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EUROPEAN LOTTERY MARKETS THE NUMBERS GAME

Tracking the sheer scale of the European lottery business and the vertical rise of Instant Games

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The Brazilian Institute of Gaming claims 200,000 Brazilians leave the country to gamble...
BRAZIL P11



The first installations of Aristocrat's Lightning Link have been sited at Westspiel Casino
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GLI discussed iGaming and fantasy sports at its 16th North American Regulators Roundtable
US P20



Mohegan Sun's plans to build its integrated resort at Incheon Airport could face major issues
SOUTH KOREA P26

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April 2016



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Lewis Pek
Editor

Comment

April 2016

It's been great to tackle full-on a subject about which we've given only cursory attention in the past - lotteries. While we have included a lotteries section in every one of our market reports, this enormous sector deserves a much more dedicated approach - and so this issue we begin by looking at some of the major western European lottery markets. To truly understand a gaming market you must consider the impact of every form of gaming within its borders and a clear appreciation of where each lottery product sits within its firmament of gaming options, makes for a fascinating report and one that we'll be expanding in the near future to add to our global lotteries reach.

In addition to our lotteries focus this month, we have several fascinating Insight stories, starting with a look at the street market in Serbia ahead of the gaming show in Belgrade next month; we study the architectural use of lighting designs and how they have transformed the interior of a casino in Canada; and, perhaps the hardest article to include this month, the opening of Casino Liberte in the Seychelles. There's nothing like staring at a Manchester skyline in gloom of March while sourcing photography for a Seychelles 'paradise' casino opening to make life seem futile.

THE IDEA THAT ONE IN EVERY TWO DDoS ATTACKS IN ONLINE WAGERING IS CARRIED OUT BY A COMPETITOR IS SHOCKING

Thanks also to Mazooma Games and Greentube for their technical patience explaining the details of the novoSDK (software developers kit) for our Interactive article and make sure to read the final Interactive piece this month from MiFinity. 'Financial impact protection' might sound like a 'dry as a bone read,' but the statistics alone are worth the entry price.

The fact that the online gaming industry is the target of half of the recorded DDoS attacks in the third quarter of 2015 is a frightening statistic. However, the idea that one in every two DDoS attacks (Distributed Denial of Service - electronic attacks involving multiple computers, which send repeated HTTP requests or pings to a server to load it down and render it inaccessible for a period of time) in online wagering is carried out by a competitor, is both shocking and at the same time unsurprising. Why be a 'mischievous' hacker when you could be well paid too?

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Calendar

April 2016

NORTH AMERICA

iGaming North America 2016

April 5-7, 2016

LOCATION

Planet Holly Wood Resort & Casino
Las Vegas, Nevada, United States

ORGANISER

iGaming Business
Electric Word, 2nd Floor
5 Thomas More Square
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EMEA

World Regulatory Briefing Africa

April 11-12, 2016

LOCATION

Lagos, Nigeria

ORGANISER

Clarion Events
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SOUTH AMERICA

FADJA Colombia 2016

April 13-14, 2016

LOCATION

Corferias, Bogota, Colombia

ORGANISER

3A Producciones SAS
Av Carrera 60 No 22-99 Arboleda
de Salitre, Torre 1
Oficina 2201
Bogota
Colombia

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EMEA

Slot Summit Europe 2016, Germany

April 18-20, 2016

LOCATION

Steigenberger Hotel Am
Kanzleramt, Berlin, Germany

ORGANISER

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Fulham Green, Bedford House
69-79 Fulham High Street
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EMEA

Betting on Football Conference 2016, UK

April 21, 2016

LOCATION

Stamford Bridge, London,
United Kingdom

ORGANISER

SBC Events
103-105 Brighton Road
Coultsden
Surrey CR5 2NG
United Kingdom

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NORTH AMERICA

GIGSE 2016, US

April 27-29, 2016

LOCATION

Marriott Marquis Hotel,
San Francisco, California, US

ORGANISER

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Fulham Green, Bedford House
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NORTH AMERICA

The Millennial Summit, US

April 27-28, 2016

LOCATION

Marriott Marquis Hotel,
San Francisco, California, US

ORGANISER

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NORTH AMERICA

Southern Gaming Summit & Bingo World 2016

May 3-5, 2016

LOCATION

Mississippi Coast Coliseum &
Convention Center, Biloxi,
Mississippi, US

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El proceso de licencia para la construcción de un Hard Rock Hotel y Casino en Ciudad del Este (Paraguay) se pondrá en marcha en el primer semestre de este año, según anunció el Ministro de Industria y Comercio de Paraguay, Gustavo Leite.

En lo que supone un acuerdo emblemático, la Federação Paulista de Futebol (FPF), que gestiona todos los torneos de fútbol oficiales de São Paulo en Brasil, ha incorporado el sistema de detección de fraudes Sportradar para cubrir más de 200 partidos en los años 2016 y 2017.

La multinacional española Codere ha publicado que sus ingresos operativos subieron en 2015 un 18,3 por ciento hasta situarse en los 1639,5 millones, fundamentalmente gracias a la mejora en los resultados de Argentina, Italia y Panamá.

Enjoy ha abierto el primero de los tres casinos que tiene previstos la empresa con la cadena hotelera Decameron, que opera en Centroamérica, Sudamérica y África. El nuevo casino tiene un total de 90 máquinas tragaperras, ocho mesas y un bar, y ofrecerá entretenimiento del directo.

El Comité de Finanzas de la Cámara de Representantes de Uruguay se dispone a aprobar una importante ley nueva sobre el juego. Tiene como objetivo establecer un «marco legal exhaustivo» que supondrá cambios importantes para la forma en que el Estado regula y organiza el sector. El proyecto de ley también refuerza el monopolio estatal sobre los casinos, las carreras de caballos, las loterías y las apuestas deportivas, además del juego online.

El presidente del Instituto Brasileño del Juego, Magno José de Sousa Santos, ha afirmado ante el Congreso que nada menos que 200 000 brasileños salen del país al mes para participar en actividades de juego.

El mercado de los casinos podría asistir a un despegue significativo en la República Dominicana, tras el anuncio de que el Grupo Globalia tiene previsto seguir invirtiendo en el mercado. Su propietario, Juan José Hidalgo, ha creado Riverbound Investment para invertir en casinos formando parte de hoteles que ya son propiedad de la empresa y sus socios.

La Superintendencia de Casinos de Juego de Chile (SCJ) ha publicado los requisitos para el próximo proceso de licitación para la obtención de licencias de casino municipales. El Consejo de Resoluciones de la SJC rebaja los requisitos mínimos para las nuevas licencias, incluida una oferta financiera mínima garantizada en función del tamaño y la ubicación del nuevo casino.

Los casinos de la zona de juego de la ciudad rusa de Azov podrían mantenerse abiertos hasta finales de 2018 tras las negociaciones con la administración de Krasnodar y el Gobierno de Rusia.

Paraguay Minister makes licence announcement at an investors meeting that Hard Rock will be granted approval this year

PARAGUAY CASINO LICENCES



Paraguay to Grant Hard Rock 2016 Licence

The licensing process for the construction of a Hard Rock Hotel and Casino in the city of Ciudad del Este in Paraguay, will be initiated in the first half of this year, according to the Ministry of Industry and Commerce of Paraguay, Gustavo Leite.

“We want a hotel with over 200 rooms, and which has parking for at least 2500 cars. We want something that will transform Ciudad del Este,” the Minister said during a press conference at the Presidential Palace. The Minister added that in terms of scale the casino will be something similar to which is “operating internationally and in Las Vegas. We want our neighbours to invest in the country the most, it is a time when they are looking a lot at this country and everyone is welcome.”

The Minister made the announcement after a meeting with a group of investors from The Latin American Gaming Group – a group associated with the Hard Rock Hotel and Casino brand and added that the government wanted to supplement the industrial area of Ciudad del Este with an entertainment area for tourists.

“The government can only provide clear rules, as you know a casino and hotel of this magnitude cannot be granted without a

transparent bidding process. We want a first class hotel, which prevents money laundering, and we want global operators,” he said.

Hard Rock International first announced plans to install a casino and hotel in the city of Ciudad del Este in 2014. The hotel will, it is believed, have 250 rooms while the casino will house 500 slot machines and 30 gaming tables.

The decision to launch in Paraguay was made after a wide sweeping study was carried out by a team of local specialists who provided advice on marketing, strategy as well as financial planning, government oversight and local gaming laws. Ciudad del Este is the second largest city in Paraguay and the capital of the Alto Paraná Department, situated on the Rio Paraná.

There has, however, been some controversy regarding the planned location of the casino and hotel. Last November it was announced that the casino would be located on land belonging to the headquarters of Paraguay’s National Ports Authority (ANPP) which has become increasingly abandoned. However trade unionists have asked a judge to block the move arguing that there is a ban in place which prohibits further development in the area.



FPF brings Sportradar's fraud detection system to South America

Brazil

In a landmark agreement, the Federação Paulista de Futebol (FPF), which manages all the official football tournaments within the state of São Paulo in Brazil, has brought in Sportradar’s Fraud Detection System to cover over 200 matches in 2016 and 2017.

This partnership marks the first time that any match-

fixing detection service has been employed by a South American football rights holder. Under the terms of the agreement, the FDS will monitor matches in the Campeonato Paulista (which includes teams like Corinthians, Santos and São Paulo F.C), as well as Youth and Women’s competitions in the state.

Speaking at the official signing ceremony in São Paulo, FPF President Reinaldo Carneiro Bastos underlined the following: “In today’s climate, where sports and leagues everywhere are fighting with those who would manipulate results, our teams, players and fans must trust the performances on the field and scores on the league table. So we looked for the best in the business. Sportradar are trusted by the biggest names in the biggest sports. We are delighted that we could bring them to South America, to

Brazil, to show our teams and fans that football in São Paulo is pure and will remain pure”.

Sportradar Security Services Managing Director Andreas Krannich added his thoughts: “This is a big moment for Sportradar’s Security Services. It is the first time that we have been asked to provide our Fraud Detection System to a competition in South America. We have managed to establish some great momentum in recent years: developing our relationships in Asia, signing MoUs with law enforcement agencies and supporting successful investigations from Austria to Australia. But there is no doubt today is a significant milestone in our evolution. We are sure that all the fans, participants and stakeholders will be equally thankful. We have here today set a clear marker about what we want for the future of Paulista and Brazilian football”.

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El desarrollador de casinos ruso Diamond

Fortune ha revelado sus planes para su Selena World Resort & Casino, valorado en 900 millones de dólares, en la zona de juego rusa de Primorye, en el extremo oriental del país cerca de Vladivostok, junto con su propia pendiente de esquí.

El Consejo de Gobierno de Castilla-La

Mancha ha autorizado la apertura de un nuevo casino en la localidad toledana de Illescas. El Gran Casino de La Mancha, que abrirá sus puertas en junio, generará más de 120 puestos de trabajo.

El 10 de marzo, el pleno de la Cámara de

Representantes de Chipre aprobó el reglamento del primer casino completamente legal de la República de Chipre con 28 votos a favor, uno en contra y 16 abstenciones. Los requisitos mínimos son 100 mesas y 1000 máquinas, y la opción que consiga la licencia podría empezar inmediatamente a operar un casino para un período de 30 años, de modo que el ganador de la licitación se anunciará inminentemente.

Los mayores casinos de Gauteng se

someterán a una imposición fiscal más elevada, ya que el Gobierno provincial del Primer Ministro David Makhura está intentando mejorar su recaudación. El impuesto sobre el juego estuvo fijado en el nueve por ciento en la última década pero ahora, con el Gobierno intentando impulsar su recaudación para pasar de 5000 a 5600 millones de rands a finales de 2019, se está tomando en consideración un sistema fiscal escalonado.

Gaming Laboratories International (GLI)

albergó con satisfacción su 16.ª Mesa Redonda Anual de Reguladores de Norteamérica, en la que participaron más de 200 reguladores de 31 jurisdicciones de Norteamérica y el Caribe.

MGM Resorts se ha asociado con la nación

tribal de los Schaghticoke para intentar desbaratar los planes de conceder una tercera licencia de casino en Connecticut a los dos operadores que tienen casinos allí actualmente.

El Seminole Hard Rock Hotel & Casino

Tampa ha inaugurado una nueva sala dedicada a tragaperras VIP donde se ofrecerá el máximo nivel de servicio y privacidad a los clientes más exclusivos del establecimiento.

VGT ha firmado un importante acuerdo con

Cherokee Nation Entertainment (CNE), la rama de la nación Cherokee dedicada al juego y al sector de la hospitalidad, que supone la incorporación de juegos de VGT en nueve establecimientos de casino por todo el noreste de Oklahoma.

El futuro del juego en Florida podría decidirse

ahora en los tribunales tras la decisión de los legisladores del estado de posponer la proposición de acuerdo para un casino valorado en 3000 millones de dólares suscrito entre el gobernador de Florida Rick Scott y la tribu de los seminolas de Florida.

Enjoy Opens First Casino in Colombia

Chile-based operator Enjoy has begun its further expansion into Latin America with the inauguration of its first Colombian casino on the island of San Andrés in the Caribbean Sea

Enjoy has opened the first of three casinos the company has planned with the hotel chain Decameron, which operates in Central and South America and Africa

COLOMBIA CASINO OPERATIONS



The new casino has a total of 90 slot machines, eight tables, a bar and will offer live entertainment. General Manager Enjoy, Gerardo Cood said that the agreement will allow the company to, "get to know a market that we think has great potential and which opens up interesting possibilities for the company." He also went onto say that the company is "looking to continue to expand its operations in Latin America and from the assessment we make of this first operation in San Andrés, we will define where and when to open new operations in other Decameron resorts in Colombia and Peru, under the agreement we have signed."

The total investment for the new casino was US\$3.5m. The licence is valid for the next five years and may be renewed. The partnership also enables Enjoy to operate casinos located in the hotel complexes located in the Royal Decameron Barú located on the peninsula in Cartagena Colombia as well as the Royal Decameron Punta Sal in Peru.

In April 2015 it was announced that Enjoy had signed a Memorandum of Understanding with the Decameron hotel chain. The document

outlines the general terms and conditions of a partnership regarding the operation of casinos by Enjoy in the Decameron resorts, and the marketing of the hotels belonging to both chains. According to the document the joint operations would come into operation in the first half of 2016. The total investment will stand at around US\$5m.

Decameron Hotels & Resorts, S.A. owns and operates a chain of hotels in the Caribbean, Central America, South America, and Africa. Enjoy is the leader of the Chilean casino industry with around 37 per cent of the market and recorded sales of US\$325m in 2012. The company operates over 6,000 slot machines, 274 tables and 860 bingo seats in Chile. In Chile the company operates seven casinos. It also operates two other casinos in Argentina and Uruguay. The company's improved outlook has also been helped by its recent purchasing of the Conrad hotel and Casino in Punta del Este, the largest in South America. In May 2013 the Uruguayan government approved a deal where the operator of the Conrad in Uruguay switched from Baluma SA to Enjoy SA meaning that Enjoy took control over the Conrad.



Panama & Argentina Latin America drives revenues for Codere

Spanish multinational Codere has reported that operating revenues in 2015 increased by 18.3 per cent to €1,639.5m mainly due to the improved results in Argentina, Italy and Panama.

In Argentina, revenue increased by 39.4 per cent compared to last year and stood at €681.8m. Improved revenues were due mainly to the appreciation of the Argentine peso when compared against the dollar and against the Euro. Codere also reported increased volumes in their gaming rooms in most markets. Operating income was also helped by the appreciation of the dollar

against the euro in Panama. However, a decrease of €2.7m was recorded in Colombia mainly due to the devaluation of the peso against the euro (14.8 per cent).

The company highlighted a number of recent developments, in particular the new gaming tax imposed on operators in 2015 in Panama. The new tax applies a tax on cash withdrawals from casinos of 5.5 per cent. However the new tax is not applicable to its largest operation in Panama – the racino located at the Presidente Remon race track in Panama City.

The report also highlighted the fact that Colombia's gaming control board has begun the connection of all slots in Colombia to a centrally controlled server. The gaming board has divided the timetable into three stages with full compliance for the industry set for September 30, 2016. The tax regime will also change with either a fixed rate per machine or 12 per cent of revenue generated per slot – whatever is the highest amount.

Mexico

A number of tourism associations and organisations in Mexico are joining forces to put pressure on the government so that casinos are not permitted in already popular tourist zones.

Manuel Paredes Mendoza, Executive Director of the Riviera Maya Hotel Association said that a total of 20 associations had agreed to lobby the government so that Mexico's new gaming laws have safeguards in place. "We believe the law as it is currently stipulated could be counterproductive not only for the tourism sector, but because it could compromise the security of the country," said Mr. Paredes Mendoza. A number of organisations aim to be a hindrance to both the economic and social development of Mexico.

200,000 Brazilians Travel to Gamble

The President of the Brazilian Institute of Gaming Magno José de Sousa Santos has told Congress that as many as 200,000 Brazilians leave the country in order to gamble in neighbouring countries each month

Institute of Gaming Director presents case for casinos before congress, describing the exodus of players and their taxes to neighbouring countries

BRAZIL CASINO LEGISLATION



The President of the Brazilian Institute of Gaming Magno José de Sousa Santos has told Congress that as many as 200,000 Brazilians leave the country in order to gamble each month.

Speaking before the Special Committee in the House of Representatives, which is currently considering proposals in order to create a regulatory framework for gaming in Brazil, Mr. Sousa said that around 150,000 Brazilians travel a year to casinos in Las Vegas alone and that 70 per cent of players in casinos in Uruguay are Brazilian.

"The lack of a regulatory framework in the area of gaming leads Brazilians to bet in casinos in South America, mainly in Uruguay, Argentina and Paraguay," he said. "Travel agents in countries belonging to the Mercosur region bring Brazilians over to stay in hotels with casinos in these countries," he said.

Mr. Souza said that Brazil is losing out on around R\$17bn a year in gaming tax revenue and that the ban on gaming in Brazil has led to a significant increase in illegal gaming as well

saying that illegal gambling amounts to around R\$18.9bn, almost twice the amount generated by the legal sphere.

The special commission tasked with drafting the regulatory framework for gaming in Brazil has heard from a wide number of experts over recent weeks. Last month the commission held a public hearing to hear the opinions of experts from abroad in order to more fully understand the operation of casinos and how gaming is regulated in other countries.

Impetus is growing for reform and new gaming legislation is being debated as part of "Brazil Agenda" a set of new rules put forward by the President of the Senate, Renan Calheiros – a business-friendly agenda which is designed to provide a much needed boost to economic growth. Casinos were first banned in 1946 by President Eurico Gaspar Dutra claiming they spread prostitution and encouraged the mafia and money laundering. This saw the immediate closure of around 70 casinos. Before the ban Brazilian casinos were some of the most famous in the world and generated a significant proportion of government finances.

URUGUAY – The Uruguayan Finance Committee in the House of Representatives is set to approve a major new gaming law. It aims to establish a 'comprehensive framework' bringing major changes in how the industry is regulated and organised by the state in the future. The bill also reinforces the state monopoly over casinos, horse racing, lotteries and sports betting as well as online gaming. In addition the new bill will create a new office which will be responsible for monitoring the industry and for enforcing bans as well as imposing fines and sanctions on those found to be breaking the law.

According to the draft of the new law it will "reorganise the institutions and clearly distinguish the regulatory function, control and supervision over the direct operation of gaming by the state."

If passed the new law will put an end to many years of stalemate when it comes to gaming. During the first Vázquez administration (2005–2010), the Executive sent a bill to parliament banning slot machines in shops and established a restrictive policy on gambling. This project became stalled in the legislature. Then the administration of José Mujica (2010–2015) put forward regulation which would allow slots in neighbourhood shops with three slot machines being permitted per establishment with provisions in place that they could not be in close proximity to school, colleges and sports centres. However this bill failed to gather enough support.

Crucially, the bill seeks to put an end to the controversy over the legality of slot machines in unauthorised establishments. According to official data, throughout the country there are approximately 20,000 slots located in shops, bars, kiosks and sports clubs. On average per month each of these machines collect between US\$15–20,000 and do not pay taxes. The rise in illegal gambling has meant that the new law has for the first time gained a wide level of consensus amongst lawmakers who have become increasingly concerned over the spread of illegal gaming. In addition it could have wide ranging consequences for the online sector as the bill also states that all online gambling which is not run and administered by the state, will be banned.

DOMINICAN REPUBLIC – The casino market could see a significant boost in the Dominican Republic with the announcement that Grupo Globalia is looking to invest further in the market. Owner Juan José Hidalgo has created Riverbound Investment to invest in casinos as part of hotels which are already owned by the company and its partners. It will also look for other opportunities in standalone casinos on the island and casinos not currently owned by the group.

The company is looking to gain a significant market share as it seeks to expand. The company runs casinos in its Be Live hotels as well as the only stand alone casino on the island: the Dominicus. Globalia is Spain's leading tourist group and Globalia's investments in the Dominican Republic stand at more than US\$450m. The Dominican Republic already has over 30 casinos, more than any other country in the Caribbean.

Dominican Republic

Vermantia is going live with Juancito Sport, one of Dominican Republic's most dominant betting operators.

The agreement gives Juancito access to Vermantia CONNECT, and specifically an extensive portfolio of 12+ Virtual Games, which will be delivered across the operator's retail network.

The suite offers high quality virtual sports by Vermantia and its premium content partners Kiron Interactive, VSOFT and FLUID GAMES. The initial rollout includes Horse Racing Roulette, a tailor-made virtual game created by Vermantia's partnership with Kiron Interactive, combining Virtual Horse Racing and the traditional bet types of mini-roulette.

The service is offered through Soll Systems' central platform as a fully integrated end-to-end solution.

Chile publishes details for Municipal Tender Process

Chile

The Chilean Gaming Board (SIC) has published the requirements for the upcoming tender process for the municipal casino licences.

The SIC's Resolution Council lays down the minimum requirements for the new licences including a guaranteed minimum financial bid depending on the size and location of the new casino. This varies from US\$526,000 (for the casino located in Puerto Natales) to a maximum of US\$22.3m (for the casino located in Vina del Mar) in order to "foster greater competition" within the industry. In addition the SIC will take into account and welcome any additional

projects connected to the casino which will improve tourist infrastructure.

The new tender process could help raise tax income generated for the state by the new casinos by as much as 46 per cent on average while gross gaming income (which will be divided equally between the municipality and the state where the casino is located) will increase by 20 per cent.

The SIC's Resolution Council confirmed that the casinos in Arica, Iquique and Vina del Mar will continue to be housed in the municipal buildings which are already built and intended for this purpose but operators will be permitted to renovate and expand upon these properties. The seven new licences are available after President Michelle Bachelet signed into law new regulations, which extend the licenses of the seven municipal casinos in Chile.

Der Lizenzierungsprozess für den Bau eines Hard Rock Hotels und Kasinos in Ciudad del Este in Paraguay wird laut Gustavo Leite, dem Minister für Industrie und Handel von Paraguay, in der ersten Hälfte dieses Jahres beginnen.

In einer wegweisenden Übereinkunft hat die Federação Paulista de Futebol (FPF), die alle offiziellen Fußballturniere im brasilianischen Staat São Paulo managt, das Betrugserfassungssystem Sportradar eingeführt, das 2016 und 2017 mehr als 200 Spiele abdecken soll.

Der spanische Multi Codere berichtet, dass die betrieblichen Erträge 2015 um 18,3 Prozent auf € 1.639.500 gestiegen sind, was hauptsächlich auf die besseren Ergebnisse in Argentinien, Italien und Panama zurückzuführen sei.

Enjoy hat das erste von drei Kasinos, die das Unternehmen mit der Hotelkette Decameron geplant hat, die in Mittel- und Südamerika sowie in Afrika operiert. Das neue Kasino verfügt über 90 Spielautomaten, acht Spieltische und eine Bar und bietet darüber hinaus auch Live-Unterhaltung.

Der Finanzausschuss im Repräsentantenhaus von Uruguay wird ein wichtiges neues Glücksspielgesetz genehmigen. Ziel ist es, einen "umfassenden Rahmen" zu erstellen, der für die Zukunft wichtige Änderungen bezüglich der Regulierung der Branche und der Organisation durch den Staat mit sich bringen soll. Die Gesetzesvorlage stärkt darüber hinaus das Staatsmonopol in den Bereichen Kasino, Pferderennen, Lotterien und Sportwetten sowie das Online-Glücksspiel.

Der Präsident des Brazilian Institute of Gaming, Magno José de Sousa Santos, teilte dem Kongress mit, dass 200.000 Brasilianer jeden Monat das Land verlassen, um zu spielen.

Der Kasinomarkt in der Dominikanischen Republik könnte durch die Ankündigung, dass der Grupo Globalia weitere Investitionen am Markt plant, einen wichtigen Schub erfahren. Der Besitzer, Juan José Hidalgo, hat Riverbound Investment gegründet, um in Kasinos als Teil von Hotels zu investieren, die sich bereits im Besitz des Unternehmens und dessen Partnern befinden.

Der Chilean Gaming Board (SJC) gab die Anforderungen für das bevorstehende Ausschreibungsverfahren für die kommunalen Kasinolizenzen bekannt. Die SJC-Beschlussversammlung beschreibt die Mindestanforderungen für die neuen Lizenzen, einschließlich eines garantierten finanziellen Mindestgebotes in Abhängigkeit von der Größe und dem Standort des neuen Kasinos.

Kasinos in der Spielzone in der russischen Stadt Asow könnten nach Gesprächen mit der Verwaltung von Krasnodar und der russischen Regierung bis Ende 2018 geöffnet bleiben.

Casino Interlaken Delighted with DRGT

Casino Interlaken came to DRGT with an 'SOS' call as its system had failed. The problem was so bad that it had affected all slot machines. The casino was forced to switch off all slot machines for a full seven days due to problems with the system of the previous supplier

A year after calling DRGT with a "systems SOS," Switzerland's Casino Interlaken is delighted with the practical intervention

SWITZERLAND OPERATIONS

A year since the install of its DRGT casino management system, Switzerland's Casino Interlaken is singing its praises. Casino Interlaken came to DRGT with an 'SOS' call as its system had failed. The problem was so bad that it had affected all slot machines. The casino was forced to switch off all slot machines for a full seven days due to problems with the system of the previous supplier.

Oliver Grimm, CEO of Casino Interlaken, said: "We were faced with real damage to our corporate image – we had to react immediately. The previous systems supplier was no longer a viable solution for us – we made the conscious choice of moving to a new systems supplier." This choice was DRGT. The management team looked to the systems experience in other Swiss casinos – and the feedback for DRGT was overwhelming. Within four weeks of placing the order, DRGT had completed the installation. "The speed from order to implementation was excellent," Mr. Grimm continued. "The DRGT

team is extremely professional. We are very pleased with the system and we look back on 12 months of the system working excellently."

Jens Sellgard, COO at Casino Interlaken added: "The DRGT system is very stable – and I am referring to both hardware and software. The software is easy to handle and we have complete reports of our slots at our fingertips. We really appreciate that."

Christian Eder, Operations Director at DRGT, added: "The excellent feedback in the Swiss market contributed to Casino Interlaken management deciding in favour of DRGT. We had a customer in real problems and I am very proud of the quick and professional support our team gave them to ensure that their casino could return to normal business. Today they profit from a system that is serverless, so has no single point of error, and that offers a host of benefits. Last but not least, we have the service to match."



UK

Caesars UK donates £25,000 to charity

Caesars Entertainment UK has presented a charitable cheque donation for £25,000 to the Gordon Moody Association, a charity that supports people with severe gambling addiction and their families.

The cheque presentation took place outside the garden meeting space at one of the charity's residential centres in Beckenham, Kent. The garden buildings, which are used as part of the charity's rehabilitation programme, were funded from a previous donation by Caesars Entertainment UK.

The new funds, which were presented by Managing Director of Caesars Entertainment UK Mike Rothwell and Caesars Entertainment UK Chief Marketing Officer EMEA, Sarah Sculpher, will help towards upgrading accommodation at the Beckenham and Dudley residential site as well as help enhance language capabilities to the Chinese and Arabic communities within the UK.



Mike Rothwell, Managing Director of Caesars Entertainment UK, said: "Caesars Entertainment UK has been a driving force behind the development of SENSE, the UK casino industry's national Voluntary Self Exclusion scheme and the creation of Playing Safe – a statement of principles which express the industry's commitment to doing more than the minimum required by law to promote responsible gambling. However, despite these measures, for a small percentage of people, they are not enough. The problems caused can be devastating. We are proud to support the good work the Gordon Moody Association do to help rehabilitate those most in need."

Russia

Casinos in Russia's Azov City gambling zone could stay open until the end of 2018 following discussions with the administration of Krasnodar and the Russian Government.

Three casinos are in operation in the gambling zone; Casino Shambala, Casino Nirvana and Oracul Casino. However the State Duma signed off a bill to develop two more gambling zones in Crimea and Sochi in the summer of 2014, spelling the end of the gambling zone in Azov City. The casinos in Azov City were given a deadline of April 1, 2015 to close but some took legal action demanding that they were reimbursed for their investments which are believed to be as high as US\$37.2m. At least two of the casinos have refused to shut and are still in operation. In 2015 the Azov City was visited by about 500,000 people.



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Der russische Kasino-Entwickler Diamond

Fortune hat seine Pläne für sein US \$ 900 Mio. Selena World Resort & Casino in Russlands Gaming-Zone Primorje im russischen fernen Osten in der Nähe von Wladivostok mit einer eigenen Skipiste bekanntgegeben.

Der Regierungsrat von Castilla-La Mancha

hat die Eröffnung eines neuen Kasinos in der Stadt Toledo in Illescas genehmigt. Das Gran Casino de La Mancha, das im Juni seine Pforten öffnet, wird mehr als 120 Arbeitsplätze schaffen.

Am 10. März bestätigte das Plenum des

Repräsentantenhaus auf Zypern die Regelungen für das erste vollständig legale Kasino in der Republik Zypern mit 28 Ja-Stimmen, einer Nein-Stimme und 16 Enthaltungen. Mindestanforderungen sind 100 Spieltische und 1000 Spielautomaten; der Gewinner der Ausschreibung wird in Kürze bekanntgegeben und könnte den Betrieb eines Kasinos für einen Zeitraum von 30 Jahren unverzüglich aufnehmen.

Gautengs größere Kasinos sollen zu einem

höheren Satz besteuert werden, da die Provinzregierung von Premier David Makhura ihre Steuereinnahmen erhöhen will. Die Glücksspielersteuer wurde auf 9 Prozent für das letzte Jahrzehnt festgesetzt. Jetzt jedoch wird über ein abgestuftes Steuersystem nachgedacht, da die Regierung die Steuereinnahmen bis Ende 2019 von R5 Mrd. auf R5,6 Mrd. steigern will.

Gaming Laboratories International (GLI)

richtete seinen 16. North American Regulators Roundtable aus und hieß mehr als 200 Regulierer aus 31 Rechtssystemen Nordamerikas und der Karibik willkommen.

MGM Resorts arbeitet jetzt mit dem Stamm

der Schaghticoke zusammen, um Pläne zu vereiteln, nach denen den beiden Betreibern, die derzeit Kasinos in Connecticut betreiben, eine dritte Kasinolizenz gewährt werden soll.

Seminole Hard Rock Hotel & Casino Tampa

hat eine neue Räumlichkeit für VIP-Slots geschaffen, die VIP-Gästen das höchste Niveau an Dienstleistungen und das höchste Maß an Privatsphäre bietet.

Die Zukunft des Glücksspiels in Florida

könnte sich nun – nach einer Entscheidung des Gesetzgebers von Florida, wonach ein 3 Mrd. Dollar schwerer Kasino-Deal zwischen dem Gouverneur von Florida, Rick Scott und dem Stamm der Seminolen in Florida, erst einmal auf Eis gelegt werden soll, vor Gericht entscheiden.

Die Mohegan Tribal Gaming Authority (MTGA)

Betreiber von Mohegan Sun Einrichtungen in den gesamten Vereinigten Staaten erhielt – zusammen mit seinen Partnern KCC Corporation und Incheon International Airport Corp (IIAC) eine Lizenz der koreanischen Regierung, ein bis jetzt in seiner Art einmaliges integriertes Ressort am Incheon International Airport in Korea zu planen und zu bauen.

Diamond Fortune Lifts Curtain on Primorye

Russian casino developer Diamond Fortune has revealed its plans for its US\$900m Selena World Resort & Casino in Russia's Primorye gaming zone, in Russia's Far East near Vladivostok, complete with its own ski slope

A new US\$35m project in Primorye expects an ROI in 18 months and plans a second and third hotel to be financed wholly by the casino



RUSSIA NEW OPERATIONS

Russian casino developer Diamond Fortune has revealed its plans for its US\$900m Selena World Resort & Casino in Russia's Primorye gaming zone, in Russia's Far East near Vladivostok, complete with its own ski slope. It will be the fourth project destined for the zone following the opening of Tigre de Cristal and the commitment to develop projects from NagaCorp and Royal Time.

Selena will be developed around three distinct areas and three gaming floors: Golden Gate, Moon Gate and Sun Casino & Resort. It will build Sun casino first, followed by Golden Gate and Moon Gate 2018. Sun Casino will consist of two hotel towers with a combined 900 rooms and a gaming floor of 375 tables and 1,800 slots.

Golden Gate meanwhile will boast 576 hotel rooms, 200 gaming tables and 2,100 slots. The

property will also feature a 350-meter-long ski slope. Moon Gate, which in Chinese culture symbolises a luxurious doorway to the gardens and palaces of the upper class, will house 460 rooms, 110 tables and 1,100 slots.

Diamond Fortune's General Director Georgy Kondakov said the total build-up area would be over 174,000sq.m. He added that the project had been designed by Steelman Partners. "We are sure that our hotel and entertainment complex will be attractive for guests and as a place for family recreation and tourism," he said. In terms of the zone itself, he said it would benefit from favourable visa policies for Asian visitors with 300m Asians within a three hour flight whilst the local population and port industry would provide an incremental revenue source. He also said that the venue would benefit from one of the lowest tax rates on gaming in the world.



StakeLogic agrees content partnership with Unibet

Austria

StakeLogic has completed its first content agreement with Unibet. The interactive unit of Greentube specialises in the development and sublicensing of high-end 3D HTML5 casino games and will supply a selection of its premium content on Unibet's websites.

Established as the interactive specialist of Greentube, StakeLogic is in the business of developing and licensing software such as 3D slot games for both desktop and mobile, in addition to owning and controlling various game designs. Furthermore, StakeLogic Malta Limited was recently established for StakeLogic B.V to start licensing software to third

parties and is currently waiting to receive an MGA license.

Unibet is able to significantly enhance its casino offering with StakeLogic's line of slot games. Through this new partnership, Unibet remains true to its corporate motto: 'By players, for players' by taking an active role in understanding what game content players want and by continuously exceeding their expectations.

Ruben Visse, CEO of StakeLogic, said: "StakeLogic strives and is convinced to be one of the best software providers to help the market reach an even higher level. We are aiming to deliver unique and high-end games for the online gaming market and are honoured to welcome Unibet, as our first partner to realise this. We are looking forward to start working with them."

David Craeghs, Unibet's product manager, added: "Unibet is looking forward to launch the StakeLogic games on their sites. The high quality graphics they stand for combined with the Novomatic maths look like a sure bet to us."



Spain

The Governing Council of Castilla-La Mancha has authorised the opening of a new casino in the town of Toledo in Illescas. The Gran Casino de La Mancha, which will open in June, will generate more than 120 jobs. The casino, which will be owned by Casinos de Castilla-La Mancha, will be located in a building with four floors, with over 2,500 square meters. It will be located 32km away from the motorway linking Madrid and Toledo. The project will need an investment of €3m. The operator has four casinos in Castilla-La Mancha. The first opened in April 2014 in Cuenca and six months later the group opened in Guadalajara. Openings followed in 2015 in Talavera de la Reina and in Puertollano. Sánchez Colilla revealed that the Gran Casino de La Mancha would be the company's biggest project so far with the aim being to attract players from Toledo and southern Madrid.

Cypriot Tender Down to Three Casino Groups

Cyprus has whittled down its tender list from a total of 12 major companies from the USA, Philippines, Cambodia, Russia and France that formally expressed their interest in the Cyprus licence and paid €10,000 each for the option to bid

The Cypriot Parliament approves legislation to grant the Republic of Cyprus' first legal casino, with the tender process expected to conclude shortly

CYPRUS CASINO LICENCES



IRELAND – The centerpiece of the Alfastreet stand at the Irish Gaming show was the six-station electronic Roulette R6, part of the company's compact range, which is delivering excellent results in Irish venues. Two multigame stand alone units, the Alfastreet 1.Q. Multigame, were shown combining a brand new slot cabinet with a selection of classic table games, such as roulette, poker variants, Baccarat, Dragon vs Tiger and Black Jack.

The demand from Irish operators is high and the company is discussing the possibility of connecting multiple machines with its online gaming platform across several venues. These features are considered an important upgrade for the popular electronic gaming halls, vastly widening accessibility for the target audience. There is also great anticipation for the upcoming slot machine range to be added to the island, with the first installation in selected locations scheduled in a few months time.

POLAND – The Supreme Administrative Court of Poland has ruled that casinos acting as a taxpayer must calculate, collect and pass on to the Polish tax authorities personal income tax on all tips received by employees from casino customers. Casinos Poland described the announcement as 'unfavourable news.'

Peter Hoetzinger, President of Century Casinos, which owns 66 per cent of Casinos Poland, said: "The verdict is final, but we have not yet received the written justification. That will be issued by the court within about two or three weeks. That ruling, stating that tips are part of the salary of our casino employees could also have negative consequences on certain Social Security charges of Casinos Poland. The exact financial impact including a potential write-off of the goodwill we have on our books for Casinos Poland is not yet known and is being analysed by our tax advisors. It is really bad news and could lead to a significant one-time hit to our income statement in the first half of this year. But we will move on and focus even more on operating and profit margin development at all nine properties of Casinos Poland."

GIBRALTAR – Lottoland has appointed Gavin Grimes as VP of Gaming. Mr Grimes follows in the footsteps of other recent key appointments, including Rob Fell as VP of Product and Lucky Multani as Chief Operating Officer.

Lottoland specialises in offering licensed and regulated betting on the outcome of major lotteries worldwide and Gavin joins them after previously working as Head of Casino at Gala Coral Interactive. Gavin has spent 17-years working in online gaming, with prior roles including Head of Social Gaming at Gala Coral, Managing Director of marketing agency McBroom and Head of Marketing at Cantor Index.

March 10 saw the Cyprus' House Plenum approve the regulations for the first completely legal casino in the Republic of Cyprus with 28 votes in favour, one against, and 16 abstentions. The minimum requirements are 100 tables and 1,000 machines and the successful bidder could immediately start operating a casino for a 30 year-period, with the tender winner due to be announced imminently.

The Cypriot government whittled down the list of 12 casino tenders to just three who will make it through to the final stage of its tender process. Bloomberry of the Philippines and Naga Corp of Cambodia have made it through along with a consortium including Melco Entertainment of Macau and Hard Rock of the United States.

The operators have submitted their final plans for consideration including the location and the details behind their project. Under the framework, the winning bidder will have to build a holistic integrated resort, the first of its kind in Europe. It will feature 500 hotel rooms, plus a casino with more than 1,000 slots and 100

table games. The group will be granted a 30-year casino license with an exclusivity period of 15 years. However, a challenge has already been made by a candidate not accepted in the tender, the Goldenlady Consortium, which has lodged a complaint about the licensing tender process and has called on Auditor General Odysseas Michaelides to intervene.

A total of 12 major companies from the USA, Philippines, Cambodia, Russia and France had formally expressed their interest in the Cyprus licence. These casino operators paid €10,000 each for the option to bid. According to reports one of the short-listed bids proposed an investment of €450m, the other two offer €250 million, while whereas Goldenlady's bid was for a €1.15bn investment.

The winning operator will have the option to develop, in addition to the ICR, up to four satellite casino premises, in districts other than the one where the ICR will be located. Each will be licensed for the operation of up to 50 gaming machines per location.



Isle of Man

Isle of Man – ORYX Gaming has teamed up with B2B gaming software provider Booming Games to offer online casino operators access to its extensive portfolio of content. ORYX Gaming jumped on the opportunity to offer Booming Games' slots, which have proven immensely popular with more and more players all over the world.

The Booming Games portfolio currently features over 50 original games, and they are constantly increasing that number with the addition of five new slots each month. Many of these games include completely original game features, like The Rotator, which awards players multiple win chances with amazing gameboard animations.



Intralot to merge with Gamesnet in the Italian gaming market

Italy

Intralot is to merge its Italian operations with that of Gamesnet to form one of the largest operators in the Italian gaming market.

Intralot Group and Trilantic Capital Partners Europe, the controlling shareholder of Gamesnet, confirmed they have signed a Memorandum of Understanding to merge the Italian activities of Intralot into those of Gamesnet.

Following completion of the

transaction, Intralot will control around 20 per cent of the combined operations., which will comprise approximately 800 betting POS, that will continue to use Intralot's brand name, 8,200 VLTs, over 50,000 AWP's and more than 60 directly owned and managed gaming halls.

Intralot CEO Antonios Kerastaris said: "Since acquiring a betting operator license in Italy in 2007 and at a later stage VLT and AWP licenses, Intralot has established a strong presence in one of the largest and most competitive gaming markets in the world."

Gamenet CEO, Guglielmo Angelozzi, added: "This is a strategic step for us, as we were seeking size and diversification to complement our vertical integration programmes. We look forward to capture all the synergies from this combination and seize all the opportunities available in the market in the next years."



IRELAND – Firmly established in the Irish gaming market, APEX gaming took the opportunity to greet new and existing customer at the Irish Gaming Show last month. The long-standing partner in Ireland for APEX gaming, Ardee Leisure, presented the latest APEX solutions, supported by the APEX management team

Both the Pinnacle slots machines with the EVO platform and the APEX Player Station automated multiplayer were the focus for visitors to the stand. "We are well recognised for our style, quality and the popularity of our gaming solutions with players in Ireland," explained APEX's Kubilay Özer. "Our Pinnacle slot machines are very popular and the reaction from the show underlines that this popularity is continuing to grow".

Damien McCoy, CEO of Ardee Leisure, looked back at an extremely positive Irish Gaming Show, stating, "APEX gives something special to our market – the products are so stylish and appealing and the EVO games platform represents the very best the market can offer. The APEX Player Station was introduced to the market here only two years ago, yet we are very proud of the number of installations here in Ireland. This show underlined how the market views APEX – as the company that is taking gaming to the next level that has a very bright future here in Ireland".



IRELAND – SuzoHapp took its 'heart of gaming' message to the visitors of the Irish Gaming Show, held in Dublin last month. SuzoHapp's Harald Wagemaker and René Huibers, pictured above, both attended the event to support the SuzoHapp UK team. "For us at SuzoHapp it is essential to know our customers and ensure we can match our solutions optimally to their requirements. Each country has its own set of particular attributes and therefore we place great emphasis on attending local exhibitions," explained Mr. Wagemaker. "It is always a pleasure to be able to greet our customers at the Irish Gaming Show," he concluded.

This is the corporate strategy at SuzoHapp – to invest in supporting customers at a local level so that customers can best profit from the industry's global leader in cash handling, spares and components.



Lightning Link Strikes Twice at WestSpiel

Lightning Link, Aristocrat's first player-selectable multi denomination progressive link, is now set to take its next region by storm, with the first installation in EMEA already showing growing popularity amongst players. German casino operator, WestSpiel, became the first European operator to go live with Lightning Link and was amongst the first group of visitors to Aristocrat's Big Play stand at ICE, placing a repeat order.

WestSpiel, which operates six casinos across the North and West of Germany, worked closely with Aristocrat's German distributor, Dieckhaus, to bring the link to players at Spielbank Duisburg at the end of 2015z

"We placed a straight bank of eight Helix™ slot machines running Lightning Link on the floor in the week before Christmas," said Spielbank Duisburg Slots Director, Michael Wiebeck. "Customers were initially intrigued by this new gaming format and in the subsequent weeks

occupancy has grown steadily." The performance prompted WestSpiel to expand the reach of Lightning Link, ordering a further bank of games for its casino in Bad Oeynhausen.

Aristocrat Sales Director – EMEA, Erik-Jan van den Berg commented, "We were delighted in WestSpiel's decision to become European pioneers of Lightning Link. This game has generated stunning results across Australia and the United States and is now showing strong early performance figures in Europe."

Comtrade Gaming announce platform deal with Dafabet

Slovenia

Slovenia's Comtrade Gaming has signed an agreement to supply Dafabet with their enterprise gaming platform (iCore). The deal will see Dafabet implement iCore as their complete backend solution.

Comtrade Gaming's Director of Interactive, Steven Valentine said: "We are incredibly proud to be selected as Dafabet's long term strategic platform partner. Dafabet are the leading operator in Asia and highly respected across the industry and this deal is a great endorsement of the focus and work we have put into our platform. We have always believed we are leading the

way with platform functionality but performance and stability is our real USP for large operators."

Dafabet's Group CTO Mark Biegel commented: "As a large operator the demands and expectations placed on our technology are significantly higher than most other operators. Our partnership with Comtrade Gaming means we can focus our efforts on enhancing the customer experience, safe in the knowledge we have the right platform to support our business."

Comtrade Gaming's platform iCore is a complete backend gaming solution based around seamless wallet integrations and real time data. Comtrade Gaming have recently opened an office in Manila to support their growing international client base.

Austria

Leander Games has agreed a deal with StakeLogic to roll out its gaming products via LeGa RGS. Leander has become the first third-party supplier to partner with StakeLogic. The agreement enables operators to benefit from LeGa's flexible integration and rapid delivery. "We are firmly focussed on the continued development of our aggregated content offering," said Steven Matsell, CEO at Leander Games. "Signing StakeLogic to LeGa will see us import games of the highest quality to the platform. They are known for having the best graphics on the market, great immersive UX and unique themes." StakeLogic's suite of games, including latest slots title Monkeys of the Universe, will be available via LeGa.

Proven iGaming Leadership

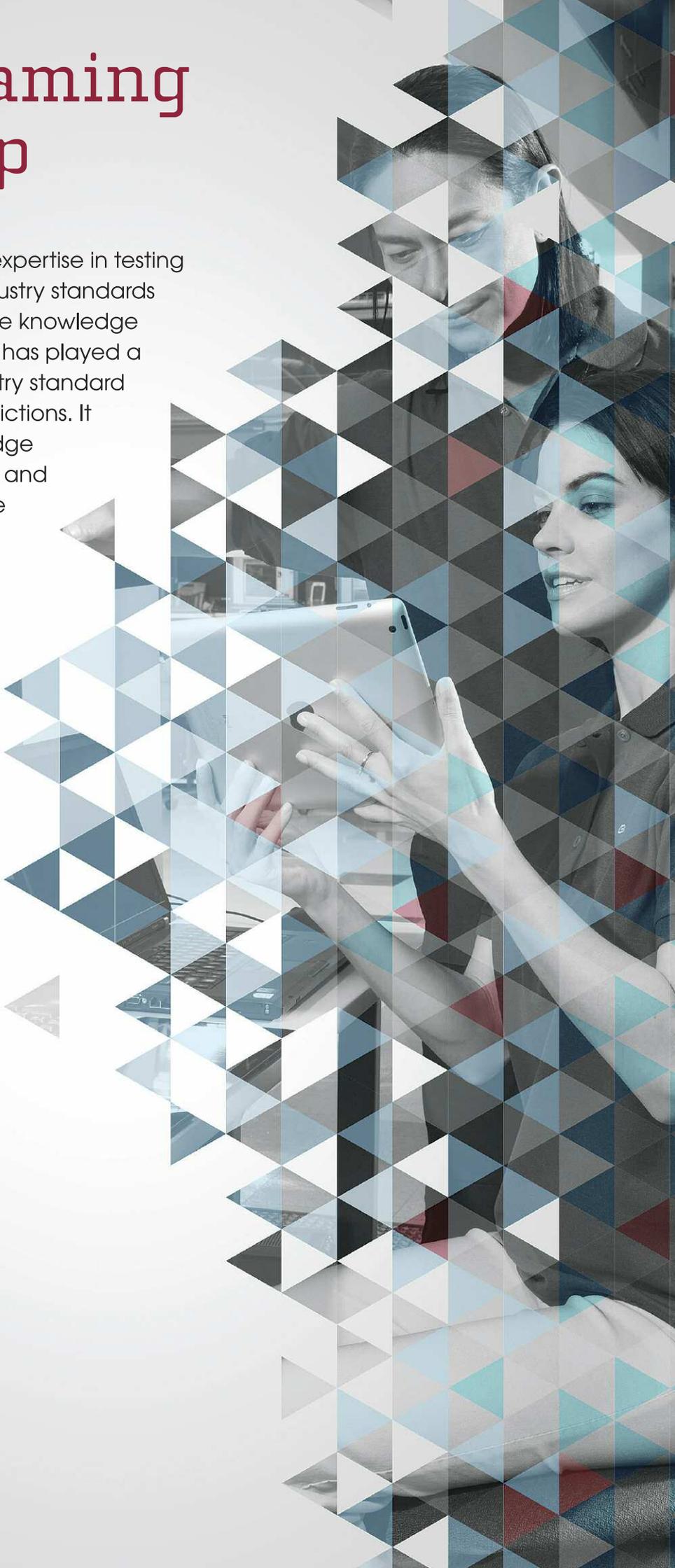
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Novomatic/Sazka to Control Casinos Austria

Novomatic and Sazka's long-term strategic partnership will see the groups becoming equal partners in a joint venture to control Casinos Austria

Novomatic and the Sazka Group call off litigation and form joint venture to control Casinos Austria in partnership

AUSTRIA CASINO OPERATIONS

Slot manufacturer and casino operator Novomatic is partnering with Sazka Group, which represents the investment group KKCG and Emma Capital, to ensure the growth of Casinos Austria. The pair had been going head to head for a majority shareholding in the Austrian group, securing shares wherever possible, but had forced each other into a cul-de-sac.

Sazka had planned to increase its share in Casinos Austria, asserting that its 11.3 per cent ownership gave it the right to first refusal if any shares were being sold. However this bid was blocked at a Casinos Austria shareholder's meeting in October 2015, which instead attempted to pave the way for Novomatic to increase its own stake via the purchase of a 16.8 share owned by private shareholder MTB.

Emma Capital's Jiri Smejck claimed that his company had been mistreated by Austrian authorities. He alleged it had been 'discriminated against by the Austrian finance ministry' and promised legal action. However, the two have now opted to work together instead of against each other. Their long-term strategic partnership will see the groups becoming equal partners in a joint venture



company involving their purchased and soon-to-be-purchased shares of Casinos Austria and the Austrian Lotteries, equating to more than 51 per cent of the company. Novomatic CEO Harald Neumann said: "This is the first important step towards provide Casinos Austria with a clear ownership structure and securing the company's long term future in its national and international markets. It is important for us, to reach an understanding with all shareholders on the way forward."

Štěpán Dlouhý, Investment Director of Sazka Group, added: "We are very pleased to partner with such a strong partner as Novomatic and we are convinced that our cooperation for the future success of Casinos Austria will be crucial. We recognise the importance of Casinos Austria in Austria and have always stressed our intention, together with our Austrian partners to develop its casino and lottery business."

The objective is also to terminate the existing litigation between Sazka Group and the MTB Private Foundation and the Medial Beteiligungs GmbH with regard to any pre-emption rights as soon as possible and to establish an effective and sustainable joint shareholding.



TUNISIA – NOVOMATIC subsidiary NOVOMATIC LOTTERY SOLUTIONS (NLS) has been awarded a six-year contract by PROMOSPORT, acting on behalf of the Republic of Tunisia's Ministry for Youth and Sport, to provide a turnkey solution for the management of sports betting and ongoing maintenance and support services.

Under the newly signed agreement, which was secured through a competitive bid with three other participants, NLS will provide PROMOSPORT with up to 3,000 online retail terminals as well as a state-of-the-art and fully integrated central system encompassing retail, Internet and mobile capabilities. The modern design of the system allows for the first Omni-channel system implementation in the region as well as for the integration with best-of-breed content providers for any future expansion requested by PROMOSPORT.

Frank Cecchini, CEO of NOVOMATIC Lottery Solutions added: "We will deliver a solution that comprises the latest technologies with terminals deploying thin client applications, web-based transaction engines and back-office applications. PROMOSPORT will be receiving the latest premium quality system with integrated support for new games and channels."

Heidar Karlsson, CTO of NOVOMATIC Lottery Solutions said: "We are looking forward to a long lasting business partnership with the team at PROMOSPORT. Our industry leading technologies will help to generate increased revenues at lower cost for PROMOSPORT and help to raise more funds for its good causes."

SOUTH AFRICA – Gauteng's larger casinos are to be taxed at a higher rate as Premier David Makhura's provincial government looks to improve its revenue collection. Gaming tax has been set at nine per cent for the last decade but now with the government looking to boost its revenue collection from R5bn to R5.6bn by the end of 2019, a tiered tax system is being considered.

It means larger casinos in the province such as Carnival, Emerald, Emperors Palace, Gold Reef, Morula, Monte Casino and Silver Star could all pay more than their smaller rivals.

Mediatech signs platform deal with Fairplay Online

Spain

Omni-channel provider Mediatech Solutions is to supply Dutch land-based chain Fair Play with its new online casino using its IRIS platform. The deal with owner Janshen-Hahnrahts Group, which runs 42 casinos across the Netherlands under the Fair Play brand, will see the new Malta-licensed Fairplay Online casino launch this summer.

Mediatech facilitated the company's social gaming site last year using the IRIS platform, which has been developed to cater for the next generation of player-focussed operators. Under the agreement, Fairplay Online will enjoy access to a suite of real-money gaming

content, including slots provided by Microgaming.

Mediatech Solutions CEO and founder Jessica Ordovas said: "Fair Play has extensive land-based heritage in the Netherlands and can replicate this success online by leveraging our products and services to create a world class offering. With new regulation on the horizon, the Netherlands is set to become an important part of Mediatech's fast-expanding global footprint."

Fairplay Online's manager Carel Meijer added: "We knew Mediatech well from working together on our social gaming site, so there was no question as to where we would turn when looking for a RMG platform provider."

Last month, Spanish land-based casino supplier R. Franco took a controlling stake in Mediatech.

Denmark

In April the Danish Gaming Authority, DGA, is changing its practices to allow self-service terminals in betting shops without using NemID, Denmark's CPR-Number identity scheme. The change states: "Betting shops and land-based casinos can offer terminals operated by staff and where the player logs on to his gaming account with the licence holder, entering details into a terminals operated by the customer." This means that betting can now be provided via self-service terminals in betting shops. However, players' funds online and land-based must not be merged. "The deposit on a player's account must not be merged in regard to land-based and online provision of gambling. This is due to the fact that the executive order on online betting states that cash deposits cannot be accepted," according to the statement by the DGA.

Net Holding sees Merit in DeckMate 2 Deal

Scientific Games strengthens its Net Holding partnership with a new agreement to supply 50 DeckMate2 Shufflers to five Cyprus casinos

Scientific Games signs a new agreement with Turkey's Voyager Kilbris to supply 50 Shuffle Master DeckMate 2 shufflers

CYPRUS CASINO SUPPLIES



Scientific Games has signed a new agreement with Voyager Kibris Ltd. Merit Crystal Casino ("Voyager Kibris") to supply 50 Shuffle Master DeckMate2 shufflers to its five Merit casinos in North Cyprus to drive operational efficiencies and power an exceptional gaming experience for players. Voyager Kibris is owned by Net Holding, the world's eighth largest operator of luxury hotels and casinos with a combined casino floor of approximately 24,000sq.m., 2,700 slot machines and 400 table games.

Scientific Games' table products installation at Merit Casinos will include 50 DeckMate2 shufflers to increase game speed and security on single-deck blackjack, single-deck poker, and other single-deck, hand-pitched specialty games. The dealer-favorite poker shuffler comes with a shuffle time of just 22 seconds, features onboard card recognition and sorts cards back to a suited deck. Above all, the shuffler includes a remote touchscreen display and works with all card types and card brands.

"Merit Casinos offer some of the most exclusive gaming experiences throughout Europe and the Middle East, and are recognized worldwide for exciting table game tournaments that include renowned international players," said Gavin

Isaacs, President and Chief Executive Officer for Scientific Games. "This new partnership will bring an unmatched player experience, including increased game speed and enhanced security, to help drive customer satisfaction, revenue growth and profitability. We are delighted to have been selected by Net Holding to help grow their casino business with one of the industry's most respected and hottest shufflers, the DeckMate 2."

Marco Herrera, VP & Managing Director (EMEA) for Scientific Games, commented on the deal: "We are confident that the Shuffle Master DeckMate2 shufflers will deliver a measurable return-on-investment and increased profitability by enhancing the casino's gaming and entertainment experience. We look forward to continuing a fantastic partnership."

Net Holding is listed on the Istanbul Stock Exchange (IMKB) and is one of the Company's key strategic partners in Europe and the Middle East. The company recently signed a casino five year management agreement with Casino Avala to operate a 2,000sq.m. casino in Budva, Montenegro and is bidding for the operating rights to Turkey's national lottery, Milli Piyango, which is slated for privatisation.

Romania

A new law that bans smoking in enclosed public spaces will strongly affect the local casino industry, according to Violeta Radoi, the general manager of the Slot Organizers Association ROMSLOT. In other EU countries, the smoking ban has led to a drop of 30-40 per cent in the operators' revenues. This would also affect the revenues the industry pays to the Romanian state. In 2012, the state collected €650m from gambling operators from taxes and fees, according to the ROMSLOT representative. In many EU countries, such as Italy, Austria, Belgium and Sweden, the smoking ban doesn't apply to gambling halls, Radoi argued. "Smoking is allowed, under various conditions, in most countries in the EU. Such solutions can be implemented in Romania too," she said.



Senator Group Macedonia exclusively chooses JCM Global

Macedonia

Senator Group Macedonia is the latest casino operator to exclusively choose JCM Global bill validation solutions for their entire casino operation.

Senator Group operates more than 2,000 slots across Macedonia, and previously, the group used a number of different validators from different companies. That changed recently when the

group received a demonstration of the power of JCM's bill validation solutions.

Following the demonstration Senator Group began replacing older bill validators exclusively with JCM products.

"From Spain to Macedonia and all points in between, JCM's bill validation solutions are leading the gaming industry in Europe. We are very pleased to welcome Senator Group Macedonia to the JCM family of operators who exclusively choose JCM products," said JCM EMEA General Manager Payam Zadeh.

Pictured above having cemented the deal at the ICE Totally Gaming exhibition in London is Jaime Bonet, Sales Manager, JCM Global, Dimitar Deskoski, Director of Operations, Senator Group and Nobuyuki Sato, Managing Director, JCM Global.



Stephane Muller and Marcel Wenger of Casino Basel alongside Christian Eder of DRGT

SWITZERLAND – Casino Basel is the latest casino in Switzerland utilising systems solutions from DRGT. The casino management team was looking to strengthen its systems and having conducted extensive market research found DRGT's reputation for safety, quality and the simple handling of such a complex part of the business, entrusted DRGT with the major project.

The DRGT installation took place on December 1, 2015. "The entire change-over to DRGT was completed in a single day while the casino remained open. The planning was excellent, so that players hardly noticed the work going on around them", explained Marcel Wenger, Managing Director of Casino Basel. Casino Basel makes use of a wide selection of DRGT systems solutions, including drAccounting, drJackpots, drTicket and drReports.

During the one day installation, the first segment of slots was ready for play at 10am – the casino's opening time. "The trust in the DRGT is very strong", noted Stéphane Muller, IT Manager at Casino Basel. "The DRGT team is always there to help – on a 24/7 basis. Our business relationship is extremely good, I see the DRGT staff as friends. The system is very secure. Before we had issues with our system, especially at weekends. Now I can sleep better."

"I agree with that," added Marcel Wenger. "It's fair to say that using DRGT systems adds to the quality of life of a casino manager. We were under permanent stress previously and had no overview of the problems. Also the previous system was server-based, so if there was a problem, then all the slots were affected. DRGT is not server-based so we no longer have to worry about all slots going down. On the contrary, the DRGT is extremely reliable."

UK – Inspired has agreed its first Virtuals Connect deal with SBTech, a provider of interactive sports betting solutions and services. Under the terms of the agreement, SBTech will license the use of Inspired's Virtual Sports platform and Virtual Sports events as part of its Online Gaming Platform, offering it to its Third Party Operators via Virtuals Connect. Virtuals Connect is a fully-managed, turnkey solution which is designed to be easily integrated into any Bet Management System. The platform is continually refreshed and updated to ensure that every Virtuals Connect subscriber benefits from Inspired's ever evolving technology.

Marc Thomas, Head of Product at SIS commented: "We are delighted that SBTech have chosen to take Inspired's Virtuals Connect content and utilise our innovative low latency streaming platform – SIS Stream."

Le processus d'obtention d'une licence pour la construction d'un Hard Rock Hotel et Casino dans la ville de Ciudad del Este au Paraguay commencera au cours du premier semestre de cette année, selon Gustavo Leite, Ministre de l'industrie et du commerce du Paraguay.

Dans le cadre d'un accord sans précédent, la Federação Paulista de Futebol (FPF), qui gère les tournois officiels de football dans l'état de São Paulo, au Brésil, vient d'introduire Sportradar, un système de détection des fraudes, qui couvrira plus de 200 matchs en 2016 et 2017.

La multinationale espagnole Codere vient d'annoncer que ses revenus d'exploitation ont augmenté de 18,3 % en 2015 pour atteindre 1639,5 millions de dollars US du fait d'une augmentation de ses résultats en Argentine, Italie et Panama.

Enjoy vient d'ouvrir le premier des trois casinos que l'entreprise a planifié d'installer avec la chaîne d'hôtels Decameron qui opère en Amérique Centrale, en Amérique du Sud et en Afrique. Le nouveau casino compte un total de 90 machines à sous, huit tables, un bar et proposera des événements en live.

Le comité des Finances uruguayen de la Chambre des Représentants devrait approuver une nouvelle loi décisive sur les jeux d'argent. Son but est de fixer un cadre global qui apportera à l'avenir des changements majeurs sur la manière dont l'état réglemente et organise le secteur. L'ébauche de loi renforce le monopole de l'état sur les casinos, les courses de chevaux, les loteries et les paris sportifs ainsi que les jeux en ligne.

Le secteur du casino pourrait connaître un essor significatif en République Dominicaine puisqu'on a annoncé que Grup Globalia cherche à accroître ses investissements sur le marché. Juan José Hidalgo, le propriétaire du groupe, vient de créer Riverbound Investment pour investir dans les casinos qui font partie des hôtels appartenant à la société et à ses partenaires.

Le Comité des jeux chilien (SJC) vient de publier ses directives pour le futur processus d'appel d'offres concernant les licences de casinos municipaux. La résolution du conseil de SJC établit les exigences minimum pour les nouvelles licences, y compris une offre financière minimum garantie suivant la taille et la situation géographique du nouveau casino.

Le promoteur de casinos russe Diamond Fortune vient de révéler qu'il projette d'ouvrir le Selena World Resort & Casino, un complexe de 900 millions de dollars US et qui serait situé dans le Primorié, à l'extrême ouest de la Russie, près de Vladivostok. Il serait doté de ses propres pistes de ski.

Gaming Laboratories International (GLI) a été fier d'accueillir la 16e table ronde annuelle des instances de contrôle des jeux d'Amérique du Nord, avec 200 législateurs de 31 juridictions de l'ensemble de l'Amérique du Nord et des Caraïbes.

GLI Hosts NA Regulators Roundtable

Gaming Laboratories International (GLI) proudly hosted its 16th annual North American Regulators Roundtable, welcoming over 200 regulators from 31 jurisdictions across North America and the Caribbean

GLI's roundtable theme, strategically embracing innovation, was fitting, with discussions centered on topics like iGaming and fantasy sports

NEVADA CONFERENCE



GLI President & CEO James Maida said: "We are honored by the support that our regulator clients provide for our Regulators Roundtables. GLI is proud to host networking and learning opportunities for our guests.

Every aspect of our 16th annual North American Regulators Roundtable was a success – the keynote addresses, the various high-level sessions, and the brand new event mobile application."

The annual, two-day event, held at Planet Hollywood Resort & Casino on the Las Vegas Strip, is a unique opportunity for regulators to absorb high-level information from thought-leaders and discuss or share ideas about various topics with their peers.

Brand new to this year's Regulators Roundtable was the event mobile application, accessible to attendees via their smart phones.

Regulators were encouraged to use the application for submitting questions throughout the event, which were answered either during respective sessions or the "What's On Your Mind? An Interactive Forum," also new to the

event. Other popular sessions included "Detecting Cheaters and Minimizing Fraud," which featured live demonstrations of techniques thieves use to gain access to sensitive information and compromise the integrity of a gaming operation; and "What is the Call for Fantasy Sports?", which opened up discussion about Daily Fantasy Sports and the legal and policy issues related to the debate.

The exciting keynote address was delivered by Lt. Colonel Kevin Sweeney, a motivational speaker, author and decorated combat pilot. Sweeney's presentation, "Pressure Cooker Confidence: How To Lead When the Heat Is On," focused on his life or death experience as a pilot during a night combat mission and allowed the audience to mentally live through the challenges he faced.

Concluding this year's event, we were pleased to announce that next year's Regulators Roundtable will be held March 15 and 16, 2017 at Luxor Las Vegas. GLI will produce the Latin American Regulators Roundtable August 24 and 25, 2016 in Curacao. The North American Regulators Roundtable was presented free of charge to regulators.



Seminole Tampa unveils new room dedicated to VIP slots

Florida

Seminole Hard Rock Hotel & Casino Tampa has debuted a new room dedicated to VIP Slots which will offer the highest level of service and privacy to the property's VIP guests. Specifically reserved for VIP guests, VIP Slots has 85 slot machines, a dedicated cage, credit office, ATM, service bar, lounge seating and restrooms. Additionally, four 75-inch televisions provides

continual entertainment. All of the slot machines have adjoining oversized, luxury chairs and have been placed on an extra-wide, spacious base to include a storage cabinet and cell phone stand complete with USB charging ports.

VIP Slots will provide expedited payment of jackpots through the use of Fast Pay.

Created by Cleo Design, Klai Juba Wald (architect of record), GSA (engineers) and Ruzika (lighting designer), VIP Slots also offers a private salon which provides a secluded gaming area for a VIP guest and their guests. It includes four slot machines that can be changed per guest request, a private restroom, a seating area with a 75-inch television and a refrigerator that can be pre-stocked with a guest's favorite beverages. The salon can be reserved in advance.

Connecticut

MGM Resorts has teamed up with the Schaghticoke Tribal Nation to try and thwart plans to give a third casino licence in Connecticut to the two operators who are currently running casinos there.

MGM is reportedly financing the Schaghticoke tribe to help in its opposition. Both the tribe and MGM have now filed lawsuits claiming it is unlawful to just give the tribes that own Connecticut's current casinos; the Foxwoods Resort Casino and Mohegan Sun instead of launching a tender to see who should develop a commercial, off-reservation casino.

The sole aim of the third casino is to prevent the flow of potential players to a new US\$950m MGM casino across the state border in Springfield, Massachusetts.

Le conseil gouvernemental de la Castille-La Manche vient d'autoriser l'ouverture d'un nouveau casino à Illescas, dans la province de Tolède. Le Gran Casino de La Mancha, qui ouvrira ses portes en juin, va créer plus de 120 emplois.

Le Parlement de Chypre vient d'approuver le 10 mars en séance plénière les réglementations régissant le premier casino entièrement légal en République de Chypre avec 28 votes favorables, un vote défavorable et 16 abstentions. Les exigences minimum sont de l'ordre de 100 tables et 1000 machines à sous. Le soumissionnaire gagnant pourrait immédiatement commencer à gérer un casino pour une période de 30 ans et le nom de celui qui remportera l'appel d'offres sera annoncé d'ici peu.

Les plus grands casinos de Gaungeng devraient être taxés à un taux plus élevé puisque le gouvernement provincial du Premier ministre David Makhura cherche à améliorer ses recettes. L'impôt sur les jeux a été fixé à 9 % il y a 10 ans mais étant donné que le gouvernement cherche maintenant à booster ses recettes pour passer de 5 milliards à 5,6 milliards de rands d'ici fin 2019, un système de taxes progressives est à l'étude.

MGM Resorts s'est associé à la nation Schaghticoke pour tenter de contrecarrer le projet d'accorder une troisième licence de casino au Connecticut aux deux opérateurs qui gèrent actuellement les casinos de la région.

Le Seminole Hard Rock Hotel & Casino Tampa vient d'ouvrir une nouvelle salle dédiée aux machines à sous VIP pour offrir un service haut de gamme et un degré d'intimité élevé à ses clients VIP.

VGT vient de signer un important contrat avec Cherokee Nation Entertainment (CNE), la filiale jeux et hôtels de la nation Cherokee. Les jeux VGT sont ainsi présents dans neuf casinos du nord-est de l'Oklahoma.

L'avenir des jeux en Floride pourrait se décider au tribunal suite à la décision des législateurs de Floride de refuser un contrat d'ouverture d'un casino de 3 milliards de dollars US approuvé par le Gouverneur de Floride Rick Scott et par la tribu séminole de Floride.

Au moins la moitié des installations du Revel Casino Hotel d'Atlantic City, casino qui a connu des difficultés, pourrait rouvrir d'ici juin 2015 avec la promesse du Polo North Country Club de Floride qu'un tiers des chambres, un étage dédié aux jeux et tous les restaurants seront opérationnels d'ici cet été.

Les casinos situés dans la zone réservée aux jeux de la ville d'Azov, en Russie, pourraient rester ouverts jusqu'à fin 2018 suite à des discussions avec l'administration du Krasnodar et avec le gouvernement russe.

Le président de l'institut brésilien des jeux, Magno José de Sousa Santos, a affirmé au Congrès que 200 000 brésiliens sortent chaque mois du pays pour jouer à des jeux d'argent.

Scientific to supply Jack with 250 slots

Jack Entertainment, formerly known as Rock Gaming, has chosen a comprehensive suite of Bally Systems solutions, 250 popular game titles and WMS and Bally cabinet platforms for three Ohio gaming properties

Jack Cleveland Casino, Jack Cincinnati Casino, and Jack ThistleDown Racino are to be outfitted with the latest Bally and WMS Gaming titles

US CASINO INSTALLATIONS



Winning in a competitive bidding and selection process, Scientific Games will provide Jack Entertainment with its latest SDS slot-accounting solution, CMP player-tracking system, TableView real-time table-management solution, and the Company's award-winning iVIEW Display Manager on-device messaging technology across each property's high-speed networked gaming floors. Jack Entertainment will use the Bally Elite Bonusing Suite applications to offer automated, interactive on-game bonusing, promotions, and rewards.

The systems conversion project is already underway, and the Bally Systems are slated to be fully installed and deployed at all three properties by June 30, 2016.

Scientific Games' systems will also connect Jack Entertainment's player-loyalty programs at Jack Cleveland Casino, Jack Cincinnati Casino, Jack ThistleDown Racino, and Jack Detroit Casino-Hotel Greektown, enabling the gaming operator to offer enhanced player recognition and

rewards for patronage at and across all four properties.

"We chose Scientific Games because they are the leader in systems innovation," said Jack Entertainment CEO, Matt Cullen. "We look forward to having the enhanced system in place, which will allow us to streamline our processes and operations."

Jack will also purchase 250 new Scientific Games gaming machines including the ALPHA 2 Pro Series Wave and Pro Series V32 cabinets supporting many of the company's popular titles, including Quick Hit Wild Red Free Games Fever Any Bet Triple Quick Hit Blazing 7s, Fu Dao Le, Quick Hit Platinum Blazing 7s Wild Jackpot, and Dragon Rising.

"We are honored that Jack Entertainment has selected Scientific Games as their partner to help grow their business with the industry's most complete portfolio of solutions, applications, platforms and games," said Bob Parente, CRO, Gaming at Scientific Games.



Oklahoma

VGT signs Class II deal with Cherokee Nation

VGT has signed a major deal with Cherokee Nation Entertainment (CNE), the gaming and hospitality arm of the Cherokee Nation, bringing VGT games to nine casino locations across northeast Oklahoma.

"At VGT, we are committed to the success of our tribal gaming customers, and we are thrilled to announce this contract, the latest milestone in a long-term relationship between our two organizations," said VGT Sales Executive Vice President James Starr. "We have a strong portfolio of field-proven games that players enjoy, and we are continually developing new products, which is further spurred by our relationship with the design teams at Aristocrat."

Under the new contract, VGT is supplying Class II games, including new VGT Class II products such as Easy Money Jackpot wide area progressive, Red Spin Gambler video series, and the upcoming Client 6 high entertainment games.

Canada

OpenBet has partnered with BCLC (British Columbia Lottery Corporation) to launch Sports Pools on PlayNow.com, British Columbia's gambling website. OpenBet has worked closely with BCLC since they launched their initial online gaming offering in June 2010, when it delivered Canada's first online casino on OpenBet's leading platform and centralised account (Player Account Management). Since then, OpenBet and BCLC have continued to develop the offering through new games like Sports Pools. Sports Pools is a first for a regulated online gambling site in Canada. Sports Pools engages all levels of fans with their favourite sports and doesn't require knowledge of sportsbook odds. With a \$5 buy-in, players can test their sports knowledge against each other for a chance to win or share the prize pool.

Crown's Alon Maintains Holding Pattern

James Packer's third attempt to enter the Las Vegas casino market has run into trouble with plans for his Crown Resorts' Alon project on The Strip on hold due to 'weakened American debt markets'



NEW JERSEY – At least half of Atlantic City's failed Revel Casino Hotel could be open again by June 15 with Florida-based Polo North Country Club promising that a third of the rooms, a gaming floor and all the restaurants will be operational by the summer.

The boardwalk property, the most expensive casino in Atlantic City and one which was once seen as the city's saviour, has been shut since September 2014, having never made a profitable month. Polo North Country Club's owner Glenn Straub, who bought the \$2.4bn property for \$82m last April said the property would be renamed when it reopens.

Talking to the Associated Press he said: "It's definitely not going to be 'Revel. It doesn't mean anything. We're not going to have all 1,800 rooms open; we'll probably have 500 open that day. All the restaurants will be open, I think. They've been wanting to re-open since the day it closed."

Atlantic City's Licensing and Inspection Chief said Mr. Straub will however have to secure a certificate of occupancy, a gaming licence and permits to reopen the restaurants, the hotel and to carry out any construction work. Mr. Straub plans to hire a casino group to operate the gaming floor.

NEW JERSEY – Billionaire casino investor Carl Icahn has agreed to plough US\$100m into his newly bought Taj Mahal casino in Atlantic City but only if New Jersey rejects plans to allow two new casinos to be built in the north of the state, just outside New York City.

Mr. Icahn, whose Tropicana Entertainment will operate the Taj Mahal, said any in-state competition added to that from neighbouring states would make it impossible to invest that much money into his new casino as the model would be unprofitable.

Mr. Icahn, Chairman of the Board of Icahn Enterprises, said: "Although I had planned to invest up to \$100m in the Taj, just as I previously made substantial investments in the Tropicana, obviously it would not be judicious to proceed with those investments while gaming in North Jersey remains an open issue. We will have to wait to see the outcome of those proposals."

His warning followed Tropicana Entertainment's announcement that it would take over the management of Trump Taj Mahal Casino from Trump Taj Mahal Associates. It said it would manage the Trump Taj Mahal Casino Hotel and provide consulting services relating to the former Plaza Hotel and Casino in Atlantic City, New Jersey. Both the Tropicana and TTMA are subsidiaries of Icahn Enterprises.

Crown's plan to secure \$1bn in US debt to finance the project has been delayed although Crown is insistent that it is not working to any deadlines

NEVADA CASINO DEVELOPMENTS



In 2014, Australian casino operator James Packer bought the 35-acre former site of the New Frontier, located across from Wynn Las Vegas and next to the Fashion Show Mall, for \$260m. However, since that time there has been little to no development activity at the site. Crown is believed to have taken a 73 per cent share in Alon Leisure Management, but is known to have spoken to institutional investors about a selling off some of that shareholding taking its ownership down to 45 per cent.

Andrew Pascal, CEO of Alon, and former Wynn executive, recently defended the project saying: "The report related to Alon's financing has more to do with the macro financial markets than with Alon Las Vegas specifically. There is no question that the environment is difficult for everyone at the moment, but deals are still getting done. With that said, the Las Vegas market has never been stronger – record visitation, record revenue. We have the right team, the right idea, the right timing and the

right location. We will continue to advance the development and ultimately secure the capital we need."

Crown's Chief Financial Officer Ken Barton added: "Obviously there's been some volatility around capital markets particularly in the leveraged space, so that hasn't been all that conducive, but we're obviously working on other things that are supportive of building out the business case. We haven't been prescriptive about what the right mix of debt or equity is or what the source of that equity is."

Deutsche Bank analyst Mark Wilson isn't confident though. He commented: "Crown and its partners are continuing design work on the project as well as developing a number of funding options and necessary permits have been applied for and a construction contract is being negotiated. We believe this project may be difficult to progress given the recent increase in credit spreads."

New Jersey

The New Jersey Division of Gaming Enforcement has posted its Temporary Regulations regarding skill-based gaming. The Division's regulations mirror the Nevada skill-based regulations published in September 2015, so that any product approved in New Jersey would also be eligible for approval in Las Vegas and vice versa. However, companies that bring their skill based products to New Jersey before any other jurisdiction will have an additional advantage with a provision referred to as "New Jersey First." This provision allows gaming products that are submitted to New Jersey prior to or simultaneously with any other jurisdiction or testing lab to be tested and, if approved, put on the casino floor within 14 days. Games manufacturers must make sure that the game prominently explains that the outcome of their bet can be influenced by their physical or mental skill as opposed to traditional gambling devices that are based on chance.



Michigan Lottery extends technology deal with IGT

Michigan

IGT Global Solutions Corporation, has signed a four-year contract extension with the Michigan Lottery to continue providing lottery technology and services through January 19, 2021. The Michigan Lottery has been an IGT customer since 1988.

"IGT is committed to providing products and services for sustainable lottery growth," said Michael Chambrello, IGT CEO, North America Lottery (pictured). "To that end, we will continue to work closely with

the Michigan Lottery to provide added convenience to its players and retailers through additional self-service lottery vending products and the use of evolving technology."

Under the terms of the contract extension, IGT will provide the Lottery with additional self-service lottery vending machines, as well as upgrades to the Internal Control System hardware and relating operating system and application software that interfaces with IGT's lottery central system.

In addition, the Lottery will receive IGT's ES Anywhere (ESA) which provides secure, reliable, and high performance APIs (Application Programming Interface) to customer software, such as mobile apps and web browsers. The APIs are standardised across delivery channels, so that lotteries using ESA get maximum reusability and faster time to market when adding new channels.

CAMBODIA – NagaCorp, which owns NagaWorld in the Mekong Region of Cambodia, saw its GGR increase by 26 per cent to US\$480.6m in 2015 with profits up by 27 per cent. Mass Market Revenue increased by 33 per cent to US\$257.7m whilst VIP Revenue increased by 19 per cent to US\$222.9m.

The company's results were boosted by an increase in Chinese visitation to Cambodia which was up 24 per cent year-on-year to 0.6m visitors during the first 11 months of 2015.

NagaCorp stated: "The continued downturn in Macau's gaming sector offers opportunities for the group to further penetrate the regional gaming market for both the VIP and Mass Markets. Taking advantage of NagaWorld's low-cost structure, the group is able to offer better commercial terms to junket operators and agents.

"Several North Asian junkets seeking to diversify their operations to other parts of Asia signed up with the Group during the year. NagaWorld's junket incentive program, aimed at promoting NagaWorld to a wider range of regional operators and players, continues to be successful, with a 27 per cent increase in VIP rollings during the year. For 2016, the group has revised its overseas junket incentives in order to improve its margins, as it captures a larger share of the Asian VIP gaming market."

PHILIPPINES – The Philippines Securities and Exchange Commission wants casinos to fall under the jurisdiction of the Anti-Money Laundering Act (AMLA) to give investigative authorities greater powers. The call comes after at least half the money stolen in an US\$81m cyber crime ended up in two of the country's casinos. Unconfirmed reports suggest that \$26m was found to have moved through Solaire Resort and Casino with another \$20m being laundered in Easter Hawaii Casino and Resort in the Cagayan province. The deposits were made between February 5 and 9. A casino in Sri Lanka is also thought to have been used.

SEC Chairwoman Teresita Herbosa said: "We need to strengthen the law. It's a global effort to eradicate money laundering. We have to catch up with people doing that activity."

The heist involved hackers using a malware device on the Bangladesh Bank's computer network. The Federal Reserve Bank of New York received a series of withdrawal requests from the Bangladesh Bank. It approved the first transaction, amounting to \$81m with the money then being deposited via the Society for Worldwide Interbank Financial Telecommunications (SWIFT) into foreign bank accounts, and then laundered through the casinos.

The fraud was only detected when a spelling mistake on the word 'foundation' held up the payment. Further payments of between \$749m to \$769m were scheduled to go out the same way. Cristino Naguiat, Chairman of PAGCOR (Philippine Amusement and Gaming Corp) has been asked to attend hearings of the Senate of the Philippines along with a series of executives from individual casino groups.

Mohegan Sun Unlocks Gateway to Korea

The Mohegan Tribal Gaming Authority (MTGA) operator of Mohegan Sun have been awarded a license from the Korean Government to develop and build a first-of-its-kind integrated resort at Incheon International Airport in Korea

Mohegan Tribal Gaming Authority along with the Korean chemical company KCC Corp. will develop a \$5bn casino at the Seoul-Incheon International Airport

SOUTH KOREA NEW LICENCES



The Mohegan Tribal Gaming Authority (MTGA) operator of Mohegan Sun properties throughout the United States, along with partners KCC Corporation and Incheon International Airport Corp (IIAC) have been awarded a license from the Korean Government to develop and build a first-of-its-kind integrated resort at Incheon International Airport in Korea.

The US\$5bn project will include a 20,000 square meter casino with 250 tables and 1,500 slot machines and a Paramount Studios Themed Indoor-Outdoor amusement park. It will be first and only destination resort in the world with an adjacent private air terminal operate. It will also be the largest entertainment arena in South Korea with capacity for up to 15,000 people. Other features include 33,000 square meter Eco Adventure Park featuring the latest in indoor rock climbing, zip lining, an indoor rainforest, and an archaeology experience, a Korean cosmetics and beauty hub and 20,000 square meters of retail brands in the world and over 20 food and beverage concepts.

Bobby Soper, President of MTGA, said: "We are pleased with the Korean Government's decision to award us the opportunity to help fulfill their vision of driving economic development by growing tourism, creating jobs, and showcasing Korean culture via the integrated resort."

KCC Chairman Chung Mong-Jin added: "KCC is thrilled that its partnership with the Mohegan Tribal Gaming Authority has been awarded the opportunity to develop this exciting and transformative integrated resort which will be instrumental in bringing new generations of tourists to Incheon."

Chung Il-young, CEO of the Incheon International Airport Corporation noted, "We deeply appreciate the careful review that the Korean Government has conducted on this bold new initiative for tourism in Korea. Its selection of the Inspire project at IBC-II is wonderful news for the Incheon region and will serve as a catalyst for growth in the airport development zone for years to come."

Mohegan Sun's multi-phase development project named Project Inspire will also include three-tower luxury hotel complex with 1,350 five star and six star guest rooms.

Mohegan Sun is joined by Miura Holdings Asia, a multi-purpose investment vehicle focused on gaming, hotel and food & beverage activities in the United States & Asia, as part of the development team. Consummation of the conceptual agreement and development of the project is subject to certain governmental and regulatory approvals.



Casinos could generate tax of US\$2.8bn for Thai economy

Thailand

The introduction of casinos in Thailand could generated yearly tax revenues of over US\$2.8bn to the country, according to research carried out by Rangsit University's College of Social Innovation. The study showed that a foreigner-only casino sector would reach gaming tax of TH\$100bn far quicker than Singapore which took three years.

Thailand and Brunei are two of the biggest Asian countries without legal casinos. Countries neighbouring Thailand are home to at least 120 legal casinos with the vast majority being in Cambodia and Laos.

The study was led by Sungsidh Piriyaarangsarn, the Dean of Rangsit University's College of Social Innovation. He gave his conclusion during a press conference. He claims a survey of 2,500 Thai residents found widespread support for casinos, particularly among middle-income earners.

The study also claimed that legalising casinos would increase Thailand's international tourism by up to 50 per cent. Whether anyone is listening is the question?

Vietnam

Reports out of Hong Kong claim that Hard Rock International and Banyan Tree are planning to build a casino resort in central Vietnam. The Ming Pao newspaper, published in Hong Kong, quotes Hard Rock Vice President for Asian business development Daniel Cheng. He said the partnership was considering a US\$100m investment in Vietnam to open a casino with up to 80 gaming tables and 500 slots. The report said that Hard Rock was also looking at investment opportunities in Japan, South Korea, Cambodia and the Philippines. Vietnam has been considering allowing locals to gamble in its casinos to make its potential more attractive to foreign investment.



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HD



SOUTH KOREA – Fitch Ratings has warned Mohegan Sun that it 'will have difficulty achieving robust returns on investments' on its Integrated Resort planned for Incheon Airport in South Korea 'due to the restriction on gambling activities to foreigners only.'

It also warned that competition from new casinos in the Asia-Pacific region would be relentless. Fitch stated: "Foreigner-only large-scale integrated resort projects in South Korea will face competitive pressures from other Asia-Pacific jurisdictions such as Macau, Singapore, the Philippines and Australia. We believe this pressure will not abate as the first casino opened in Vladivostok, Russia in 2015, four new large-scale casinos are scheduled to open in Macau through 2017 and Japan continues to consider legalization."

Despite a confining regulatory environment, some operators have illustrated keen expansion interest. Mohegan Tribal Gaming Authority (MTGA), KCC Corp. and Incheon International Airport Corp. (IIAC) were selected for a license to build the \$1.6bn Inspire integrated resort (phase 1) at Incheon International Airport. The local Paradise Co. and Japan's Sega Sammy have a joint venture (JV) project under way. Caesars and partner Lippo have not yet begun their JV project, and the timeline remains uncertain. Genting Singapore is also pursuing a \$1.8bn project on Jeju Island. South Korea already has 17 casinos, but only one of them; Kangwon Land is allowed to open its doors to local players and with returns from Chinese plays down, the squeeze will feel tighter with new foreigner only casinos on the horizon.

Fitch said: "Gambling volume from Chinese players has been on the decline amid the corruption crackdown and slowing economy. The 16 existing foreigner-only properties saw aggregate casino revenue decline by 10 per cent in 2015. Still, the sole casino allowed to cater to locals (Kangwon Land) continues to see solid growth. Fitch believes chances that locals will be allowed to gamble elsewhere in the medium term are remote based on our conversations with the country's officials and incumbent operators."

Mohegan Sun's Integrated Resorts will boast a 1,350 room hotel, a Paramount Studios-themed amusement park, and a 20,000 square meter casino with 250 gaming tables and 1,500 slots. Fitch hasn't completely ruled out its success. "We believe the Incheon projects could be viable if the total number of projects moving forward remains modest and Japan's effort to legalise casinos fails to materialise," it said. "Incheon International Airport is one of the most heavily trafficked airports for international passengers in the world. By comparison, the Philippines has been able to develop a modest sized international gaming business despite its poor infrastructure."

Crown Domestic Growth Ravaged by Macau

Crown Resorts home market growth has been torpedoed by falling profit margins from its investments in Macau. An Australian Tax Office bill for A\$250m relating to Crown's US joint-venture with Cannery Casino Resort is adding to the pain

Despite its domestic casinos seeing a 10 per cent increase in GGR, Crown Resorts saw its overall revenues slide 22 per cent due to the slump in Macau

AUSTRALIA CASINO OPERATIONS

Crown Resorts revenues dropped to A\$205m in the six months to December with crown's Macau casinos falling by 30 per cent whilst its Australian casinos rose 9.8 per cent.

Chief Executive Officer of Crown Resorts, Rowen Craigie, said: "The 2016 first half results across Crown's portfolio of businesses were varied. Main floor gaming revenue at our Australian resorts increased by 9.8 per cent which was a solid performance. VIP program play turnover in Australia of \$35.7bn (down 3.8 per cent) was a reasonable outcome given the strong growth in the prior comparable period of 61.4 per cent and the depressed nature of the VIP program play market across Asia."

Crown has a share of Melco Crown's casinos in Macau, comprising Altira Macau, City of Dreams, Studio City and Mocha Clubs. Melco Crown's profit of \$37.2m was down \$73.2m or 66.3 per cent on last year. After adjusting for an unfavourable variance from theoretical and pre-opening costs, Crown's share of Melco Crown's profit was \$9.4m, down \$75.9m or 89 per cent.

Mr. Craigie said: "While the medium to long-



term outlook for Macau remains positive, Macau continues to experience a challenging period which has adversely affected all casino operators. Overall gross gaming revenue across the Macau market in the half year to 31 December 2015 declined 31.1 per cent. However, Melco Crown has further expanded its market share in Macau and increased exposure to the more resilient and profitable mass market segments."

In the Philippines, City of Dreams Manila continues to grow a more diversified revenue stream, with the continuing ramp up of the rolling chip business complementing its mass market gaming and non-gaming segments.

In Australia, normalised EBITDA from Crown Melbourne was \$352.5m, up 0.4 per cent on last year. The overall normalised operating margin decreased from 30.2 per cent to 29.3 per cent. The decline in margin is due to the change in the mix of VIP program play in favour of junket play versus direct premium play and the additional costs associated with that change in mix. Normalised EBITDA from Crown Perth was \$130.1m, up 2.4 per cent on last year.



The \$10,000,000 Colossus goes live right across Asia

Asia

Adding to extensive distribution for its lotto-sized sports pools in Europe, Australia and most recently Africa, Colossus Bets has announced the launch of the first operator to go live offering 'Colossus Football Lottery' in Asia through its regional partner ONEworks.

Headlined by the weekly \$10,000,000 Colossus, a further series of ONEworks' licensees will go-live in the coming months, following this week's release of a flagship licensee, with the world's

biggest sports jackpots for their Asian customer bases.

Bernard Marantelli, Chief Executive Officer of Colossus Bets, said: "On the back of prominent partners in Europe, Australia and Africa, adding the power base of ONEworks is an important milestone for Colossus Bets. ONEworks' extensive list of Asian licensees will help drive growth into our pools and our momentum as a company."

"Life changing jackpots on top-tier football with leg-by-leg cash-out is quickly becoming an essential component for any operator seeking to provide its players with the full suite of gaming products. ONEworks is Asia's leading provider of sportsbook software services and the addition of our football jackpots to their platform will help cement ONEworks' position as a one stop shop," said Mr. Marantelli.

Australia

Favourit, an Australia-based socially-designed online gambling brand focusing on the global market, has announced the re-launch of its affiliate programme in partnership with Income Access, a technology and digital marketing company which specialises in the iGaming industry. Accompanying Favourit's launch of a new online casino, the brand's revamped affiliate programme will integrate Income Access' affiliate management software and Ad Serving tool. First launched in 2012 and regulated by the UK Gambling Commission and Malta Gaming Authority for other international markets, Favourit offers players a wide range of betting options via a socially-designed user experience. Featuring live-betting functionality, the brand also provides players with social feeds and detailed insights on betting trends and sentiment to enhance their experience.

Louis XIII Holdings Limited is renaming its Macau hotel The 13 and has released the first images of the interiors

MACAU CASINO OPERATIONS



Louis XIII Holdings rebrands to 'The 13'

Louis XIII Holdings' hotel was first announced in 2013 and will arguably be the most luxurious hotel ever built. It is expected to open in late summer 2016 at a cost of over US\$7m per room. It is not yet known whether the hotel will have a casino as originally planned.

Stephen Hung, Co-Chairman, said: "As the business and the brand have developed, we felt that the name 'The 13' most accurately reflected our Macau hotel's combination of Baroque inspiration and contemporary accents. Our brand represents a unique vision of a global luxury lifestyle based on strong bespoke traditions while embracing modern elements that enhance these traditions. 13 is my lucky number and the new name along with the new logo fit perfectly with my vision. There is a hint of tradition while also suggesting a chic and fun edginess."

The company also announced its intention to change its corporate name to The 13 Holdings Limited subject to approval by its shareholders and other relevant authorities. The first images of the interior of its breath-taking Macau hotel, targeted to open in late summer of 2016, have now been released. Of the all-villa hotel's 200

rooms (villas are large suites in Macau parlance), most will be classed as Villa du Comte with a gross floor area of approximately 2,000 square feet while 31 are even larger, topping out at a monumental 30,000 square feet for the Villa de Stephen. Virtually every design detail in the hotel is bespoke and created especially for The 13.

"These images offer a preview of a very special gateway to the refined and remarkable. The 13 connects our international guests to the world's most coveted luxury experiences and to each other. We are proud that Macau will be establishing a new world standard for ultra-luxury hotels through its native brand, 'The 13,'" said Mr. Hung.

In September 2014, Mr. Hung purchased the largest Rolls-Royce Phantom fleet in the world, placing an order for 30 Bespoke Extended Wheel Base Phantoms for his Louis XIII hotel in Macau. This transaction represented the world's single largest order of Rolls Royces ever. Two of the fleet will be the most expensive Rolls-Royce Phantoms ever commissioned. Rolls-Royce Motor Cars has also helped to design the parking and driveways to house the fleet.



CAMBODIA – Despite a disappointing fourth quarter, Entertainment Gaming Asia reported revenue for the year of \$31.5m, an increase of 41 per cent compared to \$22.4m for the 2014 fiscal year due to increases in both the gaming operations and gaming products business divisions. The increases were due to improvements in the Cambodia operations partially offset by declines in the Philippines operations.

Gaming operations revenue was \$18.1m for the 2015 fiscal year, an increase of 11 per cent compared to \$16.4 million in the 2014 fiscal year. Average consolidated daily net win per unit was \$122 for the 2015 fiscal year, an increase of 16 per cent compared to \$105 in the 2014 fiscal year.

The company's fourth quarter of 2015 had slowed though with consolidated revenue of \$7.3m, a decrease of 12 per cent compared to \$8.3m in the fourth quarter of 2014 due to a decrease in gaming product sales partially offset by an increase in gaming operations revenue.

Clarence Chung, Chairman and Chief Executive Officer of Entertainment Gaming Asia, said: "We are pleased to report a profitable 2015 fiscal year driven by strong gaming operations revenue, record gaming products performance and cost controls. We accomplished this despite incurring approximately \$3m in non-cash charges associated with both impairments of certain gaming operations assets and the loss on disposal of obsolete equipment for the gaming products division in the fourth quarter. As a result of this solid performance, we have increased our cash position by nearly \$13.4m in the 2015 fiscal year to \$30.7m as of December 31, 2015. We are focused on utilising these resources to secure projects in new and existing markets with the goal of fuelling long-term growth for the company."

Cambodia average daily net win per unit was \$152 for the 2015 fiscal year, an increase of 24 per cent compared to \$123 in the prior year primarily due to improved performance at NagaWorld and a lower machine base at Thansur Bokor. NagaWorld average daily net win per unit was \$225 in the 2015 fiscal year, an increase of 19 per cent compared to \$189 in the prior year mainly as a result of lower player traffic in the 2014 fiscal year primarily due to political and labour unrest in the first half of the year and NagaWorld renovations of the casino floor that impacted certain areas of slot operations in the second half of the year.

Philippines average daily net win per unit was \$65 for the 2015 fiscal year, a decrease of eight per cent compared to \$71 in the prior year.

Cambodia

Junket operator Jimei International Entertainment is to develop an integrated-entertainment complex in Cambodia with the country's resort developer Yeejia Tourism Development Company. The junket promoter reached a framework agreement with Yeejia on March 17 to establish a joint venture for the development in the Southeast Asian country. The integrated project would include property, hotel, golf course, theme park and other entertainment and tourism business. Jimei, which will be responsible for formulating the development project plan, and arranging finance, currently owns interests in the junket business in NagaWorld casino resort owned by Cambodian gaming operator NagaCorp Ltd. in the country, which includes seven gaming tables at the casino.



China

Macau's casinos showing first signs of recovery

Chinese New Year helped Macau's casinos report their best monthly gambling revenue performance since October with the smallest drop in growth in 20 months. GGR fell by just 0.1 per cent to US\$2.4bn, marking the 21st monthly decline in succession, but falling well short of analysts' predictions of a fall of between two to 10 per cent.

The figures were boosted by higher numbers of tourist over Chinese New Year. Tourism figures from the mainland have been on the rise for the first two months of the year up 2.6 per cent in January and 4.5 per cent in February. David Bain, an Analyst at Sterne Agee, said: "Arrival increases bode well for Macau's longer-term bull thesis which includes an unparalleled geographic gaming location, small mainland penetration and upcoming multi-staged infrastructure improvements."

Union Gaming Group LLC analyst Grant Govertsen, added: "The fact that the market almost grew in February despite continued VIP woes leads us to believe mass market increased nicely year-on-year in February, which is what investors likely need to see more of."

He predicts that Macau's casino revenues will return to growth in July following a 13 per cent and six per cent dip in March and April.

Immersive lighting designs thrill at Casino du Lac-Leamy



François Roupinian,
President and Designer, Lightemotion
"The lighting comfort was one of the most important guidelines. The primary objective is to provide lighting without disturbing the player. Thus, the light is always integrated in the architecture elements. Just like a boomerang, architectural elements serve as reflectors to emanate light. We have also found ways to break the light by using textures that are unnoticeable. It creates a soft lighting that allows visitors to feel like they're in a bubble."

About Lightemotion

The Lightemotion team is composed of lighting and theatre designers, lighting engineers, interior architects and marketing consultants from the four corners of the globe. The firm sets itself apart from others by its multidisciplinary team and its artistic approach, focusing on the needs of its customers. Able to intervene in five different languages, this eclectic team works with the same passion and technical rigor regardless of the size of a project.



Photo credits: Stéphane Brugger

A new immersive and sophisticated lighting environment, custom made by the Montreal firm Lightemotion, is getting noticed at the Lac-Leamy Casino

Canada's lighting design specialist, Lightemotion last featured in the pages of G3 at the launch of New Jersey's Revel Casino. While the casino failed spectacularly to live up to expectations, the lighting design throughout the casino was a stunning example of modern lighting techniques blended with practical gaming-orientated, player-focused solutions.

The company's most recent project is one that's much closer to home. Mandated by Loto-Quebec and the Gatineau casino, Lightemotion has worked closely with the architects of Sid Lee Architecture and Fortin Corriveau Salvail Dampousse architecture + design to create a direct symbiosis between architectural elements and light. The result is an immersive experience that begins at the threshold of the casino and continues through each of the hotel's different sections.



"The lighting comfort was one of the most important guidelines," says Roupinian, Lightemotion's President and designer. The primary objective is to provide lighting without disturbing the player." The experience of the Montreal firm in museum lighting design was put to good use in the Casino du Lac-Leamy project, with the light always integrated into the architecture elements of the location.

"Just like a boomerang, architectural elements serve as reflectors to emanate light," says Mr. Roupinian. "We have also found ways to break the light by using textures that are unnoticeable. It creates a soft lighting that allows visitors to feel like they're in a bubble."

INNOVATION AND CREATIVITY

Thanks to their experience with the mega resort of the Revel casino in Atlantic City, Lightemotion was able to highlight each space by using light in a creative and innovative way. The company has also created a majestic structure with luminous scales that have become the focal point of the casino. With its lighting finesse, the Montreal firm has managed to highlight each point of interest within the casino and hotel location.

Lightemotion's biggest challenge for this long-term project was the casino's business hours; it is open 24 hours a day, 365 days a year. "It's very difficult to do maintenance in a casino. We had to find a way to design lighting that requires no maintenance and has a perfect life span," explained Mr. Roupinian. The remit for the design team was always that the Lac-Leamy Casino had to remain open throughout the duration of the renovations, which was successfully achieved.

With its expertise, the company has become a key player in architectural highlighting around the globe. The team has recently designed the lighting of the 125th and 148th floors of the world's tallest building, the Burj Dubai Mall Expansion. They also created the lighting of the largest train museum in Europe: Brussels' Train World.

In Canada, the 2014 Lighting Master Plan of Parliament Hill in Ottawa was designed by the team and Lightemotion is currently hard at work on several lighting concepts in the Canadian Capital: The History Museum, the National Art Center and the Government Conference Centre and the East Block.





The casino presented major organisational challenges: Its interior spaces were cluttered and undistinguished, producing a confusing and unwelcoming result, devoid of hierarchy or landmarks. The architectural intervention, therefore, aimed to bring coherence to the space; open perspectives to better connect the spaces and identify their functions; and rework the vertical lines offered by the building.



REVITALISING CASINO DU LAC-LEAMY

Wishing to reinvigorate its image and position as an essential actor on the entertainment scene, Société des casinos du Québec employed the services of the Sid Lee Architecture & FCS architecture + design consortium to lead an “intervention strategy” at Casino du Lac-Leamy in Gatineau.

The casino presented major organisational challenges: Its interior spaces were cluttered and undistinguished, producing a confusing and unwelcoming result, devoid of hierarchy or landmarks. The architectural intervention, therefore, aimed to bring coherence to the space; open perspectives to better connect the spaces and identify their functions; and rework the vertical lines offered by the building.

An aquatic theme was chosen to develop a unique identity for the casino, which is located on the shores of a lake and surrounded by water. “The main staircase

was brought to the middle of the central space, among the game tables and slot machines it connects to the restaurants and discotheques on the upper floors.

Designed as a beacon visible from all aspects of the casino, the stairs are dressed with a unique carapace composed of 595 backlit metal scales declined into 94 different models, reminiscent of fish skin and its changing reflections. An iconic architectural element, it centralises all visual perspectives and asserts the space’s identity,” explained Martin Leblanc, Architect and Partner at Sid Lee Architecture.

Supported by the existing structure, the strategy sought to establish targeted and efficient actions. The result is striking: A veritable ambiance has been created, radically renewing the public’s experience and attracting a larger and more diversified clientele, in a unique space offering a multitude of entertainment possibilities.



About Sid Lee Architecture

Founded in 2009 following the integration of architecture firm NOMADE (founded in 1999), Sid Lee Architecture is the fruit of architects and urban designers Jean Pelland and Martin Leblanc’s talents and skills combined with creative agency Sid Lee’s wide-ranging offering. Operating on a global scale from its Montreal offices, Sid Lee Architecture gathers more than 35 architects, technicians, designers, managers, and other artisans offering services in urban studies, architecture, interior architecture, strategic development and positioning, brand integration, and signage – for cultural, residential, institutional, recreational, and corporate projects. Sid Lee Architecture’s work stands out for its uniqueness and strong identity, marked by history, culture, and community. Since 2015, Sid Lee Architecture is part of kyu, a new collective of creative businesses established by Hakuodo DY Holdings, the second largest network of agencies in Asia.

Changing the face of casino gaming in the Seychelles



Jake Waller,
Managing Director,
New World Gaming

"We will break the mould of casinos in the Seychelles to satisfy the demands of the owners. This will be the benchmark casino for New World Gaming".

The government has recently realised that casinos and international tourism can go hand in hand. They look to have correct casino taxes as additional sources of revenue and have also brought in advisors from the UK to completely reconsider the Seychelles gaming legislation and bring it into the 21st century



There are many reasons to go to the Seychelles today, but casino gambling is currently not one of them. All that's set to change with the opening of the Club Liberté Casino, in the stunning grounds of the Four Seasons Hotel Resort

The Seychelles; tropical green islands set in the sparkling waters of the Indian Ocean, welcome the traveller to discover this country often styled as "unique by a thousand miles" - where the houses hug the lower slopes of majestic mountains smothered in green velvet, the dark forest broken by spectacular granite outcrops and where the white beaches fuse into the turquoise seas. These beaches are the glory of the Seychelles and each beach has its distinct character.

Mahe is the main island of the Seychelles and is undoubtedly one of the most beautiful and impressive islands in the world, with most of the population of the Seychelles concentrated in the north around the capital, Victoria. Away from the bustling little capital and its business and hotels, there is extraordinary beauty to be found along the coast of Mahe, particularly in the south and over the mountains to the west.

Come to the Seychelles for a romantic vacation, come to stay in a world-class resort, come to dive in crystal-clear waters, come for the deep-sea fishing, come to chill out under a palm tree on a natural beach, come to drink a rum punch by the poolside, come to get a taste of Creole culture and cuisine - but don't come for the casinos - yet.

For some years, there have been a few casinos open in

the Seychelles, but these, even though some are located in major hotels, are small and antiquated in style and equipment and are, frankly, merely a minor part of the hotels' entertainment offers. There are several casinos in Victoria as well as slot arcades, but these are really designed for the small local player with no attraction for the more sophisticated player who might be drawn to come to the Seychelles to stay in one of the exquisite luxury resorts.

The government has recently realised that casinos and international tourism can go hand in hand. They look to have correct casino taxes as additional sources of revenue and have also brought in advisors from the UK to completely reconsider the Seychelles gaming legislation and bring it into the 21st century.

All of the existing gaming operations have nine months to comply with the new legislation and newcomers must comply from the start to ensure their licence. This will be difficult for some of the existing casinos and slot arcades and some may probably close rather than face the expense involved. The biggest casino on Mahe has recently closed its doors permanently, though whether this was because of the new legislation is an open question.

The Seychelles already has superlative large resorts that need only the addition of the casino element to turn them into integrated resorts, which will be





uniquely Seychellois in character. Casino optimisation can be achieved by issuing several licenses providing choice for visitor, and the competitive forces necessary to maintain the standards of service and product appeal that will serve to differentiate the Seychelles as a preferred casino destination.

To find the first of these integrated resorts, take a 20 minute drive from Victoria over the mountains to the southwest coast of Mahe, to Petit Anse, where the Four Seasons Resort Seychelles is located. This is "probably the number one resort on Mahe;" situated on a lush hillside, it is the perfect setting, with inspired tropical villas verdant with mango, jackfruit and coconut trees, cascading down towards sugary white sands. Here, in the grounds of the Four Seasons Resort, construction is under way on the first of the new style casinos – the Club Liberté Casino. The Club Liberté is scheduled to open in July this year.

The owners of the casino and the resort are determined that this casino will be that which "changes the face of casinos in the Seychelles" and are prepared to invest to ensure that the casino is a match for the total Four Seasons resort. With a combination of contemporary and tropical influences, the casino will resemble a colonial plantation house, and the plantation house "spirit" will be developed as soon as the door opens into the luxurious gaming area. The Club Liberté will not be a big casino, but it will raise the bar of the Seychelles casino offer to new heights. The main casino gaming floor will have roulette, poker and blackjack tables,

plus there will be a unique and exclusive VIP gaming room offering roulette, blackjack and punto banco or poker.

Thirty of the latest electronic gaming machines will be available and will include the most popular reel and video slots, all linked to a loyalty card system. Naturally there will not be just gaming, and the casino will propose a glamorous cocktail bar, a sushi bar – food as entertainment – and a quality restaurant offer, plus live music and other entertainment.

The Seychelles already has a high percentage of quality visitors from the Middle East and the Gulf States – Dubai is only a direct four hour flight from the Seychelles – and this will be one of the main target areas for the marketing of this new casino. When the owners were looking for a management company for the new casino, they took the decision not to approach the usual operators of such casinos, but to look for a smaller company who would have the interest to dedicate to this casino, and they brought in New World Gaming. New World Gaming is a UK based co-operative gaming consultancy, headed by Managing Director Jake Waller, that brings fresh and innovative management ideas and services to the casino industry backed by the experience and expertise gained and developed at top-class international operations.

As Jake says, "We will break the mould of casinos in the Seychelles to satisfy the demands of the owners. This will be the benchmark casino for New World Gaming."

About New World Gaming

New World Gaming's mission is to deliver highly responsive support to its clients in the small and medium-sized casino market in order to deliver quick, practical and cost-effective solutions and results which exceed their clients' expectations. NWG delivers its mission through its cohesive group of highly skilled and knowledgeable consultants which collectively has 157 years of hands-on casino experience. Members of the group have diverse functional specialities which are underpinned by common values and operating methodologies instilled at Sun International during their earlier careers. Their experience covers the full spectrum of management activities and responsibilities from turn-key scratch developments in new jurisdictions to multi-site optimisation in mature markets. NWG consultants have operated in the UK, Greece, Moldova, Czech Republic, South Africa, Namibia, Angola, Tunisia, Kyrgyzstan, Russia, Hungary, Croatia, Bolivia, Peru and Mexico, serving companies such as Sun Int., Stanley Casinos, Isle of Capri, Storm, Ritzio and Playboy.

Lagos regulator points way to market success in Africa



Lanre Gbajabiamila,
Chief Executive, Lagos State
Lottery Board (LSLB).

Mr. Gbajabiamila will discuss the achievements of his organisation when he delivers one of the keynote speeches at World Regulatory Briefing Africa (WrB Africa), which will take place in Lagos, Nigeria on April 11-12 and is organised by Clarion Events, the team behind ICE Totally Gaming.

WrB Africa will take place in Lagos, Nigeria from April 11-12.
www.africa.wrbriefing.com

"Online sports betting has become more popular than other gaming activities over the years, probably due to Nigerian's passion for sports, particularly football. The evolution of technology also contributed to the development of gaming and patronage as interested persons can play from the comfort of their homes without having to visit outlets."



A strong regulatory system that helps the industry to thrive is the key to success for gambling in Africa, according to the head of one of the continent's leading gaming authorities. G3 speaks to LSLB chief, Lanre Gbajabiamila about the future

Lanre Gbajabiamila is the chief executive of the Lagos State Lottery Board (LSLB), and an advocate for the legislation of the many forms of gambling in the Nigerian state, as he believes a robust licensing system has enabled law-abiding operators to offer a range of regulated products, raising money for good causes while also deterring criminals.

The LSLB splits its focus into four areas – regulate, protect, promote and generate – meaning that it plays a role in the development of the legal gambling sector, while also keeping check on the various licensed lottery, betting and other operators.

"Regulation has proved very effective," said Mr. Gbajabiamila, who has led the LSLB since 2007. "Prior to the set up of LSLB, the industry in Lagos was largely informal and unregulated. Aggrieved persons had no means of seeking redress for wrong done and the state also lost revenue that could have been generated. The benefits are job opportunities, wealth creation and social development of the state. Our major concerns are always unlicensed operators and the threat of underage gaming."

Mr. Gbajabiamila believes that strong regulation has allowed operators to attract customers from across society, including wealthy individuals who may have previously been repelled by criminality within the sector. Mr. Gbajabiamila added: "The informality of the sector cast it in a bad light and partly responsible for the stigma associated with gaming."

"In the past, it was only patronised by low income earners and uneducated people and seen as a vice for illiterates. In recent times, with involvement of regulatory bodies and proper framework, gaming has become popular and accepted by all classes of individuals."

As both a promoter and regulator, the LSLB "adopts a stakeholder-inclusive approach in its regulatory functions. We ensure and guarantee conducive operating environment for licensees and integrity of games for stakers". It is therefore in the organisation's interest that the sector is a success, as more revenue can be directed towards good causes.

Mr. Gbajabiamila is optimistic about the continued growth of gambling in Lagos and Nigeria, with technology and the public's appetite for sport among the driving forces.

"The Nigerian gaming industry is an evolving one and gradually expanding," he said. "More states and individuals are becoming more aware of the opportunities that exist in the industry in terms of entertainment, revenue and employment."

"Online sports betting has become more popular than other gaming activities over the years, probably due to Nigerian's passion for sports, particularly football," said Mr. Gbajabiamila.

"The evolution of technology also contributed to the development of gaming and patronage as interested persons can play from the comfort of their homes without having to visit outlets."

As well as offering superb networking opportunities, WrB Africa will also feature executive-led presentations and debate about matters as diverse as setting up a sportsbook in an African country, to marketing and anti-money laundering legislation.

Mr. Gbajabiamila said: "Hopefully it will create awareness, attract investors and stimulate growth of the economy. It will be useful to keep abreast of global development in the industry."



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A burgeoning street market attracts the industry to Serbia



Belgrade Future Gaming Expo
May 24-25, 2016

The Belgrade Future Gaming Expo takes place May 24-25, 2016 at the Belgrade Fair Grounds. The two day event is an amalgam of exhibits that include arcade games, poker and casino slots, through to video and computer game-based technologies associated with the Toys & Games industry. Exhibitors from the gaming industry include: Suzo-Happ, Synot, Stormbet, Nsoft, Maxbet, Casino Technology and Novomatic.



"We are very keen on having an opportunity to exhibit in Belgrade again. Also, the timing is very good for us as we are about to introduce Explosive Games I and Explosive II in March, just few months before the fair takes place.

We are ready to support and strengthen the position of these products at the market and help our distributor, to penetrate the market as fast as possible."



G3 took the chance to interview Synot Group Sales Director, Roland Andrysek, ahead of the Belgrade Future Gaming Expo about market opportunities in Serbia

What are the opportunities in the Serbian gaming sector right now?

Synot has been active in the Balkan region since 2008. In this region alone, Synot distributes its products or participates with operations in Romania, Macedonia, Albania, etc. There are a lot of operators from Serbia that have expressed an interest to cooperate with us in this market. Therefore, the main reasons why we have decided to enter this market is that we're in a strong position in the region, with very satisfactory results achieved in the neighbouring countries and also a lot of potential in this market.

According to our analysis, the market is still not saturated and there are a lot of out-dated machines, which need, sooner or later, to be replaced. Obviously, we find many challenges in Serbia such as substantial number of illegally operated machines, a lack of compliance with intellectual property law etc. Nevertheless, we experienced similar difficulties in the past in other markets, such as Ukraine etc, and we managed to overcome those obstacles.

What are the latest AWP products from Synot for Serbian operators, why are they suited to the marketplace and will VLTs be viable in the future?

For the market entry, Synot has prepared two unique game compendiums, Explosive Games I and Explosive Games II, each with 10 games. The games were selected from our basic game library, which contains over 110 games. Based on detailed analysis of the market, players behaviours, current successful game solutions in the market, we have made few minor adjustments to the selected games and created two game portfolios for Serbia. Therefore, I strongly believe that the initial game portfolios will be successful very soon after the market entry.

Regarding VLTs, as I do not know more sophisticated land-based system where not only the operators, but also the regulators have a complete online supervision over literally all activities, I am sure that an implementation of such a system in Serbia would be beneficial for all participants.

I could mention few well-known parallels, such as the Czech Republic, Italy, Canada, Slovakia, the UK etc., where the VLT system implementation caused a revolutionary improvement of the entire sector.

How have operators taken to the random nature of Synot's gaming machines, having been accustomed in the past to 'controlled' games?

There is still a considerable number of old fashioned game solutions in Serbia, however, with the growing importance of the market, the offer of the main market participants has changed significantly. Personally, I do not see random games as a novelty in Serbia as for example Novomatic, Apex, Merkur and others are present at the market and their games are also random as opposed to controlled games. Much bigger problems are the illegally operated machines, copied games and low prices of gaming equipment.

Has the show been useful in the past for Synot and what do you expect from this year's event?

The exhibition in Belgrade, where we have already participated several times, is a typical local exhibition with a lower number of visitors and exhibitors. Having said that, it is a good opportunity to present products designed for the market, meet potential customers and better understand the market expectations. All above cannot be achieved at ICE or G2E, where the main goals are very different and less focused on particular regions/clients.

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William Hill: relishing the prospect of a big year of sport



Founded in 1934, William Hill is one of the most trusted brands in our marketplace, attracting millions of customers from around the world. Employing more than 16,000 people in nine countries, William Hill continues to transform the betting business, investing in new technology and innovation. In addition to the UK Retail and Australia markets, WH's online business is headquartered in Gibraltar with its marketing and customer service functions in Israel, Bulgaria and the Philippines. WH also has licensed websites in Italy and Spain, and William Hill US operates in the states of Nevada and Delaware.



James Henderson, CEO William Hill

Having recently published its financial results for 2015, William Hill's CEO James Henderson and CFO Philip Bowcock, discuss the company's performance and address the major issues affecting the business into the future

You've publishing your final results for 2015, so how would you summarise performance?

James Henderson (JH): I think I'd sum it up as a very solid performance. We achieved a £291.4m, so a very solid performance, but you've also got to remember we had £87m worth of additional taxes, so if you strip them out actually our profit increased by two per cent year-on-year. Across the divisions, retail saw another resilient performance and is the most profitable channel.

America again continues to go from strength-to-strength and mobile now accounts for over 50 per cent of the revenues. It was a huge year too for Australia, which saw a big turnaround and we exited the year with a turnover growth in single-digits which is very, very pleasing.

As for online, it's probably best to sum up as good growth in the core product, in all of the core territories, but slightly dragged down by the Rest of the World, but all-in-all a really solid performance.

Philip, turning to the financials, revenues, profits and EPS were all down, so shouldn't that be a cause for concern?

Philip Bowcock (PB): No, because I think you need to look at it in two distinct parts. Revenue was down, primarily because it was a non-football tournament year. Also we had slightly lower gross win margins, so that accounted for a decline as well. But when we look at the profit and the EPS numbers, without the £87m of additional taxes coming through that James has spoken about, both profit and EPS would have been up, again showing the resilience of the business. So actually it was a solid year, as James has said.

ONLINE

Looking at Online, growth there has been slower than in previous years, so are you concerned about losing market share?

PB: No, you need to look at Online in two parts. We've recently announced that we'll split the reporting between 'core' and 'other', so core being our UK, Italy and Spain markets, and in those markets we saw double-digit growth. In our other markets, the other international markets in which we operate, we unfortunately had to close in five markets due to regulation and, yes, we saw revenue decline as a result. But in those core market in which we operate growth was good.

Could you give us an update on your planned marketing spend? Have you got big plans for the forthcoming European Championships?

PB: We expect marketing to go up by double-digits in 2016 over 2015, for me it's about spending the money in the right way. We're not constrained by how much we spend, for me it's about spending it in the right way.

JH: And I think it's also important to note that the collateral for the Euros was acquired last year so the BT, Sky and ITV assets were acquired in 2015 and they'll run through Euro 2016, so we're in a good place to be able to capitalise and make sure that we get our share of voice.

You've now launched the Sportsbook mobile site, and the new iOS app, both developments to come out of Project Trafalgar. What in real terms does this mean for William Hill?

JH: Huge strategic important to start with. The whole point is to be able to reduce your reliance on third parties and having Trafalgar means we

take charge of our frontend and what that allows us to do is to move at pace, so we can innovative and release new product on a regular basis. So since we launched Trafalgar we've been making 20 releases a week and we've actually also released five native apps since then as well. So that allows us to bring product through much quicker and therefore provide our customers with a differentiated and exclusive product range.

RETAIL

Looking at Retail, what are the major trends that you're seeing? Are you concerned that the performance of your machines hasn't been quite as strong as that of your competitors?

PB: When I look at Retail I look at the overall, so I look at the overall shop performance. Yes, the gaming machines did not perform as well as we would have liked in the first half, we were putting new machines out, we had a content freeze while we did that, but subsequently into quarter four of last year we actually had some content coming out and we saw good growth in our machines. I look at the whole estate, and if we look at shop performance we are market leading. Whether the consumer spend is over the counter or it's on machines, it's about maximising the opportunity of those shops.

You've often spoken about your omni-channel strategy, where exactly does Retail fit within that and your self-service betting terminals?

JH: Yes, omni-channel is a key part of the strategy because we are number one in Retail, we're now number two in Online, and that's a huge opportunity to leverage that customer base. Only 28 per cent of our retail customers use online, but only 45 per cent of those use William Hill, so we have a huge opportunity to



Philip Bowcock, CFO William Hill

do that. The more familiar we can make the content, the more familiar we can make the experience then the more likely we are to capture that in William Hill, whether it be online to retail or retail to online.

And a key part of that strategy is the SSBT, because if we're able to bring that rich breadth and depth of content from online that people are familiar with through our SSBT, which will be the only proprietary SSBT on the high street, then we have a better opportunity of catching those cross-channel customers which we know are more profitable.

PB: Our SSBT is proprietary to us therefore we don't pay a revenue share to a third party unlike our competitors, which enables us clearly to be more profitable. So from that perspective for us it doesn't matter whether the customer spends it over the counter or on the SSBT.

INTERNATIONAL And what progress have you made in Australia since you launched the brand there last year?

JH: We launched the brand in February of last year, and we started by migrating the Sportingbet customers over. And actually within a month, 98 per cent of the customers we'd migrated over had had a bet under the William Hill brand. So, we then pioneered In-Play under the William Hill brand, and that gained great traction we also launched an App at the same time in September. So the combination of the William Hill brand, the In-Play product and the new App really saw us accelerate at the back-end of the year and saw the whole business growing in a single-digit fashion, bearing in mind in Q3 we were declining by 31 per cent. So it's a real turnaround story.

Looking beyond Australia, how have the other international businesses perform in 2015?

PB: Well we have three other international businesses outside the UK, being Italy, Spain and the US. The US has performed well. We've seen good turnover growth, margin was slightly down but overall it's a great small business with great opportunity, depending on what happens in the US gaming industry.

Elsewhere in Italy and Spain, Italy turned positive in 2015, which was a major move for us,

and Spain again saw good growth and we would expect Spain to be positive in 2016.

Looking across your international footprint, how easy is it for you to roll out your technical innovations across the international portfolio?

JH: If I can just look domestically first. The SSBT [changes] that I talked about earlier that we're going to be rolling before the Euros, we've been able to do that off the Trafalgar platform. So it makes any new innovation or new product much easier and if we go internationally then there's no reason we can't replicate that.

In regards to the global trading platform and the feeds, and Australia was a beneficiary of that during the Australian tennis. We have many more markets than anybody else so it means we can have a one-stop-shop where we take all that rich product from Online and distribute it around the world. So being in charge of your own destiny, whether it be the frontend or indeed your feeds, you're going to have a much better opportunity to be able to expand internationally and domestically.

FINANCIALS You've announced a £200m share buyback scheme, so what does that tell us about WH's balance sheet and use of capital?

PB: It's about being flexible and having flexibility. Clearly the important thing is that we do pay a dividend to our shareholders, as I've just said the confidence that the Board has means that we can increase that. It's then about investment. Organic investment where we can. If not, where there is M&A opportunity then

we will pursue that. If those are not open to us, then we will look when we've got excess cash, a giving cash back to shareholders.

OUTLOOK

England, Wales and both Irish teams qualified for the European Championships, are you anticipating a bumper summer of bettings?

JH: I love tournament years, obviously, whether it be a World Cup or Euros, it's a huge opportunity for us. It's a pity Scotland aren't there to get a full suite of home nations but I'm looking forward to a really good, competitive tournament. There are more teams this time than there were last, so there'll be more matches, and with all the innovation and the Trafalgar platform that we've got in place we're really in a position to capitalize on the tournament. So I'm really looking forward to it.

Looking more broadly, what is the outlook for the year ahead?

JH: 2015, let's be fair, was a difficult year with the significant tax headwinds that we had, a lot of changes made in the Australian business and the Online business with Trafalgar, but we are now in the perfect position to be able to capitalise on the opportunities that 2016 presents to ourselves.

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MEMBER PROFILE

Company / Advantech-Innocore

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AGEM Membership level / Associate

Description / Advantech-Innocore brings to its customers the combined strengths of the largest industrial computer company together with over 15 years' experience in gaming. Advantech-Innocore is now the leading global gaming supplier. The company specializes in designing and manufacturing industrial grade hardware and dedicated software tailored to the exact needs of the gaming industry.

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Advantech-Innocore is able to meet the most demanding requirements of our customers in the gaming industry.

New products for 2016 / 2016 will see no less than three new core products introduced: the exciting new DPX-S440 in the S Series Range, and the DPX-E135 and DPX-E250 in the E Series range.

Forthcoming events / In Taiwan in 2016, Advantech will complete Phase II of its new campus headquarters complex. This 60,000 m2 addition to the Phase I 30,000m2 that was completed in 2013 will add further manufacturing, offices, research and development, training center and even accommodation space to the impressive site.

MEMBERSHIP NEWS

AGEM Key Board of Directors Actions

- The Nevada Gaming Policy Committee was recently reconvened by Governor Brian Sandoval for the second time since 1980's. The meeting was dominated by DFS (Daily Fantasy Sport) discussions, but AGEM Executive Director Marcus Prater was given a slot to speak at this important forum. His remarks centred on the significance of ensuring that Nevada remains the intellectual capital of the global gaming industry and how the Gaming Control Board and the suppliers worked together in the aftermath of Senate Bill 9 that legalised variable-payback slots. In both cases, Nevada officials and the supplier sector are working together for the betterment of all.
- The proposed conference in Mexico organised by SEGOB has now been confirmed to go ahead on May 17-18 in Mexico City. AGEM has been given a seat at the table in shaping the conference and its agenda with three main topics being proposed. These include: Machine Certification, Banning of Illegal Machines and Responsible Gaming. The conference will be a networking event, attended by regulators, suppliers and operators.
- AGEM continues to work with Bermuda Casino Gaming Commission to write regulations for suppliers who want to do business with the three proposed casinos. A draft was recently submitted to Executive Director Richard Schuetz for review and it will ultimately be presented to the full Commission. There is currently no time line regarding adopting the AGEM wording, but this collaborative event is well underway.
- As part of AGEM's mission to support responsible gaming initiatives around the world, the members recently approved annual contributions of two eminent organisations. The National Council on Problem Gambling based in Washington, D.C., will receive AGEM's annual contribution of \$40,000. The Council serves as the national advocate for programs and services to assist problem gamblers and their families. In the UK, the charity GamCare was approved a contribution of £5000. GamCare is the leading provider of information, advice, support and free counselling for the prevention and treatment of problem gambling.
- The March Board Meeting saw four new members welcomed to the group, taking the total number of AGEM members to an all-time high of 154. APEX gaming based in the Czech Republic were welcomed as a Bronze member, along with Casino Screens, RMMC and Tohkoh Plastics America as Associate members.

Events and Activities

- AGEM recently agreed to contribute \$5,000 toward The International Masters of Gaming Law (IMGL) Spring Conference being held in San Francisco from April 20-22. The IMGL is the pre-eminent global gambling law networking and educational organization shaping the future of Gaming Law.
- The 10th Annual Nevada State Conference on Problem Gambling is taking place May 5-6 in Las Vegas. AGEM pledged a contribution of \$5,000 to support this event.
- Held every three years, The International Conference on Gambling & Risk Taking will take place in Las Vegas, June 6-10. AGEM has agreed to be a Silver Level sponsor at this prestigious event, by contributing \$7,500. The conference attracts an international crowd with the world's most academic group of speakers on the subject.

AGEM INDEX

Positive growth in February 2016 after falling 8.86 points in January 2016. The index stood at 197.00 at the close of the month, an increase of 8.54 points, or 4.5 per cent, compared to January 2016. The AGEM Index reported a year-over-year increase for the fifth consecutive month, rising 4.29 points, or 2.2 per cent, when compared to February 2015. During the latest period, eight of the 14 global gaming equipment manufacturers reported month-to-month gains in stock price, with two up by more than 50 per cent and another up by more than 40 per cent. Of the six manufacturers reporting declines in stock price during the month, only one was down by more than 10 percent.

AGEM

	Exchange: Symbol (Currency)	Stock Price At Month End			Percent Change		Index Contribution
		Feb-16	Jan-16	Feb-15	Prior Period	Prior Year	
Agllys	Nasdaq: AGYS (US\$)	10.45	9.90	9.89	5.56 ▲	5.66 ▲	0.15
Ainsworth Game Technology	ASX: AGI (AU\$)	2.19	2.22	2.50	(1.35) ▼	(12.40) ▼	0.15
Aristocrat Technologies	ASX: ALL (AU\$)	10.00	10.25	7.44	(2.44) ▼	34.41 ▲	0.70
Astro Corp.	Taiwan: 3064 (NT\$)	41.00	19.60	30.55	109.18 ▲	34.21 ▲	1.16
Crane Co.	NYSE: CR (US\$)	49.05	47.76	66.83	2.70 ▲	(26.60) ▼	0.88
Daktronics, Inc.	Nasdaq: DAKT (US\$)	7.07	8.03	10.23	(11.96) ▼	(30.89) ▼	(0.43)
EverI Holdings Inc.	NYSE: EVRI (US\$)	2.94	2.81	7.11	4.63 ▲	(58.65) ▼	0.10
Galaxy Gaming Inc.	OTCMKTS: GLXZ (US\$)	0.22	0.13	0.37	69.23 ▲	(40.54) ▼	0.07
Gaming Partners International	Nasdaq: GPIC (US\$)	9.64	9.20	8.50	4.78 ▲	13.41 ▲	0.04
International Game Technology PLC	NYSE: IGT (US\$)	14.78	14.47	17.84	2.14 ▲	(17.15) ▼	0.72
INTRALOT S.A.	ATHEX: INLOT (€)	1.13	1.19	1.79	(5.04) ▼	(36.87) ▼	(0.13)
Konami Corp.	TYO: 9766 (¥)	2,739.00	2,766.00	2,418.00	(0.98) ▼	13.28 ▲	1.47
Scientific Games Corporation	Nasdaq: SGMS (US\$)	8.51	5.92	13.51	43.75 ▲	(37.01) ▼	3.69
Transact Technologies	Nasdaq: TACT (US\$)	7.24	7.73	6.52	(6.34) ▼	11.04 ▲	(0.04)
Change in Index Value							8.54
AGEM Index Value: January 2016							188.46
AGEM Index Value: February 2016							197.00



AGEM is an international trade association representing manufacturers of electronic gaming devices, systems, lotteries and components for the gaming industry. The Association works to further the interests of gaming equipment manufacturers throughout the world. Through political action, tradeshow partnerships, information dissemination and good corporate citizenship, the members of AGEM work together to create benefits for every company within the organization. Together, AGEM and its member organisations have assisted regulatory commissions and participated in the legislative process to solve problems and create a positive business environment.

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European lotteries – instant gratification

Lottery is big business. Total turnover for the European lottery and sports betting sector reached €76.7bn with a GGR in 2012 of €34.1bn. There are more than 380,000 Points of Sales whilst the largest lottery activities in the EU are draw based games such as Lotto, EuroMillions or Joker brands

Draw games, offered in all 27 member states of European Lottery Association, saw sales of €49.2bn and a GGR of €22.4bn (66 percent). The second largest category is instant games with EU sales of €20.2bn and GGR of €6.6bn (19 percent). Sports game categories saw a total GGR of €1.9bn (six percent) whilst EGMs (slots and VLTs) are operated in only a few EU member states and this saw a GGR of €2.8bn (eight percent).

The fastest growing lottery product category in Europe is Instant Games and this sector has more potential to grow through innovation and development.

Until 10 years ago instant games were only a small part of the European lottery mix and some say the catalyst behind the growth was Italy's re-launch of their instant product in 2004. The Gratta e Vinci's instant game sales has surpassed lotto sales with a 500 percent growth rate since 2005, and is the world leader for total instant sales with €9.4bn in 2014.

Developed in the US, the instant game is now tying into gaming systems at retail and also

mobile and internet systems. Lotteries are now refreshing their current instant games and expanding the number of games in their line up whilst adding branded games. So what is the reason behind their success?

According to Scientific Games, Gratta e Vinci implemented an integrated product management approach with marketing, inside sales, distribution, retailer training and in-store product display optimisation.

The lottery has about 34 instant games on sale in the marketplace at any given time through its 65,000 retailers in Italy. Their most successful instant products are the Milardario brand which is sold at €5, €10 or €20 price points.

The brand is based on spotlight games developed by Scientific Games and launched in the US last year. The €20 Milardario game alone accounted for €2.2bn in sales in Italy whilst in France the €5 cash game operated by Fracaise des Jeux drove €2.2bn in revenue into their business in 2014.

Portugal has also seen a huge growth in instant game sales in 2014 with an 18 percent

increase in 2014. The Santa Casa de Misericordia de Lisboa lottery saw sales of €711m in the instant category compared to €37.3m back in 2005. The lottery is now rolling out a second family of instant games.

Other growth markets in the lottery field include the development of second chance promotions similar to the scheme introduced by TIPOS in Slovakia which offers players more chances of winning by entering codes from lottery tickets purchased at retail via internet and mobile promotions. Some offer prizes or points for playing.

Mobile phone use is also increasing for the lottery sector in Europe – already 84 percent of European lotteries are utilising mobile phone apps to connect players to the lottery and its products. Some lotteries have integrated social media components into the games and promotions and most lottery operators aim to connect mobile and retail together.

Intralot for example has a mobile applications product line consisting of innovative native applications offering an intuitive user





experience in cooperation with a powerful player account management system, that when combined, transfer the traditional lottery experience to the mobile.

More and more lotteries are also including vending machines as part of their product distribution strategies as these enable products to be sold in more locations whilst keeping

customers happy with shorter queues and faster service.

Antonis Dimos, Intralot Group Director Lotteries said: "Vending machines of the past were used to sell scratch and draw games with many limitations in an inflexible solution. Intralot's Dreamtouch redefines the market and sets new standards in selling scratch games,

interactive gaming and offering digital signage services. Dreamtouch motivates an impulse buy concept with a simple, fast and enjoyable gaming experience that is rewarding for players and allows the lottery to increase product sales and improve brand/product awareness."

To reach new players Norsk Tipping and De Lotto have both expanded their retail network to include major supermarket chains. Scientific Games has been working with Norsk Tipping for the roll out of WAVE M retail terminals. The Norwegian lottery pioneered the launch of a new in-lane supermarket solution in 2008 and is now working with Scientific Games to refresh its instant product portfolio. Norsk Tipping offer a player card registration for debit card like convenience and player history.

Meanwhile Intralot's Omni-Channel concept enables all players' interaction points to be managed in a single and transparent manner whether they play via retail outlets, via the internet, mobile or iTV. It enables players to experience the lottery in a consistent way across the channels.

EUROPEAN LOTTERY GAMES CATEGORISED

GAME CATEGORY	LOTTERIES REPORTING	GGR 2012	SALES 2012
Draw based games	51	€22.4bn	€49.1bn
Instant games	44	€6.6bn	€20.2bn
Sports games pari-mutuel	37	€552bn	€1.4bn
Sports game fixed odds	32	€1.3bn	€5.8bn
EGMs	5	€2.8bn	
Other gaming	9	€331m	
TOTAL	52	€34.1bn	€76.7bn



CAMELOT GLOBAL

Camelot Global is a lottery solution provider owned by the Ontario Teachers' Pension Plan and owners of Camelot UK Lotteries Limited and majority shareholder in Premier Lotteries Ireland (Irish National Lottery operator). The Camelot team developed a new iLottery platform which was launched in the UK in 2014 and 2015 in Ireland. The system aims to increase participation and revenues as it gives players the freedom to play anytime, anywhere. It provides a full suite of products that can be customised to any market and can be used via mobile, tablet or PC. It gives a transactional mobile service enabling customers to buy tickets for draw based games and play a selection of Instant Win Games on their mobile.

The introduction of automation improves the quality and timeframe associated with testing and allows lotteries to be more agile and responsive to consumer needs.

After the launch in the UK there are some six million registered users with over 195 million transactions moved across from the old site in the first 24 hours. The new National Lottery site attracted over 20,000 new registrations in the first week and has handled a peak of 400 full user registrations per minute. It is capable of handling 50,000 transactions per minute.

Neil Brocklehurst, Director of Europe for Camelot Global said: "The results have been dramatic with half yearly sales at an all time high, driven by continued very strong growth across the National Lottery's digital channels. Mobile sales surged by 72 percent on the same period last year and sales through smart phones and tablets now account for over 35 percent of all sales across Camelot's direct channels. Sales over the half year were also boosted by 15 percent year on year growth across the National Lottery's Game Store range of online and in store instant play games. Camelot Global's platform now delivers sales accounting for approximately 70 percent of the entire European lottery online Instant Win game market."

In Ireland Camelot Global also provides the iLottery platform offering online instant win games and games via mobile, meaning for the first time Irish lottery players can now play online instantly on their mobile phone. In just over a week sales exceeded €175,000.

LOTSYS

Lotsys is a fully owned subsidiary of the FDJ and has over 16 years experience in long term partnerships with top end lottery operators. They provide solutions in terms of systems, terminals and project management.

The provide solutions for several lotteries including FDJ and other lottery companies. They have a long term partnership with Safran Morpho to provide high volume terminals and digital signage solutions.

Safran Morpho is a leader in security and identity solutions.

Lotsys and Morpho unveiled a new gaming terminal for FDJ back in 2013. The terminal called ELITE uses groundbreaking new imaging technology developed jointly by the companies.

It aims to reduce the overall cost of ownership by using a highly durable camera which replaces the mechanical parts of the previous generation terminals.

ELITE imaging technology means the lottery can move beyond traditional betting slips to explore

NOVOMATIC LOTTERY SOLUTIONS

Part of the Novomatic group, this company is a full solution provider offering a 360 degree solution for all distribution channels from online, mobile and retail.

Novomatic lottery Solution was formed after Novomatic acquired Betware, the Icelandic internet and lottery company, in 2013 and the company was then renamed. Its headquarters are in Austria with offices in seven other countries in Europe, North and South America.

The company has been delivering lottery solutions since 1996 and the core of their solution is a modern transaction engine that can run almost 1.5 million transactions per minute which connects to any terminal and any web client on any device.

They have worked with Islensk Getspa in Iceland, Danske Spil, BCLC and SALAE in Spain. They provide retail solutions and interactive solutions and the NLS Lottery Platform ties together all the components necessary for a lottery business providing access to a Player Account and other core gaming services.

Omni Channel enables retail and interactive channels to share the same central system and for the lottery it streamlines the operation of multiple channels into a single cohesive flow which simplifies operations and reduces time-to-market.

new shapes, colours and designs.

After testing at 1,300 outlets the FDJ has rolled out the ELITE terminals in more 25,000 outlets over the last two years.

Lotsys also implanted a Digital Draw System for the De Nederlandse Staatsloterij lottery a few years ago whilst the Loteri Romande in Switzerland also used Lotsys to develop two new tools for its lottery – the electronic draw and Results Announcement Server and Internal Control Systems. Loto Quebec has also used Lotsys and Morpho to develop a new multi lane system to bring quick pick online systems to supermarket stores.

The Omni Channel enables retail and interactive channels to share the same central system and for the lottery it streamlines the operation of multiple channels into a single cohesive flow which simplifies operations and reduces time-to-market.

Reports

EUROPEAN LOTTERIES



UNITED KINGDOM

LOTTERY OPERATOR	National Lottery Camelot Group 2009-2019
REGULATOR	National Lottery Commission
SYSTEM	Camelot Global
RETAILERS	47,000
ANNUAL SALES	7.2bn (2014/15)

The National Lottery introduced changes to its Lotto game in October last year with the addition of 10 new numbers and extra raffle prizes – making it easier to become a millionaire, but harder to win the jackpot

The first National Lottery draw in the UK took place in 1994. Since then they have raised over £34bn for sports, arts, heritage and educational causes and paid out £56bn in prizes and created over 4,000 millionaires since its launch.

The funding of causes is handled by 12 distribution bodies (National Lottery Distribution Fund) which responds to requests from charities and sport organisations. The Department of Culture, Media and Sport sets the framework for these bodies and National Lottery legislation.

Some 70 percent of UK adult residents play the lottery regularly. The lottery is operated by Camelot (owned in turn by Ontario Teachers' Pension Plan) who has won three successive licence bids (until 2019 with four years added to run until 2023) to run the lottery on behalf of the National Lottery Commission (which merged with the UK Gambling Commission in 2013) which then awards the operating licence.

The lottery consists of draw based games which are:

- Lotto – played Wednesday and Saturdays and a chance to win millions.
- Thunderball – A chance to win £500,000 on a £1 game three times a week

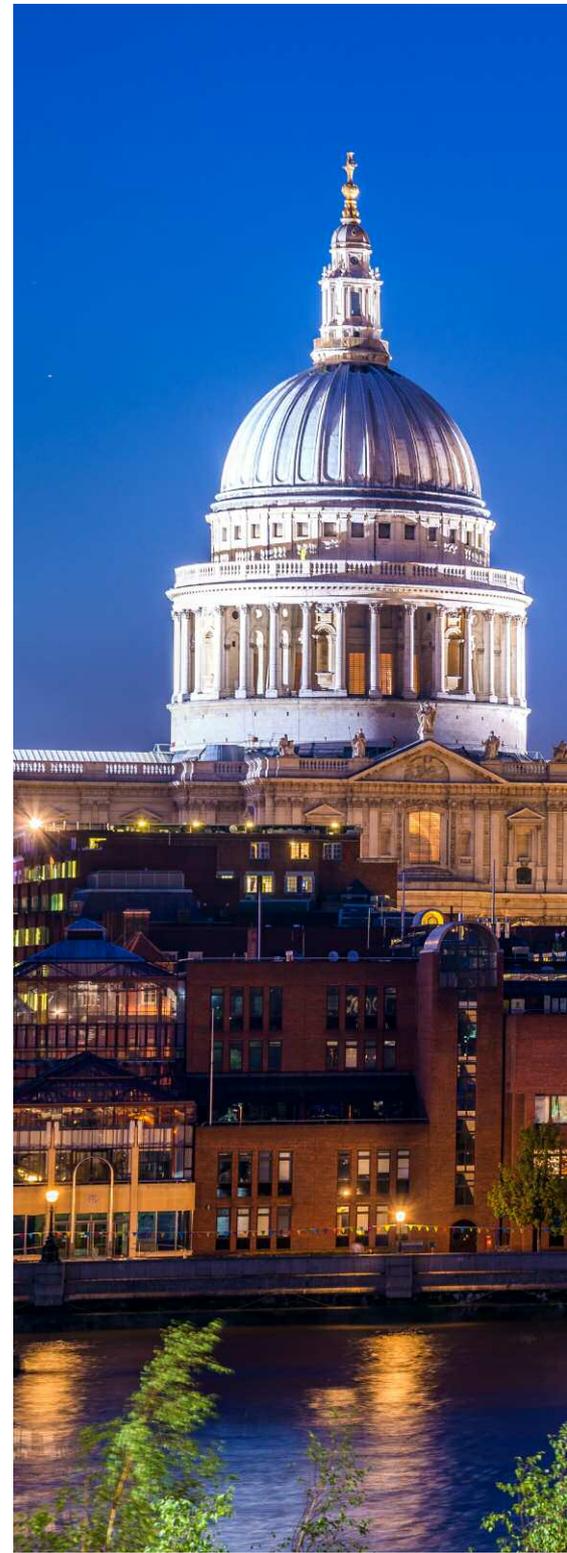
- Hotpicks – Pick and match fewer Lotto numbers every Wednesday and Saturday.
- Euromillions – played Tuesday and Fridays for millions.
- Scratchcards – Prizes with a range of games.
- Instant Win Games – range of interactive games and instant cash prizes. These and the scratchcards operate under the umbrella brand 'GameStore'.

Players must be located in the UK or Isle of Man to play and aged 16 years and over and can buy tickets via the 47,000 retail outlets, over the internet, via FastPay outlets at supermarket checkouts or using a mobile app.

Approximately from every £1 of ticket sales – 50p is paid out in prizes, 28p given to good causes, 12p is lottery duty, 5p goes to the retailer and 5p is retained by operator.

Sales surged for the year end 2015 reaching £7.27bn compared to £6.73bn the year previously. This was divided between sales for draw based games totalling £4.64bn and scratchcard sales at £2.62bn (an increase of £487m).

Of these sales total prizes were £4.04bn (55.6 percent), Lottery duty was £873.4m (12 percent), £1.79bn (24.7 percent) to the lottery fund,



£333.3m (4.6 percent) in retailer commissions and the remaining as operational fees are retained by Camelot. Group profit for last year was £71m.

OUTLOOK

The National Lottery introduced changes to its Lotto game in October last year with the addition of 10 new numbers and extra raffle prizes – making it easier to become a millionaire but harder to win the jackpot.

It is the biggest shake up in the Lotto's 21 year history and now players choose six numbers from 50 instead of 49 numbers. There is now a one in 45 million chance of winning the jackpot compared to one in 14 million chance previously. On the other hand there is a one in nine chance of winning a prize compared to one in 54 chance previously.



Meanwhile after winning its third licence bid Camelot rolled out 8,000 new terminals in 2012 and another 10,000 standalone scratchcard terminals in 2014 taking the total number of lottery retailers to 47,000 of which 36,890 are

next generation 'Altura' lottery terminals and 10,260 scratchcard only terminals. Retail accounts for 80 percent of sales.

The FastPay service was a world first and enables players to store their game preferences

on a re-usable card and play draw based games at the checkout. Sales through FastPay cards were £1.03bn last year.

A new online and mobile platform was launched in 2014 and now players can access Instant Win Games online. In addition the Barclays PingIt was introduced last year – the first ever mobile payment option so smart phone users can pay and play quickly. Online sales were £1.34bn.

Camelot operates Europe's largest online lottery in terms of sales and with over six million players the National Lottery is one of the top 10 e-commerce sites in the UK.

The system is provided in-house by Camelot Global which also works with the New York Lottery, Massachusetts State Lottery, Kentucky Lottery and Arkansas Lottery and the Irish National Lottery.

REVENUE SPLIT BY DIVISION

DIVISION	PERCENTAGE 2014	AMOUNT 2014
Prizes	55.6%	£4.04bn
Lottery duty	12%	£873.4m
Lottery fund	24.7%	£1.79bn
Retailer commissions	4.6%	£333.3m
Camelot operation fees		£71m
TOTAL SALES		£7.27bn

Reports

EUROPEAN LOTTERIES



FRANCE

LOTTERY	Loto
OPERATOR	Francaise des Jeux
REGULATOR	Ministry of Finance
SYSTEM	Lotsys & Morpho
RETAILERS	32,700
ANNUAL SALES	€13bn

Of the €13bn in sales in 2014, €8.5bn was paid out in prizes to players (65.3 per cent of stakes) and there were 211 wins of over €1m in 2014. This was compared to 75 wins the year before mainly attributed to the launch of My Million.

The French National Lottery is operated by Francaise des Jeux. The lottery was originally created in 1933 to help war invalids and victims of agricultural disasters. It later came under the FDJ.

Francaise des Jeux (FDJ) is owned and operated by the French government (72 percent government owned) which sets the state levies and commissions and authorises new games. It is the second largest European lottery and fourth largest lottery in the world. It grew rapidly during the 1960s and in 1975 was renamed the Loto.

From every €10 stake some €6.53 is paid out to winners, €2.34 goes to public finances and risk cover, €0.60 goes into the distribution network and €0.53 goes into the company operations.





REVENUE SPLIT BY DIVISION

DIVISION	PERCENTAGE 2014	AMOUNT 2014
Prizes	65.3%	€8.5bn
Retailer commissions	5%	€650m
National budget		€3.1bn
National Development for Sport		€230m
TOTAL		€13bn

FDJ has some 32,700 points of sales of which 10,128 were equipped with next generation gaming terminals with optic readers in 2014. There are some 27 million players of FDJ games – about 55 percent of the population. The average weekly wager is €9.30.

Of the €13bn in sales in 2014 some €8.5bn was paid out in prizes to players (65.3 per cent of stakes) and there have been 211 wins of over €1m in 2014. This was compared to 75 wins the year before mainly attributed to the launch of My Million.

Retailers received €650m (five percent) whilst €3.1bn was contributed to the national

In 2014 due to a decline in sales with Euro Millions the company launched My Million which was in response to the request for a wider distribution of winnings. During the same year FDJ launched a five year strategic plan to promote operational and commercial excellence looking at responsible gaming, boosting performance and a positive environmental footprint among other challenges.

New products last year included Jackpot, a new scratch card game with winnings of up to €500,000, the re-launch of Morpion, a game which was stopped in 2012 but re-introduced due to its popularity, Coup de Chance game and

Instants are a huge part of the FDJ revenue. In 2014 they made up 44 percent of FDJ business and the €5 instant category accounted for more than 40 percent of the lottery's total instant revenue. Instant sales for FDJ is around €5.5bn.

budgets. The number of sales outlets have been declining however with 700 fewer in 2014 than 2013.

The company allocates €230m a year to France's National Development for Sport and has supported more than 600 charities since the FDJ Corporate Foundation was set up in 1993 to distribute funds.

Players must be 18 years of age and there are a total of 42 games offered by the FDJ including 16 new games added in 2014 to replace older games. The games are divided into four sectors.

- Scratch cards – the first game was Tac-o-Tac launched in 1984. Instants are responsible for 44.8 percent of stakes. The Illiko range offers 19 scratch card games from €1 – €10. Cash is the top game in the range with 19 million players.
- Draw based games and Express games – this includes EuroMillions-My Million offer which was launched in 2014 and completes the range of games which also includes Super Loto, Loto, Amigo, Keno and Joker. EuroMillions is responsible for 40 percent of stakes and some 21.2 million players.
- Bingo Live – a multiplayer game where several players compete in the same draw to win the jackpot or winning amount.
- Sports Betting – responsible for 15.2 per cent of stakes. ParionsSport is FDJ's second best brand. ParionsWeb offers online bets on 23 sports. There are three million players.
- Express Games – 2.7 million players.

Bingo which was the fourth re-launch of this game with two million players.

Also launched was Loto Group Game service which aims to enrich the gaming experience and focus on the social aspect. Initially available at POS this format enables a group of two to 10 players to share their winnings in a random Loto draw. Each member receives their own tickets and winnings can be collected separately.

Instants are a huge part of the FDJ revenue. In 2014 they made up 44 percent of FDJ business and the €5 instant category accounted for more than 40 percent of the lottery's total instant revenue. Instant sales for FDJ is around €5.5bn.

Loic Bonivin, Head of Illiko instant games for FDJ said: "Between 2005 and 2014 FDJ's instant lottery sales have enjoyed growth of approximately 65 percent. The instant games category is an extremely important and integral part of our lottery portfolio and we have formulated a forward strategy which we are confident will enable us to unlock additional potential to ensure continued future long term success."

ONLINE AND SPORTS BETTING

FDJ has been a sports betting operator for the last 30 years which is provided via Points of Sale and online via ParionsSport and ParionsWeb.

Due to the World Cup in Brazil FDJ's sports betting saw an increase of 20 percent with €1.9m sales in 2014. Some €192m was wagered at 25,650 ParionSport POS during the World Cup.

All betting (both in POS and online) represent 15.2 percent of sales for FDJ and saw an 18.8 percent growth last year at POS betting. The growth of the ParionsWeb meanwhile was 45

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EUROPEAN LOTTERIES

The digital sector is growing by 16.7 per cent which is a +45 per cent growth for online sports betting and +10.3 per cent growth for online lottery games. More than 20 per cent of digital stakes for Loto and EuroMillions-My Million were placed on mobile devices

percent reflected by the increase in number of players (100,000 new players in 2014) and access to the ParionsWeb App.

There has been a rollout of 500 tablets at selected POS plus a dedicated website launch in June 2014 plus the application launch at the end of last year.

FDJ launched their website fdjeux.com in 2001 and the first game of Cote & Match fixed odds betting was set up in 2003 followed by EuroMillions a year later. In 2012 the Illiko brand was unveiled. The online website fdj.fr has some four million unique visitors each month and over a million active players.

The digital sector is growing by 16.7 percent which is a +45 percent growth for online sports betting and +10.3 percent growth for online lottery games. There are 33 games on fdj.fr of which 14 are exclusives.

More than 20 percent of digital stakes for Loto and EuroMillions-My Million were placed on mobile devices and nearly 40 per cent of ParionsWeb bets were also placed on mobiles.

The growth was attributed to more active players online (1.06 million) and the popularity of the game. Bingo Live which saw a growth of 37 percent last year thanks to a redesign whilst the third reason is down to the increased mobile activity, particularly with EuroMillions. The launch of EuroMillions-My Million was twice as dynamic online as at POS. A new portal for iPad was introduced and accessibility improved on mobiles and tablets.

Online and POS run side by side and at the end of 2014 the ParionsSport application was launched to make it possible for players to bet anywhere. There were 250,000 downloads of ParionsWeb iPhone and iPad app. Online registration is fairly rigorous with age verification and identification.



OUTLOOK

The FDJ has launched its FDJ2020 plan to look at the digital service through new partners, new games and services and a new way to communicate via the web.

The plan will cost €500m total investment which starts with digitalising its network at a cost of €180m and then transforming its IT base (a further €250m).

There will be a new network of companies and start ups – FDJ will partner game publisher Asmodeus to provide digital games and also the Web Factory School, a laboratory in France.

The idea is these new developments will attract another one million players online (especially women and young adults) over the next five years. There will be new games and new developments.

Meanwhile Points of Sale are due to be fitted with new furnishings in 2016 designed to meet accessibility standards and tailored to customers on how they interact with games. The

modernisation includes the use of new digital tools.

The new terminals have been developed in partnership with Morpho (Safran group) and Lotsys (subsidiary of FDJ) and are called the Neptune. These will replace the old scratch terminals and gradually replace the terminals for all games.

They provide a new optical reader which recognises new forms and presentations of scratchcard games and payslips. Previously these were subject to constraints. The new Neptune will facilitate betting and winning payments and as the scanner has no mechanical parts the equipment has lower maintenance demands.

The new Neptune terminals also consists of a player module with a seven inch touch screen, smart card reader and barcode reader which gives an element of interactivity to the counter area including paperless betting via smart phone.

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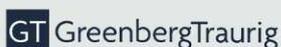


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PLATINUM SPONSORS



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EUROPEAN LOTTERIES



The lottery has suffered over recent years mainly due to less consumers blamed partly on the declining sales of newspapers, magazines and tobacco and as such some 320 outlets (263 were newsagents) were closed in 2014.

The lottery in Belgium was launched in 1934 and called at the time the Koloniale Loterij (Colonial Lottery Foundation) and was a way to raise funds for the Belgian colony of Congo. In 1963 the Nationale Loterij was established under the authority of the Ministry of Finance.

In April 2002 a new law to 'rationalise the operation and direction of the Nationale Loterij' came into force and this now governs the lottery. It granted the new Nationale Loterij the legal form of a private company with limited liability of public law.

The Kansspelcommissie (Gaming Board) has no control over the National Lottery instead a supervisory board was set up and there is more scope for new games, new development and the introduction of betting, sports betting and games of chance.

The first Loto draw was held in 1978 with the Lotto 6/40 game and more products like Presto, Joker and Subito followed in the 1980s.

In 1991 there was a huge overhaul of the organisation and the National lottery was transformed into a public utility autonomous organisation with legal status under the Ministry of Finance. New instant games were launched onto the market and it was possible to organise betting and games and chance games

BELGIUM

LOTTERY OPERATOR	Lotto
REGULATOR	Nationale Loterij
SYSTEM	Ministry of Justice
RETAILERS	GTech
ANNUAL SALES	5,000
	€1.21bn

and in 1992 all lottery outlets were connected online to a central computer. Since 1994 the lottery has been liable to an annual monopoly contribution to the state budget which was set by the King. Profit is reserved for financing programs for assistance for developing countries whilst the company also sponsors the Belgium Lotto Cycling Team.

New scratch card games were added in the 1990s and by 2004 EuroMillions joined Belgium. In 2010 the e-lotto.be website was set up so draw games could be accessed online followed by online scratchcards in 2012.

The National Lottery has 5,000 sales outlets and 42 games in total. Sports betting arrived with the game Scoore in 2013.

Today Lottery games include:

- Lottery Games – Lotto, EuroMillions, Joker+, Keno, Super Lotto and Pick 3. Lotto is drawn twice a week on Wednesday and Saturdays.
- Scratchcards - There are 13 scratch card games
- E-Games – 10 e-games available online.
- Sports Betting – Scoore is the lottery's online and offline sports betting game.

In terms of revenues from lottery sales 53 percent goes back to winners in prizes, 17 percent in grants and sponsorships, 12 percent in operating costs, seven percent in sales commissions and 11 percent to the state.

In 2014 of the €1.21bn in turnover - €636m was paid out in prizes; €205m paid to sport and culture groups; €142.5m in operating costs; €87m in sales commissions and €135m to the



state. In 2014 the division of the total turnover was €444m EuroMillions (37 percent); €227.7m Instant games (19 percent); €439.2m Lotto (36 percent) and €99.7m for other games including Joker, Keno and Pick 3 and Scoore (eight percent).

Retail outlets account for 90.2 percent of sales (€1.09bn) whilst internet sales account for 8.1 percent (€98.1m) leaving 1.7 percent of sales down to other means (€21m).

Last year saw the launch of live betting of Scoore, the mobile platform, development of self vending machines and a new corporate website.

The lottery has suffered over recent years mainly due to less consumers blamed partly on the declining sales of newspapers, magazines and tobacco and as such some 320 outlets (263 were newsagents) were closed in 2014. On the other hand 291 outlets were opened in different



locations. Players can access games via the POS or online via e-lotto.be where they can access draw games, electronic games and sports betting, via mobile or tablet or via subscription for draw games.

ONLINE AND SPORTS BETTING

The growth of internet sales for the lottery sector has been five fold. In 2010 sales amounted to €17.9m via this means and €81m in 2013. Today sales stand at €98.1m which is a 21 percent increase on 2013 figures.

After launching in August 2014 mobile players now amount to over 55,000 players with €2.5m in sales (seven percent of digital sales in total). The number of online plays was just over 22.5 million in 2014 compared to 232.8 million plays at outlets.

There are several e-games including nine Scratch and Win games, 10 Fun&Play games,

seven Profit Opportunity games and three Win for Life.

Around 2.5 million people visit the website on an average month of which 35 percent are from mobiles.

Initially the problem was most visitors didn't stick around on the page and merely checked lottery results. The company felt their existing platform, a content management system, was not so user friendly and needed to engage the player more and selected Sitecore Experience Platform to improve the digital experience for visitors.

Monthly page views increased to five million and organic visitors now represent 30 percent of online gaming conversions. Videos and new polls have proved popular.

Sitecore is a leader in customer experience management and delivers highly relevant content and personalised digital experience.

Iris de Vree, digital content producer at the lottery said: "The increased user friendliness saves a lot of time on a daily basis allowing us to focus on what's really important: the creation of relevant content the reader appreciates."

OUTLOOK

GTECH has been supplying Belgium's lottery since 1992. Back in 2002 GTECH was chosen as the vendor to provide new lottery terminals and a new communication network which replaced the existing terminal base with around 6,000 Altura terminals.

Then in 2014 GTECH was awarded a 10 year deal to continue providing lottery services to the lottery and supplied an online gaming system, terminals and integration contract. The deal is worth US\$174m in revenues for GTECH over the 10 year term.

The company agreed to provide its Enterprise



Series central system solution and replace the lottery's existing terminal base with 5,550 Altura GT1200 terminals. GTECH will also deploy mobile and handheld terminals as well as self service ticket checkers.

The IT services model aims to drive services quality and to closely align GTECH's services with the business requirements of the lottery. The company already provides its interactive gaming system to the lottery allowing it to sell traditional lottery style games to players over the internet.

Roger Maleve, Lottery Operations and Procurement Director said: "Time-to-market is extremely important in today's business environment and the same holds true for the lottery business. This services arrangement with GTECH will allow us to introduce innovations more rapidly and be better prepared in the longer term to grow the business in a competitive marketplace. The business alignment through the governance model is key in this model and will allow us to translate new technology into innovative services for our players and to become a more attractive and socially responsible gaming provider."

Meanwhile the lottery was fined by Belgium's Competition Authority in September 2015 some €1.19m for anti competitive behaviour. They say the company abused its dominant market position when it launched Scoore in 2013.

Sports betting game, Scoore, enables players to predict the outcomes of matches in different competitions such as football, basketball,

REVENUE SPLIT BY DIVISION

DIVISION	PERCENTAGE 2014	AMOUNT 2014
Prizes	53%	€636m
Sport and Culture	17%	€205m
Operating Costs	12%	€142.5m
Retailer Commissions	7%	€87m
State funding	11%	€227.7m
TOTAL		€1.21bn

E-games include nine Scratch and Win games, 10 Fun&Play games, seven Profit Opportunity games and three Win for Life. Around 2.5m people visit the website per month of which 35 per cent are mobile

volleyball, hockey, tennis and Formula 1. You can play at any lottery POS or online via smart phone, tablet for example via e-lotto.be

Scoore saw 93 percent growth in sales in 2014 compared to the year previously mainly down to the launch of live betting and mobile sales, the World Cup and retailer efforts.

The group was found guilty of using player's contact details and emailing them to announce the launch of Scoore, something competitors

would not have had the opportunity to do.

Betting groups including Stanleybet, PMU and Sagevas and the advertising body WFA registered their complaint against the lottery in May 2013. Grievances include the use of contact details obtained via the monopoly environment, using the lottery image to promote Scoore and exclusivity and non-compete clauses between the lottery and Belgian newspapers. The lottery group agreed to pay the amount.

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EUROPEAN LOTTERIES



GREECE

LOTTERY OPERATOR	Lotto/ Popular/ National/ New Year OPAP & Hellenic Lotteries
REGULATOR	Hellenic Gaming Commission
SYSTEM	Intralot/Scientific Games.
RETAILERS	4,861 (OPAP) 8,000 (Hellenic)
ANNUAL SALES	€4.26bn (OPAP) €392.9m (Hellenic)

Despite the economic downturn, over the last five years GGR has stuck at €1.2bn. Sales increased in 2014/15 by 14.8 per cent to €4.26bn (the first increase in five years and compared to €3.71bn in 2013/14)

Lotteries and football pools in Greece are currently operated by OPAP (numerical) and Hellenic Lotteries SA. Other gambling sectors in Greece include casinos, horse racing and online gambling/betting. The gambling sector is governed by the Hellenic Gambling Commission (HGC) set up in 2004.

OPAP was set up in 1958 as a private entity to support the Greek Sports and Culture and is the number one gaming company in Greece with around 71 percent of the market. OPAP also holds the exclusive licence to operate video lottery games (VLTs) in Greece.

It is the exclusive operator of numerical lottery and sports betting games in Greece. The state sold off a 33 percent stake to Emma Delta in 2013 as part of the government's plan to climb out of debt.

Meanwhile in July 2015 a concession agreement was concluded between the Greek State and Hellenic Lotteries giving Hellenic the

exclusive right to operate state lotteries for a period of 12 years.

Hellenic Lotteries is a member of the OPAP group and is now also the exclusive operator of the state lotteries – Laiko (Popular), Ethniko (National) and Protochroniatika (New Year) and instant win games (Scratch).

Revenue for Hellenic at the end of 2014 was €392.9m with gross profit of €30.7m. Scratch cards account for 71 percent of business with €279.8m in turnover followed by Laiko Lottery (20%) and €79.1m turnover. Ethniko Lottery (nine percent) and €33.9m, New Year lottery with €2.9m in commission. Of the €392.9 turnover €42m was paid in taxes and €38.1m in sales commission and €252.9m in prizes. Hellenic has 8,000 Points of Sale in Greece.

- Laiko (Popular Lottery) was founded in 1941 with a weekly draw on Tuesday. Tickets sold in sets of five for €10 or €2 each. About 60

percent is returned to player in prizes.

- Ethniko (National Lottery) was set up in 1937 and issued three times a year. Tickets are sold in sets of 10 for €40 or €4 each.
- New Year Lottery – Drawn on New Years Eve introduced in 1967. Tickets are €5 and payout is around 55 percent.
- Scratch cards or Skrats – Numerous game to play for €1 to €5

The first game OPAP launched was PROPO (coupon for football prognostics) alongside the foundation of the system of national leagues in the football championships. In the year 2000 the company became an SA company and was listed on the Athens Stock Exchange in 2001.

In 1990 OPAP added Lotto to its games and established its central computerised system.





Today OPAP has seven numerical games and four sports betting games. These are:

- Numerical Lottery games – these include:
 - Lotto – set up in 1990 with a twice weekly draw. Sales were €42.9m in 2014.
 - Proto – Set up in 1993 with the prediction of seven digits. Draw is twice weekly and sales were €22.9m.
 - Joker – established in 1997 and number selection with a twice weekly draw. Sales reached €238.5m in 2014.
 - Super 3 – Fixed odds game set up in 2002. The draw is held 10 times a day every day. Sales were €14.7m.
 - Extra 5 – Numerical fixed odds game set up in 2002. Draw is twice daily. Sales were €6.5m.
 - Kino – Numerical fixed odds game established in 2004. Draw is every five minutes. Biggest seller with €1.86bn in 2014. About 53 percent of sales.

- Go Lucky sales were €926m.
- Fixed Odds betting
 - Paem Stoixima (or Let's Bet on It) was launched in 2000 and is a fixed odds betting game on various sports. Second biggest seller with €1.5bn in 2014 with 36 percent of sales.
 - Monitor Games – new betting types launched in 2001 saw a range of Monitor Games such as Bowling and Penalties. Monitor game sales reached €54.4m.
 - Mutual Games – football prognostics
 - PROPO – set up in 1959 as the first of OPAP's games changed its name to PROPO14&7 in 2006. Predicting results of football matches on coupons. The game is held three times a week (Wednesday, Saturday and Sunday). Sales were €7.9m.
 - PROPO-GOAL – this was launched in 1996 and bets on the number of goals from several matches. Events held Sundays only. Sales were €427.9m.

- Scratch cards – Through an OPAP subsidiary the company has a licence to operate instant scratch games in Greece for 12 years through a concession agreement with HRDAF for €190m until 2026. They began operation with three games – Scratch, Laiko and Ethniko.

OPAP has a total of 4,861 retailers of which 4,667 are in Greece and 194 in Cyprus plus 3,800 POS for the distribution of scratch cards and passive lotteries. Despite the economic downturn in Greece since 2007's debt crisis, over the last five years the GGR has stuck at around €1.2bn. Sales increased in 2014/15 by 14.8 percent to €4.26bn (the first increase in five years and compared to €3.71bn in 2013/14) whilst GGR increased by 12.9 percent to €1.38bn and gross profit was €423.9m

Growth is mainly due to the strong start of Hellenic Lotteries and the growth of Pame Stoixima and the recent introduction of National

Reports

EUROPEAN LOTTERIES



Popular and Instant Lottery (scratch cards) which saw almost seven percent of total sales with €292m in sales.

Of the total turnover some 67.7 percent was paid out in prizes (€1.37bn) and between eight and 12 percent in retailer commission (€367.7m) depending on sales channel.

The company signed a new agreement with Intralot in 2014 for the next four years to operate its systems whilst GTECH is the provider of its online betting platform winning a tender against three other international companies.

GTECH will provide the central information system of its VLT network and connect 35,000 VLTs throughout its International Standard System (G2S) protocol.

VLTS

In November 2011 OPAP received its licence to operate 35,000 VLTs in Greece for a total cost of €560m. Of these some 16,500 will be installed and operated by OPAP whilst 18,500 terminals will be put up for tender and run by sub-concessionaires. The licence is valid for 10 years.

The licensing system was put into place at the end of 2014 however there are delays with the launch from OPAP who wants more time to ensure the machines comply with the new rules introduced by the government.

The rules were introduced in June last year and include lower jackpot levels, daily loss limits and length of play time allowed.

OPAP predicts that the VLT market will bring around €1bn per year in revenue from the machines.

The new regulations were introduced a few days before OPAP's launch plans and OPAP say they 'render the project no longer economically viable'.

The new rules set the daily loss limit to €80 a player and limit the time to 10 hours a week and 32 hours a month down from previous 12 hours and 40 hours (respectively). The maximum jackpot of gaming halls is now €20,000 down from €100,000.

OPAP chose IGT/GTECH, Scientific Games, Inspired Gaming and Synot as its VLT vendors last year and aimed to have 16,000 VLTs in the market under its own Play branded gaming halls by the end of 2015 with the remaining 18,500 available to sub contracted operators.

ONLINE AND SPORTS BETTING

The Greek online sector is governed by Articles 45-50 of law 4001/2011 and licences are administered by the Ministry of Finance for a period of five years which can be renewed.

In 2011 the Greek state set out the framework

for internet gambling. OPAP holds the exclusive rights until 2030 for all its games operated online and Stoixima and games under this umbrella (monitor games and Go Lucky) until 2020.

OPAP's online sector was launched in June 2014 and new betting content is now being planned with the aim of attracting more customers and reducing access to illegal online products.

Pame Stoixima is the OPAP's second most successful game with 21 percent increase in sales in 2014 with €1.52m in revenues and €434m in GGR which represents 35.8 percent and 31.5 percent of total revenues and GGR respectively.

When the sports betting game was launched the response to Pro-Po was huge and people queued for hours to play a coupon. A new coupon with 13 matches was later added and it was advertised as 'The Magic piece of paper that makes you rich!' The coupons were initially sorted painstakingly by hand until a central computer system was later installed.

In 1964 OPAP began to reform ProPo including new systems. Some 70 agencies were set up and radio broadcasting of football matches saw increased revenues. OPAP also launched its new football game 6 out of 36.



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In 1969 new systems were implanted in the selection of the coupon and payout for agents was raised from five percent to 10 percent.

During the 1970s Greek football grew rapidly and OPAP saw a big demand with more agencies and gross profit multiplying significantly.

The sportsbook consists of pre game and live betting and live betting saw a 207 percent increase last year and live betting accounted for almost 14 percent of total sportsbook revenues. Football is the most popular sport (91.6 percent of Pame Stoixima turnover) and the World Cup saw revenues top €157m.

OUTLOOK

The privatisation of ODIE (horse racing agency) finally went ahead in October last year after several delays and false starts.

Parliament voted to privatise the country's

sole licence for horse racing betting and OPAP was handed the licence and it is hoped this will bring new life into the dwindling sector.

The privatisation of ODIE was on hold last year. The loss making ODIE is state owned and was over €200m in debt to the government. The government agreed with the European Commission to liquidate the organisations although it is seeking to privatise the organisation's exclusive mutual betting rights at racetracks first to help keep horse racing alive in Greece.

OPAP applied to take up the licence and last year became the provisional successful bidder for the licence although delays and failure to complete the privatisation means Intralot is now suing the organisation.

Last year the privatisation agency HDRAF scrapped previous bids after only receiving a bid

from Intralot. Then OPAP and Intralot submitted bids for the 20 year licence. But Greece has repeatedly missed privatisation targets due to lack of investor interest and regulatory problems. It wants to raise €22bn by 2020.

OPAP joined up with British fund manager, Global Family Partners, to put in a joint bid not less than €40m but above the €5.2m initially offered by Intralot. Under the agreement OPAP will pay a 30 percent tax on GGR from horse race betting operations which saw revenues of €65.4m in 2013.

Meanwhile as the VLT market grinds to a halt amid changes in regulations it is thought OPAP will reach an agreement with the regulators given the country's need for tax revenue amid its financial crisis.

It has left VLT giants IGT and Scientific Games without movement.

Reports

EUROPEAN LOTTERIES



ITALY

LOTTERY OPERATOR	Lotto Lottomatica & Sisal
REGULATOR	AAMS
SYSTEM	Gtech (Lottomatica)
RETAILERS	45,587 (Sisal) 77,000 (Lottomatica)
ANNUAL SALES	€13.9bn (Sisal) €6.6bn (Lotto)

Italy is the mother of all lotteries. The word Lotto comes from the Italian word 'destiny or 'fate'. The lottery dates back to 1515 when it is said a lottery was organised to elect members of the Senate in Genoa. Later names were changed into numbers. In 1530 the Lo Giuoco del Lotto d'Italia was born and further lotteries followed throughout the centuries. Today the lotteries are regulated by the Ministry of Finance and the AAMS.

The total Italian gambling sector saw a turnover of €83.4bn (GGR of €16.1bn) of which lotteries were accountable for €17.2bn in turnover; betting and pools €6.2bn; Gaming machines €46.1bn; bingo €1.4bn and skill, card and casino games €12.3bn.

Of the lottery turnover the Lotto is responsible for €6.6bn turnover, Scratchcards €9.4bn and National Totalisator Number Games (NTNG) €1.17bn. The NTNG games

(SuperEnalotto, Vinci per la Vita, SiVince Tutto, Eurojackpot and VinciCasa) are operated under concession to Sisal.

Sisal received the concession for NTNG in 2008 including Enalotto which Lottomatica and Sisal also bid for. Meanwhile the Lotto is the oldest game in the Italian market and is run by Lottomatica.

SISAL was founded by three sports journalists in 1946 and is an acronym for Sport Italia Societa A responsabilita Limitata). Today it operates a number of what are called Tote Lotteries.

The first was Totocalcio followed by Totip for the horse racing section. The games include:

- Lottery games
All the lottery games can be played via Sisal retailers at Matchpoint betting shops or at Sisal Wincity gaming centres or online. GGR

was €75.7m.

- Super Enalotto was launched in 1997. Prize draws are three times a week on Tuesday, Thursday and Saturday.

- SiVince Tutto Super Enalotto was launched in 2011 and one prize draw on the last Wednesday of each month.

- Eurojackpot launched in 2012 and is the first lottery with a Europe wide jackpot shared with 16 countries. Weekly draw on Fridays.

- Vinci per la Vita – Win for Life. This game arrived in 2009 and was the first Italian lottery to offer a monthly income as a prize. There are two versions of the game now.

- ViNCi Casa – the first lottery game to reward you with a home launched in 2014. You have to guess five numbers out of 40. Weekly draw on Wednesdays.

- Betting
- Matchpoint – the acquisition of Matchpoint happened in 2004 and at the same time online gaming was launched. There are a total of 364 Matchpoint betting agencies and 3,508 Matchpoint Corners.
- Totocalcio – the first game to be launched by Sisal and began as the Sisal play slip later changing its name to Totocalcio. This is a football pools prediction game which at the time was launched to encourage sport and



LOTTOMATICA REVENUES

SECTOR	REVENUES 2014	REVENUES 2013
Lotto	€425m	€408m
Instant Tickets	€370m	€377m
Total Lottery	€795m	€785m
Sports betting	€179m	€159m
Gaming Machines	€572m	€584m
Interactive	€71m	€77m
Commerical Services	€128m	€132m
ITALY TOTAL REVENUES	€1.74bn	€1.73bn



rebuild Italy's war damaged football stadiums.

- TotoGoal
- V7 – horse racing both mutual and national betting. Totip was introduced in 1948 and was Italy's first horse race betting system.
- Tris arrived in 1991.
- Retail gaming - saw €530.2m in GGR.
 - Sisal offers slots and VLTs in the market and also operates Sisal Wincity which was launched in 2010 as an entertainment centre with food, drinks and gaming. There are 17 WinCity locations currently open.
- Online Gaming – saw GGR of €44.8m

Sisal has over 14 million customers and a network of 45,587 Points of Sale (41,520 affiliated POS and 4,067 branded shops including Wincity (17 locations), Matchpoint (3,872 locations) and Smart Point locations (177 locations).

Sisal had a turnover in 2014 of €13.9bn with total revenues of €821m – a 6.3 percent increase on the year before although the company still saw losses. Of this GGR this was divided between:

- €504m for Gaming and Betting revenues divided between: €44m for NTNG; €396m

for slots/VLTs; €9.9m horse racing bets, €33,000 bets, €29.7m virtual racing; €705,000 sports pools; €21.4m online games and €1.4m bingo.

- €124.1m payments and other services
- €78.4 POS revenues
- €8.3m other revenues.

Lottomatica (GTECH) meanwhile operates one of the largest lotteries in the world, the Lotto. The company is controlled by De Agostini Group. Lottomatica is the exclusive distributor for the Italian State of lottery games plus instant lottery, scratch games and slots, VLTs, sportsbooks and interactive games.

Revenues for the Gtech group amounted to

€3bn in 2014 of which Italy was responsible for €1.7bn of this. Lotto lottery revenues reached €795m. Total wagers on the Lotto was €6.6bn and there were 1.9 billion instant tickets sold with total sales of €9.4bn. Total fixed odds sports betting wagers was €893m; total wagers on interactive skill games was €1.8bn; total Newslot wagers was €10.1bn with a total of 65,316 installed and total VLTs installed was 10,956 (end 2014).

The Lottomatica games selection includes:

- Lottery
 - Lotto – this is the main game and played via tickets or online. Draws are held three times a week
 - €10 Lotto or Numero Oro which can be played online.
 - Scratch and Win – many options from €1 up to €20 cards.

SISAL was founded by three sports journalists in 1946 and is an acronym for Sport Italia Societa A responsabilita Limitata). Today it operates a number of what are called Tote Lotteries. The first was Totocalcio followed by Totip for horse racing



SPORTS BETTING AND ONLINE

Italy has a large betting market today and Sisal, SNAI and Lottomatica between them control about 50 percent of the market whilst companies such as Ladbrokes, William Hill, Gala Coral and Bet365 have remaining licences.

Betting is responsible for €3.1bn turnover – sports betting €2.6bn; sports pools €34m; horse betting €457m and Tris and similar €178m.

Lottomatica Betting was founded in 2007 and today it has 2,000 stores under the brand name 'Better'. In 2008 it acquired the Totosi brand for online betting. Revenue for Gtech Italy was €1.7bn in 2013 and of this €158.7m came from sports betting. In 2014 Lottomatica acquired IGT.

SNAI has a 23.4 percent share of the sports betting market and saw group revenues in 2014 of €527.5m and turnover of €5.4bn. It has a 49.8 percent share of the horse race betting market and some 876 sport corners in 620 stores and 721 horse corners. SNAI recently announced in 2015 plans to merge with Cogetech, a major gaming operator in the market, which will increase the number of gaming machines operated by SNAI to more than 70,000.

SNAI recently launched Game360's 360 Betting Mobile App – a live streaming betting

– Betting – Lottomatica Betting has over 1,500 outlets or via online betting. This sector began in 2007 when the company was given 19 percent of sports betting rights and created Better brand. This saw live sports betting introduced and today players can bet on most sports via its network, online, telebetting, mobile or tablet.

- Online – offered via lottomatica.it and totosi.it. Poker Club is the poker room of both and various games and tournaments. Plus bingo, casino, scratchcards, football pools etc.
- Gaming Machines – VLTs operated via BetterSlot gaming halls. VLTs are supplied by Spielo, Inspired and Novomatic. The games are now also available via an APP.

VLTs

Gaming machines in Italy saw a total turnover of €46.1bn representing over 55 percent of the market – VLTs reached €21bn and slots €25.1bn.

The VLTs are connected to central monitoring system with about 85 percent payout over a cycle of five million bets. Play is €0.05–€10 and maximum payout is €5,000 with national jackpot of up to €500,000 and local jackpot of up to €100,000.

VLTs can be installed in bingo halls, sports betting agencies, horse betting agencies, horse and sports betting shops, gaming centres with 30 VLTs in a 50–100 sq.m location and up to 70 for 101–300 sq.m location or 150 VLTs for those sites bigger than 300 sq.m.

Lottomatica and Inspired Gaming will begin a long term partnership with the installation of VLTs in Lottomatica venues.

Lottomatica has over 800 VLT venues and Inspired's Open VLT platform and library of games will bring a new perspective to the market. Inspired was the second VLT company to gain approval from the Italian government in 2010. Lottomatica also works with IGT who supply game content and machine to the VLT market.



Online gaming saw the highest increase in the Italian market driven by skill, card and casino games with a turnover of €12.3bn. It has grown due to the launch of phone and table apps and foreign operators

App – into Italy to run on Android, iOS and Applewatch technology.

Sisal operates the Sisal Matchpoint betting agencies and retailers, Sisal Wincity gaming centres, online via sisal.it or via mobile devices using the Matchpoint APP. Totalisator is associated with Italian and International horse racing and bets can be placed at Matchpoint agencies and retailers, via Wincity gaming centres and online.

In Italy there are a total of 4,790 sports betting points of sale, 1,468 betting shops and 801 betting agencies. There are a total of 2,822 horse racing points of sale, 1,504 horse racing betting shops and 331 agencies.

Inspired will also supply Virtual Sports into Italy after signing contracts with eight Italian operators. In mid 2015 Inspired renewed its contract with SNAI for Virtual Sports. Inspired

currently provides SNAI with eight premium Virtual Sports across retail and online venues. At the moment Inspired supplies about 95 percent of landbased and online virtual sports market in Italy. Meanwhile online gaming saw the highest increase in the Italian market driven by skill, card and casino games with a turnover of €12.3bn (85 percent of the total turnover of the market). It has grown due to the launch of phone and table apps and foreign operators. Of the online sector lotteries account for €52m, betting and sport pools €1.9bn, bingo €90m and skill, card, casino games €12.3bn

Online gaming for Sisal arrived in 2004 followed by online poker in 2009. In 2014 Sisal Live Channel was created the first Italian in store channel completely dedicated to live betting.

Sisal.it offers all online versions of its games including its lottery games, sports betting

products, horse race betting, poker (Texas Hold 'em and Omaha), 29 casino games, games of skill, over 30 games of Gratta e Vinci, five bingo hall games, 20 instant Quick games and over 30 slot machine games. Play is limited to over 18s and player open an account with a monthly spend limit. Lottomatica meanwhile reported a 12.3 percent share of the online casino games market followed by Microgame and Sisal and then Eurobet.

OUTLOOK

Lottomatica and Sisal have entered talks for the potential merger of the two companies which could see Italy with the biggest online and retail betting group valued at €1.5bn

Sisal has reconsidered its buy out options following the cancellation of its IPO earlier this year. Lottomatica is its preferred partner in a potential agreement.

Talks have been on and off since 2014 and high taxes and reduced wagering has put the pressure on the market for consolidation.

The gaming market is expected to reach €82.1bn in 2015 a slight drop from 2014 owing to the reduction in gaming machines and decline in lottery sales. However betting and online gaming is expected to grow.

Reports

EUROPEAN LOTTERIES



NETHERLANDS

LOTTERY	De Lotto/ Nederlandse Staatsloterij
OPERATOR	SNS/SENS
REGULATOR	Kansspelautorite
SYSTEM	Scientific Games/Intralot
RETAILERS	4,968 (SENS)
ANNUAL SALES	€321.8m/€737.8m

The lotto began when the Royal Dutch Football Association asked for permission to organise a national Toto in 1956. By the year 2000 all brands came under Stichting de Nationale Sporttoalisator (SNS) and the registered De Lotto

In the Netherlands there are three permanent (monopoly) licences for the lotto game, sports betting and instant lottery (scratchcard) and these are all in the possession of the Stichting de Nationale Sporttotalisator (SNS/De Lotto).

In addition the only state lottery in the Netherlands is The Stichting Exploitatie Nederlandse Staatsloterij (SENS).

Meanwhile there are three other semi-permanent charity lotteries which are operated by public limited liability company Nationale Goede Doelen Loterijen (National Charity Lottery) which are granted licences for a period of five years. These include the National Postcode Lottery, the Lottery BankGiro and the Vrienden (Friends) Lottery.

The lotteries are non profit and half of the investment goes directly to charities.

The Stichting Exploitatie Nederlandse Staatsloterij (SENS) was founded in 1726 and as such is the oldest lottery in the world.

It was known as various names until 1848 when it was officially renamed as the Dutch StaatsLoterij or Nederlandse Staatsloterij (Dutch National Lottery).

It came under the responsibility of the Ministry of Finance until 1992 when the Dutch Lottery, as an independent foundation, was formed under the Foundation SENS.

The lottery is held 16 times per year - on the 10th of each month and on four other dates, plus it also a weekly lottery Million game.

Almost half the population play it and at least 60 per cent of sales from the lottery must be returned in prize money. Prizes are free from gambling tax and all winners remain anonymous. Proceeds go to the Dutch Society and support various projects whilst 15 percent of the stake is given to the state. The games include:

- Lottery - This is played on the 10th of each month plus there are four festive draws per year (Koningsdagtrekking, July 1, October trekking and New Year Scope) with a top prize of €1m jackpot. Tickets are between €3, €15, €30 or €150.
 - Koningsdagtrekking - this is a special draw of the lottery and offers 10 first prizes of at least €1m.
 - July 1 - This draw offers €10,000 per month for 30 years in prizes.
 - October 1 - €10,000 per month for 30 years in prizes.



GAMBLING REVENUES ACROSS THE SECTORS

Sector	Licensee	Sales	Prizes	GGR	Charity	State funds	Gaming tax
Lottery	Nederlandse Staatsloterij	€772.6m	€466.2m	€306.4m		€123.6m	€63.9m
	Holding Nationale	€827.7m	€298.7m	€638.1m	€413.8m		€41.3m
	Goede Doelen						
	Samenwerkende Loterijen	€25.3m	€0.7m	€24.6m	€19.2m		€0.1m
	De Lotto	€253.1	€144.3m	€162.5m	€59.6m		€20.4m
Sports betting	De Lotto	€53.7m	Included in figure above				
	Sportech Racing	€23.1m	€16.9m	€6.2m	€1.6m		€0.4m
Casinos	Holland Casino			€209m			€60m
Slots	Holland Casinos			€242.5m			€70.9m
	Slots halls			€769.3m			€223.1m
TOTAL				€2.35bn	€494.2m	€123.6m	€480.1m

Reports

EUROPEAN LOTTERIES

Sports betting began in the Netherlands in 1957 when the Royal Netherlands Football Association (KNVB) began to organise it. The KNVB organised sports betting until 1961 when sports betting was legalised as a second state monopoly and the Stichting Nationale Sporttotalisator (De Lotto) was founded to take over.

- New Year Scope - €30 for a ticket to win up to €30m

Tickets can be purchased via the 4,968 outlets from shops, supermarkets, tobacconists, gas stations or via internet or subscriptions

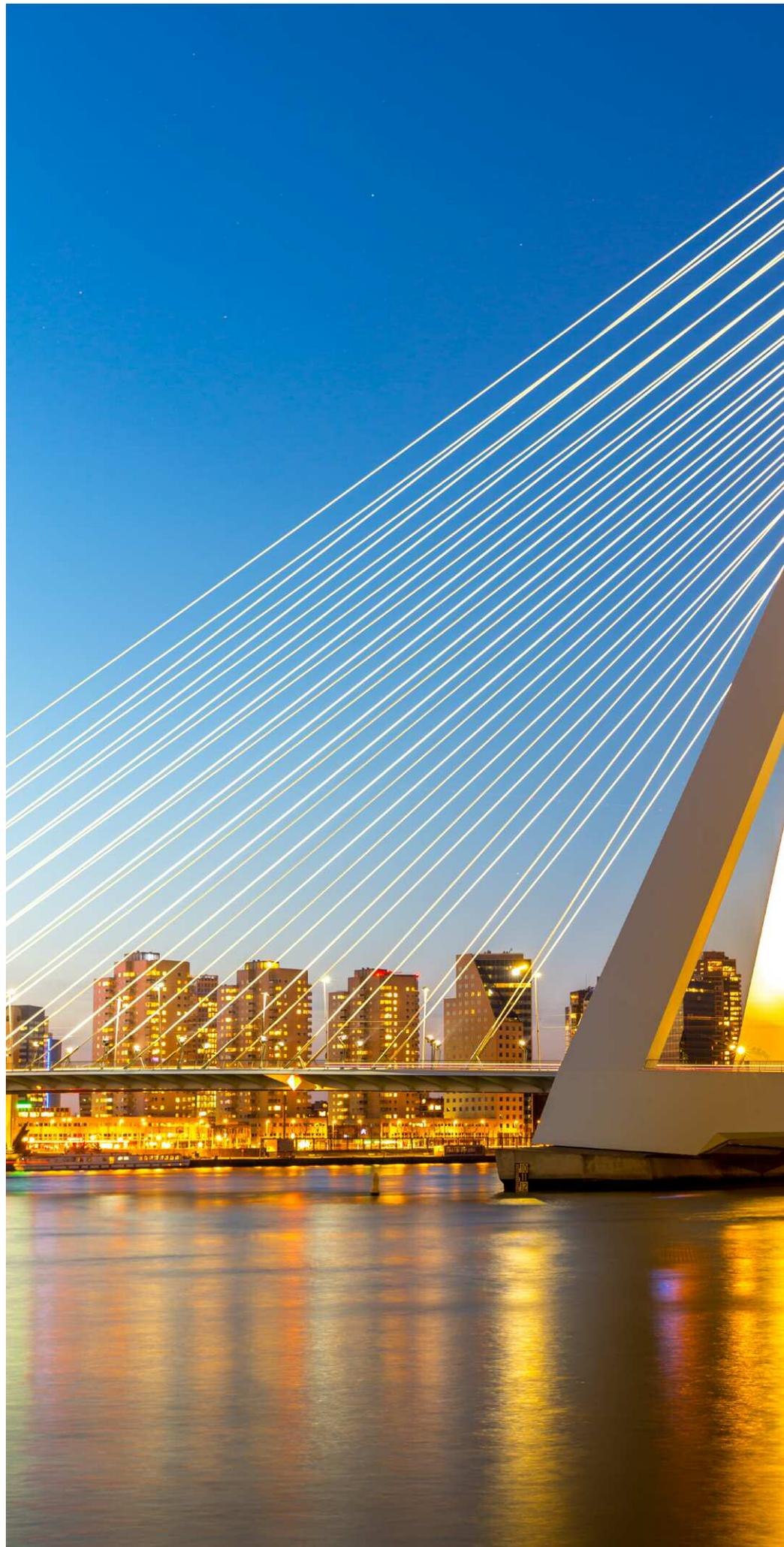
Net turnover in 2014 was €737.8m (a decrease from 2013 figures of €772.6m) of which €578.6m came from the state lottery, €120.1m came from the New Year lottery and €39.1m came from Millions game. Prizes resulted in €446.9m (68.6 percent) and €64.5m was paid out in gaming tax. Gross profit for the company was €232.1m.

It is said increased competition and reluctant consumer behaviour has attributed to the drop in revenues.

Meanwhile De Lotto has been in operation since 1961 and provides funds for Dutch charities in the fields of sports, culture, social welfare and health.

The lotto began when the Royal Dutch Football Association asked for permission to organise a national Toto in 1956. This began a year later and in 1961 lotteries also entered the game. By the year 2000 all the brands came under the name Stichting de Nationale Sporttoalisator (SNS) with the registered name of De Lotto.

It is controlled by the Ministry of Security and Justice and the Gaming Authority and the brands include Lotto, Toto, Lucky Day, Scratch cards and Euro Lotto Jackpot. Tickets can be bought via retailers in tobacco shops,





PRODUCT REVENUES

PRODUCT	2014	2013
State Lottery	€578.6m	€607m
New Year Lottery	€120.1m	€124.2m
Million games	€39.1m	41.4m
TOTAL	€737.8m	€722.6m

bookstores, convenience stores, petrol stations or drugstores or online.

In 2014 the company saw €321.8m in turnover (compared to €306.8m in 2013) of which this was divided between €195.1m via shop sales, €104m in subscriber sales and €22.6m in internet sales. Some €173.4m was dished out in prizes. Games include:

- Sports – De Lotto partners NOC*NSF which receives over 72.46 percent of profits with over €2bn paid to date to 76 affiliated national federations.
- Lottery
 - Lotto – Played every Saturday with a jackpot of at least €7.5m. Turnover was €143.8m in 2014.
 - Toto – Football prediction with various options. Turnover was €68.7m.
 - Scratch cards – 12 different cards with own character and theme. Every 13 weeks three new scratchcards are introduced. Play from €1 upwards. Turnover was €70.5m.
 - Lucky Day is based on the Keno game and is played daily with minimum €1.50 ticket and the chance to win up to €450,000. Tickets can be played online or via retailers. Turnover was €23.3m.
 - Eurojackpot now available in 16 countries is played every Friday for €2 minimum. Turnover was €15.4m.

SPORTS BETTING AND ONLINE

Sports betting began in the Netherlands in 1957 when the Royal Netherlands Football Association (KNVB) began to organise it. The KNVB organised sports betting until 1961 when sports betting was legalised as a second state monopoly and the Stichting Nationale Sporttotalisator (De Lotto) was founded to take over.

Today sports betting is run by two organisations – De Lotto which operates sports betting of all sorts (except horse racing and trotting) and Sportech Racing BV which runs the totalisator for pari-mutuel betting on horse trotting and racing.

Sportech Racing is a subsidiary of the UK's Sportech PLC company operating in the Netherlands under the name Runnerz. It is the sole licensee in the Netherlands for the organisation of bets on horse races at home and abroad via the tote method. This has operated since 2010 via Sportech Racing.

The licence for operating bets on horse racing runs until 2016. Dutch revenues for Sportech were €5.1m in 2014 compared to €5.3m in 2013 with an EBITDA of €0.3m.

In 2013 the combined turnover of the two licensees for sports betting was €77m divided between €53.7m (De Lotto/toto) and €23.1m (Sportech-Runnerz) compared to €45m and

€25m in 2012 respectively.

Runnerz sells half of its tickets through physical betting shops and has 56 locations in Netherlands.

Football is the most popular sport and most enjoy betting on the top two divisions.

Interest in online poker and casino gambling is growing and research shows some 1.5 million Dutch people sometimes or often gamble on online gambling sites and spent around €500m per year.

However online gambling still remains illegal in Holland and it is thought the treasury is losing around €100m a year in taxes.

In November last year the Dutch government gave the thumbs up to sports online gambling which at the moment is only permitted via state owned de lotto and only on matches in progress.

Last year the government submitted a legislative proposal to pave the way for regulated sports betting online but this hit several snags and it is thought this will not be passed until 2017.

There are some conditions – it seems online betting will be permitted if propositions are easy to manipulate and there are no betting on amateur and friendly matches during training camps.

The KSA (gaming regulator) reckon some 437,000 Dutch already gamble online and the sector will be worth €296m in 2015.

The new legislation will open the market but clamp down on those using unlicensed websites. It is thought there will be two types of licences granted for five years and permit casino games, slots, fixed odd sports betting, pokers, sports betting (betting exchange), pari-mutuel betting and live betting on sports betting (this may require stricter regulation). It will not permit online betting for spread betting and special betting and the state run lottery will remain under government control for the time being.

OUTLOOK

In July 2014 a modernisation plan was introduced and with that came the suggestion of merging De Lotto and the Dutch State Lottery. The idea was approved in principle by the two organisations whilst the cabinet has approved a plan to merge the Nederlandse Staatsloterij and de Lotto to improve the market and reverse declining sales.

This will reduce the number of lottery operators but in turn is good news for new lottery providers entering the Dutch market. With around 12 lotteries operating at the moment the average spend per capita on lottery products in the Netherlands is actually below the European average.

It is said the Dutch lottery market will grow at a rate of 7.6 percent this year. The fear between the merger is the cross selling over lottery and betting customers which is making some wary.

Lotteries – lifetime value and the power of cross-selling



Helen Walton,
Founder and Marketing Director,
Gamevy

Helen Walton is co-founder of Gamevy, an employee-owned tech start-up with no bosses. Helen is a marketer and creative who has launched brands in make-up, skincare, fine art publishing, theatre and financial services among others. She is also a professional writer and presenter who has authored numerous books on Agile Software Management and presents at Q-Con, Culturevist and Spark. She is a regular contributor to InfoQ and other journals.



No-one who has ever bought a burger can be unaware of the importance of cross and upselling. Would you like fries with that? Do you want to a large size? It is the key staple of modern retail... So how do online lotteries cross-sell and up-sell? Well, one answer is that many don't.

A surprising number have a poor online offering with a lack of mobile products in particular. Those that do have scratch cards and games, often rely on badly designed versions of their offline products or a wholesale import of standard casino slots. Which is crazy

We have good evidence that fully one third of lottery ticket purchasers are happy to spend more money on the site – as long that is, as operators can offer them something they are interested in.

WHAT TO OFFER?

A lottery is a game. And a game is supposed to be a playful experience, which is meant to offer a sense of fun and enjoyment. But just think about the experience you have when filling out a lottery ticket... In all honesty, it's about as playful as a tax form – and given the fact that week after week the average experience is of paying money to consistently lose – it feels just like tax as well. There's research from La Fleur's that suggests small wins are not even recalled by players.

OVER 50 PER CENT OF CUSTOMERS CLAIM THEY HAVE NEVER WON ON A LOTTERY

By cross-selling other products, operators can change that experience. Instant wins are not only immediate, but they offer higher win rates and improved RTP, along with more entertainment. As well as raising immediate GGR, in the best case, they can actually encourage retention – keep people coming back to the site to experience an enjoyable few

minutes of play – as well as the hope of a big lottery win. That's not simply a case of customer experience, it also means raising money for the causes that matter to society – changing people's lives in more ways than one.

Of course – it's not as if lottery operators haven't thought of this! But too often, the options they take aren't ideal – far from increasing loyalty and lifetime value, they can lead to a lack of differentiation, or overwhelming customers with the wrong type of product. Many also sacrifice Life Time Value for short-term increases in GGR, leading to higher costs overall through the need to re-acquire lapsed customers. Such behaviour can even reduce the popularity of lotteries in the long term.

OPTION 1 – TURN ON CASINO

There are plenty of casino and lottery-focused platforms happy – eager even! – to switch on a host of games from top quality providers. With one quick integration, you could have hundreds of games available for your customers. Amongst so many, surely every player will find something to suit them... right? Wrong.

The problem is that this is exactly what every other gambling operator does, from sportsbook to casino. Why should they come to you rather than anyone else? Suddenly your site looks hardcore and undifferentiated and carries with it a far higher risk of attracting problem gambling.

For ordinary players it becomes difficult to navigate their way through these games. For a lottery player, the choice is so overwhelming,

they may be unlikely to try even a single game.

OPTION 2 – CURATE YOUR OFFER

This is a far smarter choice. Operators can hand-pick a few games that will appeal to a broader demographic.

BUILD BRAND. LEARN FROM RETAIL

Familiarity is key to curated choice. The products that you offer should feel connected to your main product offering – in the case of lotteries, the most obvious genre is scratch.

The temptation is simply to pick up what's already on the market. The issue is that in scratch, more than any other genre, many games copy what exists on paper with no adaption to the online format. This gives poor results. While hunting for dozens of symbols or numbers can be satisfying on paper, online it is simply confusing. The 'autoscratch' button, while fast, soon kills a player's interest and repeat play.

Lottoland's newest scratch uses design elements from their brand as well as Chris Tarrant, from their advertising campaigns to create a product that feels familiar, but unique. The National Lottery also uses its basic scratch to build a cheerful, friendly own-brand feel, which is extremely simple to play.

As in other retail environments, these products lend themselves to promotion and upselling. Players can buy bundles (lottery ticket plus 3 scratch) or 4 scratch for the price of 3 – it's the perfect way to use promotions which are more familiar to a broad demographic of customers,

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rather than the endless deposit £10, get £20 heavy promotion of gambling sites.

THINK MINIMAL

Some customers like roulette, a few love an occasional spin on slots. These games can be profitable, but rather than loading numerous variants with all the overhead and maintenance required, the trick is to pick 2 or 3 of the most popular or brand-appropriate games.

Gamevy has been working on a slots designed specifically for lottery players – SpinLotto where the customer picks their lucky numbers. When the spinning reels bring up 2 or more of the numbers, it's a win. Completely intuitive for lottery players, the design strips out the extra features of a complex slots and instead combines a high win rate from slots with the big jackpots (up to £5m) of lottery.

TRUE INNOVATION - BEYOND BASICS

Games have flourished in the digital medium – more people than ever choose to amuse themselves at work, on the commute or at home with a few minutes of game-playing. Lottery operators that can offer products which connect to the audience but which also offer an entertaining gaming experience that draws on a customer's social gaming experience have a huge advantage.

The most forward-looking operators are beginning to adapt their instant win games to be more engaging. Snakes and Ladders or BubbleMania on the National Lottery site or treasure hunts on DanskeSpil are good

examples of the 'pseudo-skill' category. These feel fun in the short term, although there's a note of caution. Players eventually begin to notice that no matter how well they appear to play, the win rate is not affected. In the long-term, this may damage repeat play.

The most interesting suppliers are beginning to extend this category further with games where players have meaningful choices that impact on their winnings and even real skill. So far we're the first to offer a range of sidegames that include entertaining gameshows with a real skill element and instant wins with cashout where player agency is equally real. It's no surprise that one of Gamevy's gameshows won the Game to Watch Award at ICE2016.

MOBILE FOCUS

Given the number of players buying their tickets or checking their numbers on mobile, it is crucial that lottery sidegames are designed for mobile. Games like Candy Crush mean we're used to swiping and interacting with games on our mobiles. By comparison slots, with its single button, feels incredibly static. Similarly single scratch cards, whether scratched by hand or revealed with the autoscratch, quickly feel dull.

REAPING THE REWARDS

An example of how product innovation can transform LTV on lottery sites, Boss the Lotto is an instant win game from Gamevy where players choose lucky numbers while trying to avoid 'bad' symbols. Each step players choose whether to cash out with winnings, or keep risk

the prize to win more. The results are astonishing. In essence, this game is just a lotto – yet the average player buys 22 tickets a session, with hundreds of tickets in a 24-hr period not unusual and high player retention.

The reason is simple – the animations, music and frequent win rate (1 in 2.3) make this feel like entertainment. On mobile, the ability to touch and swipe, selecting individual balls or whole diagonals offers high interaction. In actual play, players choose when to cash out, meaning that in spite of the high volatility maths (supporting jackpots up to £5m) the game itself shows low volatility behaviour, reducing risk.

Entertaining products like these make your site a go-to place for customers, where they can not only buy the lottery ticket that offer a dream but also enjoy themselves immediately for a few minutes. Done right, a games tab will target around 33 per cent of your lotto base, who become your most profitable players by no small distance.

GETTING STARTED

There's no need for a massive redesign or strategy review! Lottery operators can begin by picking a few games that have been proven to work with lottery players – the most obvious are scratch and lotto instant wins such as Boss the Lotto. Even a few games will lift profits and operators can begin to experiment with different product types and the cost effectiveness of unique content versus existing games.

Interactive

SOFTWARE DEVELOPMENT - NOVOSDK

Greentube keeps the channels open

Game developers must work with a wide range of Software Development Kits (SDKs) to adapt titles to the specific needs of operators and distributors. G3 spoke to UK design house, Mazooma Games, about working with one of the industry's most flexible systems, Greentube's novoSDK



Steve Cross,
Operations Manager
Mazooma Interactive Games

NOVOSDK

www.novoSDK.com

NOVOMATIC's Software Development Kit
novoSDK and the corresponding converter were created as a powerful toolkit to provide comprehensive software support for developing online casino games. They allow for quick development and efficient operations of a great number of casino games on a wide range of platforms. After an initial development effort using the novoSDK toolkit, these games can be offered on a great variety of regulated cash gaming platforms, on social gaming platforms, and on land-based Plurius machines. Over 250 online casino games already were developed on this basis, with many more to come.

Is the novoSDK solution applicable to all game developers, regardless of scale?

novoSDK is a scalable product that would suit any size of games developer. In fact our in-house novoSDK development team has doubled in size since it started with no issues.

What are the most important elements of an SDK and does novoSDK tick those boxes?

It is important that an SDK is stable, easy to use and flexible. At Mazooma we constantly strive for innovation. novoSDK allows the development team at Mazooma to take the visions from the game designers and turn them into reality. The cross-platform nature of novoSDK enables the developer to code the game once and then output to multiple platforms. Normally a developer would have to adapt the code for each bespoke platform and by removing this requirement allows the developer to concentrate on what really counts - the game itself.

"Convention over configuration" is a software design paradigm, aimed at decreasing the number of decisions developers need to make, gaining simplicity, and not necessarily losing flexibility. Does this concept work in practice when utilising novoSDK and what are the benefits and pitfalls to be avoided?

novoSDK adapts this software design paradigm excellently, a developer can have a basic new slot up and running in hours, with minimal effort or code. Adding features such as Free Spins is straightforward. However, Mazooma by nature tends to develop slot games with mechanics and functionality that have never been developed before. novoSDK still remains flexible enough to accommodate new slot mechanics and

functionality. There are occasions where a mechanic has required modifications to novoSDK itself. The novoSDK development team is always helpful and implements the required changes with minimal impact to our business.

What are your main deciding factors when choosing a platform to start development of a new game? Do you try to aim for the largest install base for a chance of high profit; or does the platform itself inspire the core design of a new game idea?

I believe that both factors mentioned above are important aspects to take into consideration when deciding which platform to use when developing a new game. The platform needs to be robust and flexible enough to meet your game design and requirements, but also portable so that the business can expose the game to as many users as possible. The beauty of novoSDK is its portability - we can build a game once and then distribute to a high volume of end-users, across multiple channels with minimal effort. This allows us to maximise our profits against development costs.

Have you developed in the past for alternate SDKs/or are you currently developing for a range of client SDKs - how do they differ, what's the ideal toolset, and how close is the novoSDK to providing everything you need?

Mazooma has been developing games for years, using multiple SDKs. Whilst powerful, often the SDKs have proven too bespoke for our business needs. We run a business model focused on quality of games rather than quantity. What novoSDK has allowed us to do is produce quality games and then mass distribute them across PC, Mobile, Native Android, iOS and now Plurius, providing maximum exposure per game. The





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NOVOMATIC INTERACTIVE

How easy is it to use novoSDK's cross-compiler to create native code on multiple platforms, including: HTML5, iOS, Android, Plurius (.NET), and Adobe Flash - and how do you ensure that the game is the same across all platforms?

It is surprisingly easy to use novoSDK to create native code on multiple platforms. From the developer's perspective, they are only required to develop the game on a Java source code.

How automated and standardised is the process? How much of your time is spent on quality assurance, certification and game launch as part of the process - or are these primarily handled by Greentube? How much of the complex deployment processes do you participate in or is this left to Greentube too?

The process of using novoSDK to convert a game is very automated. This allows the development team to actually focus on creating quality game content. At Mazooma, we have a large QA team, so the majority of the QA process is handled in-house. Greentube handles certification for all the jurisdictions that Mazooma operates in and also takes full responsibility for deploying our content across all Operators and Channels.

Which are the most useful tools in the novoSDK kitbag?

There are many technically useful tools in the novoSDK kitbag. A personal favourite feature of mine is the spectator and replay mode. On spectator enabled sites, such as StarGames, players are able to view others playing the game. This is a powerful feature that can help deliver a more traditional land-based casino feel to an online site. The replay is also a nice way for a player to revisit a 'big-win' or a feature in their previous game.

How much time do you save in utilising novoSDK, and is the cost of utilising the system negated by the savings it delivers?

Utilising novoSDK has completely revolutionised our game development process. Without novoSDK, Mazooma would be required to develop bespoke code for each target platform, potentially costing additional months of development hours per game. The fact that the novoSDK only requires a game to be developed once in Java means that, from a resource perspective, we only have to recruit Java developers and do not have to recruit for specific niche platforms, which can often prove expensive.

How have you found the process of working with Greentube and NOVOMATIC?

We have been working with Greentube and NOVOMATIC for a few years now and it has completely revolutionised our business. The novoSDK is a game changer and allows for quality content development, along with rapid multi-national, multi-channel deployment for maximum exposure. The Greentube team works in synergy with the novoSDK and is both knowledgeable and helpful. I would recommend novoSDK to any game development house.

novoSDK development team is always releasing updates to the SDK that cater for new devices, platform and compliance requirements, which in turn allow us to expand the reach of our products across different channels and countries.

If you already have the mobile and web development boxes ticked, would you use novoSDK to add the social and land-based channels, or is it an all-or-nothing solution?

Although the social and land-based channels are strong reasons to use novoSDK as a potential solution, the real power lies in its portability. In my opinion, if the developers are going to be developing on novoSDK, it makes sense to expand the utilisation of novoSDK to mobile and web development. The 'develop once, deploy to many' model is a real game changer.

Extensibility is a system design principle where the implementation takes future growth into consideration. It is a systemic measure of the ability to extend a system and the level of effort required to implement the extension. How does novoSDK enable you to future-proof your game designs - how extensible is it?

In my experience, novoSDK has proven to excel as a system designed with extensibility in mind. More recently we have had to implement additional functionality to meet new UK legislation across all of our games [20+]. Traditionally, this would have been months' worth of work on our legacy games. On novoSDK, the changes were implemented by the novoSDK team and all of our games inherited this functionality with a simple novoSDK update.

Plurius was one of the flagship server based gaming systems at ICE and is an impressive addition to NOVOMATIC omni-channel operations. The technology seamlessly links the online and land-based channels and we are now beginning to develop with the Plurius system in mind.

How important is access to the land-based market, through the Plurius system, in your consideration of novoSDK?

The Plurius system was one of the flagship server-based gaming systems at the ICE exhibition this year and is an impressive addition to NOVOMATIC omni-channel operations. The technology seamlessly links the online and land-based channels and we are now beginning to develop games with the Plurius system in mind.

Are the distribution channels wide enough using novoSDK? What are the advantages of using NOVOMATIC's channels as opposed to distributing through alternative means?

As you can imagine, the NOVOMATIC distribution channels are multinational. Once a game has been developed on novoSDK, it can then be distributed worldwide with minimal effort.

Interactive

FINANCIAL CRIME

Why a high-risk sector needs high-impact protection

Every business operating in today's digital economy has to face risks related to fraud, cyber-attacks and other financial crime threats – but for online wagering or "iGaming" companies, these threats are multiplied exponentially.



Jonathan Bowman,
Chief Technology Officer
MiFinity Payments

Jonathan Bowman is the Chief Technical Officer of MiFinity Payments (formerly NXSystems). MiFinity's digital wallet solution for the gaming industry offers players a seamless user experience and a broad variety of deposit and withdrawal options, while providing gaming companies with extensive global coverage – integrated with a vast network of financial institutions – as well as sophisticated authentication and fraud monitoring controls and comprehensive reporting. [Click here to learn more.](#)

How so? It's like an equation: take all of the risk factors inherent to digital payments in any sector, then double them (since iGaming outfits operate in a two-sided transaction environment, money is constantly coming in and being paid out).

From there, add in the unique vulnerabilities of the wagering industry at large – including its inherent susceptibility to money laundering – and multiply it all by the creativity of tech-savvy financial criminals, drawn to an already high-risk, high-stakes sector.

The end calculation: an obvious hotbed for fraud and security issues.

iGaming companies are all too aware of the issues they face, in part due to the additional business challenges that their unique vulnerabilities create. For example, banks and other financial institutions classify all companies in the wagering industry as "high-risk" – putting iGaming operators in an unenviable negotiating position when it comes to third-party processing fees and enterprise technology contracts. In addition, a recent report found that the online gaming industry was the

target of half of the recorded distributed denial-of-service (DDoS) attacks in the third quarter of 2015. This high level of cyberattacks is attributable, in part, to how crowded the iGaming market is becoming. Research from Kaspersky Labs found that one out of every two DDoS attacks in the online wagering space was launched or funded by a rival business.

With so many operators in the iGaming space competing for the same base of player-customers (and their money), it is not surprising that the attacks often come from the competition... and it is also no shock that these player-customers have their own financial crime tricks up their (digital) sleeves.

The most popular of these tricks exploits the online wagering industry's heavy reliance on credit card-enabled transactions. Criminals frequently attempt to use stolen card numbers on wagering sites, and consumers play that to their advantage by committing "friendly fraud." Friendly fraud occurs when a consumer uses credit card information to wager, but later claims that the related charges from a gaming outfit were actually unauthorized. The consumer simply lost money, but can "win" an undue chargeback by telling the credit card company that he or she did not sanction the payment.

Incidents of friendly fraud are commonly



caught by iGaming operators and credit card issuers after they happen – leading to expensive investigations by both parties. But technology is now helping the online wagering industry to get ahead of friendly fraud, as well as other consumer-driven financial crime risks.

New solutions serving the online wagering space place stronger emphasis on access and validation. For example, many operators are incorporating digital wallet technology into their platforms and requiring players to supply their bank account or credit card information to an online “e-wallet” account prior to game play –

A report found that the online gaming industry was the target of half of the recorded distributed denial-of-service (DDoS) attacks in the third quarter of 2015. This high level of cyberattacks is attributable, in part, to how crowded the iGaming market is becoming.

bolstering fraud protections by creating a verifiable access trail of the card being loaded to the site.

The best digital wallet solutions tokenise cardholder information upon application in the digital wallet, thus injecting additional security into the transaction activity. (Tokenisation replaces the consumer’s original cardholder data with a randomly generated virtual card number, or “token,” bundled with business rules for its exact use – where, when, and by whom). In addition, since banking rules typically classify digital wallet transactions as “quasi-cash” (aka, representative of actual currency) due to their two-sided nature, rather than as regular merchant transactions, users are also prevented from earning undue chargebacks.

Digital wallets don’t resolve all of gaming companies’ risk factors – like competitor DDoS attacks, for example – but they do significantly lower gaming platforms’ vulnerability to fraud. (So much so, in fact, that white-labelling an e-wallet solution into their sites can put operators in a stronger position to lower processing fees or renegotiate contracts with other third parties). And e-wallet-savvy gaming sites may be in an even stronger negotiating position as 2016 progresses, as the technology serving the iGaming market is evolving rapidly to conquer

Research from Kaspersky Labs found that one out of every two DDoS attacks in the online wagering space was launched or funded by a rival business. With so many operators competing for customers, it is not surprising that attacks come from the competition.

new and existing fraud threats in the space. For example, emerging “visual card” functionality will require each player to snap a photo of the credit or debit card to authorise it for game play; only then will the player be able to load funds or otherwise utilise the e-wallet.

Ultimately, to mitigate as many of their risk factors as possible, gaming operators must seek out technology solutions geared specifically to the unique needs of their industry. The sector is high-risk enough as it is... and making it less of a hotbed for fraud requires solutions specifically “calculated” to conquer the industry’s complex threats.

Products

LAND-BASED AND INTERACTIVE GAMING

Mega Launch Bingo Slots Ortiz Gaming

Ortiz Gaming is planning a major gaming launch at the G2E 2016 show in Vegas, with a new library of engaging game content, as well as some additional surprises. The company's latest offerings will include new electronic video reel slots, keno, lottery products, and of course bingo.

This is the second time in the past six months Ortiz has announced a significant increase to their product line and offerings. Last September, Ortiz Gaming tripled their product offerings with the addition of new content to their library and expansion into the interactive, iGaming, and social gaming space where the company is leveraging its proven land-based content through its iContent game library.



PTZ Cameras Security Dallmeier

With the DDZ4220HD and DDZ4230HD Dallmeier launches new PTZ cameras with a resolution of up to two megapixels.

The cameras of the series DDZ42xxHD are high-speed HD PTZ dome network cameras. They are equipped with a high-performance Pan-Tilt-Zoom mechanism and provide real-time high-definition video with up to 30fps at a resolution of 2MP. The most advanced sensor and encoder technology and the sophisticated image processing provide recordings with excellent contrast, brilliant clarity as well as highest detail resolution and colour fidelity. The DDZ4220HD features 20x optical zoom and the DDZ4230HD 30x optical zoom with auto-focus. The high zoom factor allows for the easy and discreet surveillance even of faraway objects.

Live Plus Online Gaming PlayVenture

PlayVenture is thrilled to announce that Live Plus, its innovative live betting product, won the Pitch ICE 2016.

The whole PlayVenture team worked really hard on Live Plus, taking the innovative idea of its CEO, Theodoros Theodosopoulos, and turning it into reality.

Live Plus, a player vs player platform, seems to have attracted the interest of ICE attendees and gaming professionals by the fact that for the first time the players compete against each other on live sport events in the form of tournaments, by placing bets on real outcomes in order to finish first



on a real-time leaderboard, giving it the Pitch ICE 1st place award.

Theodoros Theodosopoulos, PlayVenture's CEO, commented on the win: "We cannot express our excitement for the win and our appreciation for everyone who voted for us. Live Plus is a product that the whole team has put their lives in it, and I believe that shows on the outcome. We feel the obligation to meet the expectations

of the people that voted for us, and to convince the ones that didn't, by constantly improving Live Plus. PlayVenture will keep working hard in order to establish Live Plus in the gaming market, making it a necessary innovative component for every gaming operator."

"The competition was tough this year, and the standards really high, so everyone in the team feels very proud to have achieved this win."

Mega Boy Online Slots iSoftBet

iSoftBet has launched its latest original title across both desktop and mobile: Mega Boy. The supplier's latest release invites players to step back in time to the golden age of 16-bit video gaming, with charmingly pixelated characters and an array of nostalgic synthesised sounds. Complementing iSoftBet's latest original offerings, Mega Boy comes packed with innovative features such as two special game modes triggered when one of the two special characters appears on the middle row of the third reel. Each mode offers its own selection of power-ups, including expanding Wilds, multipliers and Wild transformations.

Cash Cubes Mobile Bingo Playtech

Playtech, the world's leading omni-channel gaming software and services supplier, has launched Cash Cubes, a new speed mobile bingo game variant which is being deployed across the industry's leading bingo network with a £50,000 network promotion.

Developed and designed in-house with speed in mind, the 36-ball multi-stake game is played every two minutes and ideal for today's players who enjoy short, sharp bursts of rapid-fire mobile gameplay, while it also appeals to both mobile and traditional as well as lapsed players seeking new variants.

The game's unique built-in retention element is designed to increase a players' experience, loyalty and lifetime value. The more cubes a player collects, the more likely he or she is to achieve a feature bonus. Cash Cubes is available in HTML5 format across mobile, tablet, and desktop.



Rainbow Warriors Collection Casino Slots Aristocrat Technologies

Aristocrat's E*Series line of games was created especially for players who like an entertainment-based gaming experience, and the thrilling new Rainbow Warriors collection, the latest in the E*Series line, raises the bar in adventure and rewards for players in North America.

Two new warriors, Golden Guardian and Sapphire Guardian, are a player's daring escorts through an enchanting land comprised of dazzling, modern graphics, backed with a thrilling soundtrack, and filled with lions, unicorns, and exciting bonus features.

Both Golden Guardian and Sapphire Guardian feature a new math model that is expanded to eight reels using a new 4x8 reel layout. Each game has a medium volatility level that is designed to increase the number of large wins, and each has a three-level standalone progressive.

The Rainbow Warriors collection has exciting bonus features, including Max Stacks, Matching Stacks, Matching Wilds, a free games feature where up to 300 free games are awarded, and Rainbow Picks, where the player is



awarded 3, 4, 5, 6 or 8 picks that may reveal a Minor, Major or Grand jackpot or other credit prizes.

Both Golden Guardian and Sapphire Guardian are available on the Helix and Viridian WS cabinets. Each has a denom range from 1c-\$20 and a bet range from 50-800 credits.

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