to money laundering or gambling.

This put a spanner in the works as the Reserve Bank of India also refused to allow payment gateways to gambling websites. It was also suggested that no other operators applied as many are afraid of repercussions from illegal bookies.

But things continued. In August 2009 amendments were added and the Sikkim Online Gaming (Regulation) Amendment Bill 2011 was passed. This basically permitted sports betting and approved games such as football, cricket, tennis, golf and horse racing. However to offer sports betting a gambling licence is also required by the government of Sikkim.

The period for such a licence is five years requiring a Rs5 lakh application fee (around \$10,000).

In addition, the success of the national Playwin lottery has been astounding and today it is largely accepted as the main national lottery of India. It has also brought a huge amount of revenue into the state.

Goa is renowned for its beaches, places of worship and world heritage architecture and although at one time the capital Panaji was a neglected area in terms of tourism, now it is economically in a good position.

The state also has two casinos. The first was opened 2009 at the Hotel Royal Plaza in Gangtok followed by a casino in Hotel Mayfair in 2002.

The Sikkim Casino Games (Control and Tax Rules) 2002 grants licences to casino operators in the state whilst the Sikkim Regulation of Gambling (Amendment) act 2005 gives the government the authority to authorise casinos.

The law only authorises casinos in five star hotels and having had only a one party rule for the last 10 years has not faced any serious political opposition to these rules.

A licence fee of Rs5 crore is required which lasts five years plus an annual royalty fee of Rs1 crore (\$200,000) or 10 per cent of the GGR (increased to 15 per cent by the third year) whichever is higher is also paid.

CASINO SIKKIM is located at the Royal Plaza Hotel in Gangtok and was Sikkim's first casino to open in 2009 and is a luxury hotel located above a river valley. It is part of the Sarovar Hotels and Resort chain which is one of the third largest hotel chains in India. The hotel has a total of 78 rooms. The casino is located on the first floor and opens from 6pm until 4am and has table games and slot machines.

CASINO MAHJONG is located at the Mayfair Spa Resort and opened in 2011 and is owned and managed by Trio Ventures which is a company started by three entrepreneurs from Gangtok. The resort is located in a green forest and surrounded by mountains offering family rooms, cottages and villas. The casino is spread across an area of 7,000sq.ft and has 15 gaming tables and poker room with gaming tables and a VIP room and slots. The company paid Rs5 crore for the five year licence and Rs3 crore was spent setting up the facility.

GOA

Similarly Goa is also thriving thanks to tourism brought in from gambling. The state is India's smallest state in terms of area and fourth smallest by population.

It is located in West India in the region known as Konkan on the Arabian Sea. It is India's richest state with a GDP two and half times that of the country as a whole.

The capital is Panaji and the region is still culturally influenced by the Portuguese who first landed there in the early 16th century as merchants and later conquered the land. It was annexed by India in 1961.

Tourism is the primary industry and it handles 12 per cent of all foreign tourists in India. In 2010 the area saw two million tourists of which 1.2 million were from abroad.

Goa is renowned for its beaches, places of worship and world heritage architecture and although at one time the capital Panaji was a neglected area in terms of tourism, now it is economically in a very good position.

The off shore casinos emerged after restrictive laws prevented land based casinos being developed. Nothing was mentioned about hosting casinos on the water so casinos began to open onboard ferries which float outside the city of Panaji in the waters of the River Mandovi.

It is said around 30 per cent of people who fly into Goa are gamblers. Goa alone accounts for 95 per cent of the Indian gambling pie and the state government takes around Rs100 crore in taxes.

Business began in 2001 when the first offshore casino, Casino Caravela, opened its doors with 14 tables and for the last five years the casino market has grown by around 40 per cent each year.

The Mandovi River is now home to India's largest casino.

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nos. At the moment there are six offshore licences in Goa of which four are operational with a total of 106 tables and 75 slots. The entry fee is Rs3,500 per player of which Rs2,000 goes to the local Goa government. The four casinos are operated by two operators – Pride Group and Deltin Group.

Meanwhile there are nine land based casinos. Gaming fees and taxes were hiked last year when the new Goa government came into power from Rs15 lakh to Rs2.5 crore for landbased casinos and from Rs5 crore to Rs6.5 crore for offshore and many casinos were forced to close down.

"The amazing thing is very few people seem to have made an issue of this. Frankly it has far reaching consequences for every citizen of India. If one state government can start interfering with the basic rights of its citizens, where does it end?. The continual references to moving casinos out of the Mandovi River are just so much political 'noise'. It is completely unfeasible for the vessels to operate in anything other than sheltered water. The issue is not one of sea worthiness or otherwise of the vessels, but it is the safety issue regarding moving hundreds of people from shores to ship and back again in the dead of night and in water where wave height between June and end of September can be up to two metres high."

John Snowball, Vice President of Crown Casino Goa.



In 2012/13 the casinos in Goa contributed \$2.2m to the state government in form of taxes plus also earned \$296,458 from entry fees, \$536,463 in annual licence fees from offshore casinos and \$0.41 in annual licence fees from onshore casinos.

Last year the Goa courts banned mining depriving the state of taxes and so the gambling sector is more important than it was despite constant calls against the sector with reports of gambling addiction problems and the 'corruption' on local culture.

Another issue is that Indian casinos can only take dollars



and not pay back dollars (only Rupees) so currency convertibility is often a hindrance and some say this is why India only attracts one tenth of the gambling audience of major casino markets.

Earlier this year Goa's Chief Minister Manohar Parrikar announced that local Goans would be banned from entering casinos. The ban was due to come into place on February 28th. This will also coincide with the promised set up of the casino gaming commission.

The idea is to permit only tourists in the casinos in a bid to stop gambling addiction problems. However Shrinivas

Nayak, Director of Casino Pride offshore casino and three land based casinos and of the Casino Operations Association, said the ban on locals will only give rise to issues such as identifying indigenous Goans from the many casino patrons who enter.

At the moment around 80 per cent of gamblers at onshore casinos in South Goa are locals and 50 per cent of clients at onshore casinos in North Goa are Goans. For offshore casinos 70 per cent of clients are tourists so these are less affected.

Manohar Parrika, Chief Minister of Goa has said no more licences will now be issued. In June 2013 some 29 of 30 elected city council members in Panaji voted to close all casino offices in the city on the riverside and wanted floating casinos pushed out to sea.

The legislative bill was passed in the assembly more than a year ago but has received heavy criticism as to how it can be implemented and enforced. The rules were due to be notified in February.

It is thought people will resort to document forgery and it could affect the casino industry heavily particularly in the out of season periods.

Some say the idea of banning Goans from casinos is contrary to a section in the Indian Constitution where it is prohibited to ban anyone of 'religion, race, caste, sex or place of birth' from 'access to shops, public restaurants, hotels and places of public entertainment.'

John Snowball, Vice President of Crown Casino Goa said: "The amazing thing is very few people seem to have made an issue of this. Frankly it has far reaching consequences for every citizen of India. If one state government can start interfering with the basic rights of its citizens, where does it end?"

Meanwhile there are calls now to remove all offshore casinos out of the Mandovi River. Things began to brew in the summer of 2013 in Goa when Delta Corp unveiled the MV Horseshoe. The idea was to change an existing vessel in the Mandovi River for one which was bigger. The Horseshoe was three times bigger and has now catalysed an anti gambling war in Goa.

The Horseshoe was previously operated by Caesars Entertainment in the US Great Lakes, and houses a 40,000 sq.ft casino and is now named the Deltin Royale.

Manohar Parrika, Chief Minister of Goa has said no more licences will now be issued. In June 2013 some 29 of 30 elected city council members in Panaji voted to close all casino offices in the city on the riverside and wanted floating casinos pushed out to sea.

However this is thought to be a unfeasible option. John

Snowball added: "The continual references to moving casinos out of the Mandovi River are just so much political 'noise'. It is completely unfeasible for the vessels to operate in anything other than sheltered water. The issue is not one of sea worthiness or otherwise of the vessels, but it is the safety issue regarding moving hundreds of people from shores to ship and back again in the dead of night and in water where wave height between June and end of September can be up to two metres high.

"Plus the politicians, and casino opposition, seem to have forgotten the Mumbai terrorist attacks where the terrorists arrived by small boat from a vessel offshore. How could the hundreds of passenger transfers per week possibly be monitored?"

Meanwhile back in 2010 it was announced that the Goan gaming industry would soon be regulated by a gaming commission which would be set up to monitor both onshore and offshore casinos.

Despite the initial announcement however nothing really happened under the Congress government which was in power at the time. Nor under the BJP led coalition government which took over in 2012.

However following the death of 20 year old Sai Dhanush the idea of forming a gaming commission has been given new momentum and a renewed push to introduce. The commission was said to be ready by August 2013. However it is still not set up.

Dhanush under the law should not have been allowed to enter a Goan casino where the age limit is 21. He fell from a second level of an offshore casino vessel and drowned.

Once it is set up the commission will enable constant checks and inspections to make sure rules are followed and have penalising powers. It would also specify a minimum payout ratio. At the moment there is no government system to oversee the ratio of monies won by gamblers in comparison to the money netted by the casino operators.

Meanwhile the number of land based casinos has dropped over the last year or so partly due to the large increase in annual licensing fees. At the moment those which remain include:

CHANCES RESORT AND CASINO in the Vanguinim Valley Resort in Dona Paula which is located in a five star boutique hotel with 53 rooms and suites. The hotel is just 30 minutes drive from Dabolim Airport. The casino is Goa's first and largest land based casino and offers gaming and VIP room plus a kid's garden and restaurants. The casino is open 11am until 4am and includes American Roulette, Mini Baccarat, Blackjack, electronic roulette, 35 slots and video slots.

CASINO CARNIVAL in Goa Marriott Resort is located adjacent to the Miramar beach near the capital Panaji. It is one of the finest five star resort offering. Casino Carnival is a Vegas style casino with electronic roulettes, Blackjack, Baccarat, the Sigma Serby and the largest selection of slots in Goa. It is open from noon until 2am. It was associated with the offshore Carnival before its sale (not part of the sale).

G3-247 Report

INDIA



GOLDFINGER in Cidade de Goa Resort is directly associated with Chances Casino. The Cidade resort on Vanguinim Beach is a luxury five star resort spread across 40 acres. It is designed to resemble a self-contained Portuguese hill hamlet and has around 180 rooms and swimming pool whilst the casino has 35 slots and is open 24 hours a day with Baccarat, Blackjack and Roulette and a big derby.

TREASURE CASINO is located at Majorda Beach Resort which has 120 rooms spread over 22 acres of

land. The casino is open from noon until 1am. The casino was at one time a disco and has been designed like a pirate ship with rustic ambience. The resort is operated by Eastern International Hotels Ltd

DUNES CASINO at the Zuri White Sands Resort is located in Varca in south Goa and has 154 rooms available. The casino is one of the largest in Goa and one of the newest.

CASINO PARADISE is also operated by the Casino

Pride group (Goa Coastal Resorts and Recreation) and is a land based casino and over 5,000 sq.ft in size offering Roulette, Blackjack, Baccarat and Sega horse racing. It is located in Hotel Neo Majestic in Porvorim which has 50 five star rooms. The Pride Group began business in 2007 with the Hotel Neo Majestic and has gradually built up and now includes a family of four casinos (Paradise, Pride, Palms and Pearl) and two five star hotels (Neo Majestic and La Calypso)

CASINO PALMS offers table games and slots and is



01 About five casinos have closed over the last year or so including the Las Vegas Casino at the Leela Resort, Hacienda de Oro at the Holiday Inn near Mobor Beach, the Palace Casino at the Riviera de Goa Resort and the Goa Nugget located in the Ramada Caravela Beach Resort in Varca Beach, Goa which is owned by Advani Hotels (in which Delta Corp has a 35.6 per cent share).

located at La Calypso Hotel in Calangute, Baga Road in Goa. Operated by Casino Pride Group (Goa Coastal Resorts)

CASINO PEARL is newly opened in the five star resort Bogmallo Beach Resort and is one of the largest casinos with table games and slots. Operated by Casino Pride Group (Goa Coastal Resorts)

CROWN CASINO is one of the latest casinos in Goa owned and managed by Sol Entertainment (Sugal and

NUMBER OF:

LOTTERY:	State run
LOTTERY REVENUE:	estimated to be Rs12000 crore
RACETRACKS:	8
TOTE REVENUE:	Rs2bn (US\$45m)
BOOKMAKER REVENUE:	Rs2bn
LANDBASED CASINOS:	9
OFFSHORE CASINOS:	4
CASINO VISITORS (TOTAL):	2 million per year
CASINO SLOTS:	195
CASINO TABLES:	180
CASINO REVENUE:	Rs1.35 crore (US\$22bn)
ONLINE GAMBLING:	Not permitted bar Playwin Lotto

TOTAL GGR:

US\$60BN

Deltin's Casino Caravela (initially opened in 2010) has since been moved out of the Mandovi. It floated near the city of Panaji and there were 200 gaming positions made up of 190 table positions and 10 slots.

Damani Group Venture) and overlooks the Mandovi River at the Crown Goa Hotel which has 43 rooms. It is located on the first floor and has table games and slots.

About five casinos have closed over the last year or so including the Las Vegas Casino at the Leela Resort, Hacienda de Oro at the Holiday Inn near Mobor Beach, the Palace Casino at the Riviera de Goa Resort and the Goa Nugget located in the Ramada Caravela Beach Resort in Varca Beach, Goa which is owned by Advani Hotels (in which Delta Corp has a 35.6 per cent share).

Meanwhile there are four offshore casinos operating:

CASINO CARNIVAL is the newest floating casino and is on the Mandovi River overlooking Panaji. It has four operational decks with 27 gaming tables over two floors plus two electronic roulettes, a VIP room and entertainment on the main gaming floor. There are also 45 slots. Entry fee is from 1,500 Rupees per person which includes buffet dinner and drinks. There is American Roulette, Poker, Blackjack and slots. It was operated by the Salgaocar Group since 2009 but was very recently acquired by the Pride Group. The sale was estimated to be around Rs80 to Rs85 crore. Salgaocar will continue with its land based casino at the Marriott.

CASINO PRIDE is berthed near Panaji and has three floors covering 30,000 sq.ft. There are 40 gaming tables such as Roulette, Blackjack, Baccarat and poker plus electronic and slot machines. This is operated by Goa Coastal Resorts & Recreation

DELTA JAGK (formerly the Casino Royale) is the largest offshore casino in Goa with the largest selection of games. The ship has six decks and three gaming floors covering 12,000 sq.ft and you can find 50 table games including Blackjack, Texas Hold 'em, American Roulette, Teen Patti, Baccarat, slot and poker and 30 slots, VIP rooms and even an amphitheatre, creche, children's playroom and helicopter platform. It is open 24/7.

DELTA ROYALE (Horseshoe) is a luxurious casino in Panaji offering Baccarat, Blackjack and Roulette and has a dedicated poker room and a room for Indian Flush (Teen Patti). The casino is operated by the Deltin Group and was the company's first offshore gaming vessel to be launched in 2008 and previously known as the Horseshoe. The Royale has an area of 31,900 sq.ft and offers 500 gaming positions across 470 table positions and 30 slots. The four level casino also has in house dining and entertainment restaurant called Vegas and an exclusive lounge. It also houses the Royale Poker Room, India's largest such poker room.

The Goa casino operators include the Salgaocar Group which owns the Goa Marriott Resort, Hotel La Paz Gardens and Aero Mundial Pvt travel agency. The company is predominantly a mining company dealing in exporting iron ore. But it has investments in other areas such as hospitality, real estate and healthcare.

The company was set up in the 1950s by Vasudev Salgaocar and is now run by his sons Shivanand and Dattaraj Salgaocar and are responsible for the setting up of the Goa Marriott Resort and were also operators of the Casino Carnival offshore casino until its recent sale.

Goa Coastal Resorts and Recreation Pvt Ltd operates five casinos under the Pride brand – the offshore Casino Pride in Panaji and the Casino Carnival, plus three land based casinos – Casino Paradise in Porvorim, Casino Palms in Baga and Casino Pearl in Bogmallo.

The largest operator in Goa is the Deltin Group which has business interests in India, Sri Lanka and Kenya. In

SPORTS BETTING IN INDIA: THE CURRENT SCENARIO

"Betting and/or gambling in India are for the most part prohibited, especially in sports. This stance has been further cemented by the controversies in 2013 surrounding spot-fixing, match-fixing, and overall illegal betting on cricket matches through bookies. With that in mind, a legal framework was proposed by the central government in the form of a legislation that covered any unethical activity in sports. The draft 'Prevention of Sporting Fraud Bill, 2013' ("Anti-fixing Bill") was therefore released in the public domain by the Sports ministry. Although the Anti-fixing Bill was considered in May 2013, it took nearly seven months to draft the Anti-fixing Bill, by which time there has been partial dwindling in relevance and urgency. This is unfortunate because betting and/or gambling in sports is not only an area that is unchecked, but it is also governed by laws that are either archaic or inadequate. In the absence of the Anti-fixing Bill becoming a notified act, the current legislation that governs gambling and betting is the 'Public Gambling Act, 1867'. Not only is the act archaic, it is also vague in that it doesn't cover explicitly the possibility of online or telephonic betting/gambling. Not only that, the interpretation of the act is subjective to the extent that betting on cricket may not even come under the Public Gambling Act, 1867, since section 12 of the act states that any game requiring skill will not be covered under this act.

'Sports' is a state subject under the Constitution of India. Since sports is a state subject, the Anti-fixing Bill will need to be introduced before the Parliament and will require the support of the states as well as the acknowledgment by the lawmakers that the bill serves the national interest of India. 'Gambling' is also a state subject, and a majority of the states with the exception of Sikkim and Goa have prohibited gambling in their respective states. It is unlikely therefore that gambling or betting on sports will receive support in the absence of a central legislation explicitly encouraging or allowing betting on sports, either at establishments or online.

Today, the Anti-fixing Bill isn't likely to appear before the Parliament in what happens to be the last session before the general elections are held. The draft itself is yet to be finalised, and the central elections in India are scheduled for April 2014, which for the Anti-fixing Bill most likely means that it will be shelved until the monsoon



session of parliament. This possibly delays its introduction by at least six months from now. There is also the possibility that the government which is formed after the central elections may not introduce the Anti-fixing Bill in its current form and instead opt for a more detailed draft that encompasses more situations beyond what is envisaged in the current draft. Until then, ambiguity will prevail. It is extremely unlikely that betting on sports will be legalised despite certain corners supporting this move. There is a cultural and societal stigma attached to betting which will lead to controversy surrounding any move that seeks to make sports betting or gambling a mainstream and legal activity. There will also be difficulty in regulating sports betting in India, since the mechanisms for governance and accountability are either non-existent or inefficient where they exist."

Desh Gaurav Sekhri, head of Sports Initiative at J. Sagar Associates, a leading Indian law firm. Views are personal. deshgaurav.sekhri@jsalaw.com.

India is the only listed entity in the gaming industry and over the years has developed a business model offering offshore and land based gaming.

At the moment the company owns three of the six offshore gaming licences in Goa. Two are operational – Deltin Jaqk (Casino Royale) which opened in 2008 and the Deltin Royal (Horseshoe) which was opened last year.

Deltin's Casino Caravela (initially opened in 2010) has since been moved out of the Mandovi. It floated near the city of Panaji and there were 200 gaming positions made up of 190 table positions and 10 slots. There was also a bar and buffet and outdoor swimming pool.

Delta Corp owns a majority stake in this casino and this was India's first offshore gaming casino which Delta bought from Advani Hotels and Resorts and Casinos Austria International. At the time it had 10 table games and eight slots. This ship has since been sent to Zuari for a makeover and will soon be on the Zuari River after pulling out of the Mandovi river.

In addition Delta Corp also operates two resort hotels in Goa – The Deltin Palms and Deltin Suites plus also plans to open the Deltin Empress which is an all exclusive all-suite luxury offshore hotel anchored in the Mandovi River in Goa for VIP guests.

01 In theory, Daman could become a gaming hub for at least four cities – Surat, Baroda, Ahmedabad and Mumbai as it is a 2.5 hour drive from Mumbai. The casino and resort are expected to be operational by mid 2014 and will be India's largest integrated casino resort. The resort is now just waiting for final formalities to be completed although this has been an ongoing wait.

The company re-branded all its operations recently and the Deltin brand is copyrighted to the Delta Corp Ltd. The Delta Corp is a fast growing Indian company offering gaming and hospitality since 2008.

Meanwhile there are other states also looking at the casino option now in India. Other states such as Odisha, Assam and Haryana have contemplated legalising gambling but dropped the idea due to political opposition and negative responses from the public.

However the possibility of casinos is now promising for states such as Daman and Punjab.

DAMAN

Daman is located on the western Indian coast between Maharashtra and Gujarat and is a city in the Daman district in the territory of Daman and Diu.

Daman is divided by the Daman Ganga River into two parts namely Nanidaman (small Daman) and Motidaman (big Daman). Ironically Nanidaman is actually the larger of the two towns and is residential and holds many important entities such as supermarkets and hospitals. Motidaman is the old city mainly inhabited by fishing communities.

The total population is around 35,700 and the two parts are connected by two bridges. However because it is only 193 kilometres from Mumbai and has well connecting highways to other cities it is in a prime position for gaming and leisure options. It is already a popular tourist resort mainly due to the freedom to drink alcohol which is prohibited in the neighbouring state of Gujarat.

The city's gaming laws are governed by the Goa, Daman and Diu Public Gaming 1976. In 2008 an amendment was added to authorise games of electronic amusement and slot machines to be located in five star hotels.



The law states that for an application fee of Rs2 lakh this will enable two machines or less for five star hotels or for Rs20 lakh 20 machines or less are permitted on board offshore vessels. Licences are granted for five years.

In May 2013 Delta announced a deal to acquire a 51 per cent stake in Daman Hospitality, a resort in Daman for Rs50 crore. The resort is a 187 room five star deluxe property called The Deltin. It is spread over 10 acres also houses three bars and four restaurants and 70,000sq.ft of outdoor pools and events area.

Deltin Corp owns an 'in-principle' licence to set up a casino in Daman with the aim of introducing 1,000 to 1,500 gaming positions in this resort. The casino (Fiesta Casino) is a 50/50 venture between Thunderbird's subsidiary Impacto and Deltin.

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Chairman of Delta Corp, Jaydev Mody, said in his annual report: "The Indian economy is expected to jump back into growth mode after a rather unremarkable year that was marked by so called policy paralysis, higher costs of borrowing and depressed global demand.

"The India story continues to be alive and well. The

weakening of the Rupee has positives for exporters as well as for long term investors. The so called hot money has already left the country and it is a good time for foreign investors to pick up assets.

"According to government statistics consumer spending in India grew from \$549bn to \$1.06 trillion between 2006 and 2011 putting India on the path to becoming one of the world's largest consumer markets by 2025. Consumption is expected to rise 7.3 per cent annually over the next 20 years. By 2040 nine out of every 10 Indians will belong to the 'global middle class group' with daily expenditures ranging between \$10 and \$100 per person in today's PPP terms.

"Gaming and casino business remains an area of large demand. However this is limited to Goa, Sikkim and Daman. A growing middle class will mean that domestic tourists in search of global gaming experiences at home will head to Goa or Daman which are more easily accessible than Sikkim."

Deltin Corp gaming and hospitality business in Goa will generate an operating profit of Rs135 crore on annual revenues of Rs575 crore this year.



CASINOS IN INDIA: WHAT'S HAPPENING?

"Casinos in Goa have made a very positive contribution to the local economy and, no matter what their comments for local public consumption may be, they are here to stay. They have driven forward airline travel, taxi usage, hotel occupancy, restaurant usage and they have also provided jobs to thousands of young Goans, who are now earning vastly more money than they ever thought possible. Many of these are young people without any significant academic qualifications and therefore whose employment prospects would be limited to low end, low paying, and intermittent (possibly seasonal) work.

The other major effect is the levelling out of the seasonality which bedevilled to hospitality industry in Goa until recently. In short, many hotels and restaurants simply closed up during the monsoon end May to end September. This is now much less pronounced, with significantly greater numbers of arrivals (mainly domestic tourists) during the monsoon season.

On a national level, many state governments would like to see this sort of effect in their own state, but lack the political courage to push legislation through. The prime and perhaps only consideration an Indian politician has is to ensure that he gets elected at the next election – and, as everywhere in the world – there are very few votes in advocating the legalising of casinos. However, if it happens it is likely to be in one of the smaller states where the jobs and economic stimulation provided by casinos would be more pronounced.

Currently only Sikkim has casinos which is hampered by the difficulties in getting there (no civil airport as yet). Daman (a Union Territory about 150 km north of Mumbai) is awaiting the issue of a licence. The casino and hotel are built but they have been waiting for the issue of the licence for several years now. Daman operates under the same basic primary legislation as does Goa – The Goa, Daman, and Diu Public Gambling Act 1976."

John Snowball, Vice President of Crown Casino in Goa. www.crowncasino.in

PUNJAB

Punjab is in the north west of India and after the partition of India in 1947 the Punjab province of British India was divided between India and Pakistan. Punjab is the only state in India with a majority Sikh population.

Agriculture was at one time its largest industry and the state is the largest producer of wheat in India. It has a population of 27 million and tourism is fairly high and sees around 1.6 million tourists per year.

Two years ago plans began circulating about a casino opening in Punjab but were dropped following protests from the opposition party and religious groups.

However last year the idea resurfaced and Punjab's flamboyant Deputy Chief Minister Sukhbir Singh Badal started talks again and it is understood a feasibility report is now being undertaken with the aim of building a Las Vegas style casino in Mattewara, a village near Ludhiana.

It is anticipated there will be fierce opposition once again however reports of fiscal problems in the Punjab government is a good reason to go ahead with plans.

Punjab has one of the highest per capita incomes in India but government coffers are low. A disastrous 'Free Power to Farmers policy' has resulted in low state finances coupled with faltering revenue collections and stagnating agricultural incomes.

The state has one of the highest per capita incomes in India but ironically government coffers are low. A disastrous 'Free Power to Farmers policy' has resulted in low state finances coupled with faltering revenue collections and stagnating agricultural incomes.

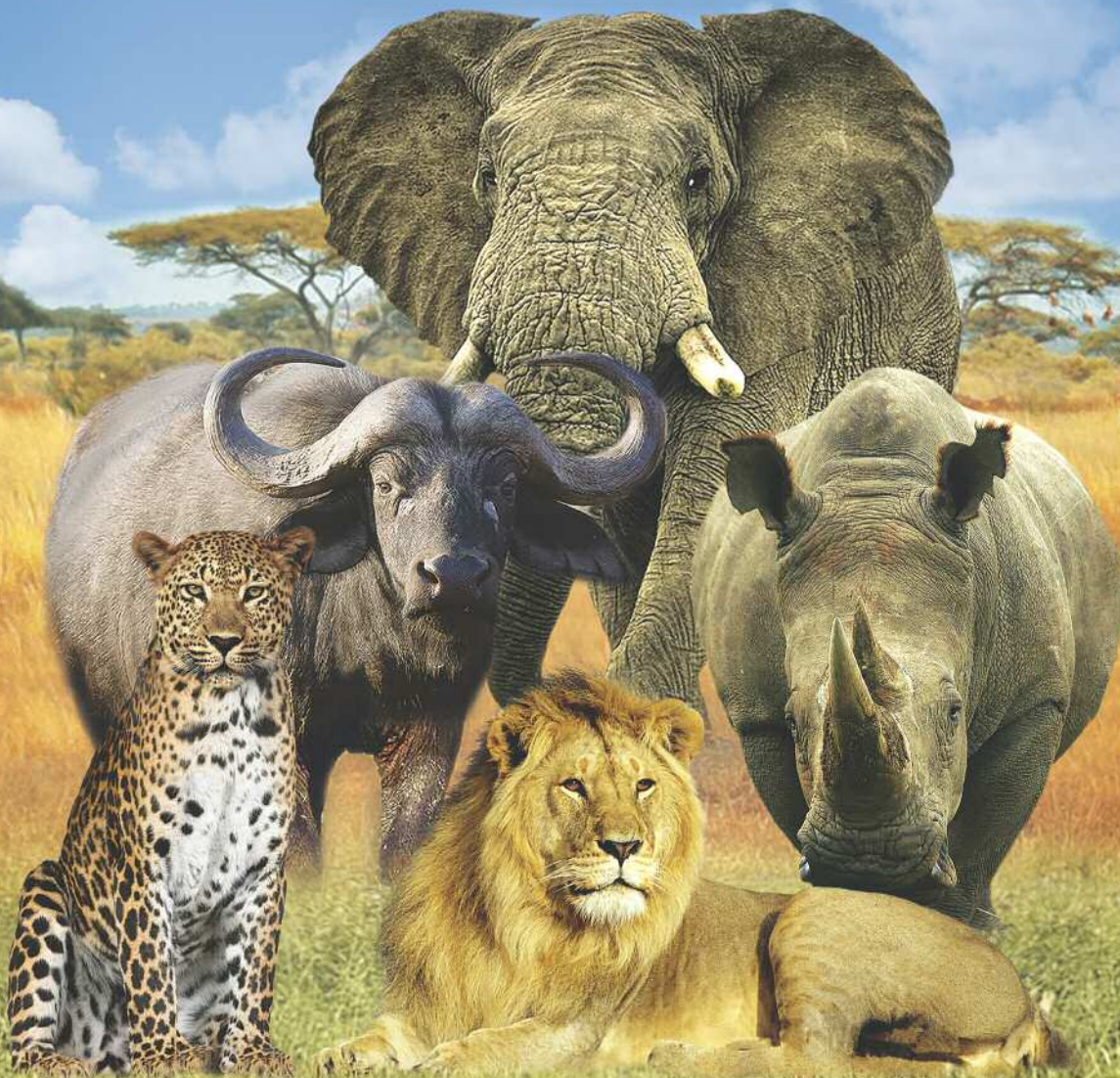
If the casino plans go through it will be part of the state's Rs300 crore proposed amusement park project which is a park in Mattewara to include entertainment, race course, forest safari, lakes, five star hotel, villas and of course a casino.

"The Indian economy is expected to jump back into growth mode after a rather unremarkable year that was marked by so called policy paralysis, higher costs of borrowing and depressed global demand. The India story continues to be alive and well. The weakening of the Rupee has positives for exporters as well as for long term investors. The so called hot money has already left the country and it is a good time for foreign investors to pick up assets. "Gaming and casino business remains an area of large demand. However this is limited to Goa, Sikkim and Daman. A growing middle class will mean that domestic tourists in search of global gaming experiences at home will head to Goa or Daman which are more easily accessible than Sikkim."

Jaydev Mody, Chairman of Delta Corp.

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Interview

TCSJOHNHUXLEY

Gaming Floor Live and kicking

At the heart of TCSJohnHuxley's product offer is Gaming Floor Live; open technology that links every peripheral on a table game to a data mining hub, delivering real-time information into the hand of operators. G3 speaks to TCSJohnHuxley's Global CEO, Cath Burns, about this revolutionary gaming solution.

TCSJohnHuxley is one of the most recognisable brands in gaming. A familiar presence at almost every international exhibition, the company has occupied a dominant position in the land-based table gaming sector for decades. As a publication we've been accustomed to the regular flow of press releases charting the company's many and varied installations across the world. TCSJohnHuxley's renowned Chipper Champ and its customised tables and roulette wheels were a foundation onto which the company added a range of distributed products to offer a complete turn-key solution for casino operations. It was a handle that everyone could grasp.

Since the appointment of Cath Burns, formerly the head of Bally Technologies' Asia Pacific in Macau as CEO of the company in 2012, the company has been pouring resources into researching and developing its own products like never before. The company has even created a dedicated facility in York to concentrate on software development.

So what has TCSJohnHuxley been developing and what path is the business forging today?

Speaking to Cath Burns in the newly refurbished showroom of TCSJohnHuxley's Stoke-on-Trent offices, there's an easy familiarity with the surroundings. Beautifully sculptured LED-lit tables are topped with exquisite wheels and stunning hi-res displays top each installation. It's a modern contemporary set-up. Discussing the shifting business environment of the gaming sector, in particular the climate of acquisitions and mergers and the power shifts within markets globally, we ask where TCSJohnHuxley fits into today's gaming industry?

"It's an important question and one that we put to our customers and employees," said Ms. Burns. "We wanted to know what we did well, what not so well and what should we be doing more of? The answers we got back all related to three key things: product, people and infrastructure. We knew we had to invest, and not just in underpinning our flagship products such as the chipper, displays and wheels, but in technology that would offer the same levels of bonusing and real-time data collection that operators currently enjoyed from their slots systems."

Feedback from customers worldwide told



"Our Asia focus has allowed us to commercialise our products quickly and test them in the world's most competitive

table market. We expect Asia and the US to be significant growth markets for us. That said, we also saw growth in Africa last year and are trending towards growth this year. That growth in Africa has come from our table bonusing product Supernova, Gaming Floor Live, Chippers, Wheels and our new Elite II display range. These are the markets that are driving the business forward and we've got to be part of that change."

**Cath Burns, Global Chief Executive Officer,
TCSJohnHuxley**

TCSJohnHuxley, that its solutions were part of a closed shop. Individually its products were more than fit for purpose, but collectively, and as part of an overall system, what was lacking was open architecture that would enable operators to connect each device, not only from TCSJohnHuxley, but multiple vendors, to existing systems technology.



Interview

TCSJOHNHUXLEY

mitted product roadmap which protects our customers investment in us and each product is now a resource for gathering data. Every product is part of an open interface that connects to casino management systems. We are utilizing as many off-the-shelf hardware and software products that can integrate into existing systems and interface with every product currently connected on the table floor. We had to show that we were flexible to adopt this open approach and able to use industry standard applications as opposed to making bespoke solutions for individual clients. Only then can you make the shift from standard pricing models to monthly maintenance fees."

It may seem extraordinary to anyone that's been an observer of the gaming industry, but TCSJohnHuxley is, as Ms. Burns puts it, 'starting to behave like a software company,' integrating data and removing costs from its hardware to create a software driven solution. What's critical is that the data pulled from the table is in real-time, allowing accurate up-to-date transparency of table operations. It's important if you're operating an average-sized European casino with 15-20 tables, but in Asia's dramatically scaled table environments, incremental data is vital to making strategic minute-by-minute decisions that effect the bottom line. And as Ms. Burns points out, as TCSJohnHuxley leverages the development of these solutions with operators in Asia, the benefits of this open architecture and software development 'pay it back' into markets around the globe.

"If you look at one of the displays here in the showroom," gestures Ms. Burns, "they're no different from a traditional high-end HD TV unit. Operators benefit not only from the standardisation of the components in terms of costs, but the open nature of the equipment means that they can integrate the entire solution across the customer floor. If you take the Venetian in Macau as an example, the casino operates 10,000+ displays, including slot toppers, table displays, F&B displays, billboards etc. If the casino wants to integrate every one of them, sending its messages across every display in the casino, which is something that you simply can't manage in isolation. If a casino wants to display the table progressive jackpot on a slot topper, why are we preventing that? We have to give the operator what they need."

The product that underpins everything that Cath Burns and her team have been working to deliver is Gaming Floor Live. It's revelatory to hear that it is one of the reasons that Ms. Burns took the top role at TCSJohnHuxley. It's a system that was created for one customer with a maximum of 30 tables to enable that operator to interface different components on a limited set-up, but for Ms. Burns, it was the key to enabling tables to interconnect in exactly the same way as slots and give the operator real-time data from their table devices. The only issues being that since Gaming Floor Live was a bespoke system, not written on Enterprise Software, it couldn't be scaled and was therefore unfit for the purposes she had in mind. One of the companies first actions was to have the software completely rewritten from the ground-up.

The development team in York were a critical element in Gaming Floor Live's development, and as such the

"We can't continue doing the same things that we did 25 years ago," states Ms. Burns. "We must remain relevant in this space and to do that, and realise the unique opportunities ahead of TCSJohnHuxley, we had to interface our products with every facet of table gaming. It's still a work in progress, but it's a change in direction that is well and truly underway."

The proof that TCSJohnHuxley's open architecture approach is working comes with customer purchases, the first of which have been confirmed and installed in international markets. Ms. Burns makes no apologies for the Asia-centric focus of these installations. "Today, that's no longer the case with Macau's economic gaming engine also stoking the regeneration of TCSJohnHuxley. Over 700 tables in Macau are presently live with TCSJohnHuxley software - yes, software. And the company expects that number to increase to well over 1,000 by the end of the year/start of 2015.

"We have been a Europe-centric company and Europe continues to be a very important region," describes Ms. Burns of the business she inherited. "But what does Europe really want from TCSJohnHuxley? More great table products that drive both revenues and efficiencies,

The proof that TCSJohnHuxley's open architecture approach is working comes with customer purchases, the first of which has been confirmed and installed.

all of the products that we have developed and are developing are and will be available to our European customers as they will be to all of our customers globally. Our Asia focus has allowed us to commercialise our products quickly and test them in the world's most competitive table market. We expect Asia and the US to be significant growth markets for us. That said, we also saw growth in Africa last year and are trending towards growth this year. That growth in Africa has come from our table bonusing product Supernova, Gaming Floor Live, Chippers, Wheels and our new Elite II display range. These are the markets that are driving the business forward and we've got to be part of that change.

"We are still selling traditional products," underlines Ms. Burns. "The difference is that each product has a com-

Interview

TCSJOHNHUXLEY

resources needed to be on hand to deliver a product quickly and fit for purpose. The company invested in people, swelling its software development team from a staff of six to a team of 48 in just 12 months. At the same time TCSJohnHuxley needed a partner, an operator that was willing to work jointly on the development of a solution. This new model would be built around hardware, software, services, maintenance and continuous support.

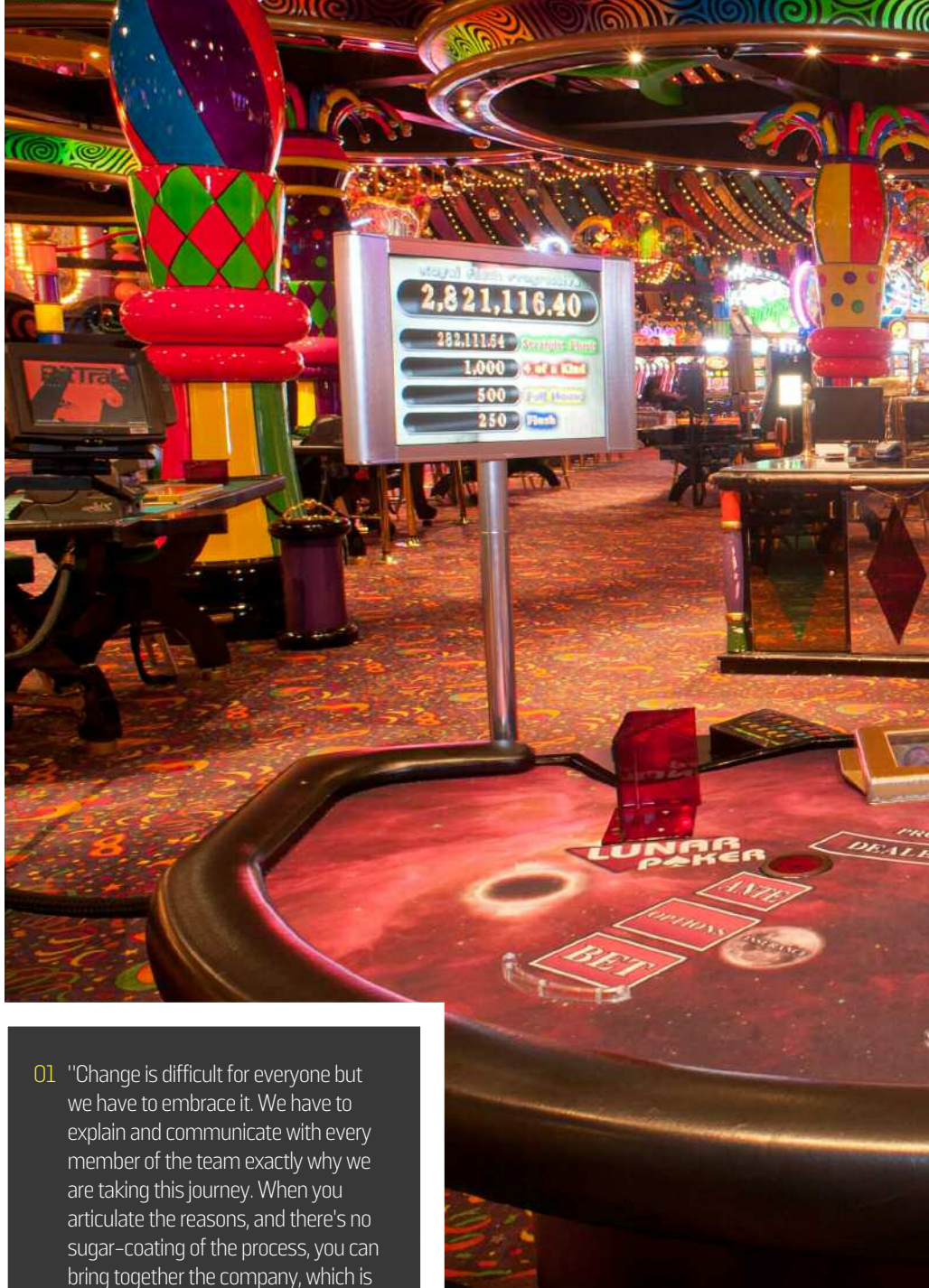
The Venetian Macau proved the ideal launch partner, both in terms of scale and ambition. However, any go-live at such an enormous venue would be a fraught affair and for a company with a reputation to build in the software sector, TCSJohnHuxley couldn't afford to be making missteps from the outset. "We measured the launch success at the Venetian by the number of software faults that we encountered," says Ms. Burns. "We had hardware and software faults but no more than what you would expect with a new product, which tells us that we have hired the right team of software and hardware developers. It's an incredible achievement when you consider that we started to pull the team together in August 2012 and had to completely rewrite the product, and by the end of 2013 we started to deliver to the customer."

One of the things externally that has been levelled at TCSJohnHuxley, and at Cath Burns, is that the company is looking to become a systems business; it's a subject that raises a wry smile. "We're not interested in building

"You can have as many as 10+ vendors on a single table that are all standalone not connected or interfaced in any way, making operating the table and collecting real-time data close to impossible"

casino management systems. There are several great casino management system companies around the world. I've been part of that business and when there are several companies already delivering great casino management systems why would we develop what is already being done really well?. When I was in Macau, what was missing was the real time collection of data from every device on a table element. You can have as many as 10+ vendors on a single table that are all standalone not connected or interfaced in any way, making operating the table and collecting real-time data close to impossible"

What's important about GamingFloorLive is its simplicity. The message is simple - to integrate the table just as you would a slot. And it's functionality is simple too. Gaming Floor Live doesn't ask anything complicated of the interconnected products. It's simple software that, for example, collects a message from the shoe that describes the card that was dealt and the speed of the deal. The simplicity is all important as there's no loading of data onto a system. Data flows from each device through Gaming Floor Live, which acts as a conduit for everything connected to the table. Gaming Floor Live can then be interfaced back to any casino management



01 "Change is difficult for everyone but we have to embrace it. We have to explain and communicate with every member of the team exactly why we are taking this journey. When you articulate the reasons, and there's no sugar-coating of the process, you can bring together the company, which is exactly what's happened at TCSJohnHuxley. We are a stronger unit, a more closely knit unit than ever before. There's a renewed energy in the business brought about by the changes that we've made because everyone understands why we've made those changes and appreciate the path that we've taken.

Cath Burns, Global Chief Executive Officer, TCSJohnHuxley

system that the operator uses. So rather than making it more difficult for the operator we simply collect the data and allow the operator to interpret it how they need to. By being open the operator's investment in their table technology and their back end systems is protected.

To hear that the policy going forward is one of inclusion, of open architecture and a willingness to engage with other, potentially rival, vendors, is a remarkable step in itself. To hear that one of the company's latest

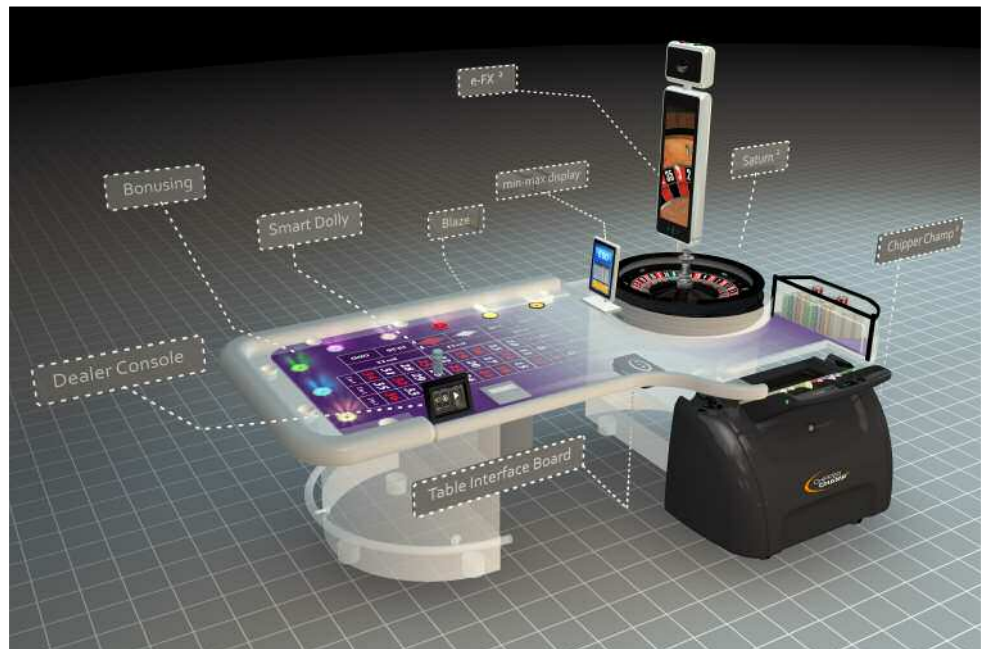
projects has involved the integration of Cammegh wheels with the Gaming Floor Live platform, is one of epic significance. What's most significant, however, is that this interconnectivity is customer orientated in focus. This is what the operator wants to see, and whatever the rivalry of their suppliers, it's in their best interest to have every component on their table talking to each other and ultimately to their central system. If the table and its components can be agnostic, then so too should the suppliers.

Managing the change internally can be just as tricky as explaining the process externally. "Change is difficult for everyone but we have to embrace it," admits Ms. Burns. "We have to explain and communicate with every member of the team exactly why we are taking this journey. When you articulate the reasons, and there's no sugar-coating of the process, you can bring together the company, which is exactly what's happened at TCSJohnHuxley. We are a stronger unit, a more closely knit unit than ever before. There's a renewed energy in the business brought about by the changes that we've made because everyone understands why we've made those changes and appreciate the path that we've taken. We need to constantly keep communicating the message, we want our team to understand why we are making the journey and how



important it is to our customers. The great thing is that our team does understand what we are working hard to achieve and more importantly why. Our message is simple we are taking the excellent legacy that we have created with our chippers, wheels and displays over the past 25 plus years and are adding a foundation called Gaming Floor Live that collects data in real time from any device on a table to help our customers drive revenues and maximize efficiencies.

A tour around the Stoke facility is a staple of any visit to TCSJohnHuxley, but what's different today is the variety of the tasks now being undertaken by the same team of people. Production of equipment that had been handled in the past by TCSJohnHuxley Australia office has been brought back to the UK. The production of the Chipper Champ2 has also been brought in-house, with TCSJohnHuxley cross-training its team to broaden their skills beyond what has in the past been a specific set of skills. "Today, having determined that the UK is the best location to manufacture our product range, we have a team trained to build chippers, to create wheels, refurbish slots, assemble displays, whatever they're required to do. We explained the reasons for the change and the benefits this brings to everyone, the entire team has



come together on this and improved their own career paths too."

The installation at the Venetian in Macau of Gaming Floor Live was a momentous moment for the company, not just because it was proof of conviction the company had placed in its software embracing focus, but also in the capability of its team to deliver in a location. Service is a huge component of the 'New' TCSJohnHuxley, and the decision to send UK staff to support the launch and take care of any future issues was a commitment to everyone at TCSJohnHuxley all being part of One Team,

one of the company's core values. What the installation in Macau ingrained in the company was that software installed in a casino anywhere in the world was as much the duty of the team in York, Stoke or Las Vegas, as it was the team in Macau. This is a global business that has made interconnectivity its watchword, and as such it views its team in the same way; interchangeable assets, agnostic and relevant for whichever role and whichever market they're required.

TCSJohnHuxley might not be in the systems business, but it's a business that has certainly embraced systems



to achieve its goals. Every customer-facing and back-end system within the company has been replaced and retasked. Customers can now log into the TCSJohnHuxley system themselves, communicate directly with engineers and track updates, including charting the location of en-route technicians. Utilising a Global Engineer Management System (GEMS), TCSJohnHuxley connects with its customers through any Windows-based devices. GEMS is designed to handle all maintenance, project and call jobs and is designed to ensure all contractual requirements are met, with reporting completed efficiently at the same time as maintaining equipment history.

The purpose of the GEMS system is to allow TCSJohnHuxley to gather information and data regarding the contracts it services to enable the company to provide better service to its customers and improve the reliability of the products it maintains. Data gathered can be analysed in many different ways to ensure TCSJohnHuxley get to the root cause of issues and prevent repeat failures.

The current TCSJohnHuxley service team counts 40

01 It's going to be incremental over the next couple of years, but our goal is to be the No.1 provider of live table gaming solutions in the world. We're currently at the early stages of that evolution, we have Gaming Floor Live Baccarat, Roulette and a Live Display solution installed in Macau, Australia, New Zealand, South Africa, Switzerland and the UK. We're very conscious that we have to build the service infrastructure around those launches, so it's a constant team building and customer support exercise at the same time. We will grow and support our business based on where we sell and install our products."

Cath Burns, Global Chief Executive Officer, TCSJohnHuxley

staff in its department looking after 100 sites and 5,500 individual pieces of equipment. The data from GEMS shows that in the last 12 months the company has made 28,000 maintenance visits and made 8,000 calls per annum. The company's Net Promoter Score is 63, while customer satisfaction scores 5.9/7.

It's all part of a service culture that is driven by people and facilitated by technology. This is the third element of the process described by Cath Burns as 'product, people and infrastructure.' This infrastructure component is just as customer facing as the rest, as it's the element that touches the operator along every step of their interaction with TCSJohnHuxley. Empowering the customer to be able to escalate up an issue with the right specialist is part of a service infrastructure that's arguably more important than ever as the company adds new recurring revenue models along side its direct sales.

The team in Stoke has built a service infrastructure that means every operator has a local and professional support services network they can call upon at any time of the day. As TCSJohnHuxley builds its maintenance and recurring revenue model, the emphasis on service

Interview

TCSJOHNHUXLEY



working upon a new wheel product, which Ms. Burns describes as a 'totally different technical product.' Launched later this year, TCSJohnHuxley promises that while it can't elaborate on the details at this time, the multiple uses for which operators can utilise this wheel means that there's nothing currently like it on the market right now.

Progress is also being targeted at the functionality of TCSJohnHuxley's Chipper Champ2, with a cloud-based service being added to the mix that will allow operators to download data remotely. There's also a media solution in the works that is to launch in the next quarter, which enables the integration of any media display within a property.

Asked about the short-term future of the business into 2015, Ms. Burns explains that the expansion of Gaming Floor Live from 1,000 tables to 1,500, 2,000+ is a very near term goal. "Once we have those kinds of numbers in operation then we will have transformed the business," outlines Ms. Burns. "It's going to be incremental over the next couple of years, but our goal is to be the No.1 provider of live table gaming solutions in the world. We're currently at the early stages of that evolution, we have Gaming Floor Live Baccarat, Roulette and a Live Display solution installed in Macau, Australia, New Zealand, South Africa, Switzerland and the UK. We're very conscious that we have to build the service infrastructure around those launches, so it's a constant team building and customer support exercise at the same time. We will grow and support our business based on where we sell and install our products."

TCSJohnHuxley's commitment to adding more recurring revenue streams to its business model coupled with direct sales, key distribution partners and alliances will ultimately position the company for growth and a strong future. Another investment in the future is a focus on IP.

"You need patents to hopefully slow down your competitors," emphasises Ms. Burns. "You also need them to build value in your business. To that end this company registered more patents last year than in the entire history of this business. We are focused on delivering value to our customers through as much innovation as possible."

As for the accusations that the company has become Asia-centric in its new focus, Ms. Burns is unapologetic for taking TCSJohnHuxley to the world's largest casino gaming markets and making the development of product for casinos such as the Venetian, a priority for the business. "Macau is the world's biggest table gaming market. We have a unique opportunity to develop and deliver products that can be used globally based on the sheer size, competition and speed of the Macau market" says Ms. Burns. "Products developed and delivered for Macau can be used in all markets. This region has given us the opportunity to really drive our product development. That is the great thing about fierce competition."

"We've seen more table innovation out of Macau in the past eight years than we've seen in the last 50 years of casino operations worldwide. It's the most exciting market in the world and that's where we've got to be developing and delivering product right now. That's the future of TCSJohnHuxley."



becomes even more acute, as products need to be functioning 24/7 for those monthly fees to be paid. Products such as Gaming Floor Live and the recently relaunched GFL Bonusing Solution (formerly SuperNova), yet another TCSJohnHuxley product rebuilt from the ground up, simply have to work. In isolation, a single failed component isn't an issue, but when interconnect-

tivity is the new watchword of your business, having the right infrastructure to meet the expectations of your clients is phenomenally important.

In addition to Gaming Floor Live and GFL Bonusing, which will be the focus of TCSJohnHuxley's stand at the G2E Las Vegas show this month, the company is also

AN EVERLASTING ICE AGE

G3 interviews Clarion Gaming's Kate Chambers about the past, present and future of the Totally ICE gaming show

This year we saw greater integration of the stands at ICE, with interactive companies cheek by jowl with land-based. Is this continuing into 2015 and what was the reaction from exhibitors and visitors to this blurring of the lines of demarcation?

One of the key themes impacting the industry in general has been convergence and ICE simply reflects that in the same way that it reflects all aspects of the business. I would agree that some of the sectors represented at ICE probably need a sharper focus, notably the betting sector. The team looks at each sector individually, establishes what the exhibitors need to achieve from their time at ICE and then works with them in order to deliver their objectives. Floor plans are always going to be a bone of contention in an event the physical size of ICE, but overall I believe our visitors and exhibitors are happy with the way we manage it as it gives them the freedom they want to express themselves.

Gaming trade shows tread a fine line when they integrate conferences into their schedule, as they draw foot traffic from the exhibition floor, much to the annoyance of exhibitors. Where does ICE stand as regards to conference integration and how do you value their importance?

The ICE Conference programme has grown and developed into one of the most influential platforms for the international gaming industry in all of its guises. Gaming professionals from both sides of the metaphorical fence – that is business and regulators – come to ICE to learn and to engage. Rather than taking people off the show floor our research has demonstrated that a robust conference programme actually brings in a new audience, which adds to the numbers attending the exhibition. Organisations which are prepared to send senior team members many thousands of miles across the globe are also keen to have their staff exposed to new thinking and to make new contacts at our Conferences. Those countries that are in the process of regulating gaming often start



Kate Chambers
Portfolio Director,
Clarion Gaming

"We apply our resource into giving the event a distinct identity with new creative themes developed each year. ICE has moved from being a product to a brand and as the custodian of the brand I feel a responsibility to deliver on behalf of our 500+ exhibitors and the 23,506 visitors who in 2014 made the journey to London from an amazing 156 nations."

the research process in London by attending ICE Conferences where they meet with other regulators, attend the appropriate sessions to immerse themselves in current thinking and then see gaming in its full glory on the ICE show floor. It's a great opportunity and we can trace the attendance of countries for whom an important part of the deregulation process began at ICE Conferences in London.

How do you keep the proposition fresh and appealing?

That is the challenge which keeps me and the team awake at night! How do we keep this huge blockbuster of an event relevant, topical and exciting? To be honest a lot of that success is down to the exhibiting companies which invest their time, their energy and their creative resource into making ICE their headline event of the year. Product is key and as we have discussed on numerous occasions the number of world launches that take place at ICE is pivotal to



keeping it fresh and appealing. In addition to that, we apply our resource into giving the event a distinct identity with new creative themes developed each year. ICE has moved from being a product to a brand and as the custodian of the brand I feel a responsibility to deliver on behalf of our 500+ exhibitors and the 23,506 visitors who in 2014 made the journey to London from an amazing 156 nations.

How do you determine success and what does it look like?

This is quite a complex issue – do you take a quantitative or a qualitative view? On the surface, numbers are important, after all it's the way in which most journalists will judge us in February and it's a headline, a tweet, a passing comment and a verdict. In two decades working in events, I know how inadequate those figures are. Head counts can't differentiate between people who might be getting on the train from Stratford in their lunch hour from senior buyers who have

Exhibitions

CLARION GAMING



travelled through time zones to buy the very latest gaming equipment. The length of time people spend at an exhibition is also important and we calculated that the number of visitor days at ICE – that's the number of visitors multiplied by the length of time they are in the exhibition – totalled over 42,000. Whilst all of this is important, the key measure of success is the quality of the customer experience. We measure this both formally and informally through structured, robust and independent research and via the feedback we receive from all of our stakeholders. You could say that success is a positive inbox!

Has ICE retained its London soul – despite moving so far out of the city with the shift to ExCeL?

Our move to ExCeL was based on three key objectives: firstly to provide a home for ICE and to be able to plan, secondly, to secure room to grow and fulfil our strategic plans, thirdly to provide our customers with 21st century business and

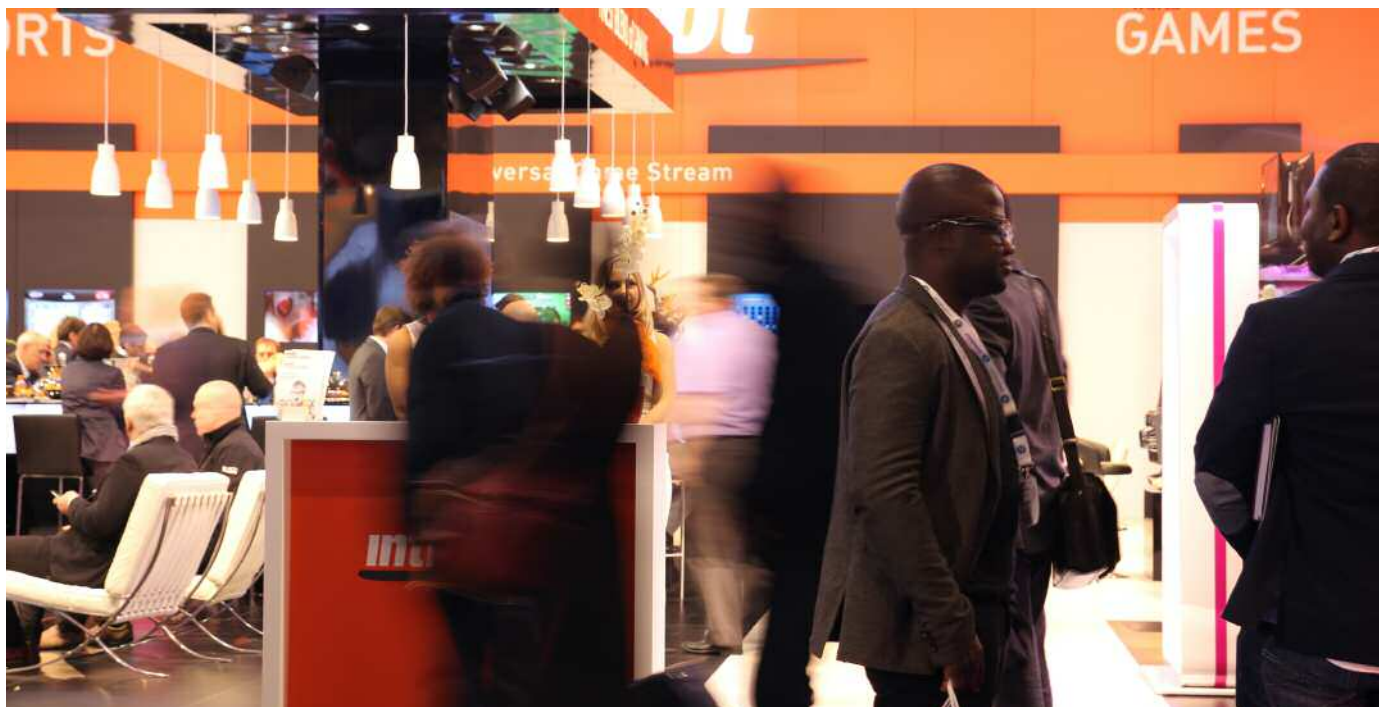
"Taking everything into consideration, including our duty to those many commercial organisations who put so much faith into having a vibrant and successful ICE show, I think the move to ExCeL has been absolutely the right decision and we will continue to do everything in our power to make the experience a positive one."

Kate Chambers
Portfolio Director, Clarion Gaming

commercial facilities. Whilst ExCeL is not a stones throw from Buckingham Palace it is, however, just 40 minutes from Green Park underground, which is in the heart of London's Luxury Quarter and the nearest stop to the Palace. As Crossrail, the new high frequency, high capacity railway for London and the South East becomes operational, the journey time from

Stratford to Heathrow Airport will be down to a little over 40 minutes! London is moving east and the huge increase in the choice of hospitality facilities around ExCeL reflect this. The London Olympics helped put this part of the capital on the world map and of course we are adjacent to Canary Wharf, which is home to the world of European headquarters of numerous major banks, professional services firms and media organisations. Taking everything into consideration, including our duty to those many commercial organisations who put so much faith into having a vibrant and successful ICE show, I think the move to ExCeL has been absolutely the right decision and we will continue to do everything in our power to make the experience a positive one.

The format and structure of Clarion's online gaming event, EiG, has radically changed this year and seeks to address not only the changing online landscape, but the way that visitors want to 'consume' events. Will we see such a revolution in



the way that ICE presents itself in 2015?

EiG has undergone a huge transformation which was made possible due in no small part to the input of the EiG Advisory Board, which comprises a large body of gaming industry professionals and luminaries who gave us their insight and opinion on what was required for the brand flourish. ICE went through its 'EiG moment' four years ago when it underwent some quite radical interventions in order to provide a platform for the next stage in its development which is where we are now.

Looking back to 2010/11 how close was ICE to the precipice? You had to change locations, there were competitors looking to set-up rival shows to ICE... how did the show not only survive, but become even stronger?

I was recruited to avert a serious decline and we started by bringing in what was in effect a whole new team. We began by consulting widely on the future direction of the gaming industry and openly discussed, with a large sample of exhibitors and visitors, what wasn't working and what they needed from the event – in other words we listened! The outcome was: a growing convergence across operation and supply, rapid adoption of new technologies, development of new content and new product. We re-branded and ICE Totally Gaming was the result. Everyone knew that the future of Earls Court was in doubt (which has subsequently been confirmed) and as a consequence the industry needed a modern new home in a world class city – with London and ExCeL the natural choices. So this acceptance

"We are very aware of the rising costs as I'm sure you are owning a business in the gaming sector. We work extremely hard in partnership with our various suppliers including the owners of ExCeL to keep the costs as reasonable as possible. One of the big advantages of being at ExCeL is that we are able to present companies wanting to exhibit with a much more comprehensive range of stand options – one of the major complaints about Earls Court and one of the frustrations, was the lack of stand options which frequently meant that we lost potential exhibitors."

Kate Chambers

Portfolio Director, Clarion Gaming

of change, convergence and a new home, all combined to create what we have today – a show which reflects what's taking place currently, but which also looks into the future, based in a modern, world class venue which gives exhibitors the opportunity to express themselves and us the opportunity to grow and to develop.

Is ICE now so big that smaller exhibitors simply get lost?

There are more smaller exhibitors, as you put it, than bigger exhibitors and we work hard to help all of our customers gain maximum benefit from their attendance at ICE. We use a number of different channels to help generate profile

including icetotallygaming.com, our e-shot campaigns, the previews we place in the international gaming media, the media packs we have at show, the ICE catalogue and the dedicated ICE app. We encourage exhibitors to produce their own media packs and invite them to meet with journalists in the media lounge at show. We have a team which is expert in helping companies to generate coverage and to engage with media. I also think that visitors to ICE come to discover the world of gaming and not just to spend three days on the stands of the big exhibitors. Often the big wins can be found on the small stands and our visitors appreciate that.

Businesses in the gaming sector continue to face shrinking budgets and rises in costs – how is ICE helping companies struggling right now, but still desperate to exhibit at the London show?

We are very aware of the rising costs as I'm sure you are owning a business in the gaming sector. We work extremely hard in partnership with our various suppliers including the owners of ExCeL to keep the costs as reasonable as possible. One of the big advantages of being at ExCeL is that we are able to present companies wanting to exhibit with a much more comprehensive range of stand options – one of the major complaints about Earls Court and one of the frustrations, was the lack of stand options which frequently meant that we lost potential exhibitors. Our strategy is to ensure that we deliver maximum value to all of our exhibitors, that we continue to deliver a truly international audience of buyers and that organisations are able to benefit from their attendance and to grow with us.



What are the technology trends that you've seen being implemented in exhibition spaces that have had the biggest impact and are the exhibitors at ICE using this technology to its full potential?

We are always searching for new ways in which exhibitors can gain more from their presence and have deployed a range of new technologies across the event to help enhance their experience. The ability to collect data from stand visitors has moved on tenfold over the last couple of years and there's no doubt that exhibitors could use this more. New technology allows companies to get invaluable information by digging down into what they have collected. As a company we are continually refining the registration process and the questions we ask in order to get a more complete picture of who is visiting the event. We then use the data to drive all of our marketing, including identifying those new companies that we target for stands each year.

'Be memorable' is an event maxim – how does ICE stay as the forefront of visitor and exhibitor consciousness for the 12 months following an event?

It's a great maxim and one which is at the forefront of our consciousness. It's very important for us to engage with customers throughout the year, which we do in a myriad of ways from informal updates on our thinking, planning for 2015 and also seeking their advice on issues: dialogue is very important and it's very much a two way street. Our marketing campaign really starts after the summer break – although the planning begins in April – and that's when we

really appear on the radar. Again we put a lot of resource into creating a stand out and memorable campaign which exhibitors and visitors can embrace and be part of.

It's been a massive year of consolidation and mergers and we've still got another quarter to go. How have the recent changes to companies, markets and sectors affected ICE to date, and how do you see the shape of the industry and its participation in ICE in the future?

Consolidation brings a with it a sense of uncertainty and obviously the potential loss of exhibitors if brands merge or disappear. Quite often when companies do merge, brands retain their own identities and to a large extent it's a question of business as usual. These things are totally out of our control and our objective has to be to continue to put on world class events which give organisations and their brands the opportunity to prosper and flourish in front of an international audience of serious buyers. So long as we continue to do that, and remember that we are only ever as good as our last show, we will be doing our job.

How have the instability issues in the gaming exhibition sector affected ICE? Specifically the SAGSE issues (due to Argentina's ridiculous export/import rules), the cancellation again of the IMA show in Germany, and the ongoing seesaw in Macau with G2E Asia and the new Macau Gaming Show.

To be quite honest we don't really get involved in the politics of exhibitions. My concern is our

"The fact that IMA has been postponed means that we will pick up a significant number of German operators as we did in 2013. Our job is to cater for them, to do everything in our power to make them feel at home and to make sure the customer experience is a positive one. We know that if the German industry had to choose between IMA and ICE it would be IMA that would win, which I'm fine about. However, we may just be able to persuade more German operators to attend both IMA and ICE in future years – who knows?"

Kate Chambers
Portfolio Director, Clarion Gaming

brands – not just ICE – and how we can continue to improve, to do the simple things perfectly and to deliver on behalf of our stakeholders. If our brands are strong, healthy and successful we really don't have to worry about any third parties. Of course, the fact that IMA has been postponed means that we will pick up a significant number of German operators as we did in 2013. Our job is to cater for them, to do everything in our power to make them feel at home and to make sure the customer experience is a positive one. We know that if the German industry had to choose between IMA and ICE it would be IMA that would win, which I'm fine about. However, we may just be able to persuade more German operators to attend both IMA and ICE in future years – who knows?



MAJOR PUSH FOR NOVOMATIC ACROSS US MARKET

NOVOMATIC Signals its 'Green Light' for G2E Las Vegas with an ever impressive line-up of best in class gaming products

In the first full business year since NOVOMATIC announced its imminent arrival on the US scene progress has been steadily made: through the foundation of NOVOMATIC Americas Sales, the establishment of a headquarters in Deerfield Beach, FL and an additional office and service centre in East Dundee, IL, the bringing together of a team of well seasoned industry professionals headed by CEO Jens Halle and VP of Sales Rick Meitzler and the creation and development of a product range plus the necessary licensing and approvals to signal a green light to bring the NOVOMATIC name to market in America.

At G2E, from September 30th to October 2nd in the Sands Convention Center in Las Vegas, the NOVOMATIC Americas team – that has already participated independently in a number of recent gaming shows such as NIGA, the Canadian Gaming Summit and the Caribbean Gaming Show will proudly take its place on booth 2653 alongside the Austrian Gaming Industries (AGI) presence and the many NOVOMATIC Group

companies for which G2E is such a significant event. The Las Vegas show is a 'must attend' event for the international gaming community and NOVOMATIC of course mirrors that with representatives from subsidiary companies and business partners from Europe, Asia, Africa and – because G2E is a traditional destination for Latin American visitors, no less than 10 NOVOMATIC companies from across the region will be strongly represented. All are looking forward to meeting their customers and business partners in order to demonstrate the latest winning technologies from the NOVOMATIC world of gaming.

GAMES & CABINETS

The booth will once again boast product highlights for the international gaming markets; among them NOVO LINE Interactive games presentations alongside the Coolfire II range that will display a huge selection of games, available as single game themes as well as in the ever popular Super-V+ Gaminator and Premium-V+ Gaminator and NOVO LINE Interactive multi-game mixes, respectively – with up to 28 games per mix and introducing a new POS concept of multi-game presentation for international casino floors. The variety is extended even further by the latest mathematical concepts, gripping game

play, innovative ways to win and maximum impact sound designs for this latest range of games with from 5 to up to 50 lines.

The games are presented in the Dominator cabinet, with its revolutionary design exclusively for the NOVO LINE platform, as well as in the Super-V+ Gaminator III and NOVOSTAR SL cabinets. The NOVOSTAR V.I.P. will celebrate its full US premiere, introducing supreme game play in panorama format with its large Crown V.I.P. chair and an extra 46" upper screen positioned at the perfect ergonomic distance for supreme game play in top comfort.

The NOVOMATIC Reel Tournament clearly demonstrates its advantages as an exciting marketing tool for all sorts of casino promotion programmes. It brings a special competitive gaming thrill to any slot floor, allowing operators to offer their guests – via the push of a button (and thus with no machine 'down time') – live tournaments in real time on an unlimited number of connected Super-V+ Gaminator machines featuring the Super-V+ Gaminator multi-game mixes T1 or T2.

Specifically for US markets the NOVOMATIC



booth will stage the Action-Gaminator that offers a sophisticated All-Star mix of internationally proven NOVOMATIC hit games for the Illinois VGT market. These games are available in a variety of highly attractive upright as well as slant top cabinets.

ELECTRONIC LIVE GAMES

The unique feature of the NOVO LINE Novo Unity II system is the flexible interconnection of a great variety of electronic live games and slot games on a virtually unlimited number of individual player stations. This multi-game functionality allows the operator to link any chosen number of terminals to an unlimited number of different games such as Roulette, Baccarat, Poker, Black Jack, Sic Bo and Bingo as well as a great slot games offering all within one installation.

This product versatility is exemplified by a G2E show installation featuring a fully automated NOVO Multi-Roulette wheel with a group of NOVOSTAR SL slant tops, each with the entire Flying (fully animated) multiplayer multi-game selection as well as Novo Multi-Roulette and the latest NOVO LINE Novo Unity II video slots multi-game mix.

JACKPOTS

The NOVOMATIC booth will also proudly present various Mystery Progressive Jackpot themes for



all platforms; such as the Magic Joker Jackpot and the innovative hybrid jackpot JEWELS FACTORY, a combination of a community and a progressive jackpot.

Apart from jackpots the Octavian team will also be presenting the modular and highly 'tuneable' casino management system ACP (Accounting Control Progressives System). The ACP system can be ideally adapted to the requirements of both the operator and pertaining regulations. The system's 'add-on' functions include profit calculation, floor monitor, TITO, Cashless and Player Loyalty as well as many more and has proved an extremely attractive 'package solution' for discerning operators.

LOTUS AND PANTHER ROULETTE

The Lotus Roulette is a highly attractive automated 6-player island configuration, consisting of individual player stations and one automatic Roulette wheel embedded in a magnificent veneered table. Each of the individual player stations is equipped with a high-resolution touchscreen monitor in 16:10 screen format and with automated cash handling facilities. The Lotus Roulette is optionally available with the attention-grabbing illuminated Light Gate sign arch.

Last, but by no means, least the NOVOMATIC booth in Las Vegas will stage an automated single player Roulette that combines Roulette entertainment with slot gaming in one unique and luxurious machine: This evolution of the original and hugely successful Pinball Roulette will be displayed in Las Vegas with the Panther Roulette and Panther Roulette II. The Panther Roulette comes with a new start button on the right hand side of the hand rest for increased

player comfort. The Panther Roulette II additionally features a second 32" full HD screen on top of the machine with FLIPSCREEN functionality. Both versions are available with a comprehensive multi-game offering of 23 HD video slot games.

GREENTUBE & IGAMING2GO

As the industry leader in providing cutting edge gaming entertainment and gaming solutions, Greentube looks forward to exhibiting and networking at G2E Las Vegas. The NOVOMATIC Group subsidiary will present innovative online and mobile applications and content. The Greentube subsidiary and game design specialist iGaming2Go will also present their latest games portfolio.

Greentube's game applications will be presented for the online and mobile channels (HTML 5, Android, iOS, Native App, etc.) and is backed up by its extensive and successful games portfolio. These innovations constitute Greentube's multi-channel strategy, which offers a link between online, mobile and Thin Client terminal solutions.

Jens Halle, Managing Director AGI and CEO NOVOMATIC Americas: "G2E Las Vegas, as the major North American gaming show, is a traditionally important event for the NOVOMATIC Group and it is now of even more of significance for NOVOMATIC Americas as it is the first big show presentation of our growing range of licensed products for the US-American markets. We have done our homework, listened closely to our customers' needs and their guests' wishes and are now in a 'green light' position to present an initial and growing US portfolio that also caters to special market requirements such as the Illinois VGT sector."

CAMMEGH DISPLAYS QUALITY IN VEGAS MARKET

Cammegh is reaping the rewards of its Nevada licence with installs at MGM Grand, the Venetian and the Palazzo

Cammegh has been on a roll in Las Vegas, securing major orders with MGM Grand and the Las Vegas Sands. Having supplied Las Vegas Sands' Venetian Casino with 10 Mercury 360 roulette wheels and 32ins. double-sided Billboard displays, the UK-based supplier of the world's finest roulette wheels, compounded this success with a further install in March of this year at the Palazzo Casino in Las Vegas. Such had been the quality and reliability of the products at the Venetian that Las Vegas Sands' Palazzo opted for the same 10 wheels and 32ins. displays, with both installations capable of streaming live sports.

"We've enjoyed a great relationship with Las Vegas Sands having first supplied Mercury wheels and Billboard displays in large numbers to the Marina Bay Sands in Singapore," explained Andrew Cammegh. "Due to the international nature of the group, complimentary feedback filtered back to Las Vegas Sands' Vegas properties, with whom we've had an amazing relationship since being awarded our Nevada manufacturer and distributor licence in 2011."

Cammegh completed its first installation in Nevada at the MGM Grand in June 2011, which gave the company an immediate foothold in the marketplace and a live showroom for other operators to sample the quality of Cammegh's roulette wheels. While the market in Nevada for roulette remains small, the decision by Cammegh to acquire its licence from the Nevada Gaming Control Board was more than just a means to sell in the jurisdiction, but also a statement of intent.

"Our view was simple," states Mr. Cammegh. "If you're serious about roulette, then you need to be licensed in Nevada. And not just to stimulate sales and growth, but to send a message to customers around the world that we're prepared to step up to the plate. It's certainly one of the most difficult licences to attain, which means that the message we send to our customers is all the more positive. We have licences for New Jersey, Washington and Delaware, but if you want wide scale customer recognition not just in the US, but in Asia, Europe and the rest of the world, then Nevada is the licence that carries the most weight."

It's also a testament to the long-term vision of the family-run business, that Cammegh views its investment in Nevada as delivering results into the foreseeable future. While the company is



world renowned for its roulette wheels, the potential for its complementary product range is huge across the US, as Cammegh's Billboard controller not only drives roulette displays, but also card table displays and the company's own card-reading system through EyeCard.

"We've only been seen as a roulette manufacturer until now," says Mr. Cammegh. "However, the dialogue is changing and we're in discussions beyond just wheels, placing baccarat displays with integrated TV for sports channels, and Eyecard recognition systems to drive real-time results. US operators are now aware that we can deliver across a wide range of products with the same level of quality and reliability as our roulette wheels."

Such has been Cammegh's success in the US that the company's visits to exhibit at the G2E show in Las Vegas have changed dramatically. "We used to go to G2E and in some ways it felt like a working holiday," describes Mr. Cammegh. "It's a great fun town and we enjoyed the international traffic, but there wasn't much business for us on the door-step. Now, however, the conversions have changed. We are not only familiar faces, but we offer a compelling range of products that serve the needs of the local market too."

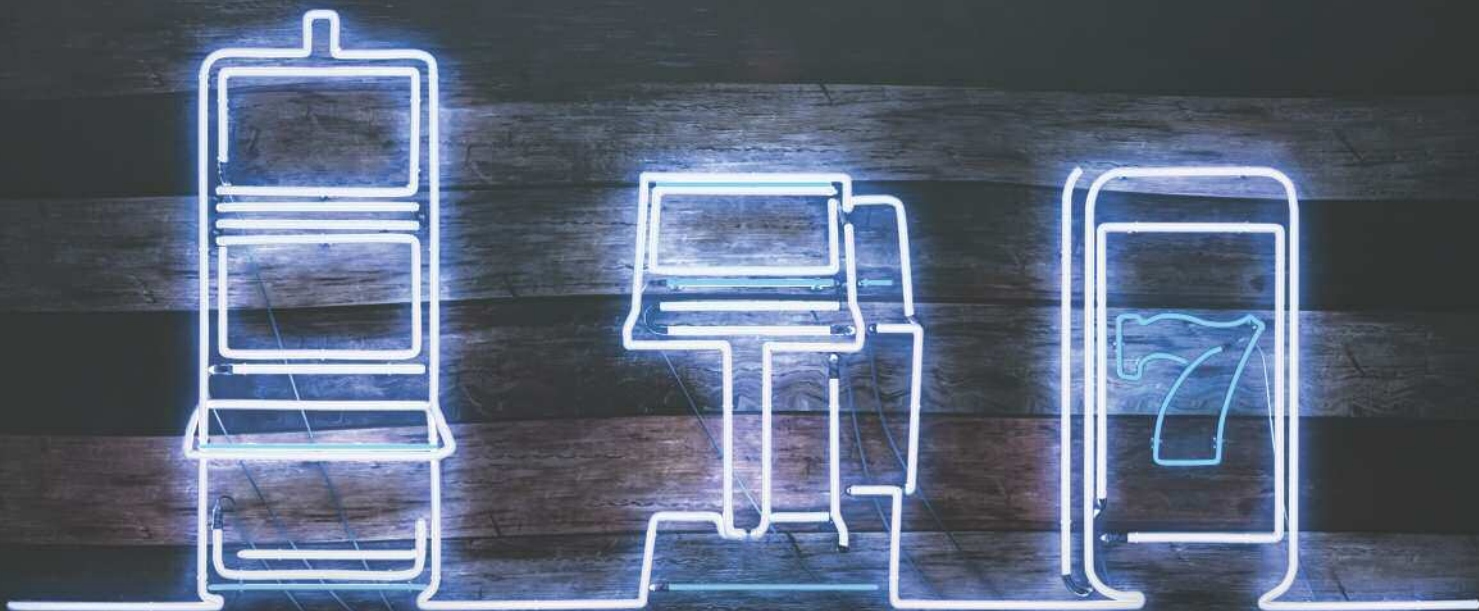
"All of our customers know we compete on quality," continues Mr. Cammegh. "But what they've also found is that our prices are where they want them to be as well. Our company's personality to support and develop products for our customers is second-to-none and we are always willing to engage with

customers to develop solutions that fits their needs."

Asked if Cammegh has a particular set of goals for the forthcoming G2E Las Vegas exhibition, Mr. Cammegh explains that he's not looking to force an agenda on the event or stand visitors. "We make the world's best roulette wheels," he underlines. "The US market demands quality and we're equally motivated to work with big and small operators wherever they may be, because ultimately they need to manage and determine roulette in a profitable way, no matter what their size. We are family-business that wants to partner with casino operators of all shapes and sizes to help them to meet their objectives."

Cammegh is exhibiting at G2E Las Vegas on stand No. (4230). The company hopes to welcome visitors not just from Nevada, but from right across the US, Canada, Central and South America. "We want to build on relationships that we already have and explore the potential of new opportunities," says Mr. Cammegh of the G2E show. "There are definite opportunities for us in the US, which is another step in ensuring that we have a truly international business and a product range that meets the highest expectations of our customers wherever they are in the world."





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IGT BRINGS THE 'BIG MONEY' GAMES TO G2E VEGAS

As the gaming world directs its attention to Las Vegas for G2E 2014, IGT is poised to make a splash and confirm that the best game content and delivery comes from 'Out of the Blue.'

Positioned in the heart of the convention hall, IGT's booth 2139 will boast a best-ever line up of core content, engaging WAP games, innovations in video poker, inspiring igaming content and casino management solutions that drive ROI and enhance the player experience.

"We have taken an especially thoughtful approach to game design and development over the last year," said Joe Sigrist IGT VP of Game Development and Global Product Management. "We have been innovating with purpose and leveraging research with a keen focus on meeting the demands of the player, attracting the next-gen player and maximising ROI for customers."

IGT will present a core portfolio that demonstrates the company's approach to game creation. Not only will IGT unveil a variety of exciting themes, but also a breadth of never-before-seen play mechanics. From over-sized reels, to the meticulous marriage of table games with IGT legacy content and much more, the product line-up is packed with innovation as diverse as the player base that it serves.

Show-goers must carve out time to see IGT's all-new King Reel series. King Reels offers players a larger-than-life reel configuration with 90 total paylines - 60 in the top box and 30 in the base game. This royal use of the game interface can be found in two King Reel themes - Farmer's Daughter and Turquoise Princess. IGT's new sizzling series Hot Roulette is the clever combination of player-favourite themes Wolf Run and Enchanted Unicorn, with bonus content that allow players to engage in a touch-screen roulette game in the top box.

Further building upon some of the company's legendary cross-platform content from Wolf Run, Siberian Storm and Treasure of Troy, IGT will introduce The Dynasty Edition - a series that merges original game features and math with enhanced characteristics, such as amplified bonus content, pace and visuals. Another must-see core title from IGT is tokidoki video slots. Inspired by the wildly popular lifestyle brand, tokidoki delivers a vibrant, fast-paced, high-volatility gaming experience that features some of the brand's most beloved characters including Moofia and Donutella & Her Sweet Friends,



IGT's innovative Systems have now merged online and onsite player tracking, connecting data from DoubleDown Casino with IGT's Advantage System. Operators can leverage the games their players enjoy in the social casino space to promote on-site visits.

IGT will bring the tropics to the tradeshow with the highly-anticipated launch of Wheel of Fortune Jackpot Paradise. Housed on the performance-driven CrystalCore cabinet, Jackpot Paradise features a touch-screen interface and interactive bonus rounds. The five-reel game introduces a playful symbol set including kiwis, coconuts, beaches, bananas and more. Players will take note of increased player communications and the scale-with-play progressives, in addition to the WAP top award. Unique to this game, the top progressive is awarded from one of the games bonuses, the Jackpot Pick Bonus.

True to the Company's pioneering past, IGT continues to drive innovation in the WAP space with the introduction of Powerhits - the first dedicated theme

to join the Company's multi-state commercial WAP link, Powerbucks. The power-packed gaming experience is poised to launch fully converged for play on land, online and for mobile wager online where allowed. Housed on IGT's recently launched CrystalCore cabinet, Powerhits is a unique title within IGT's rich game portfolio that provides a compelling visual with every wager below max bet that reveals to the players where all the symbols landed, across all reels, regardless if they were wagered paylines or not.

Game king IGT will build upon the Company's dominating video poker presence with several new innovations in this category. IGT will showcase a number of must-see offerings including All Star Poker III, an evolution of top-performing All Star II and Game Star, an impressive new bundle game set with unique game mechanics that are available in six new single hand poker games and a multi-hand stud poker theme.

IGT's innovative Systems have now merged online and onsite player tracking, connecting data from DoubleDown Casino with IGT's Advantage System. Operators can leverage the games their players enjoy in the social casino space to promote on-site visits. This holistic view of the player is available for operators now. To further assist operators, IGT will debut a suite of mobile apps for the Company's Advantage 9.2 casino management system. Mobile Host and Mobile Fills & Jackpots enable casino staff to quickly serve guests directly at the game through the use of their mobile device, increasing efficiency and improving customer service.



From player tracking, to floor management and from player engagement to elite bonusing, IGT's systems portfolio represents a proven, end-to-end solution to effective casino management. IGT has a myriad of systems tools to maximize efficiencies, optimize ROI, consolidate floor operations and enhance the player experience. The Company will feature the latest versions of several industry-leading innovations including the casino management system and game library, sbX 4.4; the multi-site management tool, Casinolink and a series of ingenious applications that complement both Advantage and Casinolink.

JCM – GAMING IN THE BLOOD

JCM Global is to showcase its Dynamic Network Applications (DNA) at its multiple benefits at G2E Las Vegas

At G2E, JCM will show an impressive array of transaction technologies that help operators conduct more than a business transaction – they build a personal connection.

JCM's featured product is the new Dynamic Network Applications (DNA). The iVIZION bill validator was designed in 2012 to be the "foundation of intelligent validation," a foundation with the ability to expand to be more than just a highly advanced bill validator.

Now, iVIZION's bundled enhancement tools, called Dynamic Network Applications (DNA™), build on iVIZION's foundation of intelligent validation and empower operators as well as regulators with real-time monitoring, triggered event alerts, along with peripheral component management.

DNA provides real-time health and event monitoring of all peripheral components used inside an EGM, utilizing either a wired or

wireless connection to a local server. Peripherals that DNA can monitor are practically limitless and include bill validators, table game validators, ticket printers, card readers, digital displays and coin acceptors.

DNA passively monitors the SAS line, provides diagnostics, analytics and value-added features that can all be managed through DNA's user-friendly mobile dashboard. The dashboard was specifically designed for platform flexibility and can easily be used on a PC, a tablet or a mobile phone. Additionally, DNA gives flexibility of information the user chooses to use/see for reports etc.

DNA's user interface was developed to be centered on feature functionality, operations, flow of data and user interactions. This design allows the user to get the information they want, when they want it, all in real time.

DNA's flexible platform means it can be used in a variety of settings and for a wide range of purposes. Multiple-property or single property

slot operators, route operators and AWP operators can each benefit from DNA's configurable platform. For example, slot operators may be primarily interested in DNA's ability to give real-time information on cash box management or firmware downloads, while route or AWP operators might be interested in DNA's meter reconciliation or preventive maintenance capabilities.

In addition to DNA, JCM will show iVIZION, iPRO and a collection of bill validators for gaming, VLT and AWP environments; advanced printer technology for a variety of applications in gaming, and JCM's total solution for digital media, including displays, controllers and production content capabilities. JCM Global looks forward to helping our customers build better, faster and stronger connections with their players!



GLI LINK BONDS THE INDUSTRY

At G2E, Gaming Laboratories International will take a non traditional approach to its stand presentation

GLI will be talking about its unsurpassed testing, certification and consulting services to G2E as it celebrates its 25th anniversary and serves more than 455 jurisdictions globally.

While GLI will not have products on the floor in the traditional sense, such as slot machines or table games, what one will find on the casino floor are devices and systems that GLI has tested and certified. Only those products that meet the highest testing standards bear the GLI Certified mark, and that gives confidence to regulators that the devices and systems on the floor in their jurisdictions are operating as expected, keeping the game fair for everyone – for players, for operators and for government agencies.

One trend the company sees in this region and in every other around the world is convergence. Game, system, land-based, online – these are all converging from a technological standpoint. The lab has been preparing for this convergence in our

testing, and it has also been doing a great deal of consulting with regulators in this region and around the world on how this technological convergence may affect their jurisdictions, and what they may have to do to adapt.

GLI also consults in the area of Professional Services. Its Professional Services division has four main areas of services, each specifically designed to make doing business in the lottery industry faster and more effective. Those categories are: Project Management; Governance, Risk and Compliance, including World Lottery Association Security Control Standards (WLASCS) and ISO 27001 Information Security audit and certification; GLI University® Training; and Technical Services.

GLI's Professional Services division has consulted with lotteries on a wide range of topics spanning the complete spectrum of the lottery industry, from security assessments to project management, IT strategy and implementation and WLA and ISO standards.

GLI's Professional Services division recently completed a major project management support

assignment for the Atlantic Lottery Corporation as the Corporation was replacing its Video Lottery system.

The company also has a range of exclusive tools, one of which was created with a keen eye on helping regulators do their job more efficiently and helping suppliers enter marketplace more quickly and cost-effectively.

The patented GLI Link technology allows the lab to test devices against systems from any of our global locations. Before GLI Link, companies would have to ship devices across the ocean for testing, and now, they simply bring them to their local GLI lab. This saves time, saves money and speeds time to market. Then when testing and certification are complete, suppliers can take advantage of GLI's exclusive Point. Click. Transfer service, where suppliers can transfer previously certified products into jurisdictions around the world with the click of a mouse.

Like other industry trade events where GLI exhibits, G2E provides a tremendous opportunity for the company to communicate its message in a face-to-face setting with regulators, suppliers and operators. In the past, GLI has had a great deal of success at G2E, and the company expects this year to exceed previous years.

SUN SET TO SHINE BRIGHTER IN LAS VEGAS

Striking new cabinets form the backbone of a dazzling array of new products from Germany's Merkur Gaming on display in Las Vegas

The international gaming company of Germany's Gauselmann Group – Merkur Gaming – is once again set to light up the Global Gaming Expo (G2E) that will take place between 30th September and 2nd October at the Sands Expo and Convention Center, Las Vegas.

This will be the perfect stage for Merkur Gaming to display brand new solutions to the international market, perfectly blending into the already strong product range. New cabinets, new games, the new 'Merkur Dispenser 100 Gold' – all await visitors to stand # 2464. Once again, Merkur Gaming will have over 600 square metres to house all their solutions.

The 'Evolution SL' and 'Avantgarde SLT' are new cabinets with large wide-screen monitors that offer HD technology. The set goal for Merkur Gaming as technology leader will be reflected in



the new 'Ozone' gaming machine. It is fair to say that this 'Ozone' has no match – it is a completely new idea. The player sits inside a capsule, a kind of cocoon, to be able to completely submerge into the gaming entertainment. The eyes can better focus on the HD gaming screens and the ears will enjoy surround sound of a new dimension thanks to the integrated subwoofer behind the seat. The desire, indeed the thirst to bring new game-changing solutions to the market was demonstrated with the introduction of the 'Highflyer' – a slant top gaming machine where the larger, upper monitor is seemingly floating in the air, giving players the opportunity to relax and enjoy gaming in a completely different way. All these gaming machines will be joined by the

popular cabinets 'Privilege Plus', 'Evolution' and 'Vision Plus'.

Merkur Gaming can link its machines with its own jackpot system that will be shown at the G2E. Furthermore, Merkur Gaming offers the innovative and unique money management systems from the Gauselmann Group – including the 'Merkur Dispenser 100 Gold' – the new standard for banknote recycling that includes the possibility to accept tickets. With 3 drums to pay back up to 34 of 3 different denominations, this solution has established itself as the leading bill recycler in the German street market and is a popular choice for change machines as well.

The Merkur Gaming team will be led by Ralf Markmann, who will be celebrating his first G2E Las Vegas at Merkur Gaming. "The sheer number of innovations of our stand is breathtaking. The 'Ozone' – where players will feel the sound and be engulfed in a new gaming experience – is set to take the G2E by storm. Naturally we have an extensive range of games with new games to be shown as well. Jackpots systems, casino management systems, money management systems – we have complete solutions – with the hardware all 'made in Germany'. We have software teams around the globe to ensure that our games match local tastes and preferences. We send out a great welcome and the entire team is looking forward to your visit", proudly stated Mr. Markmann.

ZITRO READIES TO DELIVER A REVOLUTION AT G2E

Zitro will be making a literal Splash at the G2E Vegas show with a set of new community games, new functionalities and, of course, brand new games

Zitro, the multinational leader in video bingo games, is reinventing itself and revolutionising the world video bingo market, launching the biggest number and variety of new features in its history. Together they form 'Zitro Revolution 2014.'

At G2E, Zitro will present its 'Zitro Revolution 2014' with all its new features, including new community games, new functionality available for all the games and, of course, new games.

Zitro's new Air Cash features four prizes of different amounts. With these four prizes in the draw, players' chances of winning one of them are considerably increased. The new Air Cash

also includes an innovative on-screen presentation show which is much more flexible, more dynamic and more interactive, to bring greater excitement and entertainment to the player and the room.

Treasure Box is Zitro's new pirate-themed community game, available in all Zitro games on Bluewave platform. When Treasure Box is activated, the slots appear automatically on-screen and start to turn to offer one of the three possible winning combinations. The possibility of having up to three prize lines active at the same time will increase the chances of winning a prize and also the size of the prize.

Splash, is Zitro's most team-spirited game. One player wins the bonus and 'splashes' all his or her friends with luck. When a player achieves the bonus, it is automatically gifted to all his or her neighbours, who will be able to play it as well. This bonus offers many and varied winning

combinations, which will allow all the lucky participants in Splash to accumulate numerous prizes.

Zitro has developed a new system to enter the draws for the new Air Cash, Treasure Box and Splash games, which don't require you to accumulate points. All you have to do is play, and the Cash Bonus activates on the game screen to give direct access to the draws. This new way of accessing Zitro's community games means that participation in them will increase significantly, much more excitement will be added to the game and customers will have more chances to win a prize.

All these novelties are the result of the company's efforts in R&D to ensure that its products are the most entertaining, the most dynamic, the most exciting and the most profitable, offering players a unique and unforgettable gaming experience.

SYSTEMS ARE AT THE HEART OF ARISTOCRAT'S G2E PRESENTATION ALONGSIDE POWERFUL IP BRANDS

Massive new brands, including Ted and Britney Spears, headline the Aristocrat showcase at G2E, with new jackpots and Oasis 360 forming the backbone of the company's G2E presentation this year

This is one of the most exciting times in Aristocrat's 60-year history. At G2E 2014, Aristocrat is bringing a content-led strategy to life across its entire portfolio, with the content to take customers to the next level in games and systems. If it matters to customers, it matters to Aristocrat. A series of targeted acquisitions, investments in cutting-edge hardware and technology, high-profile licenses and market-leading creative talent have positioned Aristocrat and its customers for success across multiple channels.

At G2E 2014 Aristocrat will showcase new developments in our Oasis 360 systems division. Oasis 360 is the most widely used casino system in North America, and we are executing a long-term strategy of investing in the product to deliver the best possible service to customers.

For example, Aristocrat's new Oasis HALo suite is the industry's most advanced loyalty-building software, and the new OneLink technology brings property-wide bonusing and digital media to the next level. These products are available to casinos across North America, both Oasis 360 customers and those who use another system.

Aristocrat will also feature its Episodic Bonusing and new Elimination Bonusing, a floor-wide bonusing program played on the company's nCompass media window. Finally, Aristocrat's new Clash of Coins floor-wide tournament brings interactivity to the next level where players use the casino's mobile app to collect QR codes from the EGM game screen.

In addition to groundbreaking new systems technologies, Aristocrat will present nearly 200 new games at G2E 2014 along with several innovative new cabinets. Aristocrat's investments in cutting-edge hardware and technology combined with proven content is sure to take the game and the player to a whole new level. Licensed titles and core game segments – E*SERIES, J*SERIES, and C*SERIES – will also combine to present a diversified games portfolio that is stronger than ever and will deliver excitement and performance across a diverse player range.



At G2E the company will premiere new titles including Sons of Anarchy, a stunning new video slot that brings the intensity of the TV show to the slot floor for an experience that revs up casino excitement.

Aristocrat's Gaming Operations division has a history of delivering proven performance. Buffalo Stampede was named one of the industry's most profitable new games in Goldman Sachs' 2014 Slot Manager Survey. The Walking Dead Slot Game and Batman Classic TV Series powered by Wonder Wheels also topped industry surveys, and were named among the most anticipated game releases of the year by slot managers.

Aristocrat is building on that performance with a depth and diversity of product offerings and new hardware unlike anything customers have seen before. At G2E the company will premiere new titles including Sons of Anarchy, a stunning new video slot that brings the intensity of the TV show

to the slot floor for an experience that revs up casino excitement. And Britney Spears, where players can immerse themselves in a heart-thumping gaming experience backed by everyone's favourite chart-topping hits from the Princess of Pop.

Ted and Superman The Movie pave the future roadmap for the new Wonder Wheels product line, and the latest in the successful Superman franchise, Superman Man of Steel, will also be unveiled at the show. In addition to these appealing licensed themes, Aristocrat will showcase some of its best Hyperlink content including Cashman Fever II, Good Fortune and Pixie Wishes, which combines the best E*SERIES games with the proven success of Hyperlink jackpots.

Aristocrat's Gaming Sales division has clearly demonstrated a strong commitment to operators by understanding customers have different wants and needs, and deliver with its C*SERIES, E*SERIES and J*SERIES, attracting and retaining a diverse range of players who want different types of gaming experiences. The C*SERIES maintains the commitment to classic Aristocrat style content that players love. E*SERIES is designed by industry-leading talent and contains some of the most highly anticipated games of the year. And the J*SERIES features diversified product lines specifically created to target jackpot chasing players. Aristocrat is adding to its portfolio with new games that take the fun to the next level.

The C*SERIES is rolling out the fun with new titles including Super Wheel Blast and Monster Mash. The E*SERIES was named one of the most anticipated releases in the 2014 Goldman Sachs Slot Manager Survey, and Aristocrat is delivering with new titles The Romance of Rain and Fire and Mythos. J*SERIES, for jackpot series, is growing with Dynamite Cash and with Wonder 4 Jackpot, which brings the incredibly popular Wonder 4 series and adds a jackpot component.

One of Aristocrat Technologies most popular games is better than ever in Wicked Winnings Legends, with the classic game and an enhanced deluxe version – all in the same cabinet.

With a content-led strategy approaching full momentum, smart acquisitions, full systems solutions, new cabinets and the best portfolio of new game titles in the market, Aristocrat will take you to the Next Level at the G2E trade show in Las Vegas.

GTECH JOINS ALL THE DOTS AT G2E 2014

A collection of new True 3D games headline GTECH's North American casino presentation ready for G2E Las Vegas

GTECH, with its gaming product brand SPIELO, will be presenting its comprehensive gaming portfolio at the G2E 2014. Featuring the "All Together GTECH" theme, visitors to Booth 1264 will experience a full array of games, cabinets, systems and interactive solutions, including an expanded library of True 3D titles.

For the North American Casino market, GTECH will be following up on the launch of SPHINX 3D by introducing a number of exciting additions to its True 3D game library specifically designed to appeal to different player segments. Titles include Bejeweled 3D, Dragon's Temple 3D, Dreams of Asia 3D and Aladdin's Fortune 3D.

Visitors will also want to check out GTECH's new community games from its licensed PopCap brand library. Fans of Zuma and Bejeweled will be thrilled with the latest additions to GTECH's Community product line, Bejeweled Community and Zuma Adventures, both available in a three-game configuration. Bejeweled Community features two entertaining base games as well as a variety of randomly triggered Bejeweled Bonuses. Zuma Adventures offers two unique base games, market-proven Community bonus eligibility and three innovative Community bonuses.

GTECH's line-up also includes yet another internationally-recognized licensed title from the exciting DEAL OR NO DEAL franchise, with the newest version in the series, DEAL OR NO DEALTM Las Vegas! Using the MaXVusion cabinet and featuring Howie Mandel and the DEAL OR NO DEAL ladies, this brand-new title is set against a glamorous Las Vegas backdrop and offers two base games that share a unique middle reel that only contains wilds and bonus triggers. The bonus is played during and intermittently throughout the base game. The Money Drop, offering two base games and highly interactive players' choice bonuses, completes GTECH's licensed product offering.

Completing the North American casino product line-up is a diverse portfolio of core games with a balanced mix, including the evolution of perennial successes, new and innovative



concepts, and games specifically designed for high denom play.

Customers planning to step into the Interactive arena, or who are searching for the next-generation solution, will find a complete portfolio of games, systems and services designed to work individually or together. GTECH's market-leading interactive products include solutions for poker, casino, bingo, sports betting and lottery markets. GTECH provides open architecture systems to allow fast integration of third-party products, easily creating a successful online solution tailored to customer needs. In addition to many new slot game titles, the spotlight will be on the launch of the exciting new betting platform

WagerWise, a must-see Poker App for Tablet and Poker Network Solution, and GTECH's exciting Play for Fun and Virtual Currency solutions. All games will be available to connect directly to the customer platform or through GTECH's Player Account Management system, an innovative solution that offers a single 360 degree view of the player.

For International customers, GTECH is featuring linked products such as ACTION JACKPOTS, a unique novelty product offering four different progressive links tied into one single gaming machine. Brand-new game suites will be on display for the successful diversity multigame, as well as a selection of new core games.

Specifically for the Latin American market, GTECH will be showcasing PERUVIAN RICHES, a mystery jackpot that can be run with nearly any core game from GTECH's extensive core games library. The new prodiGi Vu My Choice multigame offers nine different suites with four popular and proven games each, as well as attractive frame lights that stand out on the casino floor. For the second consecutive year, the GTECH Latin America team will feature the SpieloPlus.com

GTECH will be following up on the groundbreaking launch of SPHINX 3D by introducing a number of exciting additions to its True 3D game library specifically designed to appeal to different player segments.

campaign with attractive offers live at the show; customers are invited to visit GTECH booth 1264 for more details.

The comprehensive range of GALAXIS modules for all areas of casino management will also be showcased at G2E. In addition, the casino systems team will demonstrate JP2go, a standalone, turnkey jackpot system developed to boost machine play. SYSTEM2go, the all-inclusive, packaged slot system with accounting, remote monitoring, a jackpot system and advanced cashless and player tracking features.

The Public Gaming team will showcase new game releases now live in Louisiana and West Virginia, as well as the latest new game releases for Illinois, Montana and South Dakota Operator Markets. On the systems side, as part of the INTELLIGEN Central System, several key components of the Player Services Manager application will be highlighted: Cashless, Responsible Gaming, Vault Breaker multi-level Progressive, and Mystery Draw. As well, Player Loyalty and Rewards (PLR) will show earning benefits and rewards, spending reward points, viewing account activity, and two-way communication between the player and the PLR solution, all through the Player User Interface. New concepts in visualisations of key lottery business analytics and retailer Point-of-Sale devices will also be featured.

DROP EVERYTHING WITH APEX

Complete gaming solutions at G2E from APEX gaming with the new and improved eDROP to receive its global premiere at the Vegas event

APEX gaming, the Austrian-based gaming company, will be showing a great deal of gaming solutions at the forthcoming G2E Las Vegas. Make sure you drop in to stand # 4833 to see the eDROP. A completely new idea created from precise gaming knowledge together with focused marketing research.

Casino operators looking for novel ideas to offer their customers – look no further than APEX. The concept is to unite slots and live gaming. The eDROP makes the transition between slots and live gaming tables simple. Tickets are placed in the eDROP and the croupier hands out the corresponding jetons. The player can choose any amount on the ticket to exchange for jetons – the remaining amount is printed back out as a ticket by the eDROP. At the end of their session, players swap jetons for a ticket to return to the slots or electronic multiplayers.

The eDROP has the further benefit that croupiers can enter the banknotes into this secure device. Each banknote is validated individually even though the croupier can enter

them in bulk fashion. The eDROP is connected to the casino management system so operators have real time information on its contents.

Mobile gaming players themselves can enjoy the APEX games thanks to APEX MOBILE SLOTS. These games can be applied to tablet games – and so be a useful addition to land-based gaming. Players can be handed tablets to play the APEX games for example at the bar or restaurant. The RFID technology allows players to simply enter credit on the tablet or ask the gaming staff to pay out winnings as well.

Slots players have a great choice as well. The roots of APEX lie in the development and production of gaming machines. The Pinnacle upright cabinet will be joined by the stylish Pinnacle SL slant top. A slimline version is also available – know as the Dual Slim Line. The APEX games are enjoyed in a multitude of countries with favourites such as Mozart, Leonardo's Code, American Hot Slot, Arriva Arriva and Casanova.

The APEX PLAYER STATION – electronic multiplayer – will also be on show in Las Vegas. This fully automatic player station incorporates a roulette wheel. Three other table games are available – Sic-Bo, Bacarrat and Quikker. Quikker is an APEX game where the



player bets on the outcome of two cards – in a way this game marries the best of roulette with black jack, yet the odds are much higher. It is possible to combine this terminal with another three roulette tables, so that players can bet on four different wheels. And last but not least – the gaming terminals act as slot machines as well as the APEX slots games can be accessed from these. Now that's what we call choice!

APEX supplies live gaming tables. Specifically for poker, the Shuffle King II is the ideal electronic card shuffler. Already standard in Europe's largest poker casino (Casino Rozvadov in the Czech Republic), come and see just why the Shuffle King II is the ideal card shuffler.

Johannes Weissengruber, founder and CEO of APEX gaming, sends out a warm welcome, "Come and meet the team and learn what we can do for you. We cover practically all segments of gaming. We are very much looking forward to the G2E."

AMATIC KICKS DOWN THE TURBO AT G2E WITH LATEST ROULETTE

Amatic Industries and INAG will jointly present the Turbo Card Roulette at G2E Las Vegas, alongside the Austrian giant's new Performer C22 upright cabinet

The team at Austria's AMATIC Industries sends out a warm welcome to visitors to the forthcoming G2E Las Vegas that will take place at the Sands Expo and Convention Center between 30th September and 2nd October. Visitors to booth number 4016 will see solutions for table games and Multi Game slot machines.

The 'Turbo Card Roulette' – a joint invention between INAG and AMATIC Industries – will take centre stage. The TCR is patented to INAG and has passed all necessary GLI testing. This card-based roulette offers unique advantages over conventional roulette. It requires minimal

training for operators and surveillance – it is designed to allow no operator errors and no casino bleed. There is no decrease in decisions per hour as more players join the game. It is fully expandable as AMATIC Industries have transformed the TCR into an electronic version providing the necessary software and hardware (including touchscreen monitors). The TCR is already approved in several US states.

Multi Game has been the focus of AMATIC Industries from its company incorporation. This wealth of knowledge has seen AMATIC Industries firmly establish itself in the global gaming market. The stylish Performer C22 upright cabinet will be on display at the G2E Las Vegas.

"It will be great to see our customers again in Las Vegas. We are convinced that the Turbo Card Roulette is a perfect solution for gaming in the



USA and we see real opportunities in many other countries as well. Concerning Multi Game, we invite visitors to see the magical combination of great games in a stylish and secure cabinet. We welcome guests to our booth 4016!" noted Thomas Engstberger, Sales Manager at AMATIC Industries.

THE G2E "FACE" OF EURO GAMES TECHNOLOGY

EGT will show the future of the casino floor at stand #4046 with high-end technologies, attractive designs and a wide portfolio of land-based and online gaming products for all operators.

Casino operators from many countries in Europe, Asia, Africa and South America have already equipped their casino floors with the Premier Series cabinets of EGT and provide constant enjoyment for their players. Yet the recognized cabinet P-24/24 Up of the same series will strive to achieve even larger acclaim at the Las Vegas tradeshow. "The Premier Series is a milestone in our product development and the P-24/24 Up is one of our latest projects on sale from last year. It is

among our most successful models and it builds to our image every day, adding value to each gaming floor where it has been installed. Its multimedia topper, high resolution 24" widescreen monitors, keyboard with OLED buttons, enhanced stereo sound system, ergonomic details, engaging look, and innovative Exciter II platform make it a preferable choice for both casino operators and players," said EGT Sales and Marketing Director Stanislav Stanev.

The leading jackpot premiere on the booth of EGT will be the brand new Lady's Cards jackpot. It is a 4-level randomly triggered progressive jackpot with completely new thematic. The exciting 3D movies and eye-catching celebration animations are projected on a 42" monitor, creating cheerful mood and attracting the players. The bank of gaming machines with Lady's Cards jackpot are customizable to meet the different players' requirements.

During the Global Gaming Expo EGT will also



EGT's STORK terminal.

highlight a number of multiplayer solutions based on one of EGT's newest achievements – the STORK terminal. Bingo, automated and live roulette solutions together with a jackpot with appealing thematic will be present to show just a few of all possible multiplayer configurations – a flexibility achievable only through the high technological performance of this terminal.

The EGT interactive products for online operators will also be shown at G2E in Las Vegas.

QUIXANT SOARS INTO G2E WITH LATEST PLATFORM

Quixant prepares to showcase its latest AMD-powered all-in-one platforms designed specifically for the gaming industry at G2E Las Vegas 2014

Quixant, the only company focused solely on the design and manufacture of computer platforms for the global gaming industry, is pleased to be showcasing the latest products on its booth at G2E Las Vegas 2014.

On display will be Quixant's latest flagship gaming platform, the QX-50. Boasting AMD's high performance, multi-core "Bald Eagle" APU, the QX-50 is pioneering in bringing the world of 4K Ultra HD graphics to the gaming industry. 4K displays, which offer four times the pixel density of high definition screens, enable developers to create games with even more vivid, detailed graphics. The QX-50 features Quixant's latest advanced PCI Express gaming logic and NVRAM with inclusive gaming libraries and drivers for smooth, rapid integration.

Also on show will be our new all-in-one compact gaming platform solution, the QXi-307. Based on the next generation AMD's Embedded G-Series "Steppe Eagle" SoC with integrated Radeon™ HD 8000 Series graphics, the QXi-307 offers exceptional performance, efficiency and the



Quixant's flagship QX-50.

benefit of Quixant's best of breed technology at a cost effective price point.

Both platforms present exciting new features, such as AMD Mantle and Graphics Core Next (GCN) architecture which serve to enhance the performance and efficiency of Quixant's gaming hardware for optimised games.

"Quixant combines the latest PC technology with a wealth of specialist gaming features which enable customers to make a rapid transition to the latest Quixant gaming platform. Our proven high performance product range, high reliability, long term supply guarantee and integration of the



The new all-in-one compact, QXi-307.

features necessary to meet regulatory requirements in all major global gaming markets makes adopting Quixant's technology a compelling proposition" commented Amit Sharma, VP Sales of Quixant USA Inc.

Quixant will also be exhibiting the other platforms in the range, including the high-end QX-40, mid-range QXi-4000 and cost-effective QXi-300.

The G2E Las Vegas trade show takes place from September 30–October 2, 2014 at the Sands Expo & Convention Center. Quixant is located at booth #2430.

ALFASTREET TO DEBUT FUTURE GAME CLASSICS

Celebrating its double decade of dedicated gaming delights, Alfastreet is set to deliver again at G2E Las Vegas

Alfastreet is excitedly anticipating the upcoming edition of G2E in Las Vegas, undeniably one of the biggest and most important exhibitions in the world, in the city that is synonymous gaming.

In the very special year of the 20th anniversary of the company, Alfastreet will be present with a spectacular new booth design that will provide a grand stage for the latest evolution of its product line-up.

Acclaimed products, such as the evergreen flagship, the majestic R8 Roulette and the



A new stand design will thrill in Vegas.

proven SL single terminals will be paired with some exciting new additions to create an unforgettable experience for all of Alfastreet's guests at booth # 3639.

Alfastreet is expecting its friends and clients as

well as many first time visitors, to join in a celebratory journey through the company's history, which is reflected in Alfastreet's most recent products. The company is proud of its achievements that are a result of the great interaction with its partners and gaming enthusiasts from all parts of the world. Alfastreet's team will be at the full disposal of visitors to help with detailed information as well as a proverbial trip down Memory Lane.

Projects for the second half of the year 2014 and the upcoming 2015 are extremely interesting and visitors to the show will have the opportunity to experience them first-hand. The work accomplished so far has put Alfastreet at the forefront of electronic table games production and the company will raise the bar with this year's edition of G2E.

Alfastreet would like to extend the warmest welcome to everybody from the gaming community and ask they visit the booth #3639 to celebrate the first 20 years of success and experience the products that will shape the future of gaming industry.

GPI SHOWCASE NEW V-SERIES CHIP RANGE AT G2E

Gaming Partners International is to debut its new V-Series chip range at the Las Vegas show, sporting the latest in chip security functionality and design options. Gemaco products will also be on display

At this year's G2E, Gaming Partners International will showcase the depth of its table game product range and will introduce several new products specifically developed to meet the needs of its global customers.

GPI will also highlight its well-known Gemaco playing cards and layouts, having recently acquired the gaming brand, as well as numerous RFID products and solutions. Product demonstrations will be available at Booth #4040.

As the gaming industry's leading casino currency manufacturer, our Paulson, Bud Jones and Bourgogne et Grasset currency products are well respected for their extensive design options and unprecedented selection of security features, and at G2E, we will debut several additions to our Paulson and B&G product lines.

Renowned for their distinctive look and feel, our Paulson chips are North America's most popular casino currency brand, and during the show we



The new V-Series chip range from GPI.

will introduce several product enhancements including new standard Paulson chip designs and colors. We will also showcase several chip security features that can help our Paulson customers better protect their casino currency from counterfeiting and other threats.

Expanding our B&G plastic injected chip portfolio is our new V-Series chip range, an extensive selection of standard chip designs that not only offer an unprecedented variety of configurations but also feature a new chip material formula that is stronger and more durable. Additionally, we've increased the value of this new product by

including ChipShield as a standard feature. An anti-microbial substance that helps inhibit the growth of stain-causing mildew, ChipShield leaves a cleaner, more sanitary chip surface. Best of all, all V-Series four-shot chips come standard with an infra-red security feature exclusive to GPI.

New to our currency security features portfolio, 3-in-1 UV is a security taggant that remains invisible under standard UV wavelengths. Because it can be added to plastic injection-molded chip materials, it is easy to validate chips when placed in stacks or racks. It also offers three levels of authentication, including a forensic verification using Scanning Electron Microscopy.

We will also be introducing SecuriFilm, a decal security film with a semi-transparent hologram-like effect that enables quick authentication. SecuriFilm can be easily authenticated at the table and includes an additional covert security feature enabling a higher level of validation.

"With our wide range of table game products and our unmatched casino currency portfolio on display, we look forward to G2E and getting the industry's feedback on these new products" commented GPI Vice President of Sales Rob Jackson.



Heading back to summer school

Gaming industry technology provider, Comtrade Gaming, recently held its annual EdIT summer school for young, aspiring computer sciences students, an event that has been already running for 18 years. G3 quizzed Comtrade's Aleš Gornjec about the project

Comtrade Gaming, the premier technology provider to the gaming industry, held its annual »EdIT« summer school for young, aspiring computer sciences students, an event that has been already running for 18 years.

EdIT is organized in three countries, Slovenia, Serbia, and Bosnia and Herzegovina across six locations with different topics chosen every year. The gaming focus this year was all about the development of Bingo game from scratch with the use of HTML5 technology.

The summer school is actually a full simulation of a real project as participants must tackle the challenges of teamwork, the project must be finished within a limited time with concrete results, and ultimately they have to present their solutions to a wider range of listeners and answer their questions. For 15 participants this was a unique and also their first real life experience of how a large commercial project is accomplished, and the result depended only on them.

Aleš Gornjec, General Manager at Comtrade Gaming said: "Our corporate social responsibility

policy is mostly focused on opportunities for young people, thus EdIT is a perfect way to give them a chance to get to know the real world of business, to give them practical knowledge and to discover young talents and invite them to join our company. We are very proud that this year they have developed a fully featured mobile bingo game in just two weeks."

How long have you been running the EdIT programme and how did it start?

EdIT started already in 1996. Our goal back then was to offer a program where the winners of various programming and computer science competitions could also gain practical and team work knowledge. Over the years our summer school became opened to broad student population and this year was the 18th time we opened our doors for a 14-day long summer school for young, aspiring students.

EdIT is organised in three countries, Slovenia, Serbia, and Bosnia and Herzegovina in six locations with different topics chosen every year. At least one of them is always dedicated to develop-



Aleš Gornjec
General Manager,
Comtrade Gaming

Aleš joined ComTrade Group in 1996 as a software developer and project manager after graduating from the Faculty of Electrical Engineering and Computer Science at the University of Maribor. In 2001 Aleš founded the gaming unit within the company and has steadily built a team of more than 200 engineers.

EdIT is organised in three countries, Slovenia, Serbia, and Bosnia and Herzegovina in six locations with different topics chosen every year. At least one of them is always dedicated to developing a product connected to the gaming industry.



ing a product connected to the gaming industry. Moreover, with the growing popularity of gamification most of the solutions include gamification elements as well.

What's involved in the summer school that you organize?

Our summer school is actually a serious simulation of a real project as participants get real tasks, they must tackle the challenges of teamwork, the project must be finished within a limited time with concrete results, and ultimately they have to present their solutions to a wider range of listeners and answer their questions. For all the participants this is the first and a unique experience how real work on a large project is accomplished, and the result depends on the 15 participants.

What was this year's gaming topic and what will the students learn?

We have chosen to challenge our participants with the development of a Bingo game this year, which could be used by users all over the world on multiple devices, from mobile phones to tablets. Students have learned how to develop a game from scratch with the use of HTML5 technology. They learned how to develop web and mobile user interfaces including game design, data presentation and a chat functionality, a server with a random number generator, a card generator, security, and a database and communication between the two of them. Moreover, they also developed other elements of the game, such as animations, pictures, sounds, etc.

How many students have entered the programme over its history and how many have you since

employed? And how does this compare to employing from the general marketplace?

The number of students that have entered our summer school so far has come close to 1,000 already, and we are very proud of it. Around 30% of them were employed and some of them still are. We cannot actually compare the employment from EdIT to the general marketplace, since we are searching for high profiles such as senior

"Our summer school is actually a serious simulation of a real project as participants get real tasks, they must tackle the challenges of teamwork, the project must be finished within a limited time with concrete results."

engineers on the general marketplace, while for beginners and students EdIT is a starting point.

When employing young people there is a good chance that someone will be selected from the EdIT alumni pool, since many participants continue to cooperate with Comtrade as students. This further contributes to the possibility for them to upgrade their knowledge and experience and prove themselves even before they start looking for a regular job.

What help is EdIT to both the students and to Comtrade?

To us, this is a helpful tool to find young talent and to invite them to join our company. This allows us to get to know them before we do, while students get a chance to cooperate in the simulation of a real project, from designing a concept to presenting a resulting product to potential users. They even have to divide the project roles among themselves, learn how to communicate in a group, and to solve challenges put before them.

How has EdIT evolved over the years that you've been running it?

EdIT has evolved in two ways, one way is regarding the topics with which we always follow the progression and trends in the industry. On the other hand, the process of product development has changed from a traditional, sequential approach to an agile development approach - the scrum.

How do you cost out a programme such as this - in terms of investment for return - and would you recommend other employers in the gaming sector to adopt similar practices?

In terms of return of investment this is one of the best for sure, and we recommend it to others as well. There are three main objectives for it, firstly you develop a young talent employment pool, you build your brand as a good employer, you give youngsters the insight opportunity to work on a real project, and last but not least, you build your social responsibility by building the level of knowledge in IT sector in the region.

One + one multiplies the gaming options

G3 interviewed Tradologic's Chief Business Development Officer, Gil Erez, about a gaming product that is finding favour with operators and players; binary betting, and the company's inclusion of online and now land-based gaming solutions

Tradologic has launched a number of new products in 2014, predominantly targeted at the land-based sector. What's the reason for this move and its land-based, having been a broker facing business primarily, and is land-based a big growth area for Tradologic?

The market has been growing rapidly over the last few years and this raised the need of expanding the number of products we offer. One of the needs of the industry was to provide a land based solution for financial betting, which has not been in existence before. This need stemmed from the idea to provide a full cross-platform way of playing. Our solution allows land based operations to acquire new players using the limited physical space that they have, and lets them continue to play at home at the own convenience on their PC, or on a mobile device. We are the first in the industry to cover the land-based audiences which only strengthens our position as the leading Binary Options platform provider. Our online based solution broadens the prospective clientele for Tradologic and allows them to operate in a way they never could have been able to do it before.

Could you describe the creation of the Tradinator, a hardware-based financial gaming product? How did you go about creating your first hardware product and what has been the reaction to Tradinator since its launch at ICE?

Once we saw how big the interest in Binary Options as a whole is, we knew there were more areas which would be intrigued by the Binary Options world. We started the process by identifying the needs of the industry and the players. We had an extensive R&D process which included game designers, hardware and other experts. We went through a few product versions until the final product which was shown at ICE. The final product is one that addresses the need of the opera-

tor, with a streamlined and easy to operate box, and that of the player, with an easy, fun playing experience. The reaction has been tremendous with a lot of operators choosing to take the product. As mentioned earlier, since the game is available also online, some operators have taken the game for their online casino only since they do not operate a physical location.

Having launched Tradinator earlier in the year, May saw the debut of another land-based product, the Trado-bar. Could you describe the evolution of this product and the players you're looking to attract?

The next expo we have participated was IFX in Cyprus where the Tradinator was a huge success as well. This expo is the place where we first introduced the TradoBars. This new product is designed for retail areas that have limited space, and for places that will operate only a few machines. Thanks to the Tradinator and the TradoBar binary options are now available at cafes, bars, airports, casinos. The product and industry itself is constantly evolving so it's really hard to predict where it will be in 1, 2, or 3 years ... but you can be sure you will be seeing our machines in places where you regularly see other land-based operating machines.

Which international markets are you currently targeting with the Tradinator and Trado-bar - and who are the operators that would most benefit from these products?

The biggest markets are of course Western Europe and Asia, with land-based betting widely accepted and with infrastructures capable of taking this new product. Other areas such as Eastern Europe and some countries in Asia which are opening their legislation to be friendlier towards betting are also areas that we would like to enter. Operators that want to expand their product

offering to their already existing clientele would definitely want to take our product as something more than they can offer. We also have operators that have taken the product and have created full financial-themed betting shops right in the financial district of the city, offering a relevant product to the people which frequent that area.

Tradologic has integrated a variety of games for Trado-bar and Tradinator, including Markets Rally, Crazy Markets, Bull and Bear and FOREX Gump. Could you describe the games in more detail and explain their unique appeal to players?

As mentioned above all games are easy to play and amusing, offered on different skins. There are also numerous available assets of which you can simultaneously play on 8. The expiry times are 15, 30, 45 and 60 seconds so they are great if you need to kill some time and are willing to make some money fast. Wild Trader is our newest game on offer, and it provides the game on a totally different skin, so the player can choose which he likes to play. Coming up next are games that are very similar to those that you see in live casinos, with of course some touches to make it applicable to our industry.

Why is Tradologic making the shift from successful software developer to hardware developer? Why not simply license your software/games to an existing hardware developer?

We are still the best software providers out there and this is still our main focus. We strive to provide the best quality product, and as such we felt that if we were to outsource this aspect, we could not guarantee the end product. We want to make sure that the product the operator receives is the best available and that he can rest assured, from the hardware to software, that all is being held to a very high standard.

What are your goals and targets for the new hardware and games and will we be seeing more product launches in the near future from Tradologic?

Our goals are and have always been to satisfy the needs of our customers and end users. I mentioned some of the upcoming games in a bit earlier, and we will constantly be expanding that selection. In terms of a new type of machine - not yet, the two that we have now are very successful and there isn't a need for a new one. But stay tuned you never know what we have up our sleeve!



Gil Erez,
Tradologic, Chief
Business
Development
Officer

ACTION!





G3-247 Report

MOBILE & TABLET GAMING

A touchy subject

Mobile and tablet usage is irrevocably changing the gaming landscape as more players than ever utilise these versatile devices for play. But while there's lots of anecdotal evidence and, inexplicably, millions of infographics, what's the true picture? We asked a panel of industry experts, the people creating and delivering the games and mobile platforms, how they're shaping the market and where they see this dynamic market segment heading in the future?

Smartphones and tablet devices have become a ubiquitous part of daily life. As a reader of this magazine, you'll not only have both, but there's a 29 per cent chance that you're reading this article via a digital device. A recent study in the UK showed that Britons now spend more time using technology devices than they do sleeping. Adults spent an average of eight hours and 41 minutes per day on media devices, while the same survey showed that younger people, not unsurprisingly, had the most advanced understanding of mobile technology – with six year olds having the same level of knowledge as the average 45 year old. When asked which form of media they would miss the most, just two per cent of those aged 16 or older said they'd feel the absence of newspapers and magazines. For a publisher, that's either a frightening statistic, or a wake-up call. The statistics show that people are consuming content in greater volume than ever, they're just seeking it from new sources.

Gaming faces exactly the same challenges and opportunities in the face of a mobile/tablet revolution, and that's not just land-based operators vying for the attention of a smartphone-savvy younger generation, but online

desktop play is also being squeezed by the shift to mobile and tablet play. While there's been a lot of conference chatter as to the impact of mobile and tablet gaming, the broad spectrum of gaming sectors affected by this evolution of play from location-based to mobile hasn't been charted in any detail. In order to address this, G3 has gathered the opinions of an industry panel that spans both traditional, online, social and purely digital business for their views as to the changes taking place today as a result of the influence of mobile and tablet devices on the gaming industry.

HOW MOBILE ARE PLAYERS WHEN USING THEIR DEVICES - ARE THEY ON THE MOVE OR SIMPLY CONNECTED AT HOME?

Bryan Kelly, Senior Vice-President of Technology, Bally Technologies – Feedback from our Dragonplay team (Bally acquired social casino company Dragonplay in June 2014), is 'both' – they use on the move, at work and home. The devices are predominantly used for short sessions, when the player has a few minutes to spare, whereby they quickly consume gaming.



At DoubleDown Casino we see significant crossover between mobile/tablet and desktop play. Our players

are engaged with our game daily; whether they are on the move and playing with their iOS or Android device or if they're in the office playing via desktop. We do find players using mobile and tablet play in shorter, more frequent sessions, whereas on desktop they may play for longer periods of time.

What's really cool about our games is players can play seamlessly from device to device. Their chip balance follows them.

Jim Veevaert, Vice-President of Games, DoubleDown Casino.

Players are grabbing five minutes in-between doing something else. From a Free2Play perspective, we don't have any hard metrics right now to show that a player leaving a bricks and mortar real-money wagering location, immediately turns on their device and begins playing on the way home. What we are seeing is people killing time in the coffee shop, at home or on the move.



Neill Whyte,
Head of Product Channels,
Microgaming



Leigh Nissim,
IGT Commercial Director of
Interactive



Bryan Kelly,
Senior VP of Technology,
Bally Technologies



Aleš Gornjec,
General Manager at
Comtrade Gaming



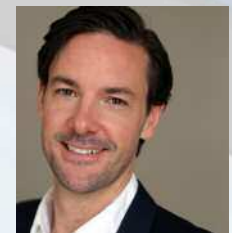
Ashley Lang,
Founder and CEO of Odobo



Jim Veevaert,
Vice-President of Games,
DoubleDown Casino



Luke Davis,
Marketing Director, Playtech



Mathias Larsson,
Director of Business
Development, Ezugi



Luke Alvarez,
CEO, Inspired Gaming Group



Derrick Morton,
CEO of FlowPlay and Vegas
World



Charles Cohen,
Vice President, Mobile, BTECH



Jerry Bowskill,
Chief Technology Officer for
Williams Interactive

Here in the US right now, location isn't the big question, it's much more about the content and the whether players are engaged enough to buy? Geo-location technology let's us know where the consumer is playing, but the casinos are marketing to their existing player databases. So instead they're looking to engage players with new content in order to increase the lifetime value of those players.

The huge difference between a company like Bally and the European firms entering the US market, is that we are purely B2B. Our customers create their own marketing programs, just as they do on their casino floor. We aren't the ones gathering data on their players.

Mathias Larsson, Director of Business Development, Ezugi – Mobile and tablet are two entirely different devices both in regards to their physical size and in terms of user experience and how the player, from a behavioural standpoint, interacts with each platform.

The mobile is the smaller and more portable device, so it is far to say the player is more or less always on the

The huge difference between a company like Bally and the European firms entering the US market, is that we are purely B2B. We aren't the ones gathering data on [operator's] players.

move, by virtue that the mobile is always being carried by the player on his/her person or is located within easy reach.

The tablet on the other hand is larger and used for other daily tasks besides from gaming and is most often connected to a WiFi network to replicate some of the functions that a desktop computer offers.

Jim Veevaert, Vice-President of Games, DoubleDown Casino – At DoubleDown Casino we see significant crossover between mobile/tablet and

desktop play. Our players are engaged with our game daily; whether they are on the move and playing with their iOS or Android device or if they're in the office playing via desktop. We do find players using mobile and tablet play in shorter, more frequent sessions, whereas on desktop they may play for longer periods of time.

What's really cool about our games is players can play seamlessly from device to device. Their chip balance follows them.

Luke Alvarez, CEO, Inspired Gaming Group – Anecdotally from the UK market we know that a sizable proportion of mobile players are on tablets and, therefore, are not hugely mobile. Gaming is a leisure activity that's often enjoyed on the sofa of an evening, so tablets are great devices for this purpose. Also, lots of people have Wi-Fi only tablets, which obviously restricts where you can play games over the Internet.

"Players choose the most appropriate device, generally according to what time of day they are playing. Early morning people tend to be on mobile devices on their

G3-247 Report

MOBILE & TABLET GAMING

way to work, during the day desktop is more common, and in the evening tablets are most popular."

Neill Whyte, Head of Product Channels, Microgaming – We see gameplay on mobile devices connecting through both phone networks and via Wi-Fi, so this would imply that players use their devices in all environments. Moreover, from looking at times when mobile devices are connecting and our gaming content is being played, it is apparent that play occurs at all times of day, which includes a player's journey to work and when they are at home at night.

In fact, we recently undertook a piece of qualitative market research on players' behavior, specifically looking at the UK market and the results from this study support the above. It was fascinating to hear how players interacted with their devices throughout the day. For example, a player would play on their Smartphone on their commute to work and then on their tablet device, at night, in bed with their partner!

Luke Davis, Marketing Director, Playtech – Playtech's advanced Multi-Channel functionalities allow players to use a single account and wallet across all platforms and products, wherever and whenever they are playing. This has created numerous cross-sale opportunities for today's leading operators and sets firm foundations for them to fully integrate their online and retail offering in the future. The result of this is that mobile players are now part of the same eco-system offered by the operator. Across all channels, device usage varies from player to player with no specific pattern. Playtech technology does give mobile players some unique gaming opportunities though. They can now use their mobile device, be it a phone or a tablet, as their second or third screen for an enriched player experience, from the comfort of their home or while out, on the go.

Jerry Bowskill, Chief Technology Officer for Williams Interactive – Our data shows that mobile play is concentrated around the evening time with spikes around 9-11PM, similar to desktop play. This leads me to believe that people are playing at home – and though main concentration of play is evening time we are seeing smaller spikes in play on the commute into work and lunchtimes.

It is also becoming clear that for a large percentage of players, their tablet is the primary method for accessing the Internet in the home.

Ashley Lang, Founder and CEO of Odobo – Players connect to play on both 3/4G connections and Wi-Fi, but a Wi-Fi connection does not necessarily mean that players are at home. Wi-Fi connectivity is available today at so many locations outside the home including cafes, lounges, trains, and hotels. It would be an incorrect assumption to presume Wi-Fi connected players are at home. Gambling games are typically made up of short single 'game rounds' that are played in succession during a game session – think of spins of a slot machine or hands of blackjack. By nature these games are inherently "snackable" meaning a player can get enjoyment out of even short games sessions. Gambling games are therefore well suited for play on the go, while commuting, or having a coffee at a café. One simply needs to look around at fellow passengers in an airport



Tablet play is seeing the most growth at the moment, but it's not necessarily more important than mobile.

Tablet play is, however, cannibalising desktop play, which is becoming less dominant as the growth of handheld devices continues. Both mobile and tablet game development is important to Inspired, and we consider tablet and mobile separately in terms of UX design. Players use and interact with the devices in different ways, so the games and navigation must be sympathetic towards these differences. Luke Alvarez, CEO, Inspired Gaming Group.

lounge or train platform to know that games entertainment is amongst the most popular activity for people outside the home on their smartphones and gambling games are increasingly a popular form of this entertainment

HOW LONG ARE THE GAMING PERIODS ON MOBILE AND TABLET - HOW DO THEY COMPARE TO PLAY ON OTHER DEVICES/ MACHINES?

Mathias Larsson, Director of Business Development, Ezugi – Mobile gaming periods have a tendency to have game session times throughout the day of between 3-10 minutes. The average session time is about 5 mins. As mobile players tend to be on the move and play during their free spare time, for example waiting to catch a bus, in a line at the fast food outlet. Therefore speed of download or access to the game is a critical factor of engagement, given that the player may only have minutes before a distraction occurs.

Conversely on the tablet, distractions are less and that of time to download or access the game play. Tablets provide a deeper engagement due to the screen size, the games graphics and ability to entertain the player and therefore games sessions are similar to those of a desktop between 15 minutes to hours of game play duration.

Neill Whyte, Head of Product Channels, Microgaming – The average session time on a mobile device is noticeably shorter than the average session time on a PC – but that is to be expected. Mobile and tablet devices are principally being used when people are on the go – short bursts of usage – whereas PC users are at home and have the ability to play for a longer time period.

Ashley Lang, Founder and CEO of Odobo – We observe tablet play sessions to be similar on duration to desktop play whereas smartphone play is 1/3 to 1/2 the average session length of desktop. This is very likely a reflection of the use of smartphones while on-the-go versus a tendency to use a tablet when stationary for a period of time.



Bryan Kelly, Senior Vice-President of Technology, Bally Technologies – Real money wagering is almost identical for tablet and mobile, but for Free2Play, there's a lot of custom development for the platform. This means that the content is much richer, there's more real-estate and there are more do things. It's a very rich and elegant experience.

The typical gaming period on mobile is about 10 minutes – it's an impulse buy – but they play for 10 minutes many times a day. Mobile players play four times per day on average, as compared to PC-based gaming, which is predominantly once a day. Players also spend a further 15 minutes per session quickly consuming other types of media at the same time.

Mobile wagering equates to short sessions, high volume and high wager size. Mobile players spend fast. Many thought we'd be looking at short sessions and small wagers, but in fact the opposite has been true. In New Jersey the Golden Nugget has installed our mobile wagering platform. (Bally was the first to launch its wagering platform in May 2014), the casino has seen a revenue spike of 70 per cent, where rest of state saw revenues down.

Aleš Gornjec, General Manager at Comtrade Gaming – Gaming duration on mobile and tablet are at around 7 minutes per session. Currently players are

mostly using mobile to access the games but we're noticing a trend of more and more players playing from their tablets so the numbers may soon be at 50/50 should this trend continue.

Luke Davis, Marketing Director, Playtech – Periods of play highly depend on the product or the game the player chooses. Typically the average gaming period is between 7–20 minutes long.

Derrick Morton, CEO of FlowPlay and Vegas World – Mobile and tablet players are typically on the go, so they're more likely to play 5–10 minute sessions whereas a desktop player is much more likely to engage for an hour or more. There can also be a lot of crossover in the platform that players are playing depending on their location, but typically players have one device that they engage with more than others.

Luke Alvarez, CEO, Inspired Gaming Group – In the UK, mobile sessions are around 10–12 minutes, which is slightly longer than the average UK LBO machine session at around 7–8 minutes.

When comparing desktop to mobile, sessions on IGT games are approximately twice the length as on desktop, which is understandable as the consumer is most likely seated in front of their machine.

Leigh Nissim, IGT Commercial Director of Interactive – There are distinctions between typical mobile and tablet sessions, in terms of both the time and duration. The extra portability of mobile phones, and the fact that they rarely leave the players' sides, means that mobile play is more common and in shorter bursts. On tablets, where there is greater real estate and the devices are more powerful, sessions are longer and players more engaged.

Mobile and tablet are entirely complementary. It means that operators can appeal to the same customer around the clock. For example, players can use their mobile on the train during the morning commute and at lunchtime while at work, then switches to a tablet in the evening which they use as a second screen as they watch television. Having content on multiple devices also makes it possible to reach different players at various points through the day and night, and across multiple locations.

When comparing desktop to mobile, sessions on IGT games are approximately twice the length as on desktop, which is understandable as the consumer is most likely seated in front of their machine. Interestingly, our average handle per session is almost the opposite, with higher values on mobile than desktop, although this is likely driven through the game play of our popular mobile table titles which have a greater customer penetration on mobile than on desktop. It's also a sign that

higher value players are wagering on mobile, complementing their desktop or in-casino play.

Jerry Bowskill, Chief Technology Officer for Williams Interactive – The number of games a mobile/tablet player plays is about half the number a desktop player plays. We've also seen that the mobile player has shorter sessions than a tablet player.

WHICH IS MORE IMPORTANT FROM AN OPERATOR'S PERSPECTIVE - MOBILE OR TABLET PLAY? –

Luke Alvarez, CEO, Inspired Gaming Group – Tablet play is seeing the most growth at the moment, but it's not necessarily more important than mobile. Tablet play is, however, cannibalising desktop play, which is becoming less dominant as the growth of handheld devices continues.

Both mobile and tablet game development is important to Inspired, and we consider tablet and mobile separately in terms of UX design. Players use and interact with the devices in different ways, so the games and navigation must be sympathetic towards these differences.

Getting mobile game development right is undoubtedly the hardest challenge, in terms of math (short session times on the go), graphics and UX. Inspired is raising the bar in terms of the quality of mobile games available to the market.

In emerging markets, where the majority of people just have a smartphone rather than a smartphone and a tablet, we expect to see mobile dominate over tablet."

Neill Whyte, Head of Product Channels, Microgaming – Both are important for different reasons, and neither should be ignored!

Smartphone devices are typically easier to target from a player acquisition perspective. This is due to Smartphones having multiple network technologies available, which in turn make marketing communications easier and more effective, e.g. SMS, Web Browser, App Push and iBeacon.

Tablets typically connect to the internet via Wi-Fi in the home and therefore a tablet's marketing reach is more limited, being geographically and time bound to when the player is at home and online. But even with it being harder to target tablet players, tablets are arguably now the new device of choice in the home replacing PC's, and as such cannot be overlooked. They have the potential for longer gameplay session times and are well placed as the user device of choice for future second screen integration with TV's and other home based electrical devices.

Bryan Kelly, Senior Vice-President of Technology, Bally Technologies – Free2Play mobile has better reach and there's more play on mobile phones than other devices, however, tablets convert users better to paying customers. While mobiles are still relatively small, they're excellent at providing a social hook and have much greater reach, whereas the performance of hi-def tablets is much better at monetising players. We think each has its own purpose, though we're watching closely the rise of the phablet. These

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much bigger phones could be the gaming platform for the future. Providers want to be able to supply two devices, but the phablet suits all purposes and people want to carry just one on their hip for both purposes.

Mathias Larsson, Director of Business

Development, Ezugi – In a way both are equally important because tablets are taking the place of a desktop. But mobile is more important since it requires better technical solutions in order to work properly.

Charles Cohen, Vice President, Mobile, GTECH

Players on mobile are equally as important as those on tablets. Broadly speaking, smartphones attract a more casual, general audience, whereas tablets attract higher yielding players. It is essential for the balance of a gaming ecosystem to cater to both.

Though certain users will predominantly use one type of device, there are increasing numbers that move between tablet and mobile at different times of the day. Morning and daytime sessions are typically in shorter bursts on mobile, as players grab a few minutes on the go, while evenings are, on average, the time for longer periods of higher-value play on tablets. As players cross over, their number one requirement is a seamless experience.

Over the long term, tablet players are only going to be satisfied by bespoke, optimised games that use the full potential of these larger and more powerful devices in just the same way that desktop and laptop titles do. Having games which offer the best experience for each device type is fundamental to securing players' loyalty and repeat engagement.

Luke Davis, Marketing Director, Playtech – Both are important for operators. Sometimes they are considered the same segment where as other times they are considered different segments but essentially they are both mobile devices. Playtech's mobile offering already mirrors the web in core functionality, with more products and features compared to competitor sets. This has led to our licensees experiencing huge take up, helping them win market share and exceeding desktop in new registration numbers in some cases.

Now with the increased choice, and therefore reduction in price, tablet user growth has also been a driving factor of our more recent developments, this is why we have deployed an optimised offering to fully utilise a tablets potential for many of our product verticals, for example our Playtech Bingo product. Designed specifically for tablet screens, our new dedicated player interface brings all the features of our desktop product to life on tablet devices. With access to bingo, chat and side-games on screen all at once – delivering a rich and engaging experience for players.

Aleš Gornjec, General Manager at Comtrade

Gaming – Both, all players need to be considered when targeting today's audience. With mobile you cover a bigger volume of players on the go. With tablets you can have players playing desktop quality games and live games with more features than would be feasible for mobile devices. Also, tablet play is increasing in comparison to mobile in the last half year so tablets definitely need to be considered when building tomorrow's games.

Jerry Bowskill, Chief Technology Officer for

Williams Interactive – As with all forms of digital media convergence everyone is striving for 'anytime, anyplace, anywhere' gaming experiences. In terms of the underlying service delivery platform and client technologies then they are the same, and for suppliers such as Williams Interactive there is no mobile or tablet, they are all HTML5 compatible devices and they all need supporting to ensure that our wagered game content is delivered in a format optimized for the device of a player's choosing. When we move from real-money



Over the long term, tablet players are only going to be satisfied by bespoke, optimised games that use the full potential of these

larger and more powerful devices in just the same way that desktop and laptop titles do. Having games which offer the best experience for each device type is fundamental to securing players' loyalty and repeat engagement.

Charles Cohen, VP Mobile, GTECH

into social casino, for example our Play4Fun Network white-label social casino platform, we're finding that while players engage on both smart phone and tablet, those playing on tablet tend to be worth more per-session than those on smart phone.

Ashley Lang, Founder and CEO of Odobo – Both are important but longer play sessions (typical of desktop and tablet play) result in greater revenue generation per session. While this is the case, tablet play is likely to remain key from the revenue per session yield (when taken from an operator's perspective). However, the accessibility of play on smartphones and the greater market penetration of mobiles over tablets make the smartphone segment of the market more "important" from a potential growth opportunity. Many of the games on the market today were designed first for desktop play and to provide the player with a play experience based upon the longer desktop average session time.

When these games are played on mobiles with a shorter average session time the player experience may not be optimal (less likelihood of experiencing a bonus feature for example) and as a result the player may be less likely to return to the same game or yield the operator the desired revenue per session. As more data is available to game developers, through services such as Odobo analytics, developers will design games for the mobile device to provide higher entertainment value within the shorter session time. Where successful player sessions may still be shorter, due to the "snackable" nature of mobile play, the game experience will be designed to be more exciting and rewarding for the player resulting in higher repeat game-play and an overall higher ARPU (average revenue per user) per month.

Odobo recognises these trends and supports game developers by making a great degree of game-play data available to game developers to identify areas of optimisation and by enabling differentiated play experiences by device.

WHAT MOBILE/TABLET PLATFORM DEVELOPMENTS ARE SHAPING GAME INTERACTIONS WITH PLAYERS?



Charles Cohen, Vice

President, Mobile, GTECH – Players are strongly influenced by the apps and the general user interface of their mobile device. Game development must take account of what users are expecting and by how they interact with other apps.

Increasingly, there is a divergence between the world of Android and of iOS interface design, which makes this task even more complex for developers. This will become even more acute with the next releases of their operating systems later in 2014.

It is inevitable that the way you interact with a game on an Android device will start to look very different to the same game on iOS. At GTECH, we are already building differently for the two platforms.

Bryan Kelly, Senior Vice-President of Technology, Bally Technologies

– The first versions of games standardised for the wagering, didn't support the OS very well. Historically, a native app draws graphics through the cell phone, but browser-based games slow due to firewall between the two. Google, Apple and Windows are all working hard on that, but it's HTML5, that has really allowed us to directly drive graphics through the phone via a web component. At the same time, if you want to play multiple games at once, you're going to need bigger real-estate, bigger displays, as adding social alongside wagering on smaller phones is a less engaging experience. Bigger form factors allow us to engage the customers more, as they've become very adept at consuming lots of data all at once.

Aleš Gornjec, General Manager at Comtrade

Gaming – The gaming industry is betting big on HTML5

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When Casino content first appeared on mobiles, the look and feel was very similar to the PC-based version, with mobile interaction limited to basic button pressing.

as the technology to use for releasing games. Quality is increasing with each year as devices are getting more and more powerful and HTML5 support is expanding to more and more potential player devices. Rich multi-channel audio is definitely one of the recent mainstream additions to games with better Canvas support in form of better frame rates also enabling better looking games. We'll see what WebGL will bring to the table as we'll be able to produce native-like quality animations in the short term future.

Mathias Larsson, Director of Business Development, Ezugi

– Just looking at the device itself of which the screen is important attribute. Now we are seeing mobile screens getting bigger and tablets getting smaller so it becomes easier from a development perspective. When it comes to software it is easier to bring forward a good product on Android compared to iOS due to limitations on iOS. However one of the most important factors shaping the game is connectivity and that is out of the manufacturers and operators control.

Derrick Morton, CEO of FlowPlay and Vegas World

– For social casinos and the online gambling space in general, the biggest development has been cross-device play – allowing players to maintain one account across PC, tablet and mobile. Having one account allows players to play wherever they are, while

maintaining a level of consistency of play based on previous progress made within the game. Beyond the ability to access accounts from different platforms is using the technology to make games truly multiplayer across all devices, so no matter what device a player is on they can still connect with friends who might be playing from a different device.

Luke Alvarez, CEO, Inspired Gaming Group

– One of the major challenges with mobile game development is the fragmentation of phones in the market and the need to support the premium iPhone-like devices and the low end, low tech devices. Inspired develops for the widest range of denominations to ensure a great experience whatever your make and model of phone.

We also only develop in HTML5, which means there aren't any Apple / Flash issues on mobiles and tablets and gives more flexibility to make increasingly immersive games.

There are some exciting new developments around making mobile more interactive, such as vibration etc., but obviously not all phones have these capabilities so it



can't be essential to the enjoyment of the game.

Another trend to note is the growing market of Windows phones, after a long period of iOS dominance.

Neill Whyte, Head of Product Channels, Microgaming

– The shift towards content being specifically developed for mobile devices is the most noticeable change in this area. When Casino content first appeared on mobile devices, the look and feel was very similar to that of the PC-based version of the game, with mobile interaction limited to basic button pressing and some simple sound-based feedback to the player.

Now, thanks to enormous technological advancements, the industry has games designed specifically for mobile and tablet devices; games that take advantage of how players hold and touch their devices and also how their device responds to events in the game. This has been a real game changer for mobile, and knowing its importance, we have ensured that we have been at the forefront of designing mobile-specific games.

Luke Davis, Marketing Director, Playtech

– The developments are mostly around smart and easy to use user interfaces alongside player tools such as mobile gestures and touch options in relevant games. Additionally we provide HTML5 and native support for android, iOS and windows devices.

Jerry Bowskill, Chief Technology Officer for Williams Interactive

– Mobile and tablet devices are personal to the player, they afford different user interfaces and different styles of more engaged interface navigation such as speech and gesture control. The best

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content is not reformatted desktop content, it has to be designed specifically to use the unique features that make navigation easier, so flicking a device to spin a roulette wheel rather than pressing a button provides a more natural and engaging experience.

Ashley Lang, Founder and CEO of Odobo – There are some interesting developments in mobile browsers that are making “native” functionality accessible to HTML5 web application developers. For example, we recently saw a web application that used the device’s sensors to generate a parallax effect; the more we gain from a device’s core features, the more “native” HTML5 games will feel.

Separately, enabling other platform OS and payment features will make securing and interacting with apps more immersive. As it currently stands, web developers have a more restrictive set of parameters to work with whereas native app developers have more flexibility.

Matt Cole, Managing Director of Digital Gaming, Blueprint – Our initial target, and that of most suppliers, was on converting back catalogue games to html 5 and fulfilling the demand for volume of games across

mobile and tablet. The next challenge was having the capacity to release html 5 and flash games simultaneously, and now that we are through that we are moving towards a tailored product whereby html 5 games will be specific to the device, be it mobile, tablet or desktop as well as the quality of the players 3G, 4G or WiFi connection. As more operators have the technology in place to offer html 5 on their traditional desktop sites the focus of developers can be switched from developing in two formats to accelerating the improvements in html 5 and on tailoring games.

IS IT HARD TO RETAIN A PLAYER ON A MOBILE DEVICE AS COMPARED TO TRADITIONAL MEDIUMS?

Jerry Bowskill, Chief Technology Officer for Williams Interactive – Speaking to real-money gaming, you’ll have to ask our operator partners which medium is easiest to retain player engagement. From a social casino perspective, where our content is provided through native applications customised for each casino partner, the marketing tools available like push notifications and geofence-dictated messaging make it very easy to re-engage players in combination with the



From a social casino perspective, where our content is provided through native applications

customised for each casino partner, the marketing tools available like push notifications and geofence-dictated messaging make it very easy to re-engage players in combination with the social casino mechanics built into the game itself. We’re seeing players log an average of 4 unique sessions per day, at 20 or more minutes per session, across deployments of our Play4Fun Network. **Jerry Bowskill, Chief Technology Officer for Williams Interactive**

social casino mechanics built into the game itself. We’re seeing players log an average of 4 unique sessions per day, at 20 or more minutes per session, across deployments of our Play4Fun Network.

Luke Davis, Marketing Director, Playtech – No, it is very similar to retaining a player on the web. Here at Playtech we work closely with our licensees to ensure all new features that we launch go through a usability phase that is well thought through. Key to our philosophy here at Playtech is to ensure the flow of using our products are designed at all times with the player in mind, making them both enjoyable and easy to use. Navigation is key to ensuring a smooth and satisfactory game playing experience.



Derrick Morton, CEO of FlowPlay and Vegas World

It is easier to retain a player on a mobile device because there are less immediate options available on the device. This is only true, however, because it is very difficult to acquire the player in the first place. You must find a way to get them to download your app to their device but once they have the app, it becomes one of the limited number (compared to general web surfing) of options they have on their device.

Charles Cohen, Vice President, Mobile, GTECH – It is easier to retain players on mobile, as interaction and marketing to players is quick, easy, and direct.

Text messages are usually the preferred contact method, because open rates – the percentage of users who open and read the message – are very high compared to email. When you include the fact that we can send push messaging to app users, and you can see where mobile has an edge over desktop as a medium. The trick is not to over-user it or mis-target messages, which can risk ruining a good customer relationship.

Ensuring strong customer relationship management, based on intelligent segmentation and frequency of

offer, is the overriding factor when it comes to retaining players on any platform. Of course, when you also add in great products, along with excellent customer service, retention becomes much easier. There is a complete picture that needs to be painted; players need all these parts in place to continue favouring one service over another.

Luke Alvarez, CEO, Inspired Gaming Group – If you're comparing a mobile session to a resort casino session then obviously the difference in retention is huge. Yes the play sessions are shorter and less immersive for mobile, but they are more frequent because of the convenience. Game development is much more complex now there are so many different channels and, for short session time channels such as mobile, the game math has to perfectly fit this 'quick bit of fun' profile.

Neill Whyte, Head of Product Channels, Microgaming – It is harder, and this is mainly due to the mobile networks ecosystem being far more complex than its online counterpart.

Mobile users spend, on average, 82% of their time on

mobiles on Apps and just 18% with web browsers (according to Sunil Gupta, Harvard Business School). Interestingly, they download about 40 Apps to their phones (out of more than a million available) and regularly use about 15. This makes it inherently difficult to advertise to a player. The traditional web-based advertising methods make less of an impact on mobile devices.

But nothing is impossible and operators need to be more creative with ways in which they can retain players on mobile devices. The best way for operators to communicate to players is with Apps and that's where "in-App" Push Messaging comes in! Effective Push Messaging more than doubles four-month App retention rates and nearly quintuples App engagement.

Jim Veevaert, Vice-President of Games, DoubleDown Casino – Actually it's easier! Mobile has great retention. If you think about it, people spend more time with their mobile devices so it makes sense. It is very important to us to sustain the continuity of our player experience – ability to play anywhere, anytime across any device with seamless play. That seamless platform integration experience is very important to us

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and our players love it. A DoubleDown Casino player can be playing Wheel of Fortune Double Diamond Slots on their desktop at lunch while they're at work, then play on their mobile phone while they're riding the bus home, and finally play on their iPad at night while watching TV. The game, bonuses, math models, etc. as well as their chip balance and experience remain the same across all devices.

Games may be more discoverable on mobile, but the cross-platform casino really helps keep players engaged.

Bryan Kelly, Senior Vice-President of Technology, Bally Technologies – A lot of people are very loyal to their specific casino. They want to improve their tier level status and want to play online and via mobile while continuing to maintain that status. It's a hugely important aspect to retain for bricks and mortar operators. To retain, with mobile, a continuous communication channel with players is enormously valuable. It enables operators to push offers to players in real-time and it's welcomed by players so long as it's not abused. It rewards them for their mobile wagers and Free2Play participation, earning them club points that can be redeemed at the bricks and mortar property. Once you've built that loyalty, you can retain customers both on- and offline.

Ashley Lang, Founder and CEO of Odobo – With the spread of popular development programs like the iOS developer program, the mobile market has been flooded with all kinds of compelling content that directly competes for every potential player's attention. Because of the ease with which players can pull new content and

the rate at which new content appears in app stores, RMG content providers are increasingly competing with other forms of entertainment. This is exacerbated by the fact that mobile devices also have consumable media (music, TV and movies) and social interactions via Facebook, Twitter and other popular social networks.

Creating games that embrace distraction (like the notifications from the aforementioned points above) and shorter session times will ultimately help compete; luckily, the nature of RMG games is that they are generally bite-sized and playable at will.

HOW DO YOU GAIN TRACTION WITH MOBILE/TABLET PLAYERS - HOW DO YOU GET THEIR ATTENTION IN THE FIRST PLACE?

Aleš Gornjec, General Manager at Comtrade Gaming – Having a quality entry point – player portal and quality games portfolio is the basis to attract players. But players need to feel comfortable that they can depend on the product they're using. Currently 10x more games are available online vs. mobile which is slowly changing as operators are going mobile first or releasing mobile and desktop simultaneously. Also there is a significant difference in quality between desktop and mobile games. This gap is decreasing due to mobile device advancements.

Derrick Morton, CEO of FlowPlay and Vegas World – One of the most effective ways to attract and acquire a mobile player is through Facebook. Facebook has deep data on its members and allows advertisers to



If you've invested capital to build a bricks and mortar operation, you want a return on those bricks and staff. However, if

some consumers want to gamble off-property, then you also want a continuous link to your brand. If you play Golden Nugget mobile games, then it becomes the perfect place to pop in and claim all your loyalty points. It's about brand reinforcement and upselling the different channels to take a greater share of the player's wallet.

Bryan Kelly, Senior Vice-President of Technology, Bally Technologies

use that data to directly target the most likely users to download your app. Once you have a player using your product, it's essential to resist the temptation to monetize them immediately. They must learn to love your product before easing them into becoming a paying player.

Luke Alvarez, CEO, Inspired Gaming Group – The initial success of a game is largely down to operator promotion, but obviously the theme, graphics and game type will influence whether the player chooses to try a new game.

Inspired recently announced a mobile deal with our largest customer William Hill. Launching big game titles across all channels at the same time is key to the game promotion strategy, as many players who visit retail

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venues to play slots will also enjoy playing the same game online."

Cross channel convergence is a key philosophy of Inspired's global expansion strategy and White Knight is the first of many exciting HTML5 Inspired games to be released to William Hill's mobile gaming platform in the coming year. Inspired's mobile games currently support iOS and Android devices and will be available on Windows devices soon.

Inspired also has further enhanced its Remote Gaming Server (RGS), Virgo, which now allows the company to offer white label services to its clients. Inspired will be launching six new HTML5 games via its Virgo RGS in 2014.

Bryan Kelly, Senior Vice-President of Technology, Bally Technologies – If you've invested capital to build a bricks and mortar operation, you want a return on those bricks and staff. However, if some consumers want to gamble off-property, then you also want a continuous link to your brand. If you play Golden Nugget mobile games, then it becomes the perfect place to pop in and claim all your loyalty points. It's

The mobile market is very volatile, because new devices are available on a weekly basis. Upgrades to mobile operating systems are also frequent and developers have to adapt their software to these new versions or risk being left behind.

about brand reinforcement and upselling the different channels to take a greater share of the player's wallet.

Casino can also differentiate across both the product and their marketing. Bally is currently working on a sophisticated bonusing solution for casino floors, whereby an online player can earn access to those games and claim their reward via the slot machines.

Charles Cohen, Vice President, Mobile, GTECH – Clear, targeted and intelligent marketing across various

media is the first part of this equation. Search Engine Optimisation is vital, as are other traditional methods for acquiring new customers, such as offers, bonuses and incentives.

The second piece of the equation is maintaining widespread coverage across new devices. The mobile market is very volatile, because new devices are available on a weekly basis. Upgrades to mobile operating systems are also frequent and developers have to adapt their software to these new versions or risk being left behind.

Most importantly, it comes down to the consistency and quality of the products and services. A great game portfolio is simply a must. GTECH has enjoyed great success in its land-based game development over a sustained period of almost 25 years, which has given us a great portfolio of titles for our fast-growing mobile portfolio.

Word of mouth is, ultimately, the best and most positive form of advertising, and we always enjoy non-paid acquisition thanks to personal recommendations and referrals from happy players.

Jim Veevaert, Vice-President of Games, DoubleDown Casino – I'd say the first area we focus on would be our content – we bring the same great games players know and love from the casino floor to the social environment. Kitty Glitter, Siberian Storm, Golden Goddess are all great IGT games that players recognize. In fact, this fall we'll be bringing the iconic Wheel of Fortune game to DoubleDown Casino! Through IGT we have the most authentic, recognizable casino slot games as well as Game King Video Poker, Blackjack, Poker, Roulette and Bingo available.

Additionally, we work with land-based casinos through our Casino Partner Program. This program offers a way for land-based casinos to "wire-frame" in DoubleDown Casino to their property's website enabling players the opportunity to play great games when they're not in a casino and offering a marketing opportunity for operators to reach out to players through their website.

Finally, we have great partnerships with Facebook as well as Apple and Amazon.

Luke Davis, Marketing Director, Playtech – This is more of a question for our operators as they develop and roll-out the targeted marketing efforts that attract their players, but Playtech does provide promotional tools within our industry leading Information Management Solution, IMS, to assist operators with marketing efforts such as bonuses, client messages etc. IMS is the backbone of all our products, this allows our licensees to intuitively manage their player base end-to-end, maximise cross-selling and leverage player value.

Jerry Bowskill, Chief Technology Officer for Williams Interactive – A number of mobile specific marketing techniques are starting to emerge, such as used a branded app as a player acquisition tool, from which the wider offering of gaming content can then be loaded. In the UK specifically, cross-selling of the game from LBO shops onto mobile is key. In-shop advertising allows players to play their favorite games at home and now with the some LBO customers having one wallet across both land based and online allows for different types of marketing and bonusing specific to the player.

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WHAT ARE THE IMPORTANT ANALYTICS TO BE CONSIDERING WHEN MEASURING MOBILE/TABLET PERFORMANCE?

Bryan Kelly, Senior Vice-President of Technology, Bally Technologies – Speaking in regards to our social business, the metrics they care about are second day and day seven converts. Monitoring those numbers is pivotal to the success of the product. We monitor the time played and number of sessions, we look at the drop off figures and calculate a life time value for the player. It's also important to track additional features, not just on the game side. Bally offers operators an mobile concierge application, which communicates with the play to let them know where restaurants are, book shows and rooms, order a drink or their car from the valet. It's a really valuable tool for tracking player engagement.

New Jersey operators are also seeing a high percentage of players new to bricks and mortar, that are consuming gaming on the mobile and making the cross-over to playing on-site. Mobile is driving players to want to play the game on the bigger machine. People will always choose the best screen possible to enjoy their entertainment. Cinemas didn't not go out of business with TV on Demand, or Blockbuster, rather people still want to congregate in these locations with other people and enjoy the best possible entertainment experience. It is hard to replicate that on the mobile.

Aleš Gornjec, General Manager at Comtrade Gaming – Used device and user session duration – on which devices do users play the most. You need to notice the trends and optimise your future portfolio based on the trends (like we're seeing with tablet usage picking up).

Mathias Larsson, Director of Business Development, Ezugi – On a mobile the key analytics are upload speed of the games and connection times. Games need to upload quickly on the mobile as users have less time and after that the connection has to be stable so that the game isn't dropped or lost within a game session.

In terms of the tablet, connection and upload speeds are of lesser importance as the player is usually connecting via the WiFi network which affords a more stable environment to engage the player.

Usability is another important analytic given the different ways of interacting with the device.

Derrick Morton, CEO of FlowPlay and Vegas World – There are three that really help us determine how we're monetising and if we're effectively reaching our target audience. The first is Return Rates, which looks at what percentage of players come back to the app a second time, a fifth time and a tenth time. Also Conversion to Pay, which defines what percentage of players make a purchase as well as ARPU, or the average revenue per install of your app. Ultimately, this is how you know what you can afford to pay to acquire a customer.

Leigh Nissim, IGT Commercial Director of Interactive – Measurement statistics do not vary significantly from desktop – we track key areas including

transactions, unique players, session length, handle and hold. When considering mobile and tablet, we also consider device type, operating system and, importantly, whether the player ID crosses other channels, i.e. are they a desktop players too? We try wherever possible not to consider these as separate channels – they work in unison, driving gameplay effectively together.

We can highlight this with some statistics around Cleopatra, one of IGT's top performing games of all time. Designed in 2001, it was an instant classic, deployed on thousands of EGM units in casinos all over the world. Following its land-based achievements, Cleopatra has been a mega hit with online players. The game launched in September 2006 and was an unprecedented success, accumulating more than 600 million cash transactions. Cleopatra has passed the 2.5 million hour-mark of total cash play and has paid out more than £800 million.

Mobile players also love Cleopatra. The J2ME launch was in September 2009 and it has been playable on smart phone browsers since July 2010. On mobile, Cleopatra runs at a rate of well in excess of three wagering transactions per second and has the highest lifetime payout of any IGT mobile slot. Cleopatra is Cleopatra, regardless of device, channel or time of day.

Jim Veevaert, Vice-President of Games, DoubleDown Casino – At DoubleDown Casino, one analytic we look at is loading times. As we focus on delivering an authentic experience in our games – we know the player has expectations about content loading quickly no matter how they are playing.

We also look at overall performance of the experience as well. Casino players are used to instant response experiences. At DoubleDown Casino we work really hard to make graphics, sound, etc. that accentuates that casino experience. Because it's fun and social, we're able to create experiences that allow players to be high rollers and experience those BIG wins!

We also look at what percent of our audience comes back to play over a 30 day period and track analytics through Facebook.

Luke Alvarez, CEO, Inspired Gaming Group – The popularity of online and mobile games is measured by 'plays per unique player', and of course Value Played and Hold. Simply, you want a game to have broad appeal, stickiness (repeat play) and to make money – income matters most of all. Obviously unique players is much easier to measure online where all players are registered and identifiable.

Neill Whyte, Head of Product Channels, Microgaming – There are several analytics that are important, but actually, they are the same as with online content. Game play duration, player numbers, player wagers and gross win are all vital indicators as to the performance of gaming content.

Jerry Bowskill, Chief Technology Officer for Williams Interactive – It is critical to have a robust set of operational KPIs that highlight issues with specific devices, just because there are so many potential ways in which games are being consumed and there is always some customization required to allow games to



Using a tablet often puts players in a different playing scenario to that of a desktop device, such as playing from the

comfort of their sofa whilst enjoying TV, or enhancing their experience with a second screen to play. This makes gameplay different for the player, and we mostly see changes around the length of game sessions, bet amounts and number of games played.

Luke Davis, Marketing Director, Playtech

be played on some operating systems and hardware specifications. It's especially important to consider the player experience. In that sense, one metric that is very important to us for our HTML5 gaming content is the bounce rate (how often a player tries to load or play a game but can't). Due to differing devices and data connections, it's important to monitor and analyze how easily players can access the games. We want everyone to be able to play, so this KPI needs to be monitored closely.



Ashley Lang, Founder and CEO of Odobo – First and foremost, we look to track player access to the games content. We monitor device, OS and browser usage to ensure that games offered through Odobo have the widest market compatibility. Where a player is attempting to access a game via an incompatible browser, we detect this and offer them options to upgrade to an HTML5 compatible browser. Secondly, we monitor connection speeds and game load times – tracking the ‘fall off’ between initiating a game (download) and successfully placing their first wager. These “top of the funnel” metrics are critical as they relate to the universe of potential players of the games – for which all subsequent metrics apply.

Once within a game any analytic that tracks behaviour within a game is valuable.

From an activity standpoint the following are invaluable: stakes, bet count, session count, session duration, time between sessions, average time between bets, device type, browser / app type, locale, country, cross-over data (% of players that play N games), average number of plays until special feature hit, returning days, and average revenue per user (ARPU).

Tablet games like roulette and blackjack need separate interfaces optimised for bigger tablet screens whereas slots don't as much as you can offer the same high quality content on mobile devices and tablets with minor differences.

HOW DIFFERENT ARE THE GAMES ON MOBILES AND TABLETS AND HOW DIFFERENT SHOULD THE GAMES BE ON THESE DEVICES?

Bryan Kelly, Senior Vice-President of Technology, Bally Technologies – The trick is replicating the slot machine, which has many more screens and displays high-definition graphics at 1080p. You have to shrink all that to run on small mobile screens

and tablets, without creating massive downloads and waiting times. So you have to pack in less information, particularly due to the small screen. However, since we can tie games to the cloud, there are also advantages, such as bringing social elements into play where things are much more engaging.

We also have a strategy for our Take 'n Play solution, where we take exactly the same game and stream it to a tablet or any wireless device in the resort. It means that players can enjoy gaming wherever they are in the resort, and aren't restricted to just one location.

Ultimately, the best experience will be in bricks and mortar, simply because we're having to port down high-quality audio and gigabit games to 5mb title on mobile – but that's world we are in today. It's very tricky trying to capture the essence of the game while still cutting the graphics by 95 per cent.

Aleš Gornjec, General Manager at Comtrade Gaming – Games on mobiles are simpler so the user can play with one thumb while on the go. Quality of content is more important on tablets where users expect desktop like animations and sounds. Tablet games like roulette and blackjack need separate interfaces optimised for bigger tablet screens whereas slots don't as much as you can offer the same high quality content on mobile devices and tablets with minor differences.

Mathias Larsson, Director of Business Development, Ezugi – The actual game play is not different, it is the user interface and the functionalities that have to be considered and are different.

For example a mobile is generally held with two hands and is controlled by the thumbs. Therefore there have to be as many swipe functions as possible for the user to interact with the games and deliver the information they require to a smaller display screen.

For a tablet due to its larger screen, more features and functions can be displayed on the game lobby and menus in order for the user to complete tasks. However swipe and tap functions still need to be included.

Derrick Morton, CEO of FlowPlay and Vegas World – The two inches between a seven inch tablet screen and five inch mobile screen makes a world of difference. In tablet form, you can pack everything you have on a desktop to fit within the smaller screen. While it's not easy to translate the desktop experience to tablets as they don't have the same technical prowess of say a laptop, by doing so you can provide a more engaging and social experience on tablet – which means you also monetise at a higher rate. Typically for mobile you need to provide a completely different experience, taking into account the separate keyboard that pops up and the type of play mobile players are looking for. For us, the handset form is simply a filler to allow our existing customers to maintain contact with their game while on the go.

Leigh Nissim, IGT Commercial Director of Interactive – In a recent study of mobile casinos that IGT conducted with Econsultancy, we underlined that the key consideration for mobile players is the user experience. In what is still a maturing market, some operators remain at the emergent end of the spectrum,

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with the more successful offering compelling products, optimizing the player's entire experience.

At this advanced level, mobile and tablet games, as well as the overall offering, should be personalized and cater to the needs of different players and groups. It should render beautifully on a player's device, whether tablet or phone, and be fully functional across all operating systems, whether iOS or Android. The user journey needs to be simple and direct, with the minimum number of taps to play required.

Designing tablet specific games allows for the inclusion of more design functionality and intelligent use of screen real estate. Repackaging content and images might have been acceptable two or three years ago but players' demands have risen sharply.

IGT recently released tablet specific Roulette! and Blackjack games. They have a tailored interface taking advantage of the increased screen size, richer graphics, advanced animation as well as super quick download. They also demonstrate the fact that IGT has an impressive portfolio of table games to match the slots library with which we are more traditionally associated.

We're often asked why our mobile table games perform better than others. The reason is in their simplicity and consistent player experience across desktop, phone and tablet. In the battle to acquire new players it is vital that operators arm themselves with the ability to serve the highest quality content with consistent player experience on every channel.

Jim Veevaert, Vice-President of Games,

DoubleDown Casino – At DoubleDown we don't think about the difference between mobile and tablet, we think more about the similarities, that's how we design our experiences to be seamless and same great play across devices. We have this great library of content from IGT and we work to bring that content to our players in an effort to create the best game experience they can have on a mobile or tablet device.

Luke Alvarez, CEO, Inspired Gaming Group – For mobile and tablet games, UX and math are the two key points of difference to the player. Players use and interact with the devices in different ways, so the games and navigation must be sympathetic towards these differences.

In terms of differences between land-based and interactive games, we believe that the theme, design, structure and mechanics of the game should be consistent so that a player who enjoys the land-based version is likely to enjoy the mobile or online version.

Some of our competitors use the same theme, but make the type of game completely different, which can be confusing to cross-channel players.

Neill Whyte, Head of Product Channels,

Microgaming – It's important to offer mobile and tablet players a smooth, hassle-free experience. But it's not always easy – there are over 1,000 different screen sizes and resolutions of devices that we have to cater for. How do we overcome this? We use a smart, adaptive responsive design for HTML5, so that our games are compatible with a broad range of screen sizes and reso-

lutions, including devices across Android, iOS and Windows.

In time, gameplay and content will become far more targeted to a player depending on the device they are using – we're already seeing elements of this. With our Native Applications, we have begun to introduce features and content that will enable our development teams to differentiate between devices, by taking advantage of their inherent Native API capabilities, specifically with regards to Geolocation, video and audio and the user interface.

Jerry Bowskill, Chief Technology Officer for

Williams Interactive – Whether discussing our wagered or social casino content, the key for us is leveraging our deep library of UK-favorite and authentic Vegas-style casino games in these important digital distribution channels. We take great care with these gaming experiences, already proven on casino floors and in betting shops around the world by our sister companies WMS Gaming and SG Gaming, and optimizing the player experience for players on-the-go.

Ashley Lang, Founder and CEO of Odobo – There are different challenges associated with mobile devices, namely that the game needs significant design considerations that go well beyond user interface and artistic design. In particular:

Mathematical models generally need to accommodate shorter play times (see the session time average comment) so that important parts of the game are likely to be experienced during the average play session. Bonus rounds that typically trigger within a 50-100 spins range need to either be quick enough to reach with traditional spin/play cycles or the RTP and model need to adjust to lower the average session time required to trigger different parts of the game.

We are seeing more and more games with a storyline or player progression element to the game design (level-ups, achievements, etc.) For these games seamlessly resuming play from one session to another is a critical to providing a great play experience across a number of mobile play sessions. Castle Builder slot by Rabcat Gambling is a great example of a game with these features and that benefits from the game-play resumption across devices and sessions supported on the Odobo platform.

WHERE DOES FREE2PLAY FIT INTO THE MOBILE/TABLET OFFERING AND DOES IT HAVE A LONG-TERM FUTURE?

Bryan Kelly, Senior Vice-President of

Technology, Bally Technologies – Bally's focus is on real money wagering. Free2Play is a tool used to engage customers and ultimately monetise that relationship. We all know the crawl, walk, run strategy. The go-live for mobile in New Jersey is all part of a B2B business approach to the overall gaming offer. Bally is providing the best North American interactive content, with a precise focus on our business relationship with the operator. We are building on Bally's position as the biggest systems provider in the business to offer a truly unified approach. This is a single solution from a single business that offers operators one view of the patron.

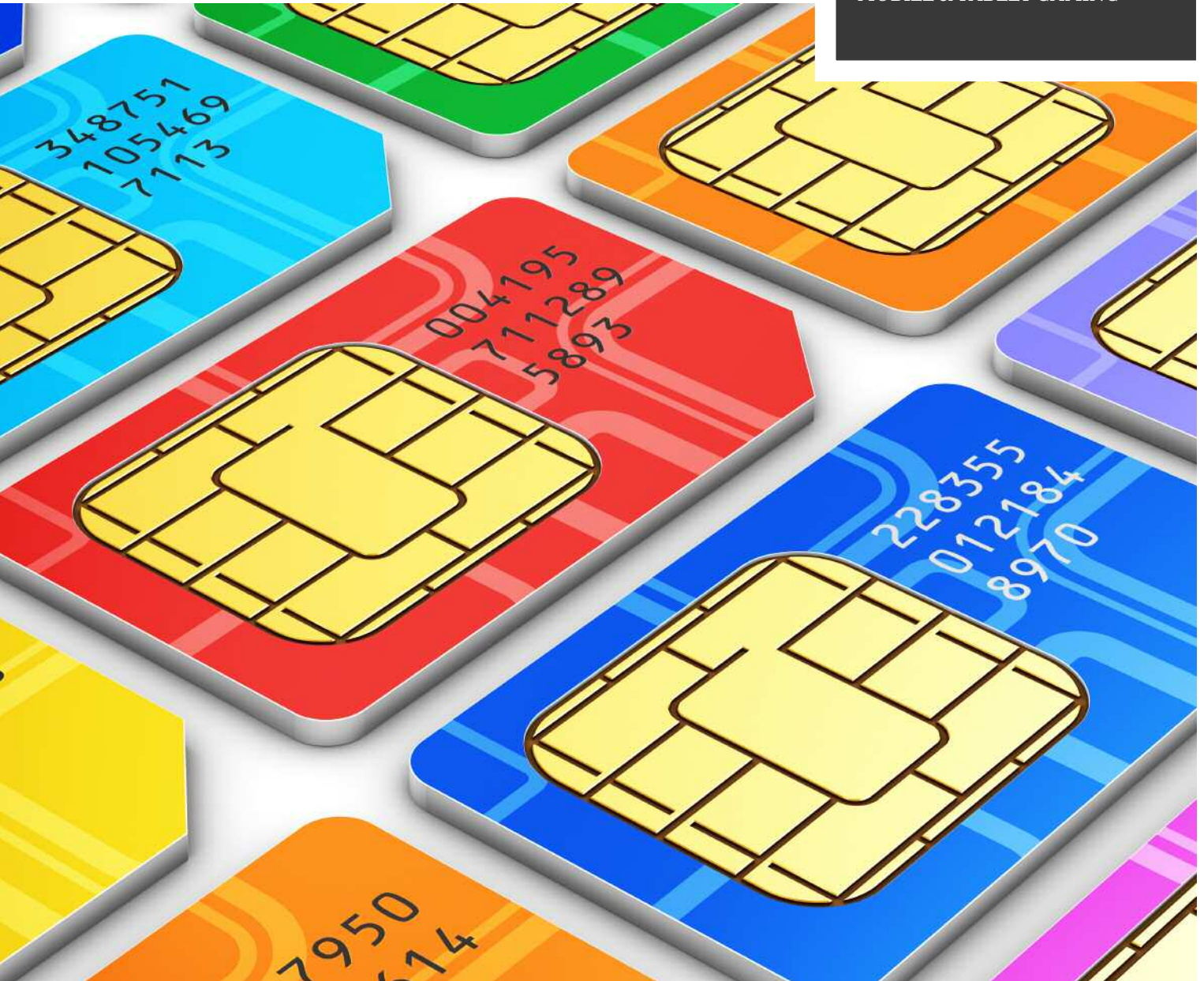


We're often asked why our mobile table games perform better than others. The reason is in their simplicity and

consistent player experience across desktop, phone and tablet. In the battle to acquire new players it is vital that operators arm themselves with the ability to serve the highest quality content with consistent player experience on every channel.

Leigh Nissim, IGT Commercial Director of Interactive

As such, we are covering all bases, offering three separate modes. There's FreePlay, with no cost to the player. Then Free2Play, whereby there's no cost up to certain amount of free credits and then players have the option to buy credit packages that give no financial reward. Finally, in regulated jurisdictions, there's the wagering application. We believe that B2B is the right way to



engage Free2Play players. It's a means to sign-up new customers to drive into the bricks and mortar locations. In advance of real-money wagering, most customers in the US deploy FreePlay and Free2Play in advance of regulated gaming.

Dragonplay integrates very sophisticated ramification mechanics, power-ups, achievements and social hooks, with convergence between those features in its games. Even real-money players want to brag, to share their wins. Over time these social game features will blend into the FreePlay, Free2Play and real money wagering.

We currently have a slot machine that has direct hooks into social. For example, in the bonus game, we capture the entire win via video to send to Youtube and Facebook and social sites. It's a real-money wagering game, but it's integrated with social, for player bragging rights. We even capture the player's face and embed it within the game, creating a video postcard. We are leveraging the best features from Free2Play into real money gaming. We're showing that in real money play you can add social hooks and give loyalty points, achieve missions and quests.

Dragonplay integrates very sophisticated ramification mechanics, power-ups, achievements and social hooks, with convergence between those features in its games.

Derrick Morton, CEO of FlowPlay and Vegas

World – Especially in the US market, Free2Play will always have a place – which, as a social casino developer, means that we're providing an environment that allows people to play free in the same location as they're gambling with virtual currency. This doesn't, however, mean that we're not monetizing through other forms of real-money to virtual currency transactions.

Jim Veevaert, Vice-President of Games,

DoubleDown Casino – DoubleDown Casino games are Free2Play games. Free2Play is something social gamers are very familiar with and used to. The majority

of our players play for free but some do buy virtual chips in order to spend more time playing and having fun. We don't have any gated content so players can play in the manner that's best for them.

Mathias Larsson, Director of Business

Development, Ezugi – Free2Play is important for mobile just as it is for desktop. A new player needs to be able to test and be confident in playing the game before placing a bet. So certainly for the near term Free2Play is part of the marketing process of increasing usage and adoption of games.

Luke Alvarez, CEO, Inspired Gaming Group –

Free2Play is primarily a US tool because online and mobile gaming hasn't been legal in the USA and still isn't in most States. In Europe it's less important – players enjoy playing for money when they can, but in general it's a good way for players to try out new content so they don't waste their leisure spend on a game that disappoints."

Jerry Bowskill, Chief Technology Officer for

Williams Interactive – Free2Play is critical for terrestrial operators and internet operators alike. Whether

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this is "demo play" mode or a more robust social casino offering, there is a continuously growing interest in this type of experience that can greatly expand an operator's ability to engage players when they may not be in a jurisdiction or frame of mind to engage in a wagered experience.

WHEN YOU PUT A TABLET INTO THE HANDS OF A PLAYER, WHAT CHANGES HAPPEN AND HOW VALUABLE IS THIS CHANGE FOR THE OPERATOR?

Ashley Lang, Founder and CEO of Odobo – My assumption here is that it decreases the perceived barrier to entry for play and provides an appealing form factor for consuming gaming entertainment. Mobiles are great for when you're on the go, but you don't get the same immersion you would from a device with a larger screen. On the flip side, depending on the desktop device, you can be tethered to a specific location or prescribed use (sitting at a desk or table, for example).

The tablet is the happy medium by providing a large, immersive playing surface while giving the user the mobility to consume that entertainment wherever they are or multiple media sources at once. Enjoying a slot game on a sofa while having TV on in the background is a different proposition to sitting at a desk for any length of time.

Luke Davis, Marketing Director, Playtech – With cross-product and cross-platform capabilities Playtech allows players to move across products and platforms using a single login, ensuring the 'on the go', 'on the sofa', 'at your desk experience' are the same. Using a tablet often puts players in a different playing scenario to that of a desktop device, such as playing from the comfort of their sofa whilst enjoying TV, or enhancing their experience with a second screen to play. This makes gameplay different for the player, and we mostly see changes around the length of game sessions, bet amounts and number of games played.

Aleš Gornjec, General Manager at Comtrade Gaming – The time a user spends playing your games can potentially increase as the user has more time to play than if he would be sitting behind his workstation or laptop where he is more limited in what he can do (e.g. while watching TV players can comfortably play games on their tablets right from their couch).

Luke Alvarez, CEO, Inspired Gaming Group – Players interact with handheld tablet devices in completely different ways to a gaming machine. They are just focused on one screen and it's not as immersive. Game design and math is very important for tablet and mobile gaming, as there is less 'theatre' than on a modern gaming machine.

Tablet and mobile gaming is also more personal – it is their device and they choose where to play it. Because of player IDs the experience is also made more personal by operators."

Neill Whyte, Head of Product Channels, Microgaming – In comparison with a Smartphone, players appreciate the larger screen size and superior graphical capabilities of the tablet format. And naturally, like mobile and PC players, tablet players will gravi-



128GB

Applications

Thomas Lee

RE: News strategy discussion
We have good news to you! Our main...

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Calendar

25
Monday

Greatest Hits

Blues collection
Now playing

Playlist

Messaging



Rebecca Stanley
also commented
on your photo

Chat

STOCK EXCHANGE
538.19
+24.76 +4.08

Finance



Desktop

76°F
New York
United States

Weather

tate to the form of content that best suits their individual specific need, be that via the Web or a Native App.

In terms of the value of tablet players to operators, according to Juniper Research, tablet owners tend to have a higher disposable income than the general Smartphone user and spend more on mobile content than other demographics. What's also important to take note of is that in general, tablet owners tend to use their devices for longer periods of time whereas Smartphone usage tends to be distributed in short bursts through the day.

Bryan Kelly, Senior Vice-President of Technology, Bally Technologies – The Take 'n Play technology is architected for casino-supplied tablets or user-tablets, enabling players to take their favourite game and play in any location within the resort – for example, into smoking areas, allowing the machine to continue to make money. High-rollers don't always want to be trapped in a VIP room, so they can go to a restaurant and consume gaming wherever they want. Take 'n Play is undergoing GLI testing right now and will be deployed this Fall.



Free2Play is important for mobile just as it is for desktop. A new player needs to be able to test and be confident in

playing the game before placing a bet. So certainly for the near term Free2Play is part of the marketing process of increasing usage and adoption of games.
Mathias Larsson, Director of Business Development, Ezugi.

The importance of this kind of technology can't be overstated. Ultimately, we see an older generation continuing to enjoy playing at the slot machine, whereas the next gen gamers want more. We've seen our Wave cabinet, with its curved screen really increase revenue on the slot floor, but people of younger demographic want to consume gaming at the pool and lounge side. They've be

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trained to consume media wherever they are on the best screen possible. You can't force this generation to play in one spot, we have to allow them to take the game wherever they want.

WHAT ARE THE SPECIFIC MOBILE/TABLET SECURITY ISSUES AND SHOULD WE EXPECT MORE FRAUDULENT USE FROM THIS TECHNOLOGY?

Neill Whyte, Head of Product Channels, Microgaming – As mobile technology continues to grow, unsurprisingly the potential for fraud grows too. But that's not specific to the gaming industry – it's a problem for everyone. Unencrypted public Wi-Fi networks and scams such as Rogue Tech Support sites offering faked assistance with device problems, are just two examples.

Unfortunately, there is research to suggest that mobile and tablets come with security issues – the 2013 Javelin Strategy & Research Identity Fraud Report found that tablet users (in the U.S.) are 80 per cent more likely to become victims of identity fraud than all consumers – 9.6 per cent for tablet owners compared to 5.3 per cent

There is no difference in dealing with security issues on mobile/tablet devices as opposed to web or other platforms. We ensure players details are kept strictly secured regardless of the platform used.

of all consumers. With this in mind, it's important for tablet users to secure their devices.

Derrick Morton, CEO of FlowPlay and Vegas World – Mobile devices (tablets included) have a somewhat lower risk profile for fraud. Personal computers are open systems with many tools available to even the most amateur of hackers. These tools are widely shared over the internet and capable of a wider variety of exploits. Mobile devices aren't as open and there are fewer hacking tools available. Of course, highly skilled individuals are capable of creating exploits and using their deep

knowledge of technology to defeat security systems. It's the lower skilled hackers that will find it more difficult to beat the security systems that are possible to put into place and thus will be thwarted.

Bryan Kelly, Senior Vice-President of Technology, Bally Technologies – I think everyone is paranoid about security. Experts are hired to explain about the attacks that can occur, where in fact all the gaming activity occurs on a server, where the client is nothing more than a viewer. The communications from client to server are secured, you put strong passwords in place, encrypt the data, protect those passwords and don't share credentials. Playing from your mobile phone is no less secure than playing in the casino. All our systems are down on the server. If you attempt to hack into the client – we will catch you.

There's actually much more risk in the Free2Play space right now. Multiple logins are a big issue, with players on the same phone getting to play indefinitely. There are still a lot of issues tracking the device ID, you have multiple different users registered to one device, which means they could be deleting the app many times, resulting in multiple login abuse.

Aleš Gornjec, General Manager at Comtrade Gaming – HTML5 games are basically very interactive web pages so we can do fraud prevention with IOvation etc. like on desktop (e.g. when the user logs in his location and other data is checked to prevent fraud). Additionally, standard security measures like HTTPS are used to prevent network traffic snooping so user connections are always safe from potential hackers during gameplay.

Luke Alvarez, CEO, Inspired Gaming Group – Exposing services to the public internet carries risk of anonymised attack from anybody with access to a public PC or control of botnet: physical access to the network is no longer needed, so installing state of the art intrusion protection systems is vital.

This becomes particularly critical where HTML5 and modern device support allows use of state of the art technologies such as Secure Web Sockets (wss) with newer technologies: these provide faster responses and lower bandwidth consumption for consumers, but as with all newer technologies, technology providers must be continually alert for new exploits.

However, clean design and adherence to well understood internet security principles such as those espoused by OWASP should not mean that fraudulent use will increase: the technologies in question are the same to those used across the entire internet sector and therefore can benefit from the same understandings and approaches.

Luke Davis, Marketing Director, Playtech – From our point of view, there is no difference in dealing with security issues on mobile/tablet devices as opposed to web or other platforms. We ensure players details are kept strictly secured regardless of the platform used.

Ashley Lang, Founder and CEO of Odobo – Mobile devices are inherently more vulnerable to theft or loss, however, device makers are getting ever-more vigilant about (a) making sure that users can disable or wipe

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devices that have been stolen or (b) making it so hard for someone to break into the device that it's easier for them to wipe it and start fresh.

Those measures, combined with stronger authentication means via fingerprint (like Apple's Touch ID) and the KYC measures operators take as a general rule with gaming would make it difficult for any stolen device to be used fraudulently when it comes to gaming. This is caveated by the player taking the necessary precautions themselves to ensure that these measures are set up to protect themselves.

IS THE PLAYER SPEND DIFFERENT ON MOBILE AS OPPOSED TO TABLET DEVICES? HOW DOES SPEND COMPARE TO LAND-BASED OR DESKTOP SLOTS SPEND FOR EXAMPLE?

Bryan Kelly, Senior Vice-President of Technology, Bally Technologies – I think over time, the Lifetime Value of mobile and casino players will be very close to each other. I think we will see a drop in some of the bricks and mortar spend, but overall the effect will be accretive. We will see bricks and mobile spend plus new users entering the gaming space.

As regards Free2Play, in general we're seeing iOS device spend higher than Android, with tablets better than phones. However, this trend is dependent on the quality of the content. As developers become really confident on mobile, then people will gravitate to games on mobile devices. The adoption rate for mobile and tablets is insane right now and it's only natural for gaming consumers to move in that direction too.

Derrick Morton, CEO of FlowPlay and Vegas World – You're really looking at a mass market vs. a niche market in this case – the number of people that want to gamble on a mobile phone is much smaller. While the payout for a RMG is 3-4 times higher than a social casino game, there's a much larger market of social gamers that can be tapped into.

Luke Alvarez, CEO, Inspired Gaming Group – There's a wider range of staking options via mobile and tablet, and wide-area jackpots are allowed online in the UK but not for land-based gaming.

We believe our games attract similar types of players across platforms and, therefore, staking patterns are similar. Where we have released cross channel games we see a similar staking level across channels.

Luke Davis, Marketing Director, Playtech – Player spend is definitely different on mobile as opposed to tablet devices and other platforms as players access their mobile phones more frequently and regularly throughout the day. Nevertheless, when players use their mobile phones they face a variety of distractions such as phone calls, emails and day-to-day activities which disrupt their gameplay and often result in short game sessions. At the same time, what we find is that cross-platform players, which play multiple platforms, are normally the ones who generate the highest spend. This is mainly due to their ability to choose the most suitable game time and location across each platform and the ability to mix platforms to avoid the disruption that exists only with mobile devices usage.

Jerry Bowskill, Chief Technology Officer for Williams Interactive – The spend per player on mobile/tablet is currently lower than desktop. We see higher spend on a tablet than mobile. This aligns with what we expect as the average session time on tablet is greater than mobile, which allows for a higher spend.

WILL MOBILE/TABLET GAMING BECOME THE DOMINANT FORM OF INTERACTIVE/ ONLINE GAMING - AND WHAT DOES THE FUTURE HOLD FOR DESKTOP PLAY?

Luke Davis, Marketing Director, Playtech – It will probably become the more dominant form of online gaming; at the same time we don't believe it will replace desktop devices. Mobile and tablet devices will simply become another platform players can use to play at times and locations where desktop devices and other platforms are not available to them or are inconvenient to use.

Neill Whyte, Head of Product Channels, Microgaming – Make no doubt about it, mobile is booming. We knew that mobile was the future of the industry over 10 years ago when we developed the industry's first mobile Casino product. We invested heavily, building all of the necessary tools so that we were ready for when it really took off. We believe this time has come and we're now seeing the fruits of our labour. Mobile gaming is growing at an incredibly fast rate and there is no sign of this slowing down.

I think over time, the Lifetime Value of mobile and casino players will be very close to each other. I think we will see a drop in some of the bricks and mortar spend, but overall the effect will be accretive.

Nonetheless, there are still developments to be made with mobile, and rather than just looking at one single platform or one single form of device, for us it's about developing content which can be played on all platforms, providing a seamless experience no matter the device. It's about a multi-device approach where a players profile in terms of network, Geolocation and device status are available in real time and then relevant gaming content format is delivered to them, based on those parameters. Omni-platform is the future.

Jerry Bowskill, Chief Technology Officer for Williams Interactive – In many cases it is already the dominant source of player revenue and the lines will continue to blur between what is a desktop, Tablet or mobile device. The reality is that players have multiple internet devices and one-size does not fit all, while the concept of 'desktop computing' is melting away the reality for the industry is that content has to be created in order to be consumed in many ways.

Bryan Kelly, Senior Vice-President of Technology, Bally Technologies – I think in the end PCs will continue to shrink as the gaming platform of



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the future, and the move to personal handheld devices will dominate. People are growing accustomed to consuming wherever they are. If you look at the long-term picture, the volume of smart devices in homes is increasing and it's a trend that ties into gaming just as it does every other sector right now.



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we developed the industry's first mobile Casino product. We invested heavily, building all of the necessary tools so that we were ready for when it really took off. We believe this time has come and we're now seeing the fruits of our labour. Mobile gaming is growing at an incredibly fast rate and there is no sign of this slowing down.

Neill Whyte, Head of Product Channels, Microgaming.

Aleš Gornjec, General Manager at Comtrade Gaming

Currently the market is focusing on cross-platform gaming in Free2play as well as in cash gaming. Mobile and tablet gaming is rising faster than other forms of gaming. It's still significantly less than land based gaming which is also due to the fact that mobile, tablet and online are not allowed in some regions. In the future we may see more and more HTML5 games which run on tablets and desktops and offer a similar experience to the user with a simplified interface that is targeted for mobiles.

Mathias Larsson, Director of Business Development, Ezugi

Yes it will be. Tablet will take over games played from home and mobile will increase in the same pace as we have seen in the past year. The only thing holding mobile back is connectivity in some markets. This is improving all the time.

Derrick Morton, CEO of FlowPlay and Vegas World

Mobile and tablet play is already the dominate form, but desktop isn't going away anytime soon – laptops especially will be around for a long time. While tablets have some similar functionality, specifically the Surface, they don't do everything a consumer needs them to do from a technology perspective and can provide players with a completely different gaming experience. Deeply social games that require a lot of chatting in particular will always require the keyboard provided by a desktop.

Jim Veevaert, Vice-President of Games, DoubleDown Casino

We think both mobile/tablet and desktop are important. Through Facebook Connect we have a great ability to add social features that enable us to better connect the player experience between devices.

For us it's really important to provide that seamless integration so no matter how or where a player wants to play they're able to tap in to the casino.

Leigh Nissim, IGT Commercial Director of Interactive

Mobiles and tablets aren't the future; they are the here and now. As the market continues to mature and moves toward becoming fully optimised, it is certain that mobile and tablet will become the dominant channels for interactive and online gaming, both in-casino and at home. This means the continued evolution of interactive gambling, in legalised markets like the UK, which continues to transform itself quickly in response to player demands and patterns.

Luke Alvarez, CEO, Inspired Gaming Group

People only really play on their desktop as a break from work! Occasionally people play on a desktop at home in the evening, but more and more people are moving to tablets for online leisure activities such as shopping and gaming. Tablet and mobile are in a period of massive growth and are already overtaking desktop from a revenue point of view.

We have a mobile first strategy with HTML5 code – we're not building for Flash / desktop and then converting to HTML5 mobile.

Ashley Lang, Founder and CEO of Odobo – Mobile has certainly changed the way we interact with computing. This will continue to change over time, particularly as we start making our way into augmented reality (Google Glass) or even virtual reality (Occulus Rift). Desktop will always have its place; however there is a trend towards desktop for production and mobiles and tablets for consumption. Gaming content falls into the consumption category and therefore will likely see desktop overtaken by tablet/mobile.

WHAT CAN MOBILE/TABLET REAL MONEY GAMING LEARN FROM THE SUCCESS OF SOCIAL GAMING ON MOBILES? AND WHAT CROSS-OVER CAN WE EXPECT?

Derrick Morton, CEO of FlowPlay and Vegas World

There's a mass market of people that enjoy casino games – but by strictly focusing on just gambling, you're not tapping into the (much larger) market of casual and social gamers. There is a significant market for people that want to just play slots, bingo, poker, etc and not gamble real money. Social casinos are really complimentary products for land-based casinos to expand on the experience already provided by the B&M location, so I expect to see a lot of land-based casino brands (especially the larger, more recognizable names) to begin partnering with technology companies to bring online, virtual currency products to market with similar branding.

WHAT WILL THE ADOPTION RATE FOR SINGLE WALLET SOLUTIONS BE ACROSS A LAND-BASED LOCATION'S CUSTOMER BASE AND HOW LONG WILL IT TAKE TO ACHIEVE THIS?

Luke Alvarez, CEO, Inspired Gaming Group – Single wallet integration is fairly expensive, so only the major cross channel operators are looking to do this. We've recently implemented single wallet capabilities with

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COMTRADE GAMING - ICORE

iCore, The Enterprise Gaming Platform, is designed for premium online operators that manage very diverse environments often combined with land based casino or retail outlets. It complies with several online regulatory restrictions, enables fraud prevention and empowers operators with leading-edge player engagement features.

ICORE MODULES

Besides standard modules such as CRM, payments, business intelligence, affiliates etc., it also extends operators' capabilities with centralized bonus, loyalty, promotions management, and centralized game and content management over all products and channels (online, mobile, social, and landbased) allowing the operator to choose best of breed content from various suppliers.

A modular architecture also allows for selective and gradual use of features that enable operators to mini-

mize operational risk during deployment. Its modules are also tightly integrated, ensuring better user experience, usability, operational efficiency and quick determination of business performance through the Business Intelligence module with the use of reports, metrics and Key Performance Indicators.

Key business benefits:

- Fully flexible operation with the option to choose from a partial or full platform;
- High level of integration and adaptability for regulated markets;
- Faster customer service with the single player view module;
- Effective steering of a player's lifecycle by responding to the player's gaming activity in real-time and delivering promotions while players are still

engaged in game play. This also ensures increased average player spending.

- Cross-selling between products and channels regardless of the content supplier by attracting and rewarding the player's migration. This allows for better optimisation of returns from marketing investments.
- High personalisation and optimisation of web and mobile portals with central product configuration and content management. This enables enriched customer experience.

With iCore, The Enterprise Gaming Platform, operators are now able to attract and reward players with advanced, centrally managed bonus and loyalty awards which increase the attractiveness of their offering and allowing for transparent, multi-channel, and multi-product playing experience and player migration.

Paddy Power across retail, online and mobile."

We believe single wallet technology will be driven to the forefront in the next 12 months, but obviously territorial legislation and restrictions on credit cards and cashing out is a big factor. For players who play across channels, then it's very handy.

Single Wallet should be familiar to any casino player who has used Advanced Funds transfer to manage a player account, so in those sectors adoption should be rapid; technically, it is well trodden ground for machines providers.

Bryan Kelly, Senior Vice-President of Technology, Bally Technologies

– We are a strong believer in the common wallet and the need for everything to be tied into the bonusing as well. When you spend on whatever channel you choose, then your rewards grow based on spend. One wallet creates brand loyalty. Players leave money in their wallet in preparation for their next session. There's no need to cash-out on their mobile platform when they'll be in the casino at weekend and use their balance in the restaurant or for slots play. In that regard, a single wallet is pivotal for brand loyalty and analytics, giving one view of the monetisation of the customer.

A single wallet also reduces back-end costs. It means one customer support team. One call centre that has everything to do with that wallet. It means seamless movement, transferring to the slot machine from the mobile wallet, to the same tablet for Take 'n Play, to their favourite game mobile game when they walk off property. The single wallet is the glue that binds the multi-channel infrastructure together.

Bally is the biggest casino systems provider in the world. We have the largest mobile concierge application in the industry and we are combining the concierge and mobile wallet into one, enabling the player to move seamlessly from cash/ticket to cashless. It is a solution that we are deploying this Fall. When you look for an

igaming vendor, look to Bally, to support that same wallet.

GIVING A LAND-BASED PLAYER THE FREEDOM OF USING A TABLET IS GREAT - EXCEPT THAT MOST LOCATIONS DON'T HAVE BREAK-OUT AREAS FOR THEM TO SIT AND RELAX, THE ENVIRONMENT IS DESIGNED TO CIRCLE THEM BACK TO THE TABLES/MACHINES AS FAST AS POSSIBLE. WILL THIS TECHNOLOGY ULTIMATELY RESHAPE THE CASINO ENVIRONMENT?

Aleš Gornjec, General Manager at Comtrade Gaming

– We don't think it will reshape current environments because this would be too costly – such solutions will get adopted in casinos that have appropriate environments – hotel rooms, pool, and restaurants to promote playing on a tablet that you can take with you when you leave a physical roulette, baccarat or blackjack table.

Mathias Larsson, Director of Business Development, Ezugi

– Most casinos are in connection with a hotel so once it is allowed for players to play from their room this will not be an issue. Before that happens the casinos will not change their layout because they want people at the tables.

Luke Alvarez, CEO, Inspired Gaming Group

– Inspired is a specialist in convenience gaming – meaning primarily street VLT venues and interactive gaming on mobile and tablet. Street gaming venues are typically tight on space, but have sportsbetting areas where it's common to see players on their phone checking schedules and prices.

In street gaming we expect phones to be used in the morning on the way to work, popping into the shop is more of a lunchtime or after work activity, and a tablet is for at home on the sofa."

Jerry Bowskill, Chief Technology Officer for



In the social casino industry, most players fall under the older/silver-surfer demographic. Poker, slots, and

bingo are all games that they're familiar with and they grew up playing. Hybrid games (combining mechanics from various casino games to come up with a new product) is what is most attractive to the younger generation and is how we try to attract that newer audience. Derrick Morton, CEO of FlowPlay and Vegas World

Williams Interactive – Yes this is already happening with the equivalent of in venue 'LGS' (local gaming server) solutions offering players the opportunity to extend their playing experience away from the casino floor using their own personal tablet or mobile devices. Ultimately the physical environments within the venue will adapt to give they players a unique experience with gaming content that is specifically designed to interact with in venue screens and gaming devices. The key is giving players the ability to enjoy casino experiences on the device of their choice, anywhere anytime – and to provide players the most compelling gaming experience possible. As people become more and more comfortable wagering on mobile devices, it's incumbent upon game creators and suppliers to create compelling gaming experiences both in-venue and online that leverages the "always on" smart phone as a vital component of the game.



WHAT CAN MOBILE/TABLET REAL MONEY GAMING LEARN FROM THE SUCCESS OF SOCIAL GAMING ON MOBILES? AND WHAT CROSS-OVER CAN WE EXPECT?

Ashley Lang, Founder and CEO of Odobo – User experience.

If you look at how a player gets up and running with a virtual currency casino versus a real money offering, the two journeys are incomparable. On the social side, getting started is as easy as signing into your Twitter or Facebook account, authorising an in-app purchase, and getting directly into the game. On the real-money side, a player has to seek out an operator either via website or app, register with a complex form specific to their jurisdiction, enter payment information, make a payment, and only then, assuming that there are no KYC deposit hurdles as some jurisdictions have, can they play. In some cases there are even special identification measures that need to be undertaken prior to registering for an operator to comply with the local legal landscape.

In some way, this relates to the point of cross-over. Would we have more real-money gamblers if it was an easier experience? Furthermore, if we had like-for-like

On the social side, getting started is as easy as signing into your Twitter or Facebook account, authorising an in-app purchase, and getting directly into the game.

player journeys, would we see comparable numbers of players with more players attempting both sides?

HOW IS NFC BEING INCORPORATED INTO MOBILE GAMING APPLICATIONS AND WHAT ARE THE BENEFITS TO THE PLAYER?

Luke Alvarez, CEO, Inspired Gaming Group – NFC has been under-utilised so far and many retailers are looking at how it can be better harnessed for gaming. We are working on some ideas that involve NFC.

Jerry Bowskill, Chief Technology Officer for Williams Interactive – NFC offers potential in a cou-

ple of areas. It provides a mechanism for mobile devices to interact with physical land based gaming systems and there are a number of research and development initiatives to see how this can be used to enhance the playing experience, whether that's by allowing the player to 'walk away' with a gaming title they discover on a casino floor or 'walk in' with a free spin that has been awarded on the internet. The second are of promise is around payments and this is already well advanced in Europe with NFC becoming a standard by which debit card transactions are conducted at point of sale terminals.

HOW SEGMENTED IS THE TABLET/MOBILE PLAYER BASE? IS THE MOBILE/TABLET AUDIENCE A NEW AUDIENCE – A YOUNGER PLAYER BASE OR AN OLDER (SILVER-SURFER) PLAYER BASE?

Bryan Kelly, Senior Vice-President of Technology, Bally Technologies – It is younger – approximately 10-15 years younger. And as the baby boomers grow older, they're also more tech savvy; they're used to using tablets, used to resistive communication. Casinos need to provide these tools to engage with their players, to communication with them 24/7.

G3-247 Report

MOBILE & TABLET GAMING

APEX GAMING - MOBILE SLOTS

APEX gaming has grown to be a major force in gaming over the past ten years. With its roots in land-based gaming, naturally APEX gaming offers all possible payment possibilities. These include playing with banknotes, coins, tokens and tickets. A banknote recycler ensures wins can be paid out in notes if required. Hoppers pay out coins and tokens and a ticket printer can print out winnings for ticket-in, ticket-out applications. In short, all possible payment options are available on APEX gaming machines. Customer preference and local regulations decide on which cash handling devices are implemented.

The aim at APEX gaming is to offer players the possibility to play their favourite APEX on any platform. Under the motto, 'Wherever you go', players are given the choice. To succeed here, there must be a transition between land-based and tablet gaming to ensure that players can continue their game play on any platform – so from the APEX slot down to APEX games on a tablet.

APEX introduced a major new innovation at this year's ICE show: 'APEX MOBILE SLOTS'. This gives gaming



operators a brand new way to expand their gaming offer to these customers. For land-based gaming, players are bound to the slot machines and thus must discontinue playing, say if they wish to go to the restaurant or bar. APEX players can now enjoy gaming in the gaming location regardless whether they are at an APEX slot or not. The answer: APEX MOBILE SLOTS. An example: a player wishes to go to eat but wants to carry on playing. This player then cashes out the credit on the APEX slot machine and transfers the credit onto a tablet to continue playing at the restaurant via the APEX iDROP redemption terminal. Afterwards the player wishes to return to the APEX slot. This player then returns to the iDROP terminal and can cash out

the remaining credit from the tablet. The credit is printed in the form of a barcoded ticket that can then be used on the slot machines. This perfect symbiosis unites both worlds – land-based and tablet gaming.

The APEX solution combines two different types of gaming machine segments. Tablet gaming is controlled by server-based gaming. The outcome of the gaming machines is controlled by the individually gaming machine mathematics. This enables operators to expand gaming in their locations. Thus, players are offered the same games as on the slot machines – yet only managed in a different way. This is not visible to the player. The player sees and plays the same games on both mediums. The operator can thus offer APEX gaming on the slots and on the tablets at the same time.

Max Pessnegger, CTO at APEX gaming, notes, "We have made our first installations already and the results are tremendous. This is a simple and cost-effective way to expand APEX games. Our complete technical server-based gaming back-up ensures 24/7 tablet gaming alongside slots gaming".

It's important to remember how consumers use their devices. Mobiles are predominantly used for communication and social networking whereas tablets are used for games and entertainment.

We are seeing fewer younger generation players going to the slots, preferring instead to head to the tables. This generation doesn't want to sit at a machine that their mother/grandmother played at. If they have a tablet for the lounge, they can sit with pals and game with a new form factor. That's a lot of the stuff we are working on at Bally. On property mobile wagering is a big thing going forward. Off property where regulations allow. And that requires a mobile wallet.

Derrick Morton, CEO of FlowPlay and Vegas World – In the social casino industry, most players fall under the older/silver-surfer demographic. Poker, slots, and bingo are all games that they're familiar with and they grew up playing. Hybrid games (combining mechanics from various casino games to come up with a new product) is what is most attractive to the younger generation and is how we try to attract that newer audience.

Charles Cohen, Vice President, Mobile, GTECH – Mobile has opened the doors to a wide range of new audiences that can be segmented in a number of different ways.

For those that have previously preferred to wager on desktop, laptop, or even at traditional casinos, the con-

venience and around-the-clock availability of mobile means that it attracts a large number of experienced players. And for the same reasons, mobile is also commonly now the entry point for most first-time players in legal gaming markets.

The biggest age group is the under-35s, but we also have a high – and growing – number of older players, especially among VIPs. Increasingly, we are seeing players take up gaming for the first time in their 50s, 60s and 70s. In short, the appeal of mobile is huge, and it is responsible for driving play-time among all types of consumers.

Luke Alvarez, CEO, Inspired Gaming Group – There's clearly some cross over between the tablet/mobile player base and our UK retail player segments.

Generally speaking you get a wider range of player segments online than in UK LBOs for example – lots of young sports bettors, a balance of more women typically playing bingo and a bit of slots, and the demographic is predominantly younger.

Neill Whyte, Head of Product Channels, Microgaming – In terms of segmentation, it's important to remember how consumers use their devices. Mobile phones are predominantly used for communication and social networking whereas tablets are used for games and entertainment. This, combined with an evident increase in sales towards tablet devices, presents a strong argument to say that in several years' time the tablet player base will be the dominant player segment. But time will tell.

In terms of its audience, most studies are reporting that the mobile and tablet audience does seem to be biased towards the younger and wealthier demographics of



Currently the market is focusing on cross-platform gaming in Free2play as well as in cash gaming. Mobile

and tablet gaming is rising faster than other forms of gaming. It's still significantly less than land based gaming which is also due to the fact that mobile, tablet and online are not allowed in some regions. In the future we may see more and more HTML5 games which run on tablets and desktops and offer a similar experience to the user with a simplified interface that is targeted for mobiles.

Aleš Gornjec, General Manager at Comtrade Gaming.

society. A 2013 study by Global Web Index found that the typical tablet owner was middle-aged and male; around 67 per cent of tablet owners are aged between 25 and 44. The Smartphone audience is also slightly skewed towards males, whilst younger users are more likely to own a Smartphone and older users to own a more basic, feature phone.

Ashley Lang, Founder and CEO of Odobo – Mobile gaming has universal appeal so both demographics are contributing to the growth of RMG on mobile devices.

BALLY TECHNOLOGIES - TAKE 'N PLAY

Take 'n Play from Bally Technologies enables players to take their game "on the go" for the first time by playing a physical slot machine on the convenience of a tablet. This cutting-edge product provides casinos with an easy solution to the challenge of keeping players at a slot machine, easily solving the challenge of players who get up and leave their machine to smoke or use the restroom, to ones who are forced to leave when their friend or partner is ready to move on – even if they want to keep playing.

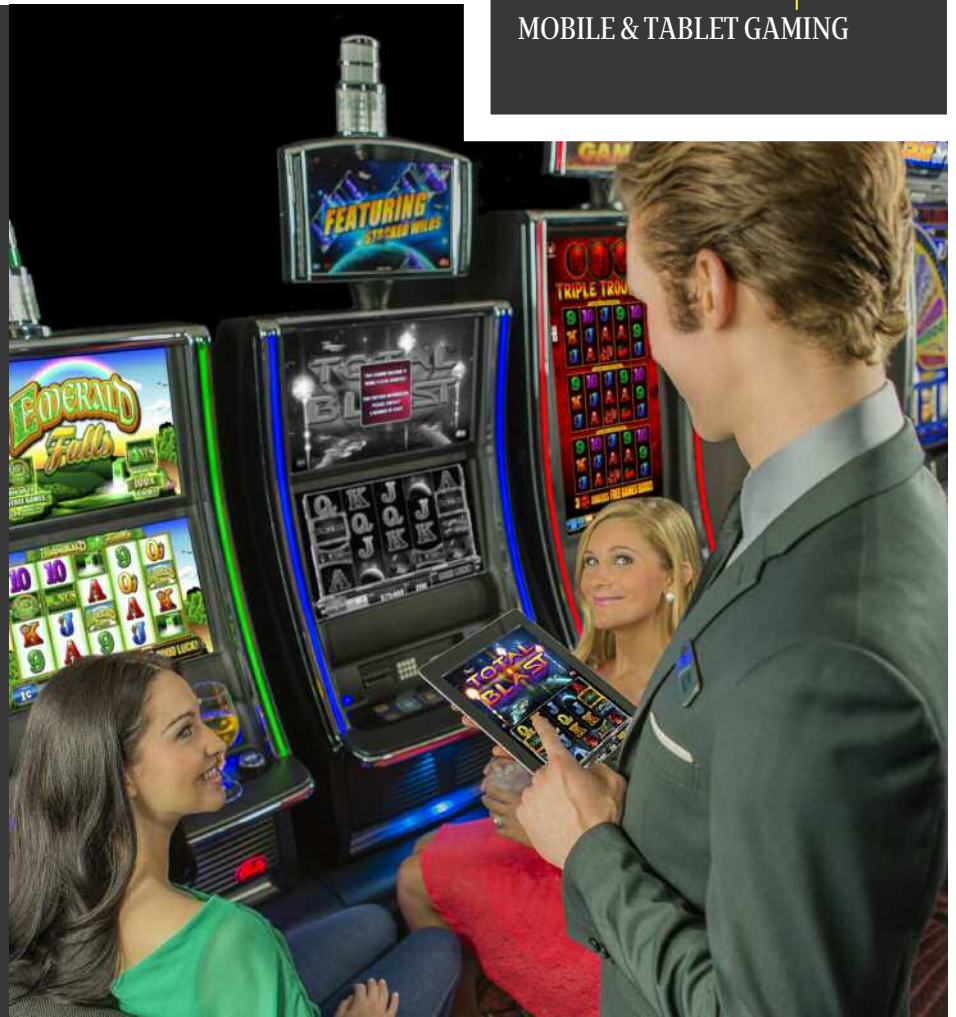
Take 'n Play is the industry's first technology that allows the same slot machine game to be played in more than one location. This innovative product streams the game content directly from the slot machine to a tablet. The game still takes place on the slot machine, with the tablet replicating the game screen. Take 'n Play empowers operators to fully utilize the machines on their slot floor to generate additional revenue and improve the gaming experience for their guests who – for the first time – have the freedom to take their game to another part of the property.

Take 'n Play offers many benefits to any casino, but it's especially useful in jurisdictions with bans on smoking or alcohol consumption on the slot floor because their gaming machines can continue to generate revenue even when a player has left to smoke or drink.

The product is easy to use and works on any tablet, including Androids and iPads. Any casino with a Wi-Fi network can utilize Take 'n Play. Once the feature is part of the Bally game suite, it requires no game re-approval because the software doesn't alter the game. When Bally launches Take 'n Play, planned for spring 2014, it will work on the popular Pro Series™ V22/22, V32, V22/32 and V22/42 cabinets that feature many of Bally's premium games. The solution is also designed to work in traditional Class III, Class II, and central-determination markets.

For players, one of the most exciting aspects is that the reels still spin on the slot machine even when they are playing remotely, which provides assurance to the patron that they're playing the same game. When the remote-control option is activated, the slot machine screen becomes monochrome and displays a message alerting other patrons that the game is being played remotely. One of the key features this product offers is privacy to discerning players. Once the game is being played remotely on the tablet, the credit and win meters are blurred out on the slot machine and displayed only on the tablet, so someone walking by can't see how much money is being wagered or how much has been won.

While Take 'n Play is targeted to casinos with smoking bans, the product has universal appeal by offering players on any casino floor the convenience of playing their favorite or current game in another environment. If a player doesn't want to sit next to someone who is smoking, they can leave their machine and continue playing their game elsewhere. If friends are playing next to each other and one wants to get something to eat but the other is on a winning streak, the hot player can take her or his game with them and keep playing at the restaurant. Additionally, two people with favorite games that aren't near each other on the slot floor can enjoy the convenience of sitting together in a



club, lounge, or sports book, for example, and play their games remotely.

Take 'n Play addresses the challenge of appealing to the younger generation who are used to doing everything on their mobile devices by enabling them to make their favorite slot machine mobile, and giving them the freedom to play anywhere in the casino.

When Bally demonstrated Take 'n Play for customers at the Global Gaming Expo (G2E) in September 2013, the feedback from casino operators was overwhelmingly positive, especially from those in jurisdictions with smoking bans. Casinos were excited about this simple solution to increase coin-in and provide convenience to their guests.

HOW PRODUCT IS AN ADVANCEMENT OVER PREVIOUS TECHNOLOGY

- Take 'n Play is the first technology that enables a player to play the same slot machine game remotely on a tablet, freeing her/him to leave the physical game but continue the play experience anywhere on property
- The game still takes place on the slot machine, with the tablet replicating the game screens and showing the same outcome as the game
- Casinos can generate increased revenue with no additional slot-machine purchases and no additional taxes because the slot machine count does not increase

- Players can take their game on the go and play remotely on a tablet in a bar, lounge, restaurant, or outside
- Take 'n Play provides privacy to discerning players, with credit meters and wins blurred out on the slot machine and displayed only on the tablet

THE BENEFITS OF TAKE 'N PLAY

- Unprecedented gaming flexibility to casino patrons, allowing them to take their game "on the go" by continuing to play a slot machine on a tablet elsewhere on the property
- The game screen turns monochrome to indicate that it's not currently available for play, and the buttons are disabled so no one else can play the machine; when the player is ready, she/he can return to the game and shift from playing on their tablet to the gaming machine
- Reels still spin on the slot machine so players can be confident that the game they were playing on the casino floor is the same one they're playing remotely on a tablet, while the slot machine meters become unreadable to provide privacy to the remote player
- Take 'n Play easily integrates with existing game technology. It requires no modification to accounting or player-tracking systems and can run on any manufacturer's slot or casino-management system.

Desktop to mobile progression in Live Casino

To what extent are players at online Live Casino tables moving away from desktop to mobile devices? Is increasing ownership and use of tablets and smartphones resulting in shorter or longer playing sessions? And how is technology driving any shift in playing patterns? Helen Hedgeland, UK Managing Director of Evolution Gaming, shares some intriguing insights into the impact of mobile on both the online Live Casino and land-based casino sectors.

Live Casino has become increasingly multi-channel and multi-device in recent years. But that's not to say that players are abandoning desktop play en masse and migrating to tablets and smartphones. There are more complex trends at work and it is right to describe this as a progression as these trends encompass complementary use of different devices, a resultant growth in incremental revenue and new opportunities to better serve customers online and in land-based venues too.

In many ways what we are seeing in Live Casino is simply a reflection of broader technology and lifestyle trends. Yes, there is far greater use of mobile devices in Live Casino now. We have moved very quickly from the period of early adopters using iPad and iPhone to mass-market adoption of these products and their Android counterparts.

In terms of statistics we have seen a number of interesting patterns emerge.

In general, wagering via tablets and smartphones is steadily increasing as a proportion of play on all devices. However, there has been a very marked increase in the last few months. Also, the proportion of wagering on Android devices versus iOS devices is increasing, with wagering on Android tablets increasing five-fold as a proportion of wagering on all devices. But of course, the device usage picture varies from licensee to licensee. It is influenced by factors such as the licensee's geographic areas of operation, their mix of tables, their audience profile, whether they have optimised their mobile offering and whether they have released and promoted an App featuring Live Casino.

With tablets, users often see these devices as

extensions of their desktop. They typically carry out a subset of tasks on tablet, tasks that are often more focused on entertainment, relaxation and multi-tasking. For a great many, the desktop is still their main computing 'hub' with the tablet being a 'satellite' device.

In many ways iPads and 7- and 10-inch tablets are the perfect devices for Live Casino. Tablets provide a good amount of screen 'real estate' for viewing live video and their size and lightweight, portable, wireless nature means they can go anywhere. So, we are seeing players supplementing their traditional play on desktop with extended sessions as they wander into another room, relax on the sofa and then get involved in a mix of TV/video-stream viewing, social networking and messaging, web browsing and Live Casino play. That kind of usage is mentioned repeatedly in focus groups.

Equally we have players who are wedded to desktop, particularly those who like to use our Multi-Game Play function. This allows players to join one game and then go back to the Live Lobby and join other games – up to 4 games at the same time in one master window, subject to the screen size of the player's desktop. So, the bigger the screen size the more games they can enjoy at once and the more bets they can place in parallel, which makes Multi-Game Play very popular with high rollers.

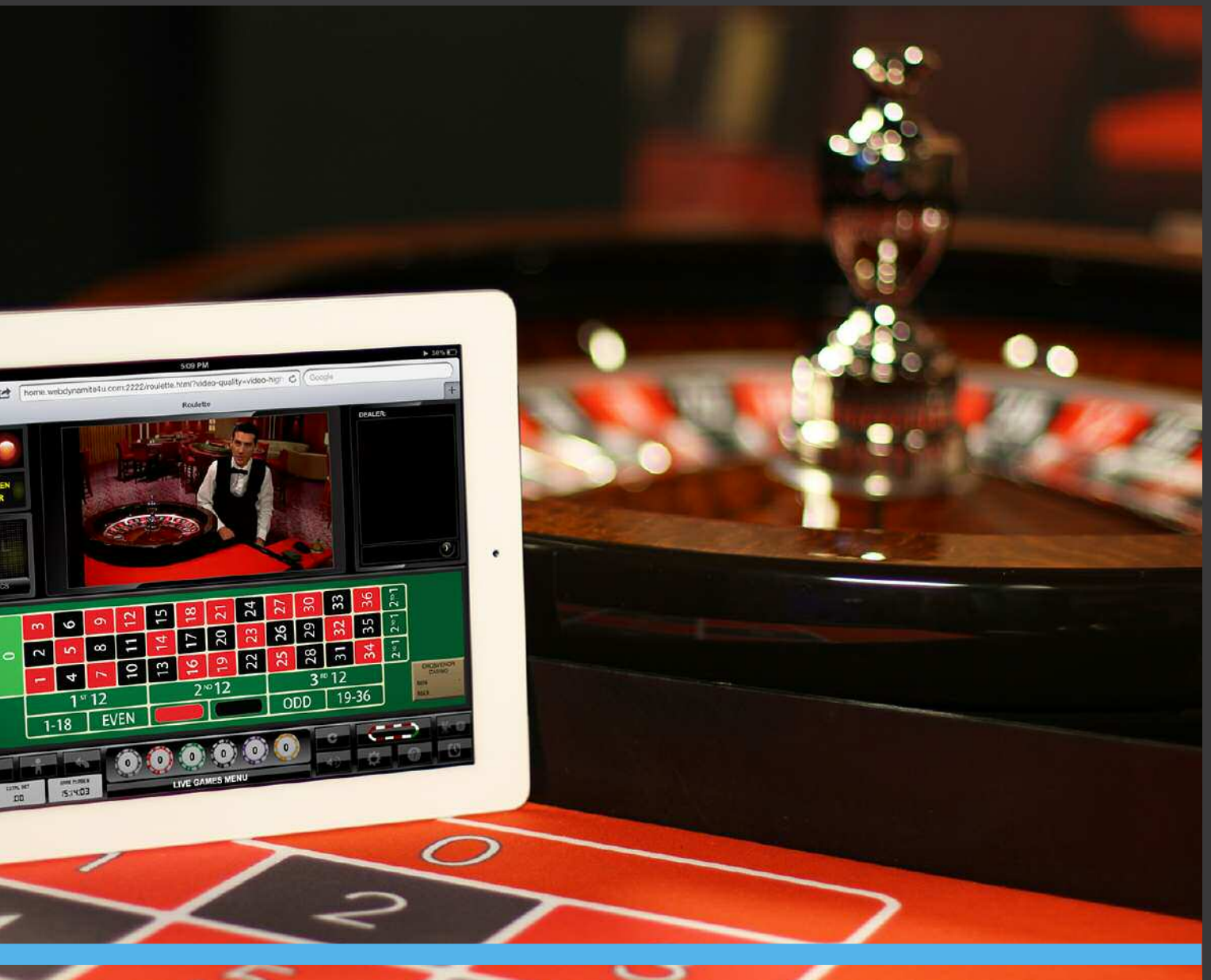
At the other end of the screen-size spectrum, the iPhone or smartphone is frequently used for 'fill-in' play. If a player cannot use their desktop or tablet then they will use what spare moments and opportunities they can find to enjoy a game on their phone.



Helen Hedgeland is the UK Managing Director of Evolution Gaming.



The device usage picture varies from licensee to licensee. It is influenced by factors such as the licensee's geographic areas of operation, their mix of tables, their audience profile, whether they have optimised their mobile offering and whether they have released and promoted an App featuring Live Casino.



Smartphone screens are generally increasing in size and HD video and 4G technologies are greatly improving the player experience. When we released our new smartphone UI recently we added full-screen HD Video Mode on supported devices and a choice of two camera views.

As a result, smartphones are coming into their own as the primary access device for Live Casino for some customers and for certain demographics. And, as I will explain later, mobile generally (tablet and smartphone) is proving to be very effective as a channel for acquiring new Live Casino customers.

But as I said before, there isn't a wholesale shift from desktop to mobile; it's about licensees providing a seamless experience across multiple channels and devices and fitting in with players' lifestyles and needs. At Evolution we aim to provide a seamless offering across all devices. The UI

is consistent and familiar, which makes it easy for players to switch between devices. Each game is optimised specifically for each device, so the gameplay on tablet and smartphone mirrors that on desktop. Perhaps most importantly, we don't view mobile as a separate market. When we make a game available on mobile we ensure that all tables are available, not just one or two. Our mobile players don't get a dumbed-down service – they are getting the full choice of available tables for a given game whichever device they choose to play on.

Without doubt, the most interesting trend to emerge is around the complementary use of devices and the impact that has on player behaviour and on KPIs such as playing session durations, wagering and revenue.

Many people had concerns that the introduction of mobile play would take away from desktop

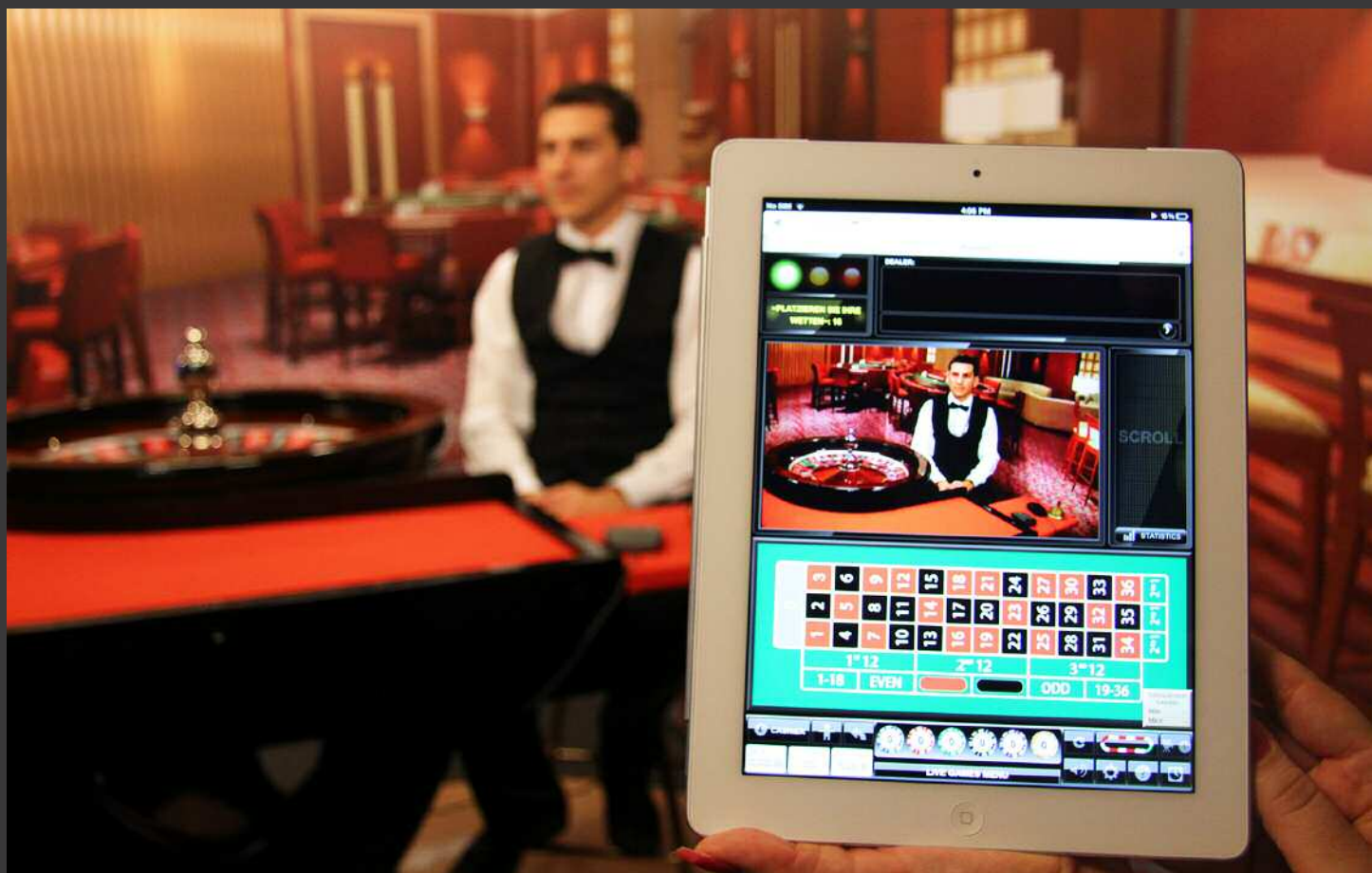
The most interesting trend to emerge is around the complementary use of devices and the impact that has on player behaviours and on KPIs such as playing durations.

and result in shorter playing sessions and a consequent drop in revenue. But what we are witnessing overall is the exact opposite: all our figures point to incremental growth, with longer playing sessions, higher average spends and, in many instances, the use of mobile triggering an increase in desktop use as well.

For example, player session times are typically 5% longer on mobile devices than on desktop, and

Interactive

LIVE CASINO - MOBILE/TABLETS



players active on mobile have a greater lifetime value than those on desktop alone.

Almost half of VIPs are active on mobile devices, wagering a quarter of all their funds on mobile.

Looking at the average for top operators for all player types, a third of all players are active on mobile devices and over a quarter of all wagering is taking place on mobile devices.

Top operators are also attracting a high proportion of players through mobile devices.

Across our network, those partners who offer mobile to their player base are generating higher GGR from each of their active players.

And perhaps the most telling statistic of all is that those who place their first bet on tablet consequently wager over a third more on Live Casino than those whose first bet was placed on desktop.

So, rather than harming revenues, mobile is doing a fantastic job in generating revenue and interest.

Another really interesting area for Evolution and its licensees is the opportunity that desktop to mobile progression opens up.

For online-only operators the main focus is ensuring that players have access to a consistently high quality of service, wherever they are and on

whatever device is most convenient for them.

Land-based casino operators, meanwhile, are increasingly looking to mobile as the enabler of 'intra-resort' solutions, which allow access to Live Casino tables for players visiting a land-based casino. Depending on local regulations, these online live tables could be located in a studio in another country or they could be on-site, showcased within the land-based casino in some way.

In each case, the live tables are extensions of the land-based casino's brand and service offering with visitors to the land-based casino having the opportunity to play the live tables on their mobile devices when they are in the bar or restaurant, or in other areas of the casino. This could potentially double the number of active players in a land-based casino. Recent research revealed that 70% of visitors to land-based casinos had a smartphone with them, and 20% a tablet.

In most jurisdictions this extended play opportunity is limited to use of the players' own mobile devices; the casino cannot hand out devices for use as this would increase the number of legal devices on their licence.

As mentioned earlier, there is the option to stream the in-venue Live Casino service in one of two ways: from a live studio located on the main gaming floor within the land-based casino, or from a

remote live studio located elsewhere or even in an unlicensed area on the same site.

As we know, currently a UK land-based casino pays up to 50 per cent tax on all table games revenue from in-venue players. However, when new Point of Consumption Tax (POCT) regulations come into force in December 2014, the land-based casino could create a live studio in an area other than their licensed gaming floor space and benefit from an advantageous POCT rate of 15 per cent on bets placed through this channel.

Our advice to operators is not to be passive observers of what is likely to be a continuing gradual shift from desktop to mobile play in the Live Casino sector.

So, to summarise: our advice to operators is not to be passive observers of what is likely to be a continuing gradual shift from desktop to mobile play in the Live Casino sector. Instead, operators should view this as a progression to a new era that presents new opportunities, not only for pure-play online operators but also for traditional land-based casino operators.

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MOBILE & TABLET GAMING

Mobile matters

Mobile Matters is a product focus on Inspired's HTML mobile games and Virgo RGS by Mat Ingram, Managing Director – Interactive Content, Inspired Gaming Group



The number of mobile phone users is growing rapidly and mobile gaming is already a huge area of growth for the industry. It's been predicted that the mobile gambling market will be worth \$100 billion by 2017 (source Juniper Research).

As well as the growth in mobile phone ownership, online and mobile gaming is being legalised by more Governments around the world, including Italy, Spain and US states such as New Jersey – with many more to come.

Inspired has been supplying Virtual Sports online in various forms for 10 years. We experienced major growth with the technical ability to stream Virtual content online around 5 years ago and we have recently tracked a huge surge in mobile betting. During the World Cup we calculated that nearly 50 per cent of all digital bets were coming through mobile and tablet devices. This figure is likely to increase significantly, particularly due to the fact that players in emerging markets are leapfrogging desktop gaming and going straight to mobile as their device of choice. Mobile gaming and betting will be bigger than desktop within 12 months.

A few gaming operators in the UK and Europe have been mobile forward for a number of years. Now nearly every land-based operator is adapting to a multi-platform gaming landscape and is, therefore, looking for the best technology and games across land-based, online and mobile. Having a strong portfolio of land-based, and HTML5 desktop and mobile games allows players to access their favourite Inspired content 24/7 and on a range of devices. Importantly, it also opens doors to new cross-channel marketing possibilities and strengthens the brand value of the games.

Inspired has set up a new team, based in the UK, to develop in-house HTML5 mobile and desktop games. Inspired has become one of the first suppliers to launch games across all channels simultaneously with the launch of White Knight and Goddess of the Amazon in the UK with William Hill. Unlike many of our competitors, Inspired tailors the maths and the UX design to the platform, but keeps the theme and game profile consistent. This is to ensure that cross-channel players can find their favourite games on the machine or online, and will have a similar positive experience on both.



Mat Ingram, Managing Director – Interactive Content, Inspired Gaming Group

Now nearly every land-based operator is adapting to a multi-platform gaming landscape and is, therefore, looking for the best technology and games across land-based, online and mobile.

Interactive

MOBILE & TABLET GAMING



Having launched both White Knight and Goddess of the Amazon at the same time across retail, desktop and mobile, we know that the cumulative impact of cross-channel marketing increases game awareness. Both of these games for desktop and mobile are premium HTML5 games offering a rich player experience even on a mobile phone with a relatively small screen.

BEHIND THE SCENES

Inspired's new HTML5 games can be easily integrated with operators' existing online and mobile platforms, via Inspired's remote game server (RGS) Virgo.

An RGS is a hosted platform upon which game developers, such as Inspired, can run online and mobile versions of games. The RGS platform supports Javascript/HTML5 games where the game logic is centrally hosted. On mobile and desktop devices that support it, we use HTML5 websockets to provide bi-directional communication between the RGS and the game.

On mobile and desktop devices that support it, we use HTML5 websockets to provide bi-directional communication between the RGS and the game.

Our RGS handles all the functions that are needed to interact with the different mobile operators, so we (and our third party game developers) can write a game once and deploy to any operator that Virgo has been integrated with. For the one-off development cost of integrating Virgo with their back-end systems, operators gain access to a growing library of Inspired HTML5 games - and some third party titles. For operators with Inspired VLTs, it is an obvious win that game releases and marketing efforts can be co-ordinated across platforms therefore increasing cross-platform brand loyalty.

PERSONALISED PLAY

Targeted marketing campaigns and single wallet functionality are two growth areas that are being driven by the increase in cross-channel players and the increase in online gambling sites. Cross-platform operators have a unique opportunity to offer players a single seamless experience, in venue and online, and gain one single view of the player - particularly the VIP players.

Inspired is further developing its Virgo RGS and single wallet technology stack, including cross platform player tracking and marketing. We recently launched a single wallet 'Cash Card' system for Paddy Power, working closely with their online system provider OpenBet. This enables players to access the same credit balance on all platforms and earn rewards on all their Paddy Power play.

WHY HTML5?

Most of the established online and mobile game developers have heavily invested in Flash and 70 per cent of web-based games are built in Flash, including 24 of the top 25 Facebook games. However, many tablets and phones are not capable of running Flash; over 35 per cent of worldwide mobile traffic can be attributed to Apple mobile devices, which do not support Flash.

With the correct implementation HTML5 is supported by all browsers and, most importantly, is the most mobile-ready tool for developing software. HTML5 and its associated technologies can be written in a very efficient manner relative to Flash, allowing for more responsive and dynamic games and bonus features.

Traditional Flash-based developers are struggling to adapt their technology, games and development teams to the next generation of entertainment desired by players and operators. Inspired's strategy has been to leapfrog this stage and go straight to developing our interactive games in HTML5, which is undoubtedly the future.

Designing games for desktop and mobile, in particular, requires a significantly different approach and user interface compared to machines. Creating responsive experiences for mobile devices has its challenges because of the fragmentation in handsets, operating systems and browsers. Whereas typically our land-based game development team is designing games for the Inspired Core platform and a small handful of different cabinets, for mobile you have to design for hundreds of different combinations of devices, operating systems and browsers. So, the design needs to be as flexible as possible and the programming needs to be slick to keep the experience fast and fun.

Unlike other game developers, we don't design mobile games for the lowest possible denominator, but specifically for multiple devices. Another key USP of Inspired's mobile and desktop games is that we develop at a higher resolution than most other game suppliers, so that when you're playing on a device with a premium screen the games are very high quality and immersive. As with our land-based games we are committed to premium entertainment.

A different strategy for Mobile and Tablet Gaming

Online casino gambling has been with us for many years now. However who would have thought that back then, that one day you would be able to play live casino games with live professional dealers on the internet never mind mobile! Mobile and table gaming are experiencing huge growth as platforms not only for operators looking to promote their brands to consumers, but for the software companies who supply them with the device specific technical gaming infrastructure.

Without question the mobile gaming space is a highly competitive marketplace with maturing consumer markets and product offerings across a plethora of devices. Mobile is no longer just another channel, it's the lifeblood of the business in the corporate battle for operators looking to dominate market share. To that end can gaming operators differentiate themselves in this homogeneous marketplace when most of the gaming products in that market are more or less the same, with perhaps just some differences in design or front end branding?

While mobile commerce has an immeasurable potential, the key to the provision of successful gaming solutions to the mobile market is to offer a truly mobile product and experience based on how the user interacts with the device. It is not good enough to just offer a desktop version merely through a mobile browser. If we therefore look at mobile, live dealer casino games are a good example of the question. Firstly technology and the continued multi billion investment by the telecoms companies in both super-fast fixed line and the mobile 4G networks and infrastructure has meant that the bandwidth to support the deployment of live dealer casino products for both desktop and mobile network is good enough in most markets today.

Live and mobile casino gaming is being driven by voracious consumer demand and that of the gaming operators looking to keep pace with the needs of their gaming players. The popularity of live gaming and mobile for the player is the transparency, interaction, emotions that replicate the live land based casino environment for the player without leaving the comfort of their home via their desktop computer or smartphone while on the move. However as the market and product adoption matures, players become more demanding. Innovation therefore becomes more of a key differentiator for the operators and their casino software providers in becoming critical to driving the creation and execution of new products, services, and business processes.

For example most online casinos now offer Live Blackjack, Live Roulette, Live Baccarat, Live Sic Bo and Live Dealer Poker as the standard product suite deployed across desktop and mobile devices. But that isn't innovation or differentiation or a device specific mobile strategy, that's merely making your product accessible by delivery channel. As we said earlier it is not good enough to merely offer a desktop version through a mobile browser. The casino customer and user experience is central to the engagement and usage and therefore must be different for different devices and platforms – it's an Omni-channel, multi product specific delivery that is required, as against one size fits all approach.

USABILITY

While there are many overlaps one of the major differences between smartphones and tablets is their connectivity. Most smartphones with data plans have Wi-Fi and 3G connectivity. This means that they are able to connect to the internet through a Wi-Fi signal, and are able to use the 3G networks to make standard voice calls, send SMS messages and send and download data. Tablets on the other hand only have Wi-Fi connectivity. Some tablets do come with both Wi-Fi and 3G connectivity, but these are the models that tend to be more expensive.

If we take a look at this connectivity and device difference for a moment. A mobile user generally plays a game for 3-10 minutes and then puts the mobile away, perhaps as they have some dwell time waiting for a bus or are waiting in a line for a sandwich during their lunch break. Therefore 'time' is a critical component of the users' hierarchy of needs. So for the user to play, the access time to the game needs to be minimal. With that in mind, we at Ezugi have created separate apps for separate products such as Baccarat and Roulette. So when a player decides to play a game he or she should instantly get access to that game of their choice. If the loading time is too long or if they have to go through too many pages to find the game they will not play. For tablets, the



Mathias Larsson,
Director of Business
Development, Ezugi

Mathias Larsson holds a Masters in Finance and is an experienced technology entrepreneur. With management roles in live casino gaming, digital and product lifecycle marketing, he is director of business development for Ezugi, the innovative live casino dealer gaming system provider.

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Interactive

MOBILE & TABLET GAMING



behaviour is different since most players use the tablet at home connected to their Wi-Fi network which offers a more stable connection. They still want to have a mobile experience but it allows us to offer a larger version with a games lobby, as 'time' to load is of a lower requirement.

Another good example of technical implementation differences between mobile and tablet, is that a mobile is generally held with two hands and is controlled by the thumbs. Therefore there have to be as many swipe functions as possible for the user to interact with the games and deliver the information they require to a smaller display screen. Our User Interface optimization engineers' have added functionalities such as swipe features that therefore leverages the natural behaviour of the human thumbs on both sides of the mobile device which the end user is already

Live dealer gaming allows players to confirm that the games are trustworthy, as you can see and interact with the dealer, which is one of the reasons for the rapid growth over RNG games.

familiar with. For a tablet due to its larger screen size, more features and functions can be displayed on the game lobby and menus in order for the user to complete game tasks. However swipe and tap functions still need to be included, but are less central to the behaviour of a smartphone only user.

Gaming consumers are extremely tech savvy customers looking for instant gaming gratification and if you can't deliver it, they shall find someone that can. Therefore in order to innovate and differentiate, live gaming solution providers need to meet these ever changing user interfaces, preferences, product delivery pathways and experiences.

GAME DESIGN BY DEVICE

The User Interface as we have explored is important both for innovation and differentiation when delivering games for a mobile or tablet, but the actual live game is as important as it captures the hearts, minds and share of wallet for the operators. It is therefore critical that operators partner with providers that are not only able to design, test and deploy new games and feature sets into the market place on a regular basis. But access to exclusive live gaming content for geographical market penetration can help make or break operators' marketing acquisition or retention programs. This component shall become increasingly central as gaming in general becomes similar to fashion, whereby you're 'hot' one moment and 'out' the next. Coupled with the decreasing attention spans of consumers, numerous distractions and desire to conform or be the first to play a new game - product marketing of new games shall be a central differentiator of success across both smartphone and tablet.

THE GAMING EXPERIENCE

Many companies consider innovation and differentiation in regards to the physical hard product or the tangible process which they should do. However live gaming players just don't buy a mobile phone because it's a mobile phone and they can play the game. It's what the phone can do for them and likewise the game - it's the experience, the engagement and how it makes you feel.

Live dealer gaming allows players to confirm that the games are fair and trustworthy, as you can see and interact with the dealer, which is one of the reasons for the rapid growth over RNG games. Live gaming is like watching your favourite television show, you wish to be entertained. So I believe you need to enhance the gaming experience or entertainment delivery for the player. Therefore live gaming providers such as ourselves need to offer live gaming streams from different exotic locations. So as against just offering a stream from one studio, Ezugi is going to offer streams from different studios and land based casinos all around the world delivering a true global experience for both the players and the operators.

Of course there shall be challenges ahead over the next 12-24 months. That is why we as a gaming solutions provider have taken those requirements into account and have produced market ready feature led products for different devices with gaming entertainment central to that process for innovation and differentiation across smartphones and tablets.

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01 SPHINX 3D

Casino Slots

GTECH

Following its initial installation in Las Vegas, Nevada, the nationwide roll-out of GTECH's SPHINX 3DTM game has begun. Properties in Connecticut, including Foxwoods Resort Casino, as well as California, North Dakota and Florida have installed the product, and more will follow in Idaho, Minnesota and Iowa. Initial performance and player feedback gathered at promotional events has been exceptional.

"Players are amazed when they see the 3D effects for the first time," said Foxwoods Resort Casino Executive Director of Slot Operations Angelo Avallone. "It keeps them engaged and eager to get to more bonus rounds, and they tell their friends and other players to check out this truly amazing game."

"Based on feedback from properties that already have the product on their floor, players are immensely enjoying the unique SPHINX 3D game experience," said Victor Duarte, GTECH Sr. Vice President, Gaming and Content, and Sr. Vice President, North American Commercial Gaming. "Innovation is the backbone of our company's success, and we are pleased to see our truly unique and innovative SPHINX 3D product becoming a huge hit with players."



02 RAPID FIRE SPORTS SERVICE

Online Gaming

Playtech

Playtech has integrated Metric Gaming's Rapid Fire Sports service into its IMS back office system, enhancing the gaming offering for Tier 1 licensee, Coral. Rapid Fire gives Coral the opportunity to significantly increase the range of betting options that can be offered to players, with an innovative and immediate in-play product offered on selected football matches. Players can place bets on the next event to occur, such as a throw in, free kick, goal kick or corner kick. This integration, which allows operators to focus on identifying the very best opportunities to grow their business and benefit from the synergy with the Playtech system, showcases the flexibility of the Open Platform.

Combining external components with the IMS's player management and marketing tools provides licensees with more opportunities to engage with players, such as the option to wrap external games with Playtech's exclusive features including Game Specific and Free Spin bonuses. In recent months various leading Playtech licensees have taken the opportunity to enhance their offering while retaining the IMS as their main back office system. The incorporation of external components and business support systems, including game servers and games, external wallets, campaign systems, and analytic systems, into the IMS – all combine with Playtech's single player account, across all products.

03 ISIGHT BACK OFFICE

Online Gaming

GameAccount Network

GameAccount Network has launched its next generation iSight Back Office. The newly re-engineered iSight Back Office will empower operators of GameAccount's GameSTACK enterprise Internet gaming solution to comprehensively manage their customers' accounts and implement cutting-edge marketing promotions designed to encourage increased visitation to any casino operator's property.

The comprehensive redesign initiative of iSight Back Office was aligned to the needs of US' operators; from enhanced bonusing functionalities, deeply integrated marketing and reporting tools, and robust Casino Management System ("CMS") integration controls courtesy of iBridge. GameAccount's patent-pending iBridge, part of the GameSTACK Internet Gaming System, links to any third party CMS enabling casino operators to implement diverse marketing promotions across desktop and mobile Internet devices capable of being redeemed online or on-property. GameAccount is committed to continuing to enhance the iSight Back Office following this month's major release to ensure operators have the most advanced patron management suite in the marketplace.

Highlights

- Next-generation iSight Back Office now live in the US market and supporting both

virtual currency-based Simulated Gaming and real money Regulated Gaming. One back office supporting two distinct business models prior to and post-regulation of Internet gaming.

- iBridge patent-pending framework links the Company's GameSTACK Internet Gaming System to various proprietary and third party casino management systems, business intelligence tools, and loyalty club programs.
- iSight Back Office grants casino operators the ability to devise an Internet gaming experience driving online players to their casino properties through cutting-edge online-to-property marketing promotions.
- Newly integrated messaging and bonusing capabilities for in-casino real money gaming via GameSTACK Internet gaming system.
- Integrated cash-in/out interface capability, enabling operators to deposit and withdraw from their online accounts via the operator's existing on-property cage infrastructure. Relevant for both real money Regulated Gaming and enabling patrons to purchase virtual credits while on-property for the purposes of undertaking Simulated Gaming at home or on the move via mobile devices.

Products

LAND-BASED & INTERACTIVE

YAHTZEE

Online Slots

Williams Interactive

Williams Interactive has launched the YAHTZEE online slot game, the first Hasbro game addition to its Game Server library of authentic Vegas-style and UK-favourite casino games. The launch is possible as a result of the brand licensing agreement between Scientific Games and Hasbro.

The YAHTZEE slot is based on a proven terrestrial casino slot machine game and has been optimised for the play styles and preferences of online casino fans. A unique persistent-state mechanic in the YAHTZEE Party Bonus allows players to save bonus triggers for use whenever they choose, allowing even minimum bet players to qualify for one of two exciting jackpot awards.

Tom Wood, Director of Casino Products for Williams Interactive commented: "With multiple exciting bonuses and a unique 'store your bonus' mechanic, we expect the YAHTZEE game to appeal to a wide range of players with multiple motivations and game preferences."



JURASSIC PARK

Online Slots

Microgaming

Microgaming has launched its latest online slot, Jurassic Park, which is now available via its download, Flash and Quickfire platforms. The new online slot is developed through a licensing agreement with Universal Partnerships & Licensing.

Featuring 243 ways to win across five reels, the Jurassic Park online slot includes a breath-taking array of 3D-rendered imagery, realistic environmental animations, parallax scrolling effects, and awesome audio, all of which combine to deliver a supreme gaming experience.

Activated by three or more of the Mosquito in Amber scatter symbols, players are randomly awarded one of five dinosaur-themed features. Each dinosaur awards 12 free spins and its own unique set of bonus features. These include wild reels, mystery multipliers, split wilds, wild multipliers, winning wilds and a new evolution of Running Wilds. Once triggered 25 times, players will have the option to choose their favourite dinosaur during the free spins rounds.

Information

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Gaming Publishing
Samson House,
457 Manchester Road,
Manchester M29 7BR, UK
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Company Registration
Number: 7342069
VAT No: 995 9138 52



Commercial Director
John Slattery
john@gamingpublishing.co.uk
+44 (0)7917 166471



Advertising Executive
James Slattery
james@gamingpublishing.co.uk
+44 (0)7917 166471



Advertising Executive
Alison Dronfield
alison@gamingpublishing.co.uk
+44 (0)1204 410771



Subscriptions Manager
Jennifer Pekk
jennifer@gamingpublishing.co.uk
+44 (0)161 724 8716



Editor
Lewis Pekk
lewis@gamingpublishing.co.uk
+44 (0) 1942 879 291



Associate Editor
(Spain-Málaga)
Karen Southall
karensouthall@gmail.com



News Editor
Phil Martin
phil@gamingpublishing.co.uk
+44 (0)161 236 6669

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