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September 2017

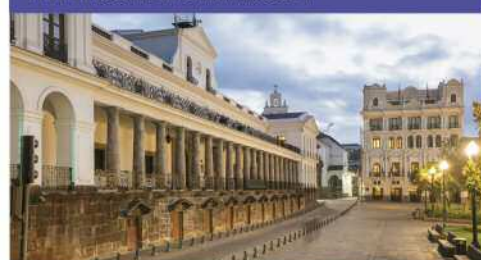
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G3 MARKET REPORT: POLAND CHANGE FOR THE BETTOR?

For better or for worse? A new gaming act resets the online and offline gaming market in Poland

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Could the door be opening for gaming establishments to return to the cities of Ecuador?
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Growth in the local economy has helped NagaWorld to increase GGR by 40 per cent
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Italy Gaming Market

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Online gaming generated gross income, from the granting of the first license until June 30, 2017, of more than €108.1m.

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Lewis Pek
Editor



Comment

September 2017

Reading the news on my BBC App has become an exercise in frustration and patience at the minute. It feels like every story either includes Donald Trump or takes a bizarre path to crowbar him into the context of the piece. What are his views on North Korea? What's his son wearing? Did he send the right message during the horrendous weather events affecting Texas? I'm not sure what the Trump-effect is exactly on ratings, but it must be significant, focus-grouped and tested, as every other story seems to reference him – and it's grating.

On the casino side, it feels like news of market openings in Japan, and previously Brazil, is having the same effect. Every move the Japanese Diet makes is poured over by commentators and reported upon in enormous depth. So much so that the wait until something actually happens is becoming excruciating. Roll on 2020+!

While the world waits with baited breath for the casino gaming markets of Japan and Brazil to open, there is actual news still taking place; with structural changes to the gaming markets in Europe presently altering the fabric of the industry. Last month we detailed the changes set to affect the street gaming market in Germany and the ramifications for neighbouring markets. This month we focus our attention on Poland and Italy, two countries that have expressed a long-standing 'love hate' relationship with gaming.

POLAND AND ITALY, TWO COUNTRIES THAT HAVE EXPRESSED A LONG-STANDING 'LOVE HATE' RELATIONSHIP WITH THE GAMING INDUSTRY

While Poland looks to be slowly reinstating its gaming infrastructure across gaming sectors, having cleaned the slate in recent years, Italy is stepping back from the brink. The former Italian government looked set to bring about a cataclysmic shift in the gaming sector, especially in relation to street machines and VLTs. The new administration, however, has decided to adopt a softer approach to machine gaming in the country, while at the same time making a cash-grab for tax revenue that could still have a dramatic effect on the marketplace.

In contrast, our third report this month looks at the Latin American market of Peru, which is all 'roses and light.' Here's a country with a buoyant economy embracing its gaming possibilities and adopting measured and progressive practices in relation to gaming. It's as refreshing as it is surprising. And we promise a Trump-free zone!

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Calendar

September 2017

EMEA

Entertainment Arena Expo 2017

September 4-6, 2017

LOCATION
Romexpo Exhibition Center, 65-67
Marasti Blvd, Bucharest, Romania

ORGANISER
Expo 24 Romania
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EMEA

Sports Betting Academy

September 5-7, 2017

LOCATION
London, United Kingdom
ORGANISER
Clarion Events
Fulham Green, Bedford House
69-79 Fulham High Street
London
United Kingdom

SW6 3JW
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NORTH AMERICA

Casino eSport Conference

September 7-8, 2017

LOCATION
West Gate Hotel & Casino, Las Vegas,
Nevada - United States
ORGANISER
Fox Marketing
United States

CONTACT
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T: +1 201 450 1718
E: info@casinoesportconf.com
www.casinoesportconf.com

EMEA

Betting on Sports 2017

September 12-15, 2017

LOCATION
Olympia, Kensington, London, UK
ORGANISER
SBC Events
New Kings House
136-144 New Kings Road
London

United Kingdom SW6 4LZ
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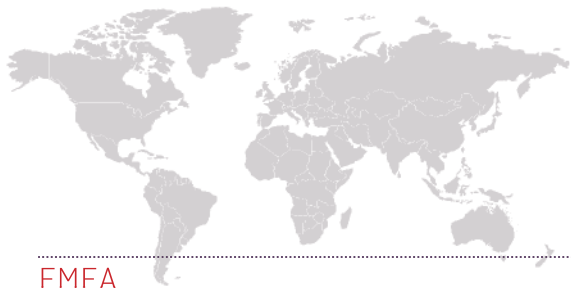
EMEA

WrB London 2017

September 12, 2017

LOCATION
OXO2 Tower, London, UK
ORGANISER
Clarion Events
Fulham Green, Bedford House
69-79 Fulham High Street
London

United Kingdom, SW6 3JW
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Cyprus Gaming Show 2017

September 20-21, 2017

LOCATION

The Hilton, Nicosia, Cyprus

ORGANISER

Eventus International Ltd
Suite 1104, Crawford House
70 Queen's Road Central
Hong Kong

CONTACT

Mo Salie
T: +2782 448 0209
E: mo@eventus-international.com
www.cyprusgamingshow.com

NORTH AMERICA

Global Gaming Expo 2017

October 3-5, 2017

LOCATION

Sands Convention Centre,
Las Vegas, Nevada, US

ORGANISER

Reed Exhibition Companies
383 Main Avenue
Norwalk, Connecticut
United States

CT 06851

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EMEA

PayExpo Europe 2017

October 4-5, 2017

LOCATION

ExCel, London, United Kingdom

ORGANISER

Clarion Events
Fulham Green, Bedford House
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London SW6 3JW

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www.payexpo.com/europe

EMEA

ENADA Rome 2017

October 17-19, 2017

LOCATION

Rome Expo Centre, Rome, Italy

ORGANISER

Italian Exhibition Group Spa
Via Emilia 155
Rimini
Italy 47900

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www.enada.it

EMEA

EiG European iGaming Congress & Expo 2017

October 30-November 1, 2017

LOCATION

Arena Berlin, Berlin, Germany

ORGANISER

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MERKUR
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El Diputado Amado Florentín, miembro del Partido Liberal Radical Auténtico (PLRA) de Paraguay, ha presentado un nuevo proyecto de ley con vistas a prohibir la operación de casinos en recintos de propiedad estatal. El Diputado espera que la nueva norma pueda ser estudiada por la Cámara de Diputados al completo a lo largo del próximo mes y que se incluya así esta enmienda en las leyes sobre juego de Paraguay, que se remontan al año 1997.

El Comité de Control del Juego en Colombia (Coljuegos) ha emitido su primera licencia online en favor de Wplay, una empresa local. Con sede en la ciudad de Medellín, la empresa se registró en junio del año pasado y es propiedad del Aquila Global Group. Esto les permitirá a los colombianos apostar en una amplia variedad de deportes, incluido el fútbol, el baloncesto, el tenis y el béisbol.

El director de la Agencia de Loterías Nacionales de Uruguay, Luis Gama, está trabajando mano a mano con el Ministerio de Economía y Finanzas sobre una medida legal destinada a prohibir todo el juego por Internet que no esté autorizado por el Estado.

El representante del estado mexicano de Sonora y miembro del Partido Revolucionario Institucional (PRI) Emeterio Ochoa Bazúa ha conminado a los municipios de la región a emitir unos reglamentos más estrictos a fin de regular la concesión de licencias de juego.

Uno de los mayores operadores de Colombia, Winner Group CIRSA, ha optado por la consola de tragaperras P-24/24 Up de Euro Games Technology para cuatro de sus establecimientos de juego. Los casinos, ubicados en Bogotá, Medellín, Cali y Buga, han recibido recientemente 15 máquinas del modelo EGT, todo un superventas.

El accionista mayoritario de Casinos Austria, el Sazka Group checo, tiene previsto adquirir el control en exclusiva de Casinos Austria en virtud de una declaración hecha pública por la Autoridad Federal de la Competencia (BWB).

Armenia se dispone a marcar el comienzo de una nueva era para su sector del juego con la aprobación por parte del Gobierno de unas nuevas leyes que garantizan una licencia de casino para proyectos que se cualifiquen como «desarrollos de alta trascendencia».

Casino Admiral Liechtenstein ha abierto sus puertas, con lo que se ha convertido en el primer casino del Principado de Liechtenstein desde el año 1846. Tras recibir su licencia por parte de la Agencia de Economía Nacional, ha comenzado a operar en el Kokon Center de Ruggell con cinco mesas de juego y más de 100 máquinas tragaperras con diversos sistemas de jackpot.

Betsoft Gaming, arquitecto de la plataforma Shift, ha anunciado que ha suscrito un acuerdo de asociación con el nuevo operador HBet63, orientado hacia Asia. HBet63 se concentra fundamentalmente en el mercado que cubre China, Singapur y Malasia.

A recent meeting in the Ecuadorian city of Guayaqui could open the door for casino gaming to return to the country

ECUADOR LICENCES



Ecuador Casinos - Back on the Cards?

Businessmen from the gambling sector have held a meeting with members from the Ecuadorian Committee on Human and Union Rights (CEDHUS) as well as representatives of the Central Government, to propose the reopening of casinos. The meeting which was held in the city of Guayaqui was attended by the head of small businesses (MYPES) as well as other high ranking government officials in order to discuss the issue with foreign owners of gambling halls and casinos, as well as Francisco Zambrano Campuzano, President of CEDHUS.

Zambrano Campuzano, promoter of the meeting, said that with the exit of casinos in Ecuador, more than 100,000 direct and indirect employees were left jobless. He also went on to say that with the regulated and controlled return of gaming, state revenue would increase and the industry would provide jobs to more than 100,000 people. From a legal point of view, with the departure of casinos and gambling halls, the constitution as well as a number of local and international laws had been broken, he said.

Members of the gaming industry delivered a document at the meeting which reflected their willingness to return and reinvest in Ecuador. They also asked that delegates from the Ministry of Tourism, Labour, Health as well as the Interior be invited to attend the next working meeting.

The news would signal a huge turnaround in

government policy. In September 2010 then President of Ecuador Rafael Correa announced that his government was seeking to ban casinos. Claiming that casinos in Ecuador had become hotbeds of corruption and money laundering Correa told local press that his administration would put the question before the Ecuadorian people as part of a referendum. If the Ecuadorian people agreed with the President's views on the issue then all of the fifty five casinos and bingo halls in Ecuador would be closed down forthwith.

Almost four million Ecuadorians (47.7 per cent of the voters) voted that they were in favour of such a move meaning that many skilled and experienced casinos workers, many of whom had been working in the industry for almost fifteen years were left jobless. It also meant that the government lost around US\$20m in tax revenue per year.

Under previous legislation, casinos operating in Ecuador had to offer—in addition to slots—at least four different types of table gaming in five-star hotels and two to three types of table gaming in three- and four-star hotels, respectively. This was then changed in 2008 when the "Regulation of Casinos in the Tourism Law" was approved by President Correa. According to article 5 of this act casinos could in the future only be part of a "hotel de lujo" meaning in a five star hotel located in a tourist hot spot.

Argentina GLI accreditation as testing lab in Mendoza

GLI is the first independent test laboratory to be awarded certification accreditation in the Province of Mendoza, Argentina.

GLI's Director of Latin America and Caribbean Government Relations and Business Development Karen Marcela Sierra-Hughes said, "Continuing with our commitment to the regulatory entities, GLI prepared and submitted the petition for accreditation per the regulatory requirements as outlined by the jurisdiction.

"Having been granted accreditation, we are ready to receive submissions for the jurisdiction of Mendoza. We are very thankful to the Inspection and Legal Department of the Provincial

Institute of Games and Casinos for their guidance during the process and to the board of directors for approving our accreditation as we look forward to continuing collaboration with them in their regulatory efforts," continued Karen Marcela Sierra-Hughes.

GLI has been accredited for the certification of gaming devices by the Provincial Institute of Games and Casinos of the Province of Mendoza of Argentina since 2012. With the issuance of a new and updated regulation strengthening the requirements for test laboratories last year, GLI submitted its application to comply with the process and successfully achieved its accreditation under the new requirements.

With this renewed accreditation, GLI gives continuity to its certification services for the Mendoza jurisdiction.

Paraguay

Deputy Amado Florentín, a member of The Authentic Liberal Radical Party (PLRA), has presented a new bill that would prohibit the operation of casinos in property owned by the state. The Deputy expects that the new rule could be analysed by the full Chamber of Deputies within the next month and would amend Paraguay's gaming laws which date back to 1997. The bill would then be referred to the Constitutional Affairs and Legislation Commission for review. Deputy Florentin said that Paraguayan rules when it comes to granting gaming licences were highly restrictive and added that the use of state property for casinos was not in keeping with Paraguayan gaming laws.

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El Gobierno de Grecia está intentando

reescribir las condiciones de un acuerdo con OPAP a fin de reducir de 35 000 a 25 000 el número total de terminales de videolotería que puede operar. Como compensación para OPAP se prevé ampliar su contrato durante otros ocho años.

JVH Gaming, propietaria de la cadena de salas

de tragaperras Jack's Casino, está interesada en adquirir «áreas de Holland Casino», según declaraciones del Director General de la empresa, Eric Olders.

El fondo de capital privado estadounidense

Blackstone Group está considerando la compra del grupo de casinos francés Joa. Blackstone se ha introducido recientemente en el mercado del juego con una compra conjunta de Paysafe y la adquisición íntegra de Clarion, organizadores de la feria del sector del juego ICE Totally Gaming.

El sector del juego en la República Checa

creció un 29 por ciento en 2016 y generó unos ingresos brutos del juego de 39 300 millones de coronas checas (1780 millones de dólares) a lo largo del año. Los resultados invirtieron la caída del año anterior, que había supuesto una reducción del tres por ciento en los ingresos derivados del juego.

Great Canadian Gaming Corp y su socio

Brookfield Asset Management han obtenido la licencia de 22 años para operar salas de tragaperras y casinos en el Área Metropolitana de Toronto.

La empresa de pagos digitales Paysafe ha

accedido a las condiciones de una oferta de 2960 millones de libras esterlinas por parte de las empresas de capital privado CVC y Blackstone. Esto les brindará a Blackstone y CVC exposición en el sector del juego online.

Century Casinos ha presentado una solicitud

de licencia para un casino en el Hamilton Princess Hotel & Beach Club en Hamilton (Bermudas) junto con la empresa propietaria del recinto.

Interblock ha anunciado la instalación de un

Diamond Video Lottery Terminal (VLT) Stadium en el Jake's 58 Hotel & Casino en Islandia, N.Y., en Long Island. Interblock es el único proveedor de ETG en el Jake's 58 que ofrece juegos de mesa tradicionales en un formato electrónico.

El proveedor de pagos Worldpay y su rival

estadounidense Vantiv han llegado a un acuerdo para fusionarse y crear una operación combinada valorada aproximadamente en 9300 millones de libras esterlinas (12 100 mill. de \$/10 300 mill. de €).

El Comité de Asesoramiento sobre Adopción

de Innovaciones (Innovation Adoption Advisory Panel, IAAP) se ha constituido en Estados Unidos como parte de un esfuerzo colectivo del especialista en juegos de mesa electrónicos Interblock, el experto en videojuegos GameCo y su miembro más reciente, Konami Gaming, para fomentar la innovación continuada en el desarrollo y la comercialización de productos de juego para casinos.

Control Board Grants First Online Licence

The Colombian Gaming Control Board (Coljuegos) has issued its first online licence to locally based company Wplay

Colombia forges ahead with its introduction of legal online gaming with the issuing of the first licence to Wplay



COLOMBIA ONLINE GAMING

The Colombian Gaming Control Board (Coljuegos) has issued its first online licence to locally based company Wplay. Based in the city of Medellín the company was registered in June last year and is owned by the Aquila Global Group. The company allows Colombians to bet on a wide array of sports including football, basketball, tennis and baseball.

Akila Global Group manager Julio César Tamayo stated: "We have more than 50 sports, more than 1,000 events per day and more than 100 ways to play or predict the results of events," he said. After launching a promotional campaign where players could try playing for free and win prizes the platform began to operate officially on July 22 this year. Around 30,000 players took part. Tamayo said that during the three years of its licence with Coljuegos they plan to award at least \$600,000m in prizes.

Colombia has made major progress of late when it comes to regulating online gaming and is now actively seeking to block unlicensed sites which are offering their services to locals. Online gaming laws began to be tightened after legislation was passed in 2015 and 2016. According to new regulations, operators granted a licence must adhere to a number of obligations

and also meet the technical requirements as per the terms granted to it by the state. Operators must pay a licensing fee of \$600m and must also meet with a number of other strict legal and financial requirements as well.

Operators must have a bank account in Colombia in which player balances and accounts are located and players may only make deposits and withdrawals in local currency. Operators must pay 15 per cent of net income in addition to a yearly licence fee as well as a fee that covers administrative expenses. The operator must also provide a number of financial guarantees to the government as well. Advertising is allowed but with a number of restrictions and games online must return a minimum of 83 per cent back to the player. The new bill allows for a large array of games including online sports betting as well as slots and table games. It also puts in place a number of player protection measures.

Head of Coljuegos Juan B. Pérez Hidalgo said that the new online gaming bill would ensure that operators "must process a licence, meet certain requirements, certify the systems they will use and pay an initial amount in order to operate the (online) games."

Alfastreet Gaming and Complete Solutions announce partnership

Caribbean

Alfastreet's strong position in Caribbean market has led to the company's decision to select local partner. Complete Solutions, as distributor and technical support provider for the islands. The agreement includes distribution of the complete Alfastreet product line, upgrades and spare parts. Under the terms of the agreement, Complete Solutions will also become the primary provider of service and application support in the region.

"With Complete Solutions as our distributor, we increase our presence in the casino market industry of the Caribbean" said Tjasa Luin Peric, CEO of Alfastreet. "Our goal is to



continuously improve our customers' experience in every aspect. Expanding our network of sales and support and being in close proximity to our customers is the key initiative towards achieving that."

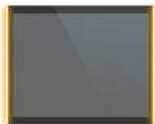
Nigel Nedd, Director and owner of Complete Solutions. "By adding Alfastreet's product line to Complete Solutions' portfolio and by leveraging our extensive support infrastructure we can provide our Caribbean customers with a total solution to their needs."

Colombia

Spanish sports betting operator Sportium will start operations in Colombia as part of its international expansion plan. Its entry into Colombia is part of a larger process as the company seeks to expand further in the region with the opening of an office in Panama having opened its first sports betting shop there in September 2016. Sportium is a joint venture between Ladbrokes and CIRSA and is already present in Mexico as well. The website offers sports betting and casino products, bingo and over 200 slot games. Ladbrokes was permitted to launch a new regulated website in Mexico due to Casino Life, Cirsa's Mexico land based casino business, which was authorised by the regulatory body: SEGOB. It is already one of the leading multi-channel betting operators in Spain and the official betting partner of La Liga.

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COLOMBIA – One of the largest operators in Colombia, Winner Group CIRSA, has opted for the P-24/24 Up slot cabinet of Euro Games Technology for four of its gaming establishments. The casinos, located in Bogota, Medellin, Cali and Buga, recently received 15 machines of the bestselling EGT model. The supplied Orange and Green multigames of the Collection series, the Premier Fruits mix and the four-level mystery progressive Lady's Cards jackpot are also keeping operator's floors fresh with new gaming offerings.

CIRSA and EGT have a long-standing partnership that has seen success in many countries across Europe and Latin America. The installation marks the beginning of their relationships in Colombia and during the initial install reported that players were excited to try the new machines. According to a CIRSA representative, the best feedback is received for EGT game themes and design and for the Lady's Cards bonus game.

"We're proud of the local reception of our products and the high satisfaction of our customer," shared Silviya Marinova, director of EGT – Colombia. "Apart from the impeccable reputation we have built around the world, I am positive that our company will soon establish itself as a key player in all future gaming installations in the country." In fact Mrs. Marinova had already contracted 15 more deliveries in August and September to different casinos of other domestic operators.

LATAM – Advanced betting solutions provider UltraPlay brings its sportsbook functionality to Eldorado casino – a brand-new iGaming operator on the Latin American market. Providing its iframe solution, Bulgarian-based online betting provider has reached the emerging iGaming market through its collaboration with the SoftSwiss platform.

With the sports betting dedicated software powered by UltraPlay, Eldorado casino will provide thousands of events with numerous markets available for betting. The state-of-the-art software enables players to enjoy a superb betting experience. Eldorado offers wide variety of payment methods, deposits and encrypted transfers, meeting the highest standards of global security in computing. The unique system is designed to answer the highest customer's expectations for fast transactions.

Following the new deal in the company's business roadmap, CEO of the company Daryl Margaritov commented: "Enriching our portfolio to Latin America guarantees that our products and services are highly-demanded, their performance rate is increasing and satisfying both operators and players around the globe."

Deputy Calls for Stricter Gaming Controls

Emeterio Ochoa Bazua, has urged the municipalities of the region to issue stricter regulations in order to regulate the granting of gaming licences

A Sonora state representative has drawn attention to the fact that it now has the highest rate of casinos per population in the country

MEXICO GOVERNMENT AFFAIRS



The representative for the Mexican state of Sonora and member of the Institutional Revolutionary Party (PRI) Emeterio Ochoa Bazua, has urged the municipalities of the region to issue stricter regulations in order to regulate the granting of gaming licences. The lawmaker said that in Sonora, which is located in the northwest of the country, and borders with the United States, that there are currently 31 gambling halls, meaning that it is the sixth Mexican state when it comes to the number of gaming halls per state. In proportion to its population, it now has the highest rate of casinos with around one gambling house per one hundred thousand inhabitants.

"It is a problem that we have in our society... If you pass by one of those establishments at 8:00 in the morning you can already see a row of people waiting to enter the place," said Ochoa Bazua. "The law we have in Sonora says that these establishments should run for no more than 12 hours," he added, "starting from 3:00 p.m. to 2:00 p.m., which obviously is something that is not being adhered to."

He went onto say that due to the need to stop gambling addiction that the municipalities where these establishments are located should issue new regulations when it comes to licenses, permits and municipal authorisations for gaming halls and stressed that the State Congress had asked the municipal council to make new regulations based on gaming laws which were passed in 2013. One of the main points dictated by this initiative is to regulate opening times so that casinos may not operate for more than 11 hours.

His calls for reform come at a time when a number of other lawmakers are making major changes to local gaming laws at a state level.

In March the mayor of Monterrey Adrián de la Garza Santos told fellow lawmakers that no casino licences had been granted during his term of office. The mayor said that casinos had been blocked from opening during his administration via a specific impediment that allows local authorities to intervene to ensure that they do not open.

Mexico

Jaime Rodríguez Calderón, the Governor of the northern state of Nuevo León, has ruled out the possibility that he could present an initiative that would prevent the opening of more casinos, because "society has the right to have a good time." Nearly six years after the fire at Casino Royale in the city of Monterrey, where 52 people were killed, he said that a similar incident could not be repeated: "The past is the past, what we must not commit are the errors of yesterday," he said. Calderón was responding to questions regarding statements made recently by the President of the Mexican Gaming Association (AIEJA) Miguel Angel Ochoa who revealed that more casinos could be granted permission to operate in the state, reaching between 35 and 45 or even by as many as 60 by 2020. "The region is a society that is making advances, an educated society, a society that needs to have fun..." Calderón said. "I am not against society having fun and doing it in a healthy way."

Governor Vidal Aims to Launch Tender by End of Year

Argentina

Governor of the province of Buenos Aires María Eugenia Vidal has decided to tender all of the casinos in the province before the end of the year. According to local sources the government has been working for several months on a set of new terms and conditions, which are now in the last stage of review.

Head of Lottery and Casinos, Matías Lanusse will be in charge of overseeing the tender process that affects casinos, slot machines and tables operating within the 11 provincial casinos which all expire in a few months time.

The operation of slot machines in the casinos, which are located in the centre of the province and along the coast, is currently held by Boldt which operates 2,600 slot machines

in the province of Buenos Aires – home to 15.6m people. The business is currently worth around \$550m pesos a year. Boldt's licence expired in March and the new tender process is likely to begin a hard fought contest as operators seek to make further inroads into the market with Codere, Inverclub, and Boldt all rumoured to be interested in the new licences.

It is estimated that the licences could cost as much as US\$100m in all: US\$70m for the licence to run the slot machines while as much as US\$30m could be invested in building improvements. There have been several delays when it comes to the granting of the new licences. The new plan was put forward when the mayor of Pinamar, Martín Yeza, made the Governor's plans public to a group of local hoteliers and businessmen. The Minister of Tourism Gustavo Santos, as well as the President of the Buenos Aires Chamber of Deputies, Manuel Mosca was also present.



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Der Abgeordnete Amado Florentín, Mitglied der PLRA, der liberalradikalen Partei Paraguays, hat einen Gesetzentwurf eingebracht, der den Betrieb von Spielbanken in Objekten, die sich in Staatsbesitz befinden, verbietet. Der Abgeordnete erwartet, dass das neue Gesetz innerhalb des kommenden Monats vom gesamten Abgeordnetenhaus geprüft und anschließend die in die auf das Jahr 1997 zurückreichende Glücksspielgesetzgebung des Landes eingehen wird.

Die kolumbianische Glücksspielaufsicht (Coljuegos) hat dem einheimischen Anbieter Wplay die erste Zulassung zum Betrieb von Online-Glücksspielen erteilt. Das in Medellín ansässige Unternehmen wurde im Juni vergangenen Jahre offiziell angemeldet und gehört zu der Unternehmensgruppe Aquila Global. Das Angebot des Unternehmens umfasst ein breites Spektrum an Sportwetten unter anderem in Sportarten wie Fußball, Basketball, Tennis und Baseball.

Der Leiter der staatlichen Lotterieberörde Uruguays, Luis Gama, arbeitet gemeinsam mit dem Ministerium für Wirtschaft und Finanzen an gesetzlichen Regelungen zum Verbot jeglichen nicht staatlich zugelassenen Glücksspiels im Internet.

Der Vertreter des mexikanischen Bundesstaates Sonora und Mitglied der Partei der institutionellen Revolution (PRI), Emeterio Ochoa Bazua, hat die Gemeinden der Region ermahnt, strengere Bestimmungen zur Regelung der Vergabe von Glücksspielzulassungen zu erlassen.

Einer der größten Spielbankenbetreiber in Kolumbien, die zur Winner Group gehörende CIRSA, hat sich entschieden, seine vier Glücksspielstätten mit Automaten des Typs P-24/24 Up von Euro Games Technology auszustatten. Die Casinos in Bogota, Medellín, Cali und Buga haben vor kurzem 15 Geräte des meistverkauften Modells von EGT erhalten.

Der größte Anteilseigner der Casinos Austria, die tschechische Sazka Gruppe, beabsichtigt laut einer von der Bundeswettbewerbsbehörde (BWB) veröffentlichten Meldung „die Übernahme der alleinigen Kontrolle über Casinos Austria“.

Armenien ist dabei, eine neue Ära für seinen Glücksspielsektor einzuläuten, da die Regierung neue Gesetze verabschiedet, durch die Vorhaben, die als ‚bedeutende Entwicklungen‘ gelten, eine Glücksspielzulassung eingeräumt wird.

Das Casino Admiral Liechtenstein hat seine Pforten geöffnet und ist damit die erste Spielbank im Fürstentum Liechtenstein seit 1846. Nach Erhalt der Zulassung vom Amt für Volkswirtschaft wurde es im Kokon Center in Ruggell mit fünf Spieltischen und mehr als 100 Spielautomaten mit mehreren Jackpot-Systemen eröffnet.

Die Great Canadian Gaming Corporation und ihr Partner Brookfield Asset Management haben eine Zulassung zum Betrieb von Spielhallen und Spielbanken in der Großregion Toronto mit einer Laufzeit von 22 Jahren erhalten.

Sazka Wants Control of Casinos Austria

The largest shareholder of Casinos Austria, the Czech Sazka Group, ‘intends to acquire the sole control of Casinos Austria’ according to the BWB

The Austrian Federal Competition Authority (BWB) has stated that Czech-based Sazka has announced its intention for sole ownership of Casinos Austria

AUSTRIA CASINOS & LOTTERIES

The largest shareholder of Casinos Austria, the Czech Sazka Group, ‘intends to acquire the sole control of Casinos Austria’ according to a statement published by the Federal Competition Authority (BWB).

Sazka Group, which runs the Czech national lottery, is owned by Czech businessmen Karel Komarek and Jiri Smejck. It said it had bought more shares in Casinos Austria to take its shareholding from 11.3 per cent to about 34 per cent.

The second largest shareholder is the state owned ÖBIB with 33.2 per cent followed by Novomatic with 17.2 per cent. Novomatic had tried to take control of the company last year but failed in the courts. It is not believed to be interested in selling its shares.

The move by Sazka is surprising, since the Group appeared to be satisfied with its joint ownership of Casinos Austria, as Sazka was solely interested in the Lotteries division of the company, leaving Novomatic to run the casino side. If this remains the case, the company could be seeking to acquire full control of the Austrian



Lotteries Group, possibly parring away the casino operations business.

Casinos Austria and Austrian Lotteries Group have just reported the best financial year in their 50-year corporate history with an eight per cent rise in group revenues to a record €3,885.95m. Sustained investments in improving and extending its portfolio as well as measures to improve efficiency also led to the group achieving clear increases in results: operating results rose by 49 per cent to €150.1m, while group consolidated results were up by 65 per cent to €91.2m. There was also cause for celebration among customers and guests, who together took home total winnings of €2.7bn, a rise of 11.3 per cent compared to 2015 and yet another historic high.

Visitor numbers at Casinos Austria’s 12 domestic casinos were up by 10.6 per cent in 2016 compared to the previous year: together, these casinos welcomed a total of 3,009,946 guests, more than half of whom were international visitors. This led in turn to a strong rise in gaming revenues, which were up 5.2 per cent year-on-year to €326.83m.



Monaco

SBM sees GGR grow by five per cent in Q1

During the first quarter of the year, the Société des Bains de Mer and its subsidiaries reported an increase in revenue of 2.6 per cent.

Turnover for the group came in at €127.5m with the increase driven by favorable developments in the gaming and rental sectors. Hotel activity remained broadly stable compared to the previous year.

Gross Gaming Revenues were up five per cent reaching €44.6m for the quarter. SBM said the increase was due to “a favorable change in the hold, turnover in table games growing by more than six per cent, whilst automated equipment also progressed favorably, in particular

at the Casino Café de Paris.”

Hotel revenue was stable at €70.3m, compared with €69.9m for the same period last year.

In addition, the rental sector, which includes the rental of shops and offices as well as the activities of the Monte-Carlo Bay, Balmoral and Villas du Sporting residences, posted a turnover of €10.4m up nine per cent. SBM said: “If the trend observed since April 1, 2017 is slightly more favorable in the gaming sector, the random and seasonal nature of the activity does not allow for forecasts for the whole gaming industry.”

Armenia

Armenia is looking to usher in a new era for its gambling sector with the government approving new laws guaranteeing a casino licence for projects that qualify as ‘major developments’. Projects will need to cost at least US\$83.5m to go ahead. Armenian Finance Minister Vardan Aramyan said that interested operators will be able to proceed with their plans if they are ready to commit to ‘major’ investment. However, if a consortium plans to develop a casino, only one of the participants will be given a licence. Armenia allows land-based casinos in four specially designated areas around Armenia; Jermuk, Meghri, Sevan, and Tsaghkadzor. The country recently approved legislation allowing operators to better target high-rollers, but must report VIP transactions and must take copies of their customers’ identity documents.

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Die griechische Regierung beabsichtigt, die Bedingungen des Vertrages mit dem Glücksspielanbieter OPAP zu überarbeiten, um die Gesamtzahl der Videolotterieterminals (VLT), die betrieben werden dürfen von 35.000 auf 25.000 herabzusetzen. Als Entschädigung für OPAP ist die Verlängerung des Vertrages um weitere acht Jahre geplant.

JVH Gaming, der Eigentümer der

Spielhallenkette Jack's Casino hat laut Firmenchef Eric Olders Interesse an der Übernahme von „Teilen von Holland Casino“.

Der amerikanische Beteiligungsfond

Blackstone Group erwägt den Kauf der französischen Spielbankengruppe Joa. Blackstone ist vor kurzem durch die gemeinsame Übernahme von Paysafe und den vollständigen Erwerb von Clarion, den Veranstaltern der Fachmesse ICE Totally Gaming, in den Glücksspielmarkt eingetreten.

Der Glücksspielsektor in der Tschechischen

Republik ist 2016 bei einem Bruttospielertrag von 39,3 Mrd. Kronen (1,78 Mrd. USD) um 29 Prozent gewachsen. Durch das Ergebnis wird der Rückgang aus dem Vorjahr, als die Einnahmen aus dem Glücksspiel um drei Prozent gefallen sind, umgekehrt.

Das Unternehmen für digitale

Zahlungsabwicklungslösungen Paysafe hat den Bedingungen eines 2,96 Mrd. Pfund schweren Angebotes der Beteiligungsgesellschaften CVC und Blackstone zugestimmt. Der Geschäftsabschluss verschafft Blackstone und CVC Zugang zum Onlinemarkt für Unterhaltungs- und Glücksspiele.

Interblock meldet den Einbau einer Reihe von

Diamond-Videolotterieterminals im Jake's 58 Hotel & Casino Inn Islandia auf Long Island im Bundesstaat New York. Interblock ist der einzige Anbieter von traditionellen Tischspielen in elektronischer Form (ETG) im Jake's 58.

Der Zahlungsabwicklungsanbieter Worldpay

und seine US-amerikanischer Konkurrent Vantiv haben die Bedingungen für eine Fusion zur Bildung eines gemeinsamen Unternehmens mit einem Wert von etwa 9,3 Mrd. Pfund (das entspricht 12,1 Mrd. USD bzw. 10,3 Mrd. Euro) vereinbart.

In den USA haben die Spezialisten für elektro-

nische Tischspiele (ETG), Interblock, und Videoglücksspiele (VGM), GameCo, sowie ihr neuer Mitstreiter Konami Gaming als Teil ihrer gemeinsamen Bemühungen zur Anregung der fortlaufenden Innovation im Bereich der Entwicklung und Vermarktung von Spielerzeugnissen für Casinos und Spielbanken das Innovation Adoption Advisory Panel (IAAP) gegründet.

Das stabile Wachstum der kambodschanischen

Wirtschaft hat dazu beigetragen dass die NagaCorp, der Betreiber von NagaWorld, dem Freizeit- und Vergnügungszentrum der Mekong-Region in der kambodschanischen Hauptstadt Phnom Penh, ihre Bruttospielerinnahmen in der ersten Jahreshälfte um 40 Prozent auf 386,8 Mio. USD steigern konnte.

Risk to Remote Gambling Licences

Gordon Dadds, a legal and professional services firm, is urging the British licensed remote gambling sector to prepare for the latest proposed changes to the Commission's Licence Conditions and Codes of Practice (LCCP)

Gordon Dadds urges all Commission licensed remote gambling operators to urgently review their group structure and activities

UK ONLINE GAMING



Gordon Dadds, a legal and professional services firm, is urging the British licensed remote gambling sector to prepare for the latest proposed changes to the Commission's Licence Conditions and Codes of Practice (LCCP) or risk a licence review.

The proposed changes to reporting requirements under the LCCP will be implemented through revisions to licence condition 15.2.2 and are scheduled to come into force in April 2018. They will impact both B2C and B2B operators, including their group companies, in an extended effort to 'keep crime out of gambling' and ensure that grey market revenue cannot be used to gain unfair competitive advantage in Great Britain by funding advertising and sponsorship.

The proposed changes, which follow a consultation on proposed changes to regulatory reporting, will require B2B and B2C operators to report details of the jurisdictions from which

they derive three per cent or more of their total group revenue. Failure to report any relevant group company activity, in an attempt to avoid disclosure of revenue from grey markets will constitute a breach of revised Licence Condition 15.2.2 and is likely to lead to enforcement action by the Commission and potential licence reviews. The Commission has concluded, from the low level of reporting under the existing requirement, which is to report the fact that a group company advertises in a new jurisdiction for the first time, that many of its licensees are not complying with their current reporting obligations.

The Commission has now confirmed that White Label Operators (GB licensees who promote 3rd party brands under their licence as part of a brand marketing agreement) must perform sufficient due diligence on their contracted brand owners and associated companies, in order to protect their own licence.



Novomatic opens its first casino in Liechtenstein

Liechtenstein

Casino Admiral Liechtenstein has opened its doors, becoming the first casino in the Principality of Liechtenstein since 1846.

Having received its licence from the Office of National Economy, it has opened at the Kokon Center in Ruggell with five live game tables and over 100 slot machines with various jackpot systems.

Stefan Hassler, Chairman of the Board of Directors of Casino

Admiral AG, said: "The location is perfect. Thanks to the direct connection to the motorway, we have a wide-reaching catchment area."

It is located within the infrastructure of the Kokon Corporate Campus in the immediate vicinity of an Italian restaurant, bar, fitness & spa, hotel and much more.

The staff, mostly from Liechtenstein, Switzerland and the neighbouring EU area, welcome guests from 11am on August 9 with free non-alcoholic beverages.

The casino will operate with a free entrance policy with a casual dress code.

Greece

The Greek government is looking to rewrite the terms of an agreement with OPAP, reducing the total number of VLTs it can operate from 35,000 to 25,000. To compensate OPAP it is planning to extend its contract for another eight years. The number of operations that OPAP will need to open to accommodate the new VLTs will also fall as the number per location is going to increase. OPAP's new PLAY stores will be able to operate 50, up from 25, whilst 'agent' shops will be able to operate 15 instead of three. The Ministry of Finance has presented the bill to Parliament. OPAP, who has signed agreements with Scientific Games, Inspired Gaming, IGT, and Synot Group, said that despite the changes it still plans to complete the roll-out of 16,500 VLTs by May 2018. It will also subcontract an additional 18,000 machines.

OPAP currently operates sports betting and lottery services in more than 5,700 betting locations in Greece and in the Republic of Cyprus.



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Glowing Report from Casino Basel Install

The APEX gaming team is proud of its latest installation of Pinnacle gaming machines at Switzerland's Casino Basel, where the management team is delighted with the response from its slots players to the new games



Testimonials from Casino Basel confirm the positive reaction from players to the installation of APEX gaming's latest Pinnacle slots

SWITZERLAND SUPPLIER NEWS



CROATIA – MSFG International has announced the installation of IGT slots at the newly opened Grand Admiral Casino in Zagreb. The Grand Admiral Casino is spread over two floors and is to open a restaurant, hotel and cafe bar as part of the grand opening. Among the large number of slots on offer, the casino features 10 IGT Axxis 23/23 cabinets and four IGT Crystal Dual cabinets. The slots are arranged on both floors, with all Axxis 23/23 cabinets featuring HD gaming packages; Diversity HD vol.1 and Diversity HD vol.2, each populated with 12 games, while the Crystal Dual offers a multigame pack with eight games.

FRANCE – American private equity fund Blackstone Group is considering buying French casino group, Joa. Blackstone has recently entered the gaming market with a joint purchase of Paysafe and the outright purchase of Clarion, organisers of gaming exhibition ICE Totally Gaming. Capital Finance has reported that the private equity investor is in exclusive talks to buy Joa, who operates 22 casinos in France making it the country's third biggest operator, for €220m. The arrival of Blackstone could enable the Joa Group to consolidate its position in the French market, while opportunities are opening up with the resumption of activity in the sector. But this could also be an opportunity to develop abroad, as Laurent Lassiaz, Chairman of Joa's board of directors, has been suggesting for several months.



CZECH REPUBLIC – The Open Doors Day, organized by EASIT, part of the SYNOT Group, for its business partners took place this summer. The aim of the event, held at the company's headquarters in Brno, was to familiarize Synot's business partners with the products EASIT offers and develops.

"Modern, online technologies and startup projects have a clear green today. That's why I decided to invest in young developers such as EASIT," said Synot's Ivo Valenta, adding: "I am glad that hundreds of guests, not only from Europe, have met for the Open Doors Day. Besides representatives of the Czech Republic and Slovakia, our business partners from Serbia and Canada, and I believe that this event will open the door to further cooperation.

The APEX gaming team is proud to report its most recent success at Casino Basel. Today, players can find both the Pinnacle VIP Stations as well as the Pinnacle SL slant tops at Casino Basel. "Our customers took to the APEX machines instantly," commented Marcel Wenger, Managing Director of Airport Casino Basel. "They have a distinctive, classy look to them. I've been long enough in this business to know that it's the games that matter the most. And I can report that I am very pleased as to how well our valued customers are enjoying playing on the APEX slots."

Each APEX gaming machines is equipped with the EVO platform that ensures that every game is brought to the next level. The rich game content – all created by in-house by the APEX game designers – has helped to increase the entertainment choice at Casino Basel.

"Our thanks go to Marcel Wenger and his team

for introducing APEX to their customers. The reaction has truly been fantastic. We will continue to offer our full support to enable our range of solutions to further grow at Casino Basel. The same applies for the whole casino estate and we are working with the Tranchant Group very closely to support their drive to bring APEX to their casino portfolio," proudly stated Kubilay Özer, Global Sales Director at APEX gaming.

Casino Basel was first opened in 2003 and today offers its guests approximately 300 slot machines. The location attracts international visitors alongside local Swiss customers as the city of Basel borders with both France and Germany. As Casino Basel is close to the airport, it offers customers pleasant accommodation with its neighbouring hotel that has 167 guest rooms. The events are a real highlight and are catered to international and local guests of differing demographics.

Novomatic takes over sales management of Ainsworth in Europe

Austria

The Global Sales Division of Novomatic, headed by Lawrence Levy, is assuming the sales management of Ainsworth in Europe. Sonya Nikolova, Novomatic's Head of sales in the CEE countries, is to lead a revamped European sales team for Ainsworth.

The move comes in line with a strategic commitment to strengthen the sales force, product offering and customer support of Ainsworth. Sonya Nikolova said: "Customer satisfaction and building long-term relationships within the gaming industry has been an immense motivation of mine for many years. I am enthusiastic about my new role with Novomatic – I consider it a big responsibility and honour – and one that will complement the quality of services and diversity of products that are delivered to

our customers and partners. I am committed to enforcing my deep industry expertise and knowledge to the development and popularization of the Ainsworth brand in Europe, as well as to collaborate intensively with my colleagues to improve customer support and product competitiveness."

The head position for sales in the CEE countries will be entrusted to Roman Czubak, who has a long record with Novomatic and previously held important roles in R&D, Project Management and Sales for the company. Roman Czubak commented on his new appointment: "For me, this appointment means returning to a sales function with the great responsibility of further building and strengthening the Novomatic brand in this core market."

In their respective roles and with the purpose of promoting the major product brands included in the Novomatic portfolio, Mrs. Nikolova and Mr. Czubak will report to Mr. Lawrence Levy, Vice President of Global Sales for Novomatic.

Holland

JVH Gaming, owner of Jack's Casino slot hall chain, is interested in acquiring "parts of Holland Casino," according to the company's CEO Eric Olders. It's a process that might prove complicated as at the same time JVH's owner, private equity investor Waterland, is reportedly looking to sell the arcade operator once the Dutch online gaming market opens to an international casino operator for licensing purposes. Mr. Olders has already confirmed that JVH Gaming will launch an online brand as soon as online gaming is legalised in the country.

The arcades business in Holland was investigated in August as the criminal division of the Dutch Revenue Service conducted raids at two gaming halls suspected of having installed illegal software to divert players' winnings to the operators. Similar software was reportedly discovered in Germany and Austria last year. The Dutch gaming association, VAN, condemned the alleged fraud and stressed the operator is not a member of VAN.



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MULTI TOUCH



AUSTRIA – Leap Gaming and Greentube, the Novomatic interactive division, have recently signed a partnership agreement, under which Leap will be providing its turnkey virtual sports product to Greentube customers.

Gabriel Cianchetto, President of Market Development, Greentube North America, noted: "In the US market virtual sports is becoming a big thing and this is the way we can offer virtual sports to our casino clients via the Greentube Pro platform."

Yariv Lissauer, CEO of Leap Gaming, added: "We are excited to partner with Greentube to provide our virtual sports content. We are confident that our virtual sports suite will fit right into Greentube's existing gaming portfolio and augment it tremendously."

UK –Private equity funds managed by Blackstone have bought Clarion Events, one of the world's leading independent events organisers and organiser of ICE Totally Gaming, from private equity funds managed by Providence Equity Partners.

Headquartered in London with over 950 employees in 13 offices worldwide, Clarion operates and delivers over 180 events and exhibitions in more than 50 countries globally. Since its formation in 1947, Clarion has grown into a truly international business with an established market leading platform. With a diversified portfolio of events and brands, Clarion enjoys global leadership positions across a range of vertical markets, including Retail & Home, Gaming, Defence and Security, Technology and Energy.

Blackstone currently owns The Cosmopolitan Casino in Las Vegas, has made a bid for Joa Casinos in France and has recently acquired currency handling firm, paysafe.



ROMANIA – Casino Technology has appointed Valentina Dobre as Regional Director for Romania as of August 1 2017.

The Bulgarian-based slot manufacturer said: "With Mrs Dobre's profound expertise, professional background and in-depth knowledge of the gaming industry in the country, we are delighted she has become part of Casino Technology team, ready to implement the overall corporate strategy."

Valentina Dobre commented: "I am honoured to accept this position and be part of the high level management team of Casino Technology. I will actively pursue further company growth on the Romanian market. Casino Technology has been on the country's market for over 10 years and proved to be leader, having maintained trusted partnerships with local operators and customers."

Evolution to Create Tbilisi Live Dealer Studio

Evolution Gaming has announced that it is to create a third major central Live Casino studio, this time in Tbilisi, Georgia.

Operating as a major central studio serving multiple Evolution licensees, the new studio will add significantly to the capacity of Evolution's existing studios

GEORGIA ONLINE GAMING



Evolution Gaming has announced that it is to create a third major central Live Casino studio, this time in Tbilisi, Georgia.

Evolution currently operates seven studios in total, with a further studio – in the Metro Vancouver area of British Columbia, Canada— set to open in late 2017. The Tbilisi studio will extend the Evolution studio count still further when it goes live in 2018.

The Tbilisi site is designed to evolve into a fully independent studio operation. Operating as a major central studio serving multiple Evolution licensees, the new studio will add significantly to the capacity of Evolution's existing major central studios in Riga and Malta.

This latest development comes during an eventful, fast-paced year for Evolution built, it says, on "strong and steady growth and continuing achievements that set the company apart from other Live Casino providers".

So far, this year's significant events have included numerous new product launches including exclusive products not offered by other Live Casino supplier offers, winning a Live

Casino Supplier of the Year award for the eighth year in a row, and moving to Nasdaq Stockholm for large cap companies.

Evolution Group CEO Martin Carlesund commented: "The past 12 months have seen Evolution launch new tables and dedicated environments across all of our studios at an intense rate. There is no sign that this fast pace, and the demand for our Live Casino services, will let up. Therefore, as part of our commitment to ever improving our service to our licensees and ever increasing our lead over our competitors, we are delighted to announce our next major studio in Tbilisi, Georgia. From this studio, we will continue to expand, offering our services to additional customers and markets."

Mr. Carlesund added: "The new studio is scheduled to launch in early 2018 and will help Evolution to achieve its ambitious growth and development plans. It will also provide further solid career opportunities, both amongst our existing staff and new employees. Tbilisi is a beautiful city with a population of over 1 million people, and offers strong development and investment opportunities."



Betsson Group adds premium Novomatic slots

Sweden

Greentube, the Novomatic Interactive division, has signed a new partnership with the Betsson Group, further expanding Greentube's presence in the evolving online gaming industry. Betsson brands such as www.betsson.com, www.casinoeuro.com, www.nordicbet.com amongst others, now offer a great number of casino games provided by Greentube.

Betsson customers can enjoy Novomatic's market-leading

interactive content. The Novomatic blue chip slots such as Book of Ra deluxe, Lucky Lady's Charm deluxe, Sizzling Hot deluxe and many more popular casino classics are among the exciting new game selection. Gernot Baumgartner, Greentube Head of Marketing & Sales, commented: "Greentube is very excited to become part of Betsson's amazing casino offering with Novomatic's world-class interactive content. This deal allows us to present the ultimate gaming experience to a wide range of new customers."

Andy Broughton Braithwaite, Betsson Director of Games of Chance, added: "We're delighted to be working with Greentube. They have a huge range of interactive games which have proved very popular for our customers, allowing us to further expand our already impressive casino portfolio."

Czech Republic

The gambling sector in Czech Republic increased by 29 per cent in 2016, generating GGR of CZK 39.3bn (US \$1.78bn) in 2016. The results reversed a slump the previous year where gambling revenues fell by three per cent. The government's gambling tax increased by 38 per cent year-on-year to CZK 10.5bn. The government has reduced the number of slot machines on Czech streets by 20,000 in the last three years, closing around 300 illegal slot halls in the process. The crackdown online has seen 50 international operators exit the market voluntarily leaving just five operators with only one, Stars Group, an international company. Online players must register their accounts in person, which has proved problematic for international operators. The government has authorised its a Czech Point system, a network of 7,500 public administration centers, to allow online signups.

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FOBT Limits Would be Financially Crippling

Changes to the UK's FOBT limits have the potential to be 'financially crippling' according to UK Finance Minister Philip Hammond

Government can't afford to lose revenues should legislation limit the maximum bets allowed as proposed on FOBTs

UK GOVERNMENT AFFAIRS



PORTUGAL – Shares for Estoril Sol have risen by more than 3 per cent after being granted the eighth online gaming license in Portugal. Estoril Sol shares rose to €7.38 the highest since January 2010. Estoril Sol was granted a license to offer online sports betting at the beginning of this month by the regulatory body Serviço de Regulação e Inspeção de Jogos (SRIJ). Local customers will be able to make bets on sports via www.estorilsolcasinos.pt. The licence will be valid for the initial term of three years, from the date of its issuance and will expire on August 03, 2020, if it is not renewed before then.

Group Estoril controls three of the existing eleven casinos in Portugal the Estoril, Lisboa and Póvo and holds a 64 per cent share in the bricks and mortar casino market. The company has also recently expanded into Portugal's online gaming sector. In July 2016 EstorilSolCasinos.pt went live and became the first licensed website to offer legal online casino in Portugal. The platform is the result of a joint venture with Belgian company GAMING1 the online gaming expert and member of the Ardent Group. GAMING1 specialises in the convergence of land-based operators in regulated markets which are ready to take their business online for the first time.

The result of this alliance is EstorilSolCasinos.pt which was the first licensed website to offer legal online casino in Portugal. EstorilSolCasinos.pt relies on a state-of-the-art platform with game content that is fully compliant with Portuguese regulations.

The Government first approved rules for online gambling and betting on April 29, 2015. However, there has been criticism over the tax regime which has made many operators wary of getting on board. This is especially the case when it comes to sports betting. The main reason for this is the 8/16 per cent turnover tax on online sports betting which makes the market unattractive to the bulk of European operators.



UK – Glück Games, the Gibraltar and Berlin-based 'casual-real money games' developer, aggregator and technology provider, has announced the appointment of Rafael Razim its new, full-time Chief Technology Officer. Mr. Razim has significant experience in the iGaming sector and is recognised as one of Berlin's top CTOs. He previously co-founded Berlin-based GimiGames, a VC-backed multiplayer skill-gaming platform, and a real-money poker-company in Malta. He joins Glück Games as "late co-founder" and part of the management team.

Changes to the UK's FOBT limits have the potential to be 'financially crippling' according to UK Finance Minister Philip Hammond. He suggested that the government can't afford to lose revenues should legislation limit the maximum bets allowed as proposed.

The review had been instigated by the Department for Culture, Media and Sport (DCMS) back in October amid claims that fixed-odds betting terminals (FOBTs) caused social harm as they allow gamblers to lose £100 every 20 seconds. The DCMS's plan was to recommend bets be limited to a maximum of £2.

DCMS Minister Tracey Crouch slammed the newspaper report claiming the report on FOBTs was still being conducted and its findings would be released later this year. The FOBT review was announced in October 2016 and was expected to take up to 18 months to complete. Despite the news article being slammed as fake news by Tracey Crouch, it has reignited a war of words. The governments tie up with the DUP in

Northern Ireland has promoted cries for the party to intervene. Christian lobby group CARE's Northern Ireland policy officer, Mark Baillie, said: "Now that the DUP play a significant role in ensuring the Conservative Government remain in power they must hold Theresa May and the Conservative Party to account over their commitment to create a fairer society. "FOBTs do not fit into this narrative – they may work for the bookmakers and the taxman – but not for problem gamblers, their families or society as a whole." He added: "This review is long overdue and much needed – the DUP must ensure that it goes ahead and the proposals recommended to reduce the stakes on FOBTs are introduced."

When asked if the DUP would seek to use its influence with the Government on the issue, the party pointed to comments from one of its senior MPs, Sammy Wilson, in which he said that the proposal to cut the maximum FOBT stake from £100 to £2 has "the support of churches, local authorities, The Royal Society for Public Health and every party in Westminster."

Sportradar to power Comunio's fantasy football

Europe

One of the leading providers of fantasy sport across Europe, Comunio, has kicked off its pre-season build up by signing a transfer deal that will see Sportradar power its player performance scores across the top European leagues starting this summer. Comunio provides fantasy football leagues based on ten of the top European competitions, including the UEFA Champions League, the top two divisions in Spain and Germany, as well as the top leagues in France, Italy, England, Portugal and Turkey. Fans from a range of European countries, including Spain, Germany, England and France can enjoy assembling fantasy teams from across any of these ten competitions and testing their expertise.

When the 2017-2018 season kicks off, those player

performance scores will be based on Sportradar's Player Performance Index. This Index, which is just one solution in Sportradar's suite of Premium Soccer products, marries a performance data collection across the most important competitions in Europe with a sophisticated, in-house developed objective algorithm that crunches and weights all of those data points to generate an incredibly accurate performance score.

Comunio CEO Fabian Loschek said: "We wanted to provide a level of performance data and analysis that would match the attention to detail of our users. Sportradar's Premium Soccer is a game changer that records over 100 types of microevents per match, evaluates their quality, weights their overall importance and then uses a sensitive algorithm to generate a deeper piece of analysis. I can't wait for the season to kick off and our thousands of users to experience a whole new level of engagement in the leagues they follow and love."

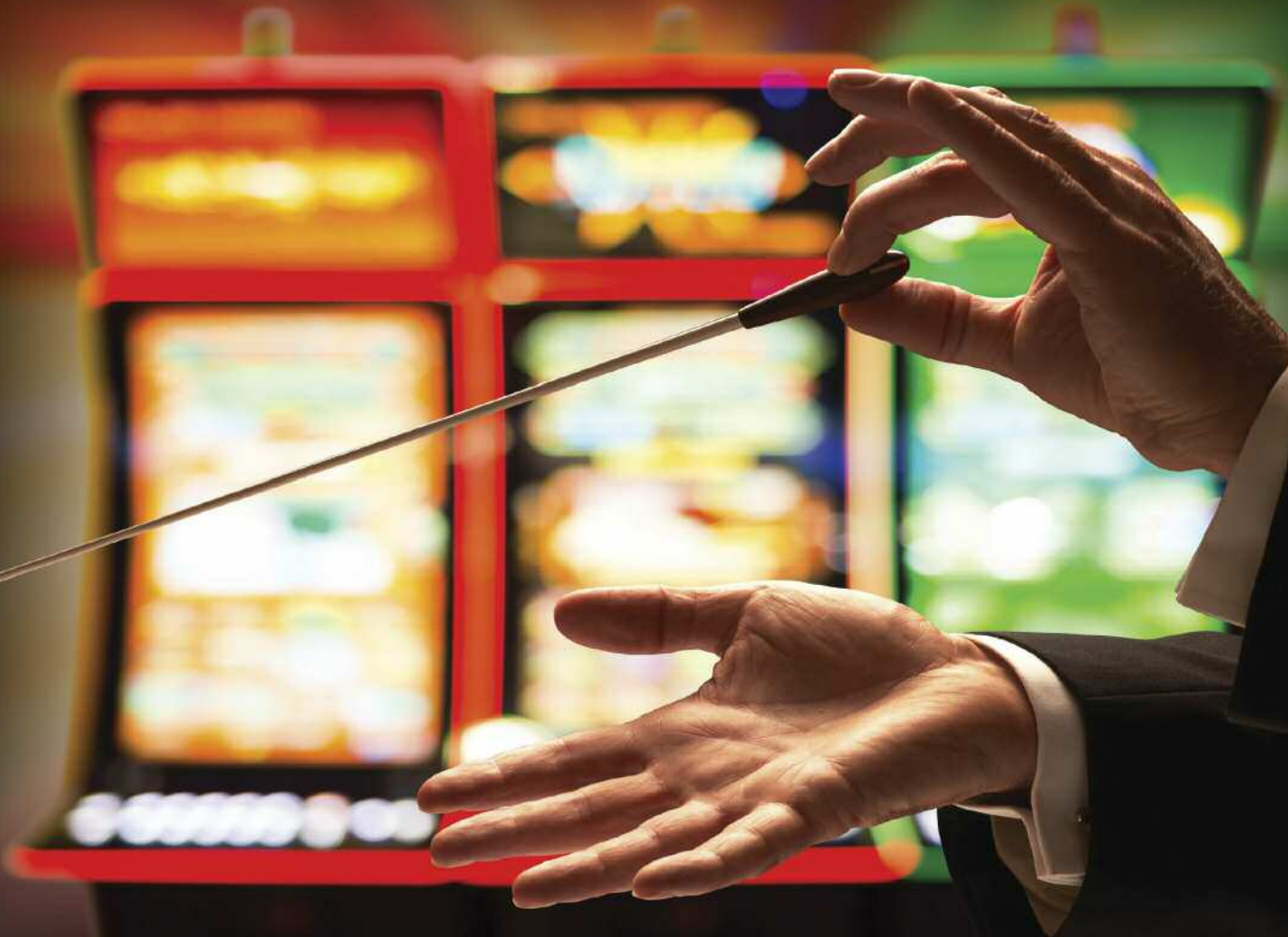
Romania

Romanian betting operator Casa Pariurilor has extended its cooperation with NSoft by launching a new set of NSoft's virtual games on its website. It includes draw based games Lucky Six and Lucky X, and racing games: Greyhound Races (based on actual recordings), plus Virtual Greyhound Races & Virtual Horse Races, fully developed and animated by NSoft's games development team. All the games are running with RNG (Random Number Generator) in the background. Since they are founded on computer generated events, their major benefit is that they can be played all the time therefore players can enjoy it 24/7.

Speaking about the release, Domagoj Marić, Senior Product Manager at NSoft has said: "NSoft's exciting games will prove attractive to players and operators alike. This cooperation with Casa Pariurilor has proven to be beneficial for both parties sharing the knowledge and innovation."



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Online Gaming Down in Portugal

The online market in Portugal recorded a decrease in gross income during Q2 of this year, reaching €25.4m or about €6m less than the previous quarter

Online gaming generated gross income, from the granting of the first license until June 30, 2017, of more than €108.1m.

PORTUGAL ONLINE GAMING



The online gambling market in Portugal recorded a decrease in gross income during the second quarter of this year, reaching €25.4m or about €6m less than the previous quarter, according to figures published by the regulatory body Serviço de Regulação e Inspeção de Jogos (SRIJ). Online gaming generated gross income, from the granting of the first license until June 30, 2017, of more than €108.1m.

The online casino segment also fell last quarter to €11.4m from €13.9m reported for the three months ending March 31, 2017. Online poker accounted for 32.6 per cent of the online casino market. Cash games accounted for 23.9 per cent while poker tournaments accounted for 8.7.

Revenues from online gambling generated €25.4m during the three months reviewed in the report compared to €31.4m during the previous quarter. This means that Portugal's online gaming market experienced its first quarterly fall since in May 2016 when the SRIJ issued the first license.

Since January, sports betting has decreased, decreasing per month on average by as much as 14.5 per cent, meaning almost a €4m decrease per month. Between April and June 2017, the decrease in gross income amounted to over €1m with betting registering the lowest value in the last month of the second quarter (€3.4m).

In the second quarter of the year, gross revenues from online gambling stood at €11.4m (down €2.5 m from the previous quarter). During the first half of the year, the highest value of betting via online gambling was via online slots (38.13 per cent), followed by poker. Meanwhile roulette recorded almost 20 per cent of total online gaming.

There are currently 523,000 registered players in Portugal. According to the latest data more than 60 per cent of players are aged between the ages of 25 and 44. In the second quarter of this year, the number of new registrations was significantly lower than the previous quarter, standing at 64,400.



SWITZERLAND – Swiss Casinos will get a new CEO next year with Marc Baumann taking office on January 1. He will replace Peter Meier, who will retire from operational activities on December 31. Mr. Baumann contributed to the reorientation and success of the Zurich casino.

Swiss Casinos stated: "After more than 20 years of very successful development work, Peter Meier will retire on 31 December 2017 from his duties as operating director (CEO) of the Swiss Casinos Group. Highlights of his activities were the economically successful construction of the casinos in Schaffhausen, Pfäffikon and St. Gallen, the allocation of the coveted casino concession in the inner city of Zurich and the realization of the successful restaurant George.

"The Board of Directors is delighted to present Marc Baumann, the current Director of Swiss Casinos Zurich, with an experienced personality from his own ranks as the new CEO of Swiss Casinos. Marc Baumann has repositioned the Zurich Casino in a very short time and positioned it extremely successfully on the market."



HOLLAND – ECommPay, the global payments transformation specialists, is pleased to announce further high-profile additions to their London-based headquarters. Gambling compliance expert Shane Mortimer joins as Gaming & Forex Business Development Manager, while industry insider George Maroufidis takes on the role of Retail & Digital Business Development Manager. Both



Maroufidis and Mortimer join ECommPay at a period of unprecedented growth, with the company expanding its value to partners interested in resolving complex payment challenges to stimulate business growth.

GREECE – A report, commissioned by Greece's finance ministry, has advised that casinos could be developed in the tourist regions of Mykonos, Santorini and Crete. The finance ministry recently asked Grant Thornton, a consulting firm, to analyse the existing casino sector and suggest proposals to reinvent the industry in Greece, which currently boasts nine licensees. Mykonos, Santorini and Crete would be ideal hosts for new casinos. The report also suggested that the government should tier taxation and make table games more viable by reducing tax. The Greek casino market has fallen sharply since the economic recession from €3.18bn in 2008 to €1.57bn in 2015.

Programme to bring more women into the casino boardroom

UK

The National Casino Forum is launching a new initiative to encourage operators to bring more women into the boardroom. Forty per cent of the 14,000 staff directly employed by UK casinos, and around 30 per cent of senior managers, are female, but there are very few women on company boards.

Tracy Damestani, chief executive of the National Casino Forum (NCF), which represents all the major operators, is engaging with the Portas Institute to develop a framework for the casino industry. The intention is to help operators understand the barriers preventing women from becoming board directors and equip them with strategic solutions to overcome them.

Ms. Damestani recently

delivered a presentation to the European Casino Association, outlining the need for more boardroom representation at board level across the industry. Research by McKinsey shows that companies with a gender balance at senior level perform better and for every 10 per cent increase in gender diversity on senior executive teams, EBIT increases by 3.5 per cent.

The Portas Institute promotes long-term change inside companies by leading workshops, which set out a roadmap for change, involving every level of the business from the executive team downwards. They identify the business case for change, set goals and create delivery teams to execute the plan. Tracy Damestani said: "I know many operators are keen to encourage women onto their boards. I hope that the workshops will be the catalyst for change. I'd love to see the casino sector in the vanguard of reform within the gaming industry, setting an example that others follow."

Holland

Kansspelautoriteit, the Dutch gambling commission, has ordered that affiliate network Catena Media closes down its operations in the Netherlands. It issued a cease and desist order saying the marketing company had broken the country's gaming laws and also issued a fine of up to €21,000 if the company failed to obey the order. Catena Media is a performance marketing company based in Sliema, Malta. It drives 'high-value online leads to its clients by helping online casino and sportsbook enthusiasts around the world to find the best deal.' Kansspelautoriteit said Catena Media targeted Dutch players by promoting online gaming on sites such as pellenoverzicht.com, gokoverzicht.com, and netentcasino.nl, all of which have now been blocked in the Netherlands. The crackdown is part of a new regime brought in in May on Dutch-facing websites.

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Le député Amado Florentín, membre du parti libéral radical authentique (PLRA) du Paraguay, vient de présenter une nouvelle ébauche de loi destinée à interdire les casinos dans les établissements détenus par l'état. Cette nouvelle loi devrait être analysée par l'ensemble de la chambre des députés d'ici le mois prochain, modifiant ainsi les lois sur les jeux d'argent au Paraguay, qui datent de 1997.

Le comité de contrôle des jeux colombien (Coljuegos) vient d'accorder sa première licence en ligne à Wplay, une société locale. Basée dans la ville de Medellin, l'entreprise a été créée en juin de l'année passée et appartient au groupe Aquila Global. Les colombiens peuvent ainsi émettre des paris sportifs sur une large gamme de sports, notamment le football, le basketball, le tennis et le baseball.

Luis Gama, le directeur du bureau des loteries nationales d'Uruguay, travaille actuellement en collaboration avec le ministère de l'économie et des finances sur une mesure juridique qui interdirait les jeux d'argent en ligne non autorisés par l'état.

Emeterio Ochoa Bazua, le représentant de l'état mexicain de Sonora et membre du parti révolutionnaire institutionnel (PRI), demande aux municipalités de la région d'émettre des lois plus strictes pour réglementer l'octroi des licences de jeux d'argent.

L'un des plus grands opérateurs de Colombie, Winner Group CIRSA, vient d'adopter la machine à sous P-24/24 Up d'Euro Games Technology, pour quatre de ses établissements de jeux. Les casinos, situés à Bogota, Medellin, Cali et Buga, viennent de recevoir 15 machines d'EGT, le modèle best-seller.

Le plus important actionnaire des Casinos Austria, le groupe tchèque Sazka, « a l'intention d'acquérir le contrôle exclusif de Casinos Austria », d'après une information publiée par l'autorité fédérale de la concurrence (BWB).

Le secteur des jeux d'argent en Arménie cherche à entrer dans une nouvelle ère suite à l'approbation de nouvelles lois par le gouvernement garantissant l'octroi d'une licence de casino aux projets qualifiés de « développements majeurs ».

Le gouvernement grec cherche à réviser les conditions de son accord avec OPAP pour que le nombre total de jeux de loterie vidéo que le groupe opère passe de 35 000 à 25 000. En compensation, il est prévu que le contrat d'OPAP soit prolongé de huit années supplémentaires.

JVH Gaming, propriétaire de la chaîne de salles de casinos Jack's Casino, souhaite acquérir des « parts du Holland Casino », d'après Eric Olders, PDG du groupe.

La société d'investissement américaine Blackstone Group envisage d'acquérir le groupe de casinos français Joa. Blackstone est récemment entré sur le marché des jeux avec l'achat commun de Paysafe et l'achat direct de Clarion, organisateurs du salon des jeux d'argent ICE Totally Gaming.

Greater Canadian Wins Toronto Bundle

Great Canadian Gaming Corp and partner Brookfield Asset Management has been awarded the 22-year license to operate slot halls and casinos in the Greater Toronto Area

Great Canadian Gaming beat off competition from Genting Group and Caesars Entertainment



CANADA CASINOS & LOTTERIES

Great Canadian Gaming Corp and partner Brookfield Asset Management has been awarded the 22-year license to operate slot halls and casinos in the Greater Toronto Area.

It beat off competition from Genting Group and Caesars Entertainment to win the right from the Ontario Lottery and Gaming Corporation to buy OLG Slots at Woodbine, OLG Slots at Ajax Downs and the Great Blue Heron Casino in the Mississaugas of Scugog Island First Nation. The three casinos house over 4,000 slot machines and 60 gaming tables between them.

The portfolio is believed to be capable of generating US\$72m per year including and to 70 per cent of gambling revenue.

Known as the GTA Bundle, it is the largest award by the OLG as part of the modernisation of its casino operations. In 2016, its three facilities, OLG Slots at Woodbine, OLG Slots at Ajax Downs and Great Blue Heron Casino located in the Mississaugas of Scugog Island First Nation, generated gross gaming revenue of over \$1bn.

As a result of this award, Great Canadian and Brookfield will acquire all the gaming assets in the GTA Bundle through a transition and asset purchase agreement with OLG, and will have the exclusive right to operate these assets for a minimum period of 22 years, in accordance with the requirements of a Casino Operating and Services Agreement. Great Canadian and Brookfield will invest through a newly formed partnership, Ontario Gaming with Great Canadian and Brookfield each holding a 49 per cent interest in the Partnership. Clairvest Group will hold a two per cent interest. Great Canadian will operate the gaming facilities within the GTA Bundle on behalf of the Partnership. The Partnership will bring considerable gaming, urban redevelopment and hospitality expertise to the operations and strategic repositioning of the GTA Bundle. This development (subject to approvals) and modernisation will include integrated property expansions that will enhance the gaming offerings to service the GTA market. It will also include leading world-class amenities consisting of conference facilities, hotels and premier entertainment venues.

Paysafe agrees deal with CVC and Blackstone

US

Digital payment business Paysafe has agreed on the terms of a £2.96bn offer from private equity companies CVC and Blackstone. The deal will give Blackstone and CVC exposure to the online gambling and gaming sector.

Dennis Jones, Chairman of Paysafe, said the company had enjoyed a 'remarkable journey' of growth. The offer from the Consortium represents an opportunity for shareholders to crystallise a certain cash value from their investment in Paysafe. The independent directors believe that Paysafe will continue to play a key role in payments innovation, leveraging the state of the art technology it has built over a number of years," he added.

CVC already owns a share of a

number of gambling companies including Sky Bet, Sisal and Tipico. Blackstone meanwhile is buying Clarion Events, the organiser of London's gambling show ICE Totally Gaming.

Martin Brand, Senior Managing Director of Blackstone, added: "We are delighted that our proposal has been recommended by the Board and excited by the prospect of working with management to develop Paysafe as one of the leading, global providers of online and mobile payment solutions. Paysafe's innovative alternative payment systems and risk management capabilities form a strong value proposition for consumers and merchants alike. As a leading technology investor, Blackstone believes that Paysafe is an ideal platform for continued innovation in the payments space, and look forward to supporting Paysafe's growth both organically and through acquisitions."

US

Officials with the American Gaming Association (AGA) met at Stockton University in South Jersey last month to unveil a new code of conduct to help promote responsible gaming. The announcement was made at the AGA's Responsible Gaming Event as part of the gambling industry's 20th anniversary of Responsible Gaming Education Week. Officials hope the new code of conduct will shape the industry's responsible gaming efforts in the future, and help raise awareness for problem gaming. "This is a voluntary measure that we [in] the industry put together that really dictates how we work with our customers to protect them," said Geoff Freeman, president and CEO of the AGA. We have an obligation to protect them, make sure that they know the odds, make sure they know where to get help, give them the tools they need to protect themselves, and, in those instances where appropriate, to stay out of the casino environment."



6 COUNTRIES
5 COMPENDIUMS

Le Casino Admiral Liechtenstein vient d'ouvrir ses portes, devenant ainsi le premier casino de la Principauté du Liechtenstein depuis 1846. Après avoir reçu sa licence du Bureau de l'économie nationale, l'établissement s'est établi dans le Centre Kokon, à Ruggell, et dispose de cinq tables de jeux et de plus de 100 machines à sous avec divers jeux de jackpot.

Le secteur des jeux en République Tchèque a augmenté de 29 % en 2016, générant des revenus de 39,3 milliards de couronnes tchèques (1,78 milliards de dollars US). Ces résultats marquent un retournement de la situation comparé à l'année précédente, année pendant laquelle les revenus ont baissé de 3 %.

La société Great Canadian Gaming Corp et son partenaire Brookfield Asset Management viennent d'obtenir une licence de 22 ans pour la gestion de machines à sous et de casinos dans la région du Grand Toronto.

La société de solutions de paiement numérique Paysafe vient d'accepter l'offre de 2,96 milliards de livres sterling des sociétés d'investissement CVC et Blackstone. Cet accord va permettre à Blackstone et à CVC d'entrer sur le marché des paris et des jeux d'argent.

Interblock vient d'annoncer l'installation d'une salle de jeux de loterie vidéo Diamond (VLT) au Jake's 58 Hotel & Casino, dans le village d'Islandia, à Long Island, état de New York. Interblock est le seul fournisseur d'EGT du Jake's 58, avec son offre de tables de jeux traditionnelles au format électronique.

Le fournisseur de solutions de paiement Worldpay et son concurrent américain Vantiv viennent de trouver un accord pour fusionner et fonctionner conjointement dans le cadre d'une opération d'une valeur approximative de 9,3 milliards de livres (12,1 milliards de dollars US / 10,3 milliards d'euros).

L'Innovation Adoption Advisory Panel (IAAP) vient d'être créé aux États-Unis suite aux efforts conjoints de VGM, le spécialiste d'ETG, GameCo, l'expert en VGM, et plus récemment de Konami Gaming, afin d'encourager l'innovation en matière de développement et de commercialisation de produits de casino.

Grâce à la stabilité de la croissance de l'économie cambodgienne, NagaCorp, l'opérateur du NagaWorld, le parc d'attraction situé dans le quartier du Delta du Mékong, à Phnom Penh, la capitale cambodgienne, a augmenté ses revenus bruts issus du jeu de 40 % au cours du premier semestre de cette année, pour atteindre 386,8 millions de dollars US.

Des tensions politiques entre la Chine et la Corée ont entraîné une baisse de revenus de Paradise Co, le plus important opérateur de casinos de Corée du Sud, au cours du second trimestre, et ce malgré l'ouverture de son tout dernier complexe casino d'exception, le Paradise City.

Century Applies for Bermuda Licence

Century Casinos has submitted an application for a casino at the Hamilton Princess Hotel & Beach Club in Hamilton, Bermuda

The casino with approximately 12,000sq.ft of gaming space will feature 17 gaming tables, 200 slot machines and automated roulette

BERMUDA CASINO LICENCES

Century Casinos has submitted a license application for a casino at the Hamilton Princess Hotel & Beach Club in Hamilton, Bermuda jointly with the company, which owns the property.

At this time there are no casinos in Bermuda. The Bermuda Casino Gaming Commission, following the enactment of the Casino Gaming Act in 2014, initiated the three stage application process for the island's first casinos in 2015. The Bermudan government granted two 'designated site orders', one thereof to the Hamilton Princess hotel in 2016, completing the first stage of the application process. In total, there is the potential for four licenced integrated resort casinos to operate on the island.

The second stage of the application process started in April 2017, when the Commission published a notice starting a three month period for filing of an application for a casino licence, which ended on July 21, 2017. The next step will be a hearing of the application on September 22, 2017. This second stage may end with the award



of a provisional casino license by the Commission. The Company believes that its application for the casino at the Hamilton Princess hotel is the only casino license application in Bermuda at this time.

The third stage of the application process will be the suitability stage. Only at the conclusion of this final stage will a casino license be granted, permitting the offering of gaming to the public, subject to the final approval of the Commission to open and operate the casino.

The Company, through its Austrian subsidiary Century Casinos Europe GmbH ("CCE"), entered in a long-term management agreement with Hamilton Properties Limited, a Bermudan company which owns the Hamilton Princess Hotel & Beach Club. Pursuant to the management agreement, CCE assisted with the license application and would manage the operations of the casino, should a license be awarded. In addition, CCE would also provide loan funding in the amount of \$5,000,000 for casino equipment.

Nevada

A rebound in the Las Vegas locals market saw Boyd Gaming post second-quarter 2017 net revenues of \$599.9m, an increase of 10.1 per cent from \$544.9m in the quarter a year-ago. The Las Vegas Locals segment saw a huge increase from \$154.9m in the year-ago quarter to \$214.2m this quarter. The results include a full quarter of contributions from Aliante, Cannery and Eastside Cannery. Keith Smith, President and CEO of Boyd Gaming, said: "Our Las Vegas Locals business achieved its best second-quarter results in nearly 10 years, driven by ongoing improvements to our operations and a strong regional economy. Our three newly acquired Nevada properties delivered another great quarter as well, as we continued to successfully execute on growth and synergy opportunities. And despite softness in a few Louisiana markets, Adjusted EBITDA grew at a majority of our regional properties, especially the upper Midwest."

New York

Interblock install 64-Seat Diamond VLT Stadium

Interblock has announced the placement of a Diamond Video Lottery Terminal (VLT) Stadium at Jake's 58 Hotel & Casino in Islandia, N.Y., on Long Island. Interblock is the only ETG provider at Jake's 58, offering traditional table games in an electronic format.

The gaming space is composed of 64 play stations, multiple high-definition LCD displays, four automated generators designed to deliver Roulette and Craps games, and six video generators that deliver Multi-hand Blackjack and Baccarat games. The unique multi-game space is the first Interblock Diamond VLT setup in New York state.

Rick Riehm, VP of Sales for Eastern U.S. at Interblock, said: "We are very proud to have formed this strategic partnership with Delaware North in bringing the Interblock Stadium product to Jake's 58. Our vision of providing new gaming experiences aligns



uniquely with Jake's 58's vision. We are honored to have been given this opportunity, and look forward to their players enjoying the many games offered in the Interblock Stadium."

Delaware North manages the gaming venue at Jake's 58 Hotel & Casino for Suffolk Regional Off-Track-Betting and also owns and operates the hotel portion. One of the largest privately held hospitality and food service companies in the world, Delaware North is also one of the most innovative gaming operators in the United States, owning a number of successful regional casino destinations.



New single platform for land-based & online gaming





WISCONSIN – Konami Gaming has launched its Synkros casino management system at Lac Courte Oreilles (LCO) Casino Lodge & Convention Center and its outpost location Grindstone Creek Casino.

Both are operated by the Lac Courte Oreilles Band of Lake Superior Chippewa in Hayward, Wis., and feature a combined 700 slots as well as table games. This marks Konami's first Synkros installation in the state of Wisconsin, which is home to 25 casino properties.

"Our key focus across all areas of the organisation is guest service, and Konami's SYNKROS provides that core technology piece that brings everything together and empowers our team to deliver a premier gaming experience every day," said Lee Harden, chief executive officer at Lac Courte Oreilles Casino Lodge & Convention Center. "The benefits of SYNKROS' advanced marketing capabilities, 99.9 per cent uptime availability, and agile infrastructure are already in motion, and looking ahead, we are most encouraged by Konami's dependable partnership, support, and commitment to stand by our business."



NEVADA – The Cromwell on the Las Vegas Strip has undergone a refresh of its gaming options that includes a slew of new player-friendly amenities. New to the main gaming floor is single '0' roulette, a game previously found only in Vegas' high-limit areas. The Cromwell is offering 'European' roulette with approachable table limits for the first time. EZ Baccarat is another new entry with the casino eager to exploit that fact that while drawing rules remain unchanged, EZ Baccarat eliminates the taking of the five per cent commission after every winning bank hand. The Cromwell also promises classic Vegas gaming with affordable table limits with 3-2 Shoe and Double-Deck Blackjack, and finally 100X Odds on craps, for spectacular rewards for players.

In addition to the new game changes, The Cromwell is debut its brand new sportsbook this month, including a 32ft. long and 9ft tall LED video wall, flexible seating for 50 guests; a greater variety of slot games including a new high limit slots area called The Abbey, and an enhanced bar and lounge experience called the Interlude.

Innovation Panel to Promote Adoption

IAAP features gaming industry expertise in casino floor and marketing operations, gaming equipment development, finance and analysis

The recently formed Innovation Adoption Advisory Panel is to recommend industry best practices in adopting new product innovation

US GAMING SUPPLIERS



The Innovation Adoption Advisory Panel (IAAP) has been formed as part of a collective effort by ETG specialist Interblock, VGM expert GameCo, and its most recent member, Konami Gaming, to spur continued innovation in casino gaming product development and commercialisation.

Industry topics being considered by the IAAP include many disciplines that impact the casino gaming floor including floor optimisation, player marketing, game development, demographic-based guest engagement, and casino gaming floor utilisation and analysis. The IAAP plans to release a white paper in mid-September that will summarise the group's insights and recommendations and foster ongoing discussion about best practices for bringing innovative products to casino patrons.

Commenting on the formation and goals of the IAAP, John Connelly, Global CEO of Interblock, said: "One of our primary goals in forming the IAAP is to study how the industry as a whole can bring innovative solutions to the market at a faster pace while at the same time making it

easier for players to feel comfortable with new forms of gaming entertainment as quickly as possible. In bringing together industry executives with a diverse range of expertise and responsibilities, we expect to have a broad range of ideas that can help guide the industry on effective strategies for developing and adopting new gaming technology solutions."

Steve Sutherland, President & CEO of Konami Gaming, Inc. commented, "The comprehensive range of topics the IAAP panelists are exploring are aimed at understanding how new gaming concepts can be brought to market at a faster pace as well as how to best introduce these solutions in a manner that is approachable, engaging, and enjoyable for players."

"The casino gaming industry competes with many other industries for consumers' attention and wallet, and our ability to complement familiar casino gaming entertainment products with new offerings that can increase players' overall value and entertainment experience is a critical goal," said Blaine Graboyes, GameCo.

Wynn Vegas aims for ultimate sportsbook destination'

Nevada

Wynn Las Vegas has lifted the curtain on its new 'technologically advanced Race & Sports Book,' which boasts an expansive high-definition LED video wall, spanning 137ft. in width and 11ft. in height, with a total of 21 million pixels.

The space offers guests a 'luxurious, comfortable space to enjoy live sporting and racing events, place wagers on current and future events, or enjoy a casual bite at the adjacent Charlie's Bar + Grill.' Conceptualised by Executive Vice President of Wynn Design and Development Roger Thomas and his team, the space features state-of-the-art technology and is custom designed for functionality, comfort and spaciousness, while maintaining its relaxed atmosphere.

Offering guests a viewing angle of 160 degrees horizontally and vertically, the sweeping curve layout also allows for maximized views of an additional 35 television monitors. A large bar on the casino level seats 22 guests and seamlessly separates the sports books from Charlie's Bar + Grill. Betting desks are distinguished by 28 historic jockey silks in high chromatic contrast. The streamlined and open individual guest desks feature USB ports and power outlets, as well as task lighting with plush executive swivel and tilt seating. Guests can view race and sports events from one of 41 regular carrels and eight VIP carrels. Additional design features include 49 general seats and 40 VIP seats, which offer private elevated areas with custom sofas and tables.

Following the reopening of Wynn's Race & Sports Book and the new restaurant, Encore will debut its own permanent Race & Sports Book.

US

Payment provider Worldpay and its US rival Vantiv have agreed terms on a deal to merge and create a combined operation worth approximately £9.3bn (£12.1bn/€10.3bn). Last month, the two companies entered into a preliminary agreement, and have now secured a deal whereby Vantiv shareholders will hold a majority 57 per cent of the combined business and Worldpay investors the other 43 per cent. Worldpay said: "The combination of scale and presence the merger will bring is an exciting step in the creation of a truly global leader in payments." Worldpay is active worldwide, but has a particularly strong presence in the UK and US. Vantiv is mainly focused on the US market. The newly combined company will base its global and corporate headquarters in Cincinnati, Ohio, in the US, and locate its international headquarters in London, UK.



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JAPAN – A second public hearing, held by the Japanese government on the potential of integrated resort casinos has heard how a 'time limit' on the length of time players are allowed to gamble for would alleviate some of the concerns regarding a limit on the number of visits allowed.

Held in Osaka, the hearing heard that there are doubts on whether limiting visits with an entry fee for locals would work. Local representative Takayuki Miyake was quoted in The Japan Times as saying: "The panel has proposed limiting the number of times Japanese people can enter the casinos on a given day or during any given week, but that could simply encourage people to spend longer periods of time in the casino. A limit should also be placed on how long people are allowed to stay in the casino on any given visit. By placing limits on the number of times Japanese people can visit, it might be possible to exclude gambling addicts or those who appear to be addicts, but that could lead them to turn to illegal gambling. An organisation needs to be established by specialists that can decide on a system for limiting entrance. Work must be done to create a policy that helps people overcome their gambling problems."

ASIA – Betsoft Gaming, architect of the Shift platform, has announced it has signed a partnership deal with a new Asian-facing operator HBet63. HBet63 primarily focuses on the market covering China, Singapore and Malaysia.

Under the terms of the partnership, HBet63 will be taking on Betsoft's complete suite of iGaming entertainment, including the award-winning Slots3 collection of cinematic 3D video slots and the best-in-class ToGo line of mobile games.

Betsoft's Shift platform, designed and built by in-house developers, uses the power of the HTML5 markup language to provide smoother, high definition graphics and more secure gameplay with reduced file sizes.

"HBet63 is a new face in the Asian market, but they are already an extremely promising operator," said Joya Zhang of Betsoft. "We foresee a fruitful partnership with them as they expand in iGaming's most active market. They provide great customer service, which is critical in our business."

"We are excited to take on Betsoft's full collection of games for both mobile and desktop players," said Vincent Yao of HBet63. "We've never before seen games that run so smoothly, with such beautiful intense graphics. These games will surely find great popularity with our players, and they will help us to build a solid operation."

NagaWorld Revenues Up 40 per cent

Stable growth in the Cambodian economy has helped NagaCorp, operator of NagaWorld, the entertainment centre of the Mekong Region in the Cambodian capital Phnom Penh to post an impressive revenue surge

NagaWorld has reported an increase its GGR in the first half of the year by 40 per cent to US\$386.8m

CAMBODIA CASINO OPERATIONS

Stable growth in the Cambodian economy helped NagaCorp, operator of NagaWorld, the entertainment centre of the Mekong Region in the Cambodian capital Phnom Penh, increase its GGR in the first half of the year by 40 per cent to US\$386.8m.

EBITDA increased 19 per cent whilst net profit increased by 20 per cent to US\$150.6m. The increase was driven by a 71 per cent increase in VIP Rollings and a 23 per cent increase in Mass Market table buy-ins. Mass Market electronic gaming machines bills-in increased 15 per cent. NagaWorld had 239 gaming tables and 1,660 Electronic Gaming Machines in operation.

A spokesperson for NagaCorp said: "The strong growth in business volumes and GGR is attributable to a number of factors. First, continued confidence in Cambodia's political climate and social order of Cambodia's operating environment leads to favourable economic conditions. Second, confidence in the operating environment leads to increasing economic activity, investment and visitation, especially from China. Third, with the completion of Naga2, the company's balance sheet has strengthened (in March 2017, the Group's property assets were valued at US\$5.4bn by Colliers International (Hong Kong



Limited) and players are expressing more confidence."

International arrivals to Cambodia, one of the Group's business growth drivers, increased 13 per cent to 2.3m visitors in the first five months of 2017. Visitor arrivals via Phnom Penh International Airport grew 19 per cent over the same period. Further, visitation from China grew by 36 per cent to 0.4m visitors, surpassing Vietnam to become the top source of arrivals.

The group added: "The continued growth of visitation to Cambodia is a reflection of the development of Cambodia as a prominent regional tourism and investment destination, brought about by continued political and social stability in the country. NagaWorld, which is a major attraction located in the city centre of Phnom Penh and the entertainment centre of the Mekong region, is poised to benefit from this growth. As the Group continues its trajectory of asset (in March 2017, the Group's property assets were valued at US\$5.4bn by Colliers International and business growth, it is also gaining increasing prominence and confidence among the gaming and entertainment community in the region. This allows the Group to further penetrate into new markets, thereby fuelling business growth and expansion."

PAGCOR reinstates PhilWeb's operating licence

Philippines

Philippines regulator PAGCOR has voted to reinstate PhilWeb's online gaming license and has granted the company a Provisional Certificate of Accreditation as an Electronic Gaming System service provider. Having seen its licence revoked in August last year, PhilWeb's income fell by 134 per cent to just over US\$6m in 2016.

PhilWeb President Dennis Valdes said. "We are grateful to PAGCOR Chairman Domingo and the entire Board of Directors of Pagcor for their faith in our company and for giving us the opportunity to

deliver services to their electronic gaming operators once again."

The company has been out of operation for over a year and has had to change its Chairman following a fall-out between Philippine President Rodrigo Duterte and PhilWeb's former Chairman Roberto Ongpin, who relinquished his role in an attempt to get the licence reissued. PAGCOR has recently introduced a new licensing system for gaming service providers aimed at giving operators greater choice.

"This allows for a level playing field for any qualified provider," said PAGCOR chair Andrea Domingo. Philweb operates over 300 internet cafes devoted to casino games. They are described as a private, members-only network.

South Korea

Political tensions between China and Korea have seen Paradise Co, South Korea's biggest casino operator, post a fall in second quarter revenue despite the opening its spectacular, newest casino resort Paradise City. The casino opened in April at Yeongjong Island close to Incheon International Airport in South Korea. Its dependence on foreign business saw it hit hard by the fall out with China. The operator blamed dwindling numbers of Chinese VIPs, the political fallout between China and Korea as well as a losing streak in its VIP sector. Its opening came at a difficult time with China, which accounted for just under half of South Korea's 17.2m foreign last year, imposing a travel ban on its citizens in groups although individuals will still be able to travel.

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MACAU – In a move that has confused analysts, Melco International will lessen its ownership in its Macau casino Studio City by floating part of its shares in the US.

Its motives are not yet known although analysts believe it could be to raise money to complete phase 2 of the Macau casino.

Having seen its joint venture partnership with Crown Resorts crumble following the Australian operators much publicised problems in China, Studio City's ownership is split with 60 per cent owned by Melco Resorts with New Cotai, a privately owned investment company, owning the other 40 per cent of Studio City International Holdings.

"Following completion of the proposed spin-off, the company's interest in Studio City will be reduced although it is intended that the company will remain as Studio City's majority shareholder after the IPO," Melco International said.

Analysts Vitaly Umansky and Zhen Gong from brokerage Sanford C Bernstein said: "The IPO, if it were to happen, does not make much sense to us at this stage (from the perspective of Melco). It further creates complexity for Melco, a company which is already complicated by Macau standards. The IPO filing allows banks/company to approach investors to gauge interest. If a valuation is palatable, New Cotai may be willing to sell secondary shares in the IPO. Alternatively, Melco may be willing to pay a similar price to acquire New Cotai's interest. An IPO process may be way to set a valuation – either to actually raise new capital that dilutes New Cotai or to get a view on third party valuation and have Melco dilute New Cotai.

CHINA – Local news service Macau Business Daily has reported that Sands Cotai Central will bring a London theme to its four towers; St. Regis, Sheraton Grand, Conrad and Holiday Inn.

It quotes a Sands China source saying: "The decision is done, it's now just a matter of starting to work on it."

The towers have been the focus of strategic business planning by Sands executives for some time now. Sands China has enjoyed huge success from bringing city brands to life with the Venetian and the Parisian proving the model works in Macau.

The source explains that the four towers will accommodate iconic features from London in the interiors and exteriors but did not speculate what they might be. Sands China has so far not commented on the report.

Genting Hong will open its Westside City Resorts World integrated resort in Manila's Entertainment City in 2020.

PHILIPPINES CASINO OPERATIONS



Genting to Open Westside City in 2020

Genting Hong will open its Westside City Resorts World integrated resort in Manila's Entertainment City in 2020. The group said: "Come 2020, another Resorts World brand will have its second location in the country. The Westside City Resorts World will be a 31-hectare property situated in Philippine Amusement and Gaming Corporation's Entertainment City and is projected to have at least 1,500 hotel rooms from in-house and international hotel brands."

Genting said it was still 'tweaking' the project's design 'so that we offer something that is quite unique not only there but also in relation to Resorts World Manila. So we don't repeat the same offering.'

Genting Hong Kong made the announcements as it confirmed its better than expected six months results to 30 June with revenue up 22.2 per cent year-on-year to US\$532.5m. Despite the revenue increase, the company posted a loss of US\$203.2m.

It operates Resorts World Manila and a host of cruise liners. Revenue from Resorts World Manila suffered as the venue was shut for 28 days in June following the much –publicised attack that killed 38 people. Genting Hong Kong's profits from the casino fell to US\$2.2m from US\$19.1m a year earlier.

Since the attack the company has completed the construction of the Sheraton Manila Hotel with the Hilton Manila and Maxims II expected to be completed in early 2018.

"The new lodgings will also include additional gaming areas, more retail space and six basement parking decks," Genting said. "The Sheraton Manila Hotel will offer 391 new hotel rooms and Maxims II an additional 190 rooms, while Hilton Manila will house 355 rooms.

"Upon completion of all three, RWM's room count will increase to 2,390 –the biggest among all the integrated resorts in the Philippines."



Hong Kong

Morgan Stanley tips Okada Manila to be leader

Analyst group Morgan Stanley is tipping Okada Manila to take pole position in the Philippines' market by 2019, surpassing Bloomberry, Melco Resorts Philippines and Resorts World Manila. The firms Alex Poon and Praveen Choudhary said: "We expect Okada to add US\$1.2bn of GGR by 2019 to the overall market, capturing 32 per cent market share (Bloomberry 30 per cent; Melco Resorts Philippines 25 per cent). This drives market GGR growth of 35 per cent CAGR over 2017-18 (VIP 43 per cent; Mass 30 per cent) for the integrated resorts or 25 per cent CAGR for the overall market."

"We expect the Philippines gaming market to be the fastest growing in Asia (25 per cent CAGR in 2017-18) and cannibalisation is not our concern. We expect EBITDA of existing operators to grow sequentially in 2H17 and 2H18 due to slow ramp of Okada, thus, Bloomberry and Melco Resorts Philippines 2018e EV/EBITDA of 6-7x and 10 per cent FCFE yield look attractive, compared to 8x based on 2Q17 EBITDA and net debt. Cannibalization is not visible in 2Q17. Strong tourist arrivals and NAIA Expressway have brought in more Chinese and Filipino mass customers from cities outside of Manila respectively."

Australia

The Australasian Gaming Expo (AGE) 2017 saw a 19 per cent increase in attendance with 8,099 people attending the show as it returned to Darling Harbour in Sydney where it started 28 years ago. "The return of this event to Darling Harbour and the halls of the new exhibition centre created the most successful event in the history of the AGE" said Ross Ferrar, CEO of the Gaming Technologies Association, which hosted the Expo. "This year there were 246 exhibitors, with 60 more than what we had last year" and thanks to the generous and well designed loading docks at the new venue, "exhibitors reported that the bump-in for this massive event went smoothly and that the facilities were superior to anything else they'd experienced," Ross continued.

Once they were at the show, visitors were able to optimise their time at the event because for the first time the Expo featured digital show bags, which allowed visitors to transfer information about exhibitors to their mobile device.

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SOUTH KOREA – Kangwon Land, the only South Korean casino operator allowed to let locals play, saw its second quarter profit fall by 10.7 per cent to US\$96.9m, making it the casino's worst performance in five years. GGR fell by six per cent to US\$338.9m whilst non-gaming revenue increased by 11.1 per cent to US\$10.51m.

JP Morgan Securities analysts DS Kim and Sean Zhuang said: "Kangwon Land's second quarter was weak, with operating profit falling 15 per cent year-on-year and missing estimates by [about] 10 per cent, dragged by a lower-than-expected top line. The disappointment came from mass (down nine per cent year-on-year) and slots (down seven per cent), while VIP (down three per cent) didn't help either. In our view, this seemingly reflects Kangwon Land's efforts to 'adjust' revenues lower amid regulatory scrutiny, and the timing of business normalization remains frustratingly uncertain."

Daiwa Securities Analyst Thomas Kwon added: "We forecast Kangwon Land's revenue and earnings to grow 9.6 per cent year-on-year and 12.6 per cent year-on-year in 2018."

PHILIPPINES – Philippine-based Udenna Development Corporation (UDC) has now formally broken ground on its The Emerald Resort and Casino, world-class integrated resort outside Luzon on the Philippines island of Cebu.

The US\$341m project sits on a 12.5 hectare prime beachfront in Mactan Island in Lapu-Lapu City. Once completed (estimated to be three years from now), it is set to make the Philippines at par with other premier regional destinations designed for leisure, gaming, MICE (meetings, incentives, conventions and exhibitions) and other commercial and residential investments.

According to Chief Executive Officer Andrea Domingo, The Emerald is the very first integrated resort that the new PAGCOR board has approved. "We hope that in two or three years' time, we will be here again to witness the opening of this project. We hope that this will be a precedent for all integrated resorts that will be built outside of Entertainment City in Manila because in Cebu City, there will be a world-class resort casino that is worth taking a look," she said.

The Emerald Resort and Casino is designed by American designer and architect Paul Steelman, whose works include The Mirage Hotel and Casino in Las Vegas and The Sands in Macau. Mr. Steelman said he is fortunate to be working on the project which has so much potential. UDC Chairman and CEO Dennis Uy said: "The project will play a vital role in transforming Mactan into a premiere tourist destination with a vibrant and thriving economy."

Jeju Shinhwa to host Lionsgate Movie World

Landing International Development is to develop Lionsgate Movie World at its Jeju Shinhwa World casino resort, Korea.

Launched at the beginning of 2017, Jeju Shinhwa World is opening in phases and will be one of Korea's most prestigious integrated leisure resorts

SOUTH KOREA CASINO OPERATIONS



Spanning approximately 1.3m sq. ft, Lionsgate Movie World is Lionsgate's first branded outdoor theme park and the latest milestone in the continued ramp up of Lionsgate's location-based entertainment business around the world.

In addition to being Korea's first international theme park, Lionsgate Movie World at Jeju Shinhwa World will be the first outdoor theme park built exclusively around world-famous movies. It is also the largest destination attraction to date in Lionsgate's growing international network of branded theme parks, entertainment centers and other attractions in the US, Europe, the Middle East and Asia. The project will be developed into seven movie zones, each themed around blockbuster Lionsgate properties which have collectively grossed nearly \$9bn at the global box office. These include The Hunger Games, The Twilight Saga and Now You See Me as well as the eagerly-anticipated March 2018 release Robin Hood.

Visitors can experience actual movie scenes through state-of-the-art rides, attractions and 4D Intellectual Property (IP) reproduced streets and towns. Each zone will also feature themed

restaurants, cafes, souvenir shops and entertainment performances. Lionsgate Movie World at Jeju Shinhwa World is expected to commence construction in 2018 and is scheduled to open in 2019.

Yang Zhihui, Chairman and Executive Director of Landing International Development (Pictured above), said: "It is our great honour to have Lionsgate as our partner. We are very excited to have the first Lionsgate Movie World at Jeju Shinhwa World bringing Hollywood movies and their immersive environments to our theme park to deliver a premium guest experience. With Lionsgate's success in the content creation industry, we strongly believe that Lionsgate Movie World at Jeju Shinhwa World will enhance our offerings and further strengthen Jeju Shinhwa World's market position as a desired tourist destination in Jeju."

"We're pleased to partner with our friends at Landing International, one of Asia's premier developers, on our first branded outdoor theme park and one of our largest and most exciting location-based entertainment destinations," said Lionsgate Chief Executive Officer Jon Feltheimer.

Aristocrat buys social gamer Plarium for US\$500m

Australia

Aristocrat has entered into a binding agreement to purchase social gaming company, Plarium for US\$500m cash (A\$667m). The decision to buy the Israel-based company will materially increase Aristocrat's Digital revenue.

CEO and co-founder of Plarium, Avraham Shalel, will continue to lead Plarium post acquisition – Mr Shalel and 12 other key members of the management team have agreed to retention and deferred consideration arrangements with Aristocrat, including deferring a portion of their upfront consideration until end of calendar year 2020.

Plarium develops Free-To-Play

(FTP) mobile, social, and web-based games. It operates across five genre-specific studios and produces mobile games for iOS and Android, as well as Facebook and browser-based games. It has a strong pipeline of high quality mobile titles across multiple segments including Strategy, Role Playing Games and Casual.

It develops games with proven monetisation across multiple themes with focused on a 'game engine' strategy, such as building successful game platforms that can be "re-skinned" with new titles across different themes such as the Middle Ages, Modern Combat, Ancient Historical and Futuristic. Aristocrat said: "Plarium has a number of key titles which have repeatedly ranked in the top 10 grossing Strategy games since launch in certain key target markets. Its content is complementary to Aristocrat's existing social casino content."

Macau

MGM Cotai, a HK\$26bn integrated resort set to open in the fourth quarter of 2017, will represent MGM's vast experience in entertainment, creating first-of-its-kind entertainment experiences in Asia through the MGM Theater at COTAI, Asia's first dynamic theatre. Designed by Scéno Plus, a world leading performance arts and entertainment design firm, the MGM Theater at COTAI is the world's first theater to offer 28 million pixel of viewing pleasure to its audience by utilising a giant 900sq.m 4K (or ultra HD) LED screen, which is the size of three tennis courts combined. The Theater is able to capture the audience's reaction and virtually reflected at real life size onto the LED wall, giving the public an impression of looking into a mirror. Upon completion, the MGM Theater at COTAI will be home to the world's largest permanent indoor LED screen.



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From Vannes to Cannes, casinos hit the transfer market

Insight

FRANCE Openings and transfers



This summer, as tourists flock to French resorts, operators have been preparing for the influx of visitors with the transfer of licences, the re-opening of once splendid establishments and the relocation of gaming activities – some motivated by pure economics, others prompted due to player demand

The casino Partouche of Cannes (Alpes-Maritimes) opened on June 30 after The Palm Beach closed its doors and relocated its slot machines and gaming tables closer to the city center, within the 3.14 hotel, owned by the group. The new establishment has simply taken the name of its host and the 3.14 casino, just a few steps from the Croisette, François Einesy Street, now offers 75 slot machines, an electronic English roulette of 15 stations and no less than 30 traditional table games, including those located in three private rooms. While in summer, five tables will be sited on the famous roof terrace of 3.14.

Another transfer, on the other side of the hexagon, in Brittany, is Vannes (Morbihan). After opening a provisional establishment two years ago, once the ministerial authorisation was obtained, the Breton Society of Casino Operations (SBEC) set out to erect a definitive building for €13m. The casino commenced operations on Wednesday, July 12 at 8pm, located behind the former premises. Slot machines numbers have increased from 75 to 100, the electronic wheel offers 12 stations instead of six and a third table of traditional games will be proposed. 35 employees were already employed. Their number will double.

In two years, the temporary casino has already risen to 95th place within the ranks of the 201 French casinos, realising during the financial year 2015-2016 a gross gaming product of 7,708,495 euros. This opening of the definitive establishment will obviously progress that figure further.

In Grasse (Alpes-Maritimes), after closing on December 31, 2014, due to the lapsing of the gaming license, the casino reopened on Thursday, July 6th. It's always good news to see a casino reborn. This small establishment perched 29 kilometers in the hinterland of Cannes was taken over by Casino Victoria whose president is Thierry Guerrier,

shareholder alongside his brother Richard and Gérard Scribans, deputy general manager. All three have been working in the casino sector for many years.

Mr. Scribans, who will be the responsible director, recruited 20 people, including former employees. The restoration aspect has been studiously followed, with quality products, tight holds and a wine bar with vintages found in small numbers, which can create a surprise.

Finally, the casino of Vernet les Bains (Pyrénées-Orientales) also reopened its doors on July 13. It had closed last October, after a long descent into hell, which had ended in judicial liquidation. Vernet is the oldest of the French casinos and ranked 201st. As a result of the closure, the director José Gimenez, who had spent 15 years working at Vernet les Bains, relocated to the casino of Font-Romeu. He has since applied for the resumption of the establishment and was retained by the municipality. The casino is due to open with 36 slot machines out of the 50 licensed alongside two traditional table games, the Ball and a Black Jack. An authorisation was also been given for an electronic English roulette table.

The mayor of Vernet les Bains, Henri Guitart, said the casino could not disappear from its spa landscape at the foot of the Canigou. "It's the oldest casino in France," he said on July 5, discussing the project with Journal of Casinos, "and the building is fantastic."

In addition, the municipality, which still has thermal baths in operation, is planning a 5-star hotel to attract a high-end clientele. The casino was a necessary part of this development.

The establishment has already partially opened with gaming taking place at the bar area for a few weeks, after renovation and redistribution of space.



The town of Vannes, in Brittany, was granted the status of tourist and seaside resort in 2006, enabling it to site a new casino. The project, which represents €15m of investment by SBEC (Breton casino company), is expected to attract 80,000 visitors a year, something that worries neighbouring casinos in Carnac, Arzon, Quiberon and Larmor-Plage, and La Trinité-sur-Mer, operated by the Groupe Partouche. However, Arnaud Mandret, director of the new casino, believes its creation does not jeopardise the other casinos, but attract a new clientele likely to frequent and complement the other casinos in the region.

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Alfastreet

Alfastreet's range will be expanded by the new Felix T single terminal at G2E, boasting an attractive design and a 27ins. touchscreen. In addition, the Slovenia-based company will exhibit its new dedicated coffee table, showing a modern alternative application for multi-player technology, alongside its new Multitouch roulette table, and upgraded Lucky 8 roulette machine and the Felix S slot cabinet. The company's registered Multigame and Simultaneous Play options will also be available, with a new online management system and an evolved remote play solution also to be unveiled.

The Coffee table is a niche product designed to offer additional comfort and to provide further value to the casino operation. We've also seen a number of Coffee tables being placed inside the casino's VIP areas, to serve as 'something special' for the chosen players.

Ahead of the Global Gaming Expo taking place in Las Vegas next month, G3 sat down with Sales Director, Albert Radman, to discuss the latest product offerings from one of the industry's most innovative gaming companies, Alfastreet

We've seen the successful Felix S terminal in action, but at G2E Alfastreet is launching the new Felix T single terminal. What's special about this new terminal and how is it distinctive?

This terminal will eventually replace our SL terminal. SL has been around for too many years now, and we decided it's time to change the cabinet, so we can support the new hardware solutions, including much improved and considerably bigger display. Felix T is a terminal that is robust, yet slick in design, very competitively priced and offers all the options and features seen at our top of the line terminal, WIKY.

You're showing a 'coffee table' (pictured below) at G2E... what's the story behind this?

The Coffee table has been made for bar areas, but specifically the sitting area around the bar. This table can be used to enjoy a drink or a meal, while still following the game and placing bets.

The Coffee table is a niche product designed to offer additional comfort and to provide further value to the casino operation. We've also seen a number of Coffee tables being placed inside the casino's VIP areas, to serve as 'something special' for the chosen players.

Alfastreet is using a single colour scheme throughout the stand at the show, coordinating products by colour way. What's the reason behind this and is it something you'll be doing more of in the future?

We've been changing our design directives in the recent past, mainly due to the fact that LED lighting offers so many options and effects to make a machine stand out on the casino floor. By creating lighting effects we also decided to refresh our colour schemes and make our machines more visible and possibly more attractive than the next machine.

How is the development of the Alfastreet slots range progressing?

Our slot development is currently undergoing major renovation, with many different titles being incorporated, suitable for different jurisdictions around the world. We've added a

lot of focus on designing our cabinets, improving ergonomics and also creating new variations for the future. It's safe to say that our slot division is yet to make a mark, but we're confident the time is coming very soon.

Alfastreet is debuting at G2E a new online management solution, could you explain some of the key functionalities of the system?

The system itself serves as a complete supervising system for any of our products, available on your mobile device at any time or place. There are multiple unique alerts, reports, and other features that make this management system very useful and possibly a necessity, aimed mainly for the casinos that don't operate with a major slot management system.

In addition, Alfastreet is showing its remote play solution at the show - what can you tell us about it ahead of G2E?

Remote play brings all of the Alfastreet's games placed on the floor to your mobile device. You can play from anywhere inside the casino, or even outside; connect to any game, see live video feeds and safely and quickly manage your betting, or just monitor the chosen game(s).

How important is the G2E show to Alfastreet? You have threatened to pull out of this event in the past...

The show is important to certain point, but not so important that we couldn't live without it. The funds that we spend for the show and accompanying events, would allow us to prepare a major marketing promotion, reach out to all the key customers and create several customised events for those specific customers. I believe this would bring at least an equal value to our company and that is why I'm pointing out the issues that happen before/during/after the show.





Insight

SG GAMING UK

Phil Horne Interview



Phil Horne,
CEO, SG Gaming UK

Having started his career on the shop floor of a chain of bookmakers, Horne has risen through the ranks and taken on a variety of roles, garnering invaluable insight from across the gaming sector. This wealth of hands-on-experience has put him in good stead to oversee SG Gaming's talented workforce of 550 people and build on long-standing partnerships with some of the UK's biggest gaming operators.

For SG Gaming, the UK division of Scientific Games Corporation, 2016 marked the start of a new era and a change in leadership. In March 2016, Phil Horne, then Managing Director, stepped up to take over the role of CEO. With the first anniversary of his appointment fast approaching, Horne's new post has provided plenty for him to reflect and build on, as he continues to shape his ambitious vision for the SG Gaming UK division.

SG Gaming is a leader in content innovation and ongoing development of gaming solutions, a proposition which excites Horne and will continue to be a priority as he drives the business division forward. "Providing our customers with innovative solutions and new gaming concepts is what sets us apart from our competitors," Horne said. "We have a proud heritage and a unique culture and identity, which along with our partnership-orientated approach is something I am keen to ensure we continue to maintain and nurture. Heading into our second quarter of a new year, I'm pleased that we are on track and can focus on developing these further in 2017.

"The most important goal last year was to ensure that we hit our financial targets, especially given the achievements of previous years. I'm delighted that we accomplished this and hope to continue to build on this going forward. Having strong working relationships with our

A Year in Charge and a Clear Vision for the Future



customers is pivotal to our ongoing success and continued performance; we're in a great place and we are looking forward to strengthening these ties further in the years to come."

As the new leader of the SG Gaming UK division based in London, reporting into the Group Chief Executive of Gaming Derik Mooberry at Scientific Games Corporation in Las Vegas, Horne is eager to enjoy a close working relationship with the U.S. team and build on his existing bonds with the parent company's senior leadership team.

"Some of the U.S. senior team have been over to

the UK since I took over, and it was great to introduce them to many of our key customers and different operating sectors, as well as them being able to get to know the team over here too. Having close links is good for knowledge sharing, exchanging ideas, and learning from the vast experience we all bring."

In an industry dominated by constantly advancing technology, innovation and the continuous evolution of existing products and infrastructure is a necessity. With a growing need to create a seamless customer journey, it's vital that SG Gaming works closely with the SG Interactive® team in the U.S. to develop omni-

successful in 2016 and exciting games like Jewel in the Crown, Black Knight® Community, Giant's Gold® and Legend of the Pharaohs™ which were launched in the first quarter of 2017, will follow on from their success.

"As we expand our library of player-popular content, our advanced server-based platform, developed in partnership with Videobet, continues to provide innovative solutions across all gaming sectors, offering our customers a range of sophisticated reporting, promotion, and player-tracking functions. We'll continue to invest and focus on technology evolution to benefit both our customers and the end consumers with the best playing experience."

While Horne will continue to build and grow partnerships with existing customers, 2017 will also see SG Gaming expand its offer within the UK casino market. The business currently has a limited presence in land-based casinos; however, February saw the launch of a new cabinet and for the first time, BI content created specifically for the UK casino market with a £10,000 jackpot.

"We have been developing an array of products, including our new state-of-the-art Riviera cabinet which has been rolled out across selected Grosvenor Casino sites as well as Aspers' flagship casino in Westfield Stratford City. The new cabinet features LED lighting, a high gloss HS screen, and the interactive Vdeck button panel operating on a server-based Gaming platform, integrated into Videobet with a casino platform. This will offer access to our vast content library, all developed specially for BI category gaming."

"Alongside our new proposition, we are also taking over the management and maintenance of Bally and Shuffle Master® cabinets and terminal systems in all land-based casino outlets across the UK. Our existing team of skilled engineers have been undergoing training ahead of the changeover, meaning that we can now provide unrivalled support to our entire customer base in our core sectors. It's an exciting time for us, and we are looking forward to the start of a prosperous new venture in this area."

In a career spanning three decades, Horne has witnessed significant changes in the gaming industry, including a greater focus on responsible gambling and player support. "This is an area which I've always been close to, working alongside key industry bodies to help work on an overall solution. At SG Gaming we've taken the lead in putting responsible gambling measures in place, and we have the capability to include these measures in our machines across all sectors, not just LBO – this is obviously an area we will continue to develop and lead on.

"If all of the right people are working together, we can get to a point where we are all doing

channel content solutions across the raft of fantastic SG-owned brands. With leading brands including Bally®, Barcrest™, and WMS® amongst others, the in-house content development team in Manchester are integral in the creation of SG Gaming's most successful titles.

With increasing demand for an omni-channel offering and bespoke solutions, Horne is keen to ensure that SG continue to lead the way in developing digital content. "It's imperative that we provide the best one-stop-shop solution for all of our customers that encompasses state-of-the-art hardware, player popular content,

advanced server-based technology, and business intelligence tools which help operators manage all aspects of their gaming solution.

"As omni-channel gaming offers players a wider choice of options and multiple touchpoints, it is important we are able to support this with cutting-edge technology solutions at the forefront of gaming innovation. Our talented team at SG Interactive is developing more and more content for an omni-channel user experience, under some of the biggest and most successful titles and franchises. Games including Hercules High and Mighty, Rainbow Riches Reels of Gold, and Africa Untamed were



"Having been with the business long before it became SG Gaming, my roles have historically been quite hands on and operational, which allows me to have a good appreciation of all aspects of what we do, but also those areas where we might need to spend a little more effort and focus. This insight to the business and the industry will be invaluable as we look to fulfilling an ambitious long-term strategy for UK gaming, including growing our successful partnerships with existing partners and hopefully establishing new ones as we progress."

exactly what we should be and something useful can arise that works for everyone. As an industry on the whole, it would be advantageous if all of the big manufacturers, developers, and retailers took a joined up approach to create a unified movement to help tackle some of the bigger issues affecting the industry – whether it be taxation, regulation, or responsible gambling. This way we can ensure that learnings, experience, and insight is shared and that collectively we can really make a difference when it comes to shaping policy and key issues affecting our industry going forward."

As an experienced hand, Horne strikes the balance of an approachable mentor but also one who inspires and motivates to get the best out of all those he works alongside. A lifelong Liverpool fan, Horne is a big admirer of the management style of current reds manager Jürgen Klopp, of whom there is a framed picture hanging in his office. "He's obviously a great leader, but more importantly, look at what he's done to the morale and work ethic of the team – everybody now plays with a smile on their face and enjoys their football, which is (generally!) reflected in their results and current league position. I think he's a great role model and I would love to bring some of his ethos and dynamism to my role here."

"Having been with the business long before it became SG Gaming, my roles have historically been quite hands on and operational, which allows me to have a good appreciation of all aspects of what we do, but also those areas where we might need to spend a little more effort and focus. This insight to the business and the industry will be invaluable as we look to fulfilling an ambitious long-term strategy for UK gaming, including growing our successful partnerships with existing partners and hopefully establishing new ones as we progress."

"Key to this is having a good team of people who will

be able to help us deliver our plans. The executive team and I understand the importance of having great staff, and we are privileged to have a pool of highly talented people here so we are currently rolling out new initiatives across the whole business to support, nurture, and develop our employees' skill sets.

"We kicked this off in autumn last year when the 13 members of the executive team assembled in rural Wales for a weekend of team building and training which culminated in us all scaling Mount Snowdon together. It was like nothing we've ever done as a team before and was both exhilarating and a great way to bond in a unique environment, with everybody valuing the experience and learnings. Activities and training like this will definitely be a bigger focus for everyone next year."

And while the business division continues to progress under Horne's leadership, his weekends and spare time are spent watching the reds, along with the ongoing challenge of improving his golf handicap. "I've always been a big sports fan, both as a player and spectator, and I've been lucky enough to attend some major events all over the world. If I wasn't leading SG Gaming, I think I'd like to have become a sports journalist or similar – I think it's probably one of those dream jobs where you get paid to watch, write about, and constantly immerse yourself in something you genuinely love."

Having just reached his full-year anniversary this April, it's clear that the last 12 months have been both challenging and eventful but Horne has relished and enjoyed the step up. "I'm lucky that I do a job I love and am surrounded by great people, which has ultimately made for a smoother transition than I probably expected. I'm still learning new things each day, but I'm looking forward to the next 12 months and beyond and hopefully conquering some more mountains along the way."

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Novomatic partners Cammegh to launch Spread-Bet Roulette



Andrew Cammegh,
Cammegh

"Spread-Bet Roulette is the first sidebet to truly punch through the glass ceiling of 35-1 on roulette. It's a game that's successful because it meets a number of key criteria. The first is that Spread-Bet Roulette provides a winning outcome every game; the second is that the game result is transparent to all players; and third, the game result is directly linked to the natural, traditional game. What gives Spread-Bet Roulette the 'X' factor, is that it enables operators, depending on pay tables, to payout up to 1,200-1 with a flat bet."



"Spread-Bet Roulette on the Novo Unity II platform is a perfect partnership between NOVOMATIC, the technology experts, and the authority in live table roulette, Cammegh. The combination of the two is the best of breeds and we're excited as to what this development and future applications will deliver."

Mark Beattie, Aspers

The launch of a new gaming product in the UK is always an exciting event, but one that brings together gaming giant NOVOMATIC and roulette specialists Cammegh, as well as the operating expertise of Aspers Casino, is a moment of special celebration.

On July 12, Aspers Westfield Stratford Casino in London, the largest casino in the UK by footprint, machines and tables, went live with Cammegh's Spread-Bet Roulette sidebet on 122 NOVO LINE Novo Unity II electronic gaming terminals (ETGs). Players can now enjoy Cammegh's innovative roulette sidebet alongside two existing roulette games and a fourth punto banco option.

Marek Kujawinski, Multiplayer Systems Manager of NOVOMATIC UK, explains: "Deploying Spread-Bet Roulette on the Novo Unity II platform enables Aspers players to enjoy a new gaming experience running alongside the traditional and well established game of Roulette. The addition of the Spread-Bet sidebets has no impact on consistent game delivery and runs seamlessly as an addition to the traditional game."

Aspers are operating their live Novo Unity II games taking feeds from a podium where a dealer deals three roulette games and an additional card game. The

main focus for the players is an area surrounded by plasma screens displaying game results, one of which is now Cammegh's Spread-Bet Roulette. Spread-Bet Roulette works by using a bonus number to bring mini-jackpots to the traditional game.

Cammegh's simple patented concept ramps up the excitement levels without distracting from the traditional game. Two concentric roulette number rings appear on the plasma display, spinning in opposing directions. At 'No More Bets', the rings stop dead, randomly aligning the two sets of numbers. The game then continues as usual until the ball drops and a winning number is determined, which is then paired with its aligning number on the plasma display. Any bets covering the range in which the Spread-Bet number falls are then paid out at the specified odds.

The live table version of Spread-Bet Roulette has been adopted by casinos both in the UK and internationally since its launch in 2015, but this is the first time that

(Left) Mark Watson, Sales Executive Cammegh, Andrew Cammegh, Mark Beattie, Group Head of Gaming Aspers, Marek Kujawinski, Multiplayer Systems Manager Novomatic UK, and Mike Robinson, International Communications Manager, NGI



Andrew Cammegh demonstrates Spreadbet Roulette on the Novo Line Novo Unity II

the innovative sidebet has been delivered as a digital game and played via ETG. Andrew Cammegh comments: "Spread-Bet Roulette is the first sidebet to truly punch through the glass ceiling of 35-1 on roulette. It's a game that's successful because it meets a number of key criteria.

"The first is that Spread-Bet Roulette provides a winning outcome every game; the second is that the game result is transparent to all players; and third, the game result is directly linked to the natural, traditional game. What gives Spread-Bet Roulette the 'X' factor, is that it enables operators, depending on pay tables, to payout up to 1,200-1 with a flat bet," says Mr. Cammegh.

Spread-Bet Roulette can be installed in two distinct configurations, a local installation, whereby the system can be fed from an automatic wheel/live podium or live table combination within a single site. The second is via a wide area network installation, whereby the results are fed from games dealt live in an alternative location.

We are certainly at the right venue to discuss the inception of this product, with Aspers' Group

Head of Electronic Gaming, Mark Beattie and NOVOMATIC's Marek Kujawinski the driving forces behind the transfer of Spread-Bet Roulette to the Novo Unity II platform. "NOVOMATIC is always looking at opportunities to add value and improve the player experience," states Mr. Kujawinski. "One way of doing that is to add sidebets to the game. We looked at the sidebets available both within and outside the UK, and the one that stood out was Spread-Bet Roulette, so it was a natural progression to partner with Cammegh and integrate the Spread-Bet Roulette with the Novo Unity II Multi-Table Roulette games."

Aspers' Mark Beattie adds: "Spread-Bet Roulette has transferred brilliantly to the terminal and is a perfect product for electronic gaming. One of the distinct advantages on a terminal is that we can offer sidebets at really low stakes to drive customer engagement. If you're seeking to establish a new game you want players to experience it with the least amount of investment possible and you can do that on terminals because you can stake at very low levels."

Beyond the launch with Aspers, the partnership

between Cammegh and NOVOMATIC continues with the roll-out of Spread-Bet Roulette on the Novo Unity II platform soon to follow with other casino groups in the UK - and watch out for the splash NOVOMATIC is set to make at the forthcoming G2E show in Las Vegas. Spread-Bet Roulette opens the door for sidebets to transition not only across from live tables to electronic terminals, but for the greater experimentation of sidebets within the ETG environment, one that according to Mark Beattie is willing to test, trial and develop new experiences to broaden the player base.

Mark Beattie concludes: "We need to cater for a wider audience; offer games to suit both new customers and established players. The world is a bigger place - players are playing online, in betting shops, they have all these options and we have to offer different things to different players.

"Spread-Bet Roulette on the Novo Unity II platform is a perfect partnership between NOVOMATIC, the technology experts, and the authority in live table roulette, Cammegh. The combination of the two is the best of breeds and we're excited as to what this development and future applications will deliver."



MEMBER PROFILE

Company / Gaming Support B.V.

Web address / www.gamingsupport.com

AGEM Membership level / Bronze level member

Description / Gaming Support was founded in May 2000. The head office is located in Rotterdam (The Netherlands), with offices in Belgium and Las Vegas, Nevada (US).

Over the years, Gaming Support has expanded its product and service offerings from being solely focused on The Netherlands to having products placed inside casinos and gambling halls on six of the world's seven continents. Gaming Support is the premier provider of outsourced gaming services. With tens of thousands of devices under management, Gaming Support's world-class service organisation possesses the training, experience and infrastructure needed to launch your operation and keep it running smoothly.

Casino services delivered by Gaming Support are based on decades of experience installing, maintaining and refurbishing all 14 of the casinos operated by Holland Casino in the Netherlands; this means that every day of the year Gaming Support look after 7,000 or so gaming machines, almost 500 live tables, and all the peripheral equipment essential to operate these machines and tables.

New products for 2017 / Gaming Support will be presenting the following new innovative products at the G2E Show: Slot Sense and G.A.M.E. These products give you full control of your slot machine. Come find out more at Booth 2623.

Newsworthy events to share / Gaming Support is Europe's largest sign builder. Furthermore the company is thrilled to present its new product combining Gaming Support's Progressive Jackpot Controller together with J.P Slots video displays in cooperation with Dynasty Games.

Forthcoming events / Gaming Support will be attending G2E (Booth 2623) in Las Vegas this October and next year in London at the ICE Show.

MEMBERSHIP NEWS

AGEM Key Board of Directors Actions

- Reed Expo Senior VP Melissa Ashley, Allie Barth, Senior Director, Industry Services, American Gaming Association (AGA) and Todd Sheahan, Event Director, Reed Expo gave a short presentation at the recent Board meeting regarding the forthcoming G2E show. New for this year's show is the Matchmaking program which leverages industry expertise by matching visitors to exhibitors based on their registration responses / objectives. Also, new to the show floor is the Innovation Lab and Keynote stage. The two keynote speeches will take place on Thursday, which should grow visitor numbers on the last day of the show. In 2016 the conference program had a fuller agenda on the Thursday which resulted in an 18 per cent increase in attendance on that day. It is hoped the new program will build on these numbers.
- The Nevada Gaming Control Board recently announced it has drafted proposed revisions to the minimum internal control standards (MICS) as a result of amendments to Regs 5, 5A, 22 and 26C for wagering accounts. AGEM members were notified that comments on the new language will be accepted up to August 18 with a public workshop scheduled for September 20 in Las Vegas.
- The 20th AGEM-AGA Golf Classic presented by JSM Global will take place on May 1 2018 at Shadow Creek. To mark this special anniversary and in light of the prestigious stature of Shadow Creek, AGEM members agreed to increase the annual contribution to \$60,000 on a one-off basis. The 2017 event hit a new high in raising \$155,000 which will provide much needed funds for the National Center of Responsible Gaming (NCRG).
- AGEM members were updated with a draft document from The New Jersey Division of Gaming Enforcement (DGE) who is asking the industry for input on updated skill-based gaming regulations. The most significant development is the creation of a category for pure skill games that no longer need to meet the minimum return to player of 83 percent for slot machines. The draft also reaffirms the allowance of adaptive play features in games for New Jersey.
- Two new Associate members were approved at the August meeting. Automated Systems America, Inc., based in Glendale, California, is a provider of ATMs and cash access services to both retail and gaming customers. ArdentSky, LLC, based in Potomac, Maryland, is a regulatory compliance company that standardises and streamlines business practices associated with gaming compliance management. This brings the number of members to 151.

Events and Activities

- The Australasian Gaming Expo, took place August 15-17, in Sydney. This year's show was located in the new convention center in Darling Harbour and promised to be 30 per cent larger. AGEM Executive Director, Marcus Prater took part as a speaker on a gaming technology panel.

AGEM INDEX

The AGEM Index experienced a slight increase on mixed stock performance. The composite index stood at 423.92 points at the close of July 2017, which represents an increase of 1.97 points, or 0.47 per cent, when compared to June 2017. The AGEM Index reported a year-over-year increase for the 22nd consecutive month and has climbed 129.24 points, or 43.9 per cent, since July 2016. During the latest period, six of the 13 global gaming equipment manufacturers reported month-to-month increases in stock price, with two up by more than 10 per cent. Seven manufacturers reported decreases in stock price during the month, with two posting double-digit declines.

AGEM	Exchange: Symbol (Currency)	Stock Price At Month End			Percent Change		Index Contribution
		Jul-17	Jun-17	Jul-16	Prior Period	Prior Year	
Agilisys	Nasdaq: AGYS (US\$)	10.06	9.97	10.47	0.90	(3.92)	0.03
Ainsworth Game Technology	ASX: AGI (AU\$)	2.41	2.16	2.16	11.57	11.57	1.41
Aristocrat Technologies	ASX: ALL (AU\$)	20.23	22.96	13.80	(11.89)	46.59	(11.75)
Astro Corp.	Taiwan: 3064 (NT\$)	16.20	17.25	37.30	(6.09)	(66.57)	(0.04)
Crane Co.	NYSE: CR (US\$)	75.50	78.57	56.72	(3.91)	33.11	(2.41)
Everi Holdings Inc.	NYSE: EVRI (US\$)	7.46	7.40	1.15	0.81	548.70	0.05
Galaxy Gaming Inc.	OTCMKTS: GLXZ (US\$)	0.74	0.78	0.31	(5.13)	138.71	(0.02)
Gaming Partners International	Nasdaq: GPIC (US\$)	10.62	12.50	9.30	(15.04)	14.19	(0.17)
International Game Technology PLC	NYSE: IGT (US\$)	19.04	18.01	18.74	5.72	1.60	3.02
INTRALOT S.A.	ATHEX: INLOT (€)	1.18	1.20	0.90	(1.67)	31.11	0.02
Konami Corp.	TYO: 9766 (¥)	5,750	6,240	3,895	(7.85)	47.63	(6.54)
Scientific Games Corporation	Nasdaq: SGMS (US\$)	37.05	26.40	9.19	40.34	303.16	18.31
Transact Technologies	Nasdaq: TACT (US\$)	8.85	8.45	8.02	4.73	10.35	0.04
Change in Index Value							1.97
AGEM Index Value: June 2017							421.95
AGEM Index Value: July 2017							423.92



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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DPX-S440 Gaming Platform



DPX-S2440 Gaming System



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- Quad and dual core AMD R Series SOC APUs up to 2.8 (3.4) GHz
- Radeon HD10000 series "3rd generation GCN" graphics
- Comprehensive gaming features
- 12V DC single input or ATX power
- Full featured driver API for IO and security
- Gaming logic box enclosure available

DPX-E135 Gaming Platform



- Quad and dual core AMD G Series SOC platform up to 2.4GHz
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Never on solid ground

Italy is a country which never seems quite sure about how to handle its extremely substantial, confusing and yet lucrative gambling market which is undergoing more changes and tax hikes.

In April the Italian government announced it would raise taxes on tobacco and gambling and crack down on VAT evasion in a bid to reduce this year's budget deficit.

The deficit cuts are worth €3.4bn and Italy has the highest public debt in the Euro zone after Greece. It has been battling with the European Commission since it presented its 2017 budget last September.

Now all Italian public bodies will pay VAT directly to the treasury when they purchase goods and services from suppliers (instead of paying to the supplier) whilst there are player tax hikes on lottery winnings and VLT winnings whilst taxes for the games are also being increased.

Italy's gambling market is a sitting duck when it comes to gathering revenues. It is thriving and is easy prey to target for more taxes. The gambling

market saw revenues of €19.17bn in 2016, an 11 per cent increase on the previous year. Slot machines produce €10.5bn of this alone and this increases by 10 per cent annually.

In 2016 the former Prime Minister Matteo Renzi announced he wanted to ban the use of slots outside of casinos and bring an end to those operated in the many bars and restaurants and cafes.

Matteo Renzi became Italy's youngest Prime Minister in 2014 when he led a coalition government and tried to reform entitlements, taxes and labour laws. He promised to resign if voters rejected a December 2016 referendum on constitutional reforms. They did and he was replaced by Paolo Gentiloni.

The Gentiloni government is now looking to find an extra €300m this year in a bid to head off a possible European Commission infringement

procedure against the country and is looking to get this from the gambling industry.

CHANGES AHEAD

Italy is located in the heart of Europe Italy and is bordered by Austria, France, the Vatican City, San Marino, Switzerland and Slovenia.

With 61 million population it is the fourth most populous EU member state and today is the third largest economy in the Eurozone and eighth in the world.

The country plays a big role in regional and global economic, military, cultural and diplomatic affairs and is the fifth most visited country in the world.

Italy is subdivided into 20 regions five of which have a special autonomous status which enables them to enact legislation on some local matters. The country is then further divided into 14 metropolitan cities and 96 provinces and over 8,000 municipalities.

Italy is seen as an industrialised nation and is a leading country in world trade and exports. It's highly developed and known for creative and innovative business with a large agricultural sector plus automobile, machinery, food, design and fashion industry. The country was the world's seventh largest exporter in 2009.

Meanwhile tourism is huge and more than 50.7 million international tourists arrived last year



REVENUES PER GAME TYPE 2016

GAME TYPE	REVENUE	WINNINGS	PLAYER EXPENDITURE
NewSlots	€26.3bn	€18.8bn	€7.4bn
VLT	€23.1bn	€20.3bn	€2.7bn
Comma 7	€236m	-	€236m
Bingo	€1.6bn	€1.1bn	€467m
Horse betting	€608m	€437m	€171m
Sport betting	€7.5bn	€6.5bn	€939m
Totalisator	€1.5bn	€849m	€731m
Loterie	€8.9bn	€6.5bn	€2.4bn
Lotto	€8.0bn	€5.0bn	€3.0bn
Tournament skill games	€755m	€685m	€70m
Card games	€15.2bn	€14.7bn	€510m
Virtual Reality	€1.1bn	€974m	€192m
Betting Exchange	€784m	€781m	€3m
TOTAL	€95.5bn	€76.9bn	€19bn

with an estimated revenue of €189bn. Italy offers a complete range of tourist delights from skiing, sightseeing to beaches and vineyards.

The islands such as Capri and Ischia offer thermal spas whilst the cities provide sightseeing trips and designer shopping. Rome is the third most visited city in Europe and 14th in the world with between seven and 10 million tourists a year followed by Milan and Venice.

Italy was hit hard by the global economic crisis and suffered serious debt. In fact its economy

has shrunk by around 10 per cent since 2007 when the country endured a triple dip recession. GDP prior had been around five per cent growth with a progressive slowdown during the 80s and 90s which virtually stopped in 2000. In 2014 public debt stood at over 135 per cent of GDP ranking second after Greece.

There continues to be a slump in consumption and investment whilst smaller enterprises have been hit hardest. There is a huge north-south divide whilst the richest region is Lombardy and the poorest Calabria. Unemployment is around

12 per cent. The Italian gaming sector is understandably very wary of the end of year. This is when the annual Budget Law is approved and usually contains some changes for the gambling sector. Last year was no exception.

The government is raising taxes on tobacco and gambling to crack down on evasion of VAT and help it reduce this year's budget deficit, as demanded by the European Union. The emergency deficit cuts are worth €3.4bn (0.2 per cent of GDP).

Reports

ITALY MARKET REPORT

Essential information and facts about Italy:

Country	Italy
Capital	Rome
Total Area	301,340 sq.km
Population	62,007,540
Median age	45.1 years
Ethnic groups	Italian
Languages	Italian (official), German, French, Slovene
Currency	Euro
Government type	Parliamentary Republic
Chief of State	President Sergio Mattarella
Head of Government	Prime Minister Paolo Gentiloni – Democratic Party (Dec. 2016)
Cabinet	Council of Minister proposed by the Prime Minister and nominated by President
Elections	President indirectly elected by an electoral college consisting of both houses of Parliament and 58 regional representatives for a seven year term. Next election 2020. Prime Minister appointed by President and confirmed by Parliament.

The government recently approved a Law Decree published in the Italian Official Gazette which will see taxes increased and the industry is quite frankly, not happy.

The government recently approved a Law Decree published in the Italian Official Gazette which will see taxes increased and the industry is quite frankly, not happy. The tax increases for VLTs and NewSlots were introduced in April. Taxes have already been increased over the last three years at a steady rate and the new hikes means:

- Gaming taxes for Comma 6a (NewSlots) have been increased from 17.5 per cent tax on turnover to 19 per cent.
- Meanwhile VLTs previously paid 5.5 per cent on GGR and this category has seen their taxes increased by one per cent to six per cent of turnover.
- Meanwhile the winning tax paid by players for VLTs exceeding €500 will be increased from six per cent to 12 per cent effective from

October 2017. It is said the increase will bring in a total of €742m over the next three years in taxes.

- The decree also aims to reduce the number of NewSlots from over 407,000 to 265,000 in 2018 in a bid to prevent the increase in gambling addiction problems.
- Finally the player tax for those winning on the Lotto game will also be increased from six per cent to eight per cent as from October 2017 on SuperEnalotto, WinforLife and scratchcards. This is expected to see tax revenues increase from €36m in 2017 to a total of €143m annually.

The law decree is effective immediately which means there is little time to change the RTP of machines. Parliament however will have to

ratify the Law Decree within the next 60 days (from April 24), otherwise it will lose effect from its initial publication in the Official Gazette. At the moment suppliers and operators are left in limbo in terms of changes.

These changes come just a year after tax hikes in 2015 when the Stability Law on December 2015/No.208 was introduced. Although this cancelled out the additional tax of €500m annually that was initially required from the concessionaries, it raised taxes from the then VLT tax rate of five per cent to 5.5 per cent whilst the PREU for AWP's was raised from 13 per cent to 17.5 per cent whilst reducing the payout to 70 per cent.

Tiziano Tredese of Elmac said: "The 'Manovrina' will reduce the number of NewSlots to 265,000 but how and who will decide which ones have to





CONCESSIONAIRE DATA 2016

OPERATOR	EXPENDITURE 2016	MARKET SHARE 2016	2016 V 2015
Lottomatica	€1,808m	17.8%	+4.9%
Global Starnet	€1,395m	13.8%	+5.1%
Gamenet	€986m	9.7%	+7.4%
HBG	€943m	9.3%	+12.2%
Cogetech	€899m	8.9%	+7.5%
Admiral	€797m	7.9%	+21.3%
Sisal	€794m	7.8%	+4.8%
SNAI	€624m	6.2%	+5.3%
Codere	€567m	5.6%	+16.2%
Cirsa	€548m	5.4%	+3.9%
NTS	€344m	3.4%	+118.6%
Netwin	€239m	2.4%	+67.7%
Intralot	€187m	1.8%	+1.4%



TERRITORIAL DISTRIBUTION OF SLOT GAMES 2016

REGION	COMMA 6A NO. OF NEWSLOTS	COMMA 6A NO. LOCATIONS WITH NEWSLOT	COMMA 6B NO. OF VLT	COMMA 6B NO. OF VLT GAMING HALLS	COMMA 7 NO. OF GAMES
Liguria	10,702	2,600	1,310	107	2,337
Lombardia	63,287	13,114	9,808	765	9,448
Emilia Romagna	35,530	6,623	5,318	421	14,382
Lazio	41,765	7,879	6,960	559	6,622
Campania	41,876	8,649	4,669	555	9,667
Sicilia	21,544	5,164	2,168	248	9,187
Sardegna	15,084	3,538	494	45	5,034
Abruzzo	10,917	2,439	1,641	152	4,518
Calabria	17,735	3,508	1,229	157	4,879
Veneto e Trentino Alto Adige	38,558	7,754	6,269	520	10,825
Marche	9,935	2,325	1,250	118	3,136
Umbria	5,911	1,357	772	80	876
Piemonte e Valle D'Aosta	29,544	6,323	4,108	390	4,815
Friuli Venezia Giulia	9,107	1,990	1,008	86	1,863
Puglia, Basilicata e Molise	31,730	6,782	3,368	393	9,252
Toscana	24,098	4,980	3,894	338	8,045
TOTAL	407,323	85,025	54,266	4,934	104,886

be removed from the operations is unclear. The situation is very strange. The decree says the concessionaire will decide but the real problem is that most of the NewSlots in Italy are owned by the concessionaires (directly or indirectly) so it's easy to imagine what they'll decide - basically remove slots from a location of the normal operator and leave slots in their own locations! The concessionaires were set up to check, control and collect the taxes from the single operator but they became the biggest

operators of NewSlots and VLTs in Italy. The controllers control...themselves!"

Under the original set up the concessionaires were also permitted to operate 14 per cent of their machine quota as VLTs. There is however no mention in the decree to reduce the number of VLTs which many say are more addictive than the NewSlots.

Meanwhile regions are creating their own laws.

In early 2016 the island of Capri banned slots from 'inappropriate areas' such as near schools, churches and tourist beaches.

The town of Anacapri on the Italian island of Capri is home to 6,000 people and in May last year a referendum was held asking citizens if they wanted to ban slots within 150m of certain 'inappropriate' areas. Nine out of 10 citizens voted in favour of the ban on slots and given the size of the island this meant no slots could be

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operated, so in January 2017 they were all unplugged.

Local administrative courts upheld the council's decision although Bologna and Bolzano have both lost similar appeals at local administrative courts which would have seen a similar ban. Citizens on the island of Capri can still buy scratchcards, bet online and bet on sports games

The new decree states that slots must be located in a 'sensible location' pertains to a certain distance from 'sensitive areas' such as schools, churches and so on. But under regional laws the region of Emilia Romagna introduced a law in June to move any existing gambling halls to outside a 500m radius from certain locations. The Italian sector is scratching their head as to why when the new law already states this.

Emilia Romagna also introduced a 'slot freeER' campaign which basically rewards shop and bar owners who have no slots or VLTs on their premises. The region sees gambling turnover of around €5.9m a year.

Tiziano added: "The Italian madness doesn't finish here, because also the majority of the different towns and villages can also make restrictions to their regional laws. Obviously the gambling addiction problems are only coming from the coin operated machines. All the other games such as Lotto, Super Enalotto, Scratch cards and online games are not involved.

"Meanwhile ticket redemption has fallen into the Black Hole as already five regions have banned ticket redemption to those under 18 years of age. This is a huge damage to our business and we are fighting to convince the regions that ticket redemption is not a slot machine."

The town of Anacapri on the Italian island of Capri held a referendum asking citizens if they wanted to ban slots within 150m of 'inappropriate' areas. Nine out of 10 citizens voted in favour and given the size of the island this meant no slots could be operated.

THE SLOTS MARKET

The slot market is huge in Italy. Turnover for the total gambling market in 2016 was €95.6bn of which €76.9bn was given out in prizes resulting in €19.4bn in revenues. Taxes amounted to €10.4 leaving €8.9bn in revenues.

There were a total of 605 concessions in 2015 of which 278 licences were for sports and horse racing games, 104 licences for online gaming, one Totalisator and one Lottery licence, 208 bingo hall licences and currently 12 for amusement machines (6a and 6b).

There are some 100,000 locations offering gaming and some 350 websites offering online gaming plus 150,000 companies in Italy working in the gaming industry. There are 200,000 operators of which 20,000 work directly in the sector and the remaining in satellite activities.

The overall revenue for the gaming sector in 2015 was €88.2bn whilst players net expenditure was €17.1bn (winnings were €71.1bn) and revenue to the treasury was €8bn. Revenues for 2016 are below.

The biggest sector is the Newslot AWP machines with 29 per cent of the revenue followed by VLTs with 25 per cent, Card games with 14 per cent, lottery with 10 per cent, Lotto eight per cent and

LOTTERY

Lottomatica

LOTTERY REVENUE

€2.4bn

LOTTO REVENUE

€3bn

SPORTS BETTING REVENUE

€939m

RACING REVENUE

€171m

NO. OF NEWSLOTS

407,323

NEWSLOTS REVENUE

€7.4bn

NO. OF VLTS

54,266

NO. OF VLT SALONS

4,934

VLTS REVENUE

€2.7bn

CASINOS

4

CASINOS REVENUES

€331m

sports games six per cent. Totalisator, virtual betting, horse betting and remote tournament games account for about one per cent each.

Non-prize games can offer up to €20 worth of prizes and can be played in bars, cafes, restaurants, beach clubs, hotels and amusement halls.

Bingo meanwhile began in Italy in 2001 and is hugely popular and now there are 206 bingo halls across the country.

Sports Betting is run via Totocalcio e II9, Totogol, fixed odds betting, virtual betting, Big Match and Big Race. Horse racing is via national horse racing and international events. Tax rate is 18 per cent on profits.

In 2002 the amusement machine law was regulated by the Law 289 aimed at reducing the illegal market. At the time there were some 600,000 illegal machines in the market and the state lost over €20bn every year.

It introduced two different categories of machines. Firstly those with no cash winnings (such as crane machines, video games) and two amusement machines with cash prizes called NewSlots and VLTs.

Reports

ITALY MARKET REPORT

NEWSLOTS (Comma 6a) are reel games with a stake of not more than €1 with cash prizes of up to €100. The duration of a game is four seconds and cycle is not less than 70 per cent on a cycle of not more than 140,000. These games can be played in bars, cafes, restaurants, beach clubs, hotels, private clubs and arcades. There are currently around 4,800 certified models which have been approved by the AAMS. These games are currently taxed at 17.5 per cent on collection.

There were 407,323 NewSlots in 2016 (418,210 in 2015) and over 85,000 NewSlot locations (83,307 in 2015). They have around 29 per cent of the total public gaming revenue and 54 per cent of amusement machine revenue.

In 2004 10 concessionaire licences were awarded to companies to set up the remote network to manage legal NewSlot machines.

The concessionaire's activity involves the real-time connection of all machines and the collection and recording of all the information regarding wagers and winnings of each single slot machine.

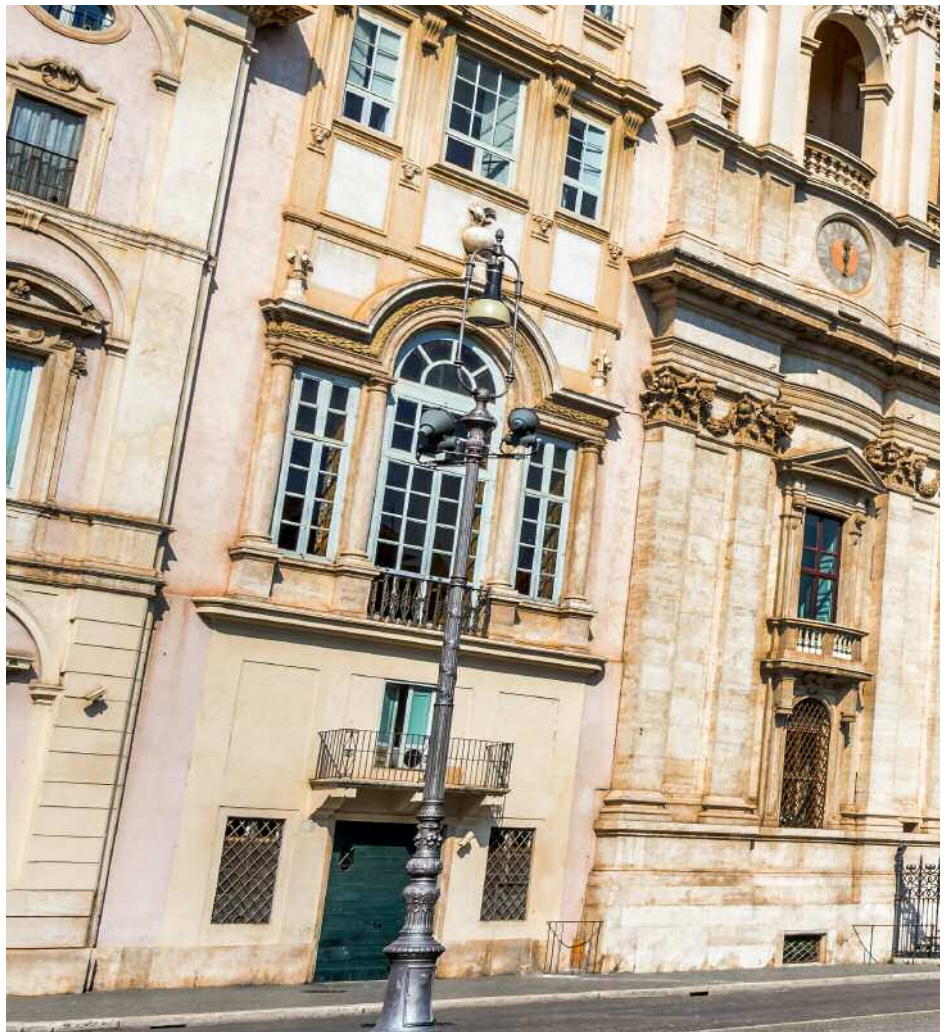
The companies selected were the main Comma 6 players in the Italian market who met the criteria of having a strong financial and gaming background and a minimum 5,000 AWP network.

The process of becoming a concessionaire was fairly complex and difficult and required a thorough screening of the capability of the company, past experiences in similar activities and financial status. The company needed to establish large bank guarantee towards the administration and produce a number of contracts with operators who would connect to the particular network.

Once the concession was granted the company then had a certain amount of time to connect all the operators and then establish a connection with SOGEL to transmit the data collected. NewSlots were introduced in 2004 and 10 operators were selected and licensed to operate these games increased to 13 operators in 2011. Cogetech and Snai joined forces to form Snaitech last year and Gamenet and Intralot joined whilst Global Starnet had its concession cancelled in March 2017.

Meanwhile VLTs (Comma 6b) were introduced in 2009 and these differ to NewSlots in that they must pay a minimum of 85 per cent for each game and games are linked to SOGEL. Play is a minimum of 50c and maximum of €10. Maximum payout (excluding jackpot) is €5,000. VLTs are taxed at 5.5 per cent on GGR.

Comma 6b machines supply Server Based Gaming services and there were initially just over 50,000 VLT licences available which were



New VLT rules were published recently aimed at upgrading platforms and machines. The main changes involve the certification of VLT platforms and games by testing labs rather than via SOGEL. Previously the time taken to certify platforms and games was lengthy. In fact in some cases it could take years.

offered primarily to the 10 concessionaires who can operate up to 14 per cent of their total AWP number base. The Comma 6b concessionaires had to pay a licence fee of €15,000 which lasts nine years for each machine.

VLTs can be installed in bingo halls, betting agencies, horse and sports betting shops, gaming halls and there can be up to 30 VLTs per 50-100sq.m and up to 70 VLTs per 101-300sq.m and up to 150 VLTs for over 300sq.m of space.

There are 54,266 VLTs (2016 data) in the market, compared to 52,349 in 2015 and just under 5,000 VLT gaming halls compared to 4,863 in 2015.

New VLT rules were published recently aimed at upgrading platforms and machines. The main changes involve the certification of VLT platforms and games by testing labs rather than via SOGEL. Previously the time taken to certify platforms and games was lengthy. In fact in

some cases it could take years. But now the testing can be done by labs accredited by the AAMS, similarly to that already prescribed for the online sector. This should speed up the process significantly. The testing labs currently listed on the AAMS site for such procedures include: BMM Spain, GLI Italy, NMI, Quinel Quality in Electronics, SGS Italia and SIQ.

In addition the VLT rules provide the possibility to use the same ticket with VLTs of different game suppliers of the same licence holders but not to use the ticket with different licence holders. The AAMS has launched a transitional period up to April 2019 to ensure that platforms and VLTs are compliant with the new decree.

THE OPERATORS

Lottomatica is the biggest operator with 58,100 machines connected to the network and a market share of 17 per cent.

Snaitech is a merger between Cogetech and



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TERRITORIAL DISTRIBUTION OF BETTING SECTOR 2016.

REGION	BINGO HALLS	HORSE RACING POS	HORSE RACING SHOPS	SPORTS BETTING POS	SPORTS BETTING SHOPS
Liguria	6	69	4	89	16
Lombardia	27	497	28	663	148
Emilia Romagna	20	133	12	234	76
Friuli Venezia Giulia	4	77	5	70	20
Piemonte, Valle D'Aosta	14	162	25	259	78
Veneto, Trentino Alto Adige	14	255	24	306	77
Lazio	28	295	25	444	142
Abruzzo	6	116	4	101	21
Marche	3	67	4	122	29
Toscana	11	191	4	230	55
Umbria	2	24	2	82	18
Campania	28	350	49	804	347
Calabria	3	174	10	180	57
Puglia, Basilicata, Molise	8	293	24	464	149
Sicilia	28	322	17	332	96
Sardegna	4	135	0	51	4
TOTAL	206	3,160	237	4,431	1,333

SNAI in late 2015 offering a range of games to the Italian market from virtual sports, VLTs, NewSlots, online and mobile games and e-sports via its network of 1,600 betting outlets or online. There are also 2,200 agencies and corners plus 600 PoS. Snaitech operates 60,000 NewSlots and 10,000 VLTs whilst snai.it offers horse race and sports betting plus casino and

skills games, bingo and Lotto and Win for Life.

The company has a 15 per cent market share for the VLTs and NewSlots with collections of €7.4bn. It's sports betting sector is worth €730m in collections and they have a 21 per cent market share whilst in horse racing they have a 40 per cent market share and collections of €214m.

Snaitech also owns racecourses in Milan, San Siro Gallop, Maura Trot and the trotting Sesana in Montecatini Terme.

Gamenet was set up in 2016 from the merger of Gamenet and Intralot Italia and is now one of the biggest gaming groups in Italy with a GGR of €7bn with €1bn in revenues and €73m EBITDA.



Gamenet currently operates some 38,427 NewSlots (85 per cent of the 45,337 licences) with more than 4,000 directly managed plus 8,030 VLTs (93 per cent of the 8,570 rights). Gamenet also operates 67 gaming halls under the Gamenet or Billions brand and also 653 PoS for betting (of 750 betting point licences) and various online games.

HBG Gaming Group is one of the largest licensed operators in Italy with products in the bingo, NewSlot AWP and VLT sector, online gaming and betting. In 2015 overall group revenue was €4.5bn divided between bingo with €1.14m; NewSlots with €2.4bn, VLTs with €2bn; Online gaming with €9.1m and betting sector with €2.1m in revenues. The company has a five per cent market share. Total player expenditure was €886.3m for 2015.

HBG had 16 bingo halls in Italy at the end of 2015 with 6,000 seats, 780 NewSlots and VLTs inside plus sports and virtual betting corners. It has a seven per cent market share of the bingo sector.

Through its subsidiary company HBG Connex they have a network of 31,901 NewSlot machines at some 9,318 stores with some €2.3bn in revenues and a 9.2 per cent market share.

For the VLT sector HBG obtained an authorisation to install 4,798 terminals which had been distributed in 455 gaming halls by end 2015. Gaming partners are Novomatic, Spielo and Inspired. HBG also runs an online network via smartgame.it enabling players to bet on sports and horse events and play online slots, bingo or poker tournaments. The group also opened 52 betting shops across Italy.

Admiral operates gaming halls and bingo halls. They have 26,000 devices installed plus 150 gaming halls and various online gaming sites. Revenues for the group in Italy reached €137.9m

Sisal was set up in 1946 by three sports journalists and today operates lottery and tote related games such as SuperEnalotto, Win for Life and football pools Totip. It has 14 million clients and has a turnover of €15.1bn and 46,000 points of sale and 376 online games.

In 2006 Sisal was authorised by AAMS to set up a slot machine network via Sisal Slot, a new subsidiary of Sisal. They have 30,000 plus machines in some 10,000 outlets and total gross collection in this sector was €47.9bn last year (VLTs €22.1bn and slots €25.8bn).

In the retail sector they have Sisal Wincity with

22 stores, Sisal Matchpoint for sports and horse betting with 360 stores and 3,800 corners and Sisal Smartpoint launched in 2014 offering lottery and AWP with 450 outlets.

Cirsa Italia was founded in 1996 with Unidesa (the manufacturing arm of Cirsa). Cirsa Bingo followed in the year 2000 and then Cirsa Interactive. Today they offer the various activities to the Italian market via 15 independent subsidiaries. Cirsa has around 12,000 NewSlots and 2,500 VLTs in Italy.

Netwin Italia became a concessionaire in 2013 and is a company set up by two brothers Bruno and Davide Ricci Bitti who have been operating in the market for years via their companies RB Videogames, Nord Est GiochiNewco and Euromondial.

NTS Network is a company formed by a group of Italian operators which supply VLTs and NewSlots

Codere Network operates bingo, betting, slots and casinos and is present in eight countries. They have been present in Italy since 2000 and today have nearly 6,000 gaming places. They opened their first bingo hall in 2002 in Italy and in 2006 acquired Rete Franco Italia to become a



Italy's online gambling market is the second largest in Europe and accounts for 5.4 per cent of Italy's overall gaming industry. Casino games are responsible for the bulk of revenue with €439m (43 per cent) followed by Sports Betting with €350m (34 per cent) and poker with €138m (13 per cent). Other games such as bingo, lotteries, virtual betting, exchange betting and horse racing make up the remaining €97m (10 per cent share).

Corallo operates casinos via Atlantis World in the Caribbean whilst Global Starnet operated 60,000 slots and 6,500 VLTs plus several online gambling sites. It received a licence in Italy in 2004 and accounted for one third of Italy's VLTs.

ITALY ONLINE

Italy's online gambling market is the second largest in Europe and accounts for 5.4 per cent of Italy's overall gaming industry.

Italy was the first EU member state to legalise, license and regulate online gambling in a comprehensive way back in 2006. Licences run for nine years with a one off fee of €350,000. Biannual concession fees of €50,000 are also due. Tax is 20 per cent for games of skill, casino games, card games and bingo and 22 per cent for sports betting.

Revenue reached €1.02bn in 2016 which is a 25 per cent increase on the year previous. It is second only to the UK in terms of revenues and followed by France and then Spain.

The casino games are responsible for the bulk of revenue with €439m (43 per cent of market) followed by Sports Betting with €350m (34 per cent) and poker with €138m (13 per cent). Other games such as bingo, lotteries, virtual betting, exchange betting and horse racing make up the remaining €97m (10 per cent share) between them.

Mobile gaming accounts for around 23 per cent of the revenue and there were 92 Italian online

licences at the end of 2016 although this is expected to multiply when the government makes up to 120 new online licences available.

This tender for new licences was announced last year during the Italian Budget Law 2016 and was expected to take place by June 2016 but there were several delays and the AAMS were expected to launch the tender by the first quarter of 2017.

There were some 766,000 gamblers in Italy in 2016 (664,000 in 2015) and over 400 mobile initiative offerings. Some 1.79 million Italians bet at least once in 2016 up by 15 per cent from the previous year. On average a player spends €48 per month for online games

Bet 365 dominates the online sports book market with around 33 per cent of online wagering followed by Ladbrokes Coral's Eurobet brand, Sisal, Snaitech and then William Hill. There were 247 licences for sports betting in 2016.

In the online casino sector Lottomatica has the biggest chunk of the market (around 10 per cent) followed by Sisal, Amaya Gaming's Pokerstars, Eurobet and William Hill.

Virtual betting is growing with Goldbet and Snaitech the main operators and online bingo is dominated by Raffles International (38 per cent) and then Bwin.

The growth is said to be down to the strong

state concessionaire for slots and VLTs and operate the Gaming Hal Codere.

Global Starnet, previously called B Plus Gaming and before that Atlantis World, saw its concession cancelled in March 2017 for unpaid taxes. The company was founded by Francesco Corallo, currently involved in a money laundering and corruption scandal in Curacao.

CASINO REVENUES DATA 2015-2016

CASINO	REVENUES	TABLE GAMES	SLOTS	TIPS	VISITORS
San Remo					
2015	€48.4m	€10.8m	€34.4m	€3.2m	227,000
2016	€48.2m	€10.7m	€34.4m	€3.1m	228,000
Venezia					
2015	€106.9m	€42.5m	€50.6m	€13.8m	765,000
2016	€107.8m	€44.7m	€50.6m	€12.5m	753,000
Campione					
2015	€101.4m	€30.2m	€64.8m	€6.4m	722,000
2016	€99.2m	€26.4m	€66.4m	€6.4m	711,000
Saint Vincent					
2015	€74.6m	€30.3m	€34.3m	€10.0m	496,000
2016	€67.6m	€26.5m	€33.1m	€8.0m	516,000

Reports

ITALY MARKET REPORT

Poker has been on the decline despite it being the most dominant online game back in 2012, accounting for half of online revenue. But it saw a 15 per cent drop in 2016 in cash game stakes and tournament spending was down by 1.5 per cent. There are plans afoot of sharing online poker liquidity with other European regulated markets which could see this

regulations which blacklist or inhibit some 6,000 dot com websites whilst leading international suppliers also deny their services to unregulated operators. Player spending on illegal sites is now decreasing and spending on legal online sites is increasing. There are currently 84 operators active in the online market.

The government takes around €247m in taxes (2016) although the government is due to increase taxes on gambling winnings above €500 from six per cent which it stands at now to 10 per cent. Lottery winnings will see an increase on all winnings from six per cent to eight per cent.

Meanwhile poker has been on the decline despite it being the most dominant online game back in 2012 accounting for half of online revenue. But it saw a 15 per cent drop in 2016 in cash game stakes and tournament spending was down by 1.5 per cent. There are plans afoot of sharing online poker liquidity with other European regulated markets which could see this sector boosted.

LOTTERIES

Lottomatica is one of the largest lottery operators worldwide and also the market leader in the Italian gaming industry and a subsidiary of IGT.

The company also operates instant lotteries (scratchcards), NewSlots, VLTs, sports betting and online interactive games via lottomatica.it and totosi.it.

Since 1993 the company has run its lottery online 'Lotto' and since 2004 has also had the concession for instant and traditional lotteries. It distributes its games and services through one of the most extensive real-time, online networks in Europe and has a network of 34,000 lottery terminals and 64,000 points of sale.

In 2016 Lottomatica was awarded the concession to operate the lotto game for another nine years at a cost of around €770m.

The online portfolio includes Lotto and €10 Lotto, Scratch and Win, betting, poker, casino and bingo games, skill games, fantasy sport and Totocalcio and Tris.

The sports betting sector has a network of 1,500 sales outlets and online sales is via lottomatica.it under the Better brand which offers TotoGol, Big Match, football betting and horse racing bets.

Totosi is the brand for horse race betting and sports betting which since 2008 has been part of the Lottomatica group and bets can be made online or via a telephone service.

The company also operates VLT games and NewSlots. The company provides VLTs under the brand of BetterSlot which provides games from Spielo, Novomatic and Inspired. Revenue for Gtech in 2015 from Italy's lottery and gaming concessions amounted to €1.4bn. Italian revenues reached \$449m in the fourth quarter of 2015 whilst total Lotto wagers for this quarter were €2.14bn, a 15 per cent growth on the same period the previous year. Instant ticket wagers were €2.28bn whilst sports betting wagers increased by six per cent on growth in live wagers.

CASINOS

Italy has four landbased casinos. The sector has been suffering losses since 2005 of amounting to €300m due to pressure from the other gaming sectors particularly Comma 6 games and VLTs plus competition from bordering Maltese, Slovenian and Swiss casinos.

Italy is subdivided into 20 regions – Abruzzo, Aosta Valley, Abulia (Bari), Basilicata (Potenza), Calabria (Catanzaro), Campania (Naples), Emilia-Romagna (Bologna), Friuli-Venezia Giulia (Trieste), Latium (Rome), Liguria (Genova), Lombardia (Milan), Marche (Ancona), Molise (Campobasso), Piedmont (Turin), Sardinia, Sicily, Trentino-South Tyrol, Tuscany, Umbria and Veneto (Venice).

Only five of these regions – Aosta Valley, Friuli-Venezia Giulia, Sardinia, Sicily and



Trentino-South Tyrol have a special autonomous status which enables them to enact legislation on some of their specific local matters.

The Italian Penal Code generally forbids gambling, however, three ad hoc provisions authorised the opening of SanRemo, Campione and Venice followed by a regional authorisation for Saint Vincent. And so the Italian casino market remains small with only four licensed casinos.

The casinos come under the control of the Ministry of Interior and run by the local authorities in which they are located. Players must be 18 to gamble. In 2015 there were around 2,210,000 visitors to the casinos compared to 2,340,000 back in 2013.

Revenues (GGR and Tips) amounted to €331m in 2015 down from €338m in 2013. However it was a slight increase on 2014 figures and is the first time in seven years the sector has seen a growth rather than a decline.

Latest figures in February 2017 showed that Casino di Campione GGR was up 11.8 per cent on the previous year to €6.86m.



Casino di SanRemo also saw an increase up five per cent to €4.05m whilst Casino di Venezia saw a drop at its two locations down 10.8 per cent to €6.7m in February and Saint Vincent Resort also saw a drop of 17 per cent to €4.4m.

CASINO DI CAMPIONE is located in Campione d'Italia, an Italian enclave in Swiss territory on the shores of Lake Lugano, about 60 km from Milan. The casino was originally built in 1917 but two years later it was forced to close its doors and didn't then re-open until 1933.

In 2006 the casino hit the headlines when reports that the son of the last King of Italy, Vittorio Emanuele di Savoia, was accused of sending girls to casino clients.

In 2007 the new Casino di Campione opened which is 55,000 sq.m over nine floors. There are 778 slots housed on the first and second floor from video slots, video poker, roulette and the latest multigames.

There is also a sports book equipped with video wall for live matches. It is run by the Municipality of Campione.

CASINO MUNICIPALE DI SANREMO is Italy's oldest casino and opened in 1905 and was designed in the art nouveau style by French architect Eugenio Ferret.

The building is in the heart of the city and has remained relatively unchanged over the years although it was closed from 1940 until the end of World War II but escaped unscathed by the war.

San Remo began to develop as a tourism haven in the mid 19th century and winter tourism was promoted alongside the development of large hotels.

The casino complex is located over 2,500 sq.m consisting of restaurants and gaming halls for slots, table games and poker. There are 470 slots in total plus online gaming offering live roulette, slots and table games.

CASINO DE LA VALLE is located in the spa town of Saint Vincent in Valle d'Aosta some 90 km from Turin in North West Italy.

The first gambling house appeared in Saint Vincent back in 1872 as an attraction for visitors

to the spa. In 1921 a request to the mayor was made to open a casino although this didn't happen until 1947 when Casino de la Valle opened its doors, at the time in the halls of the Grand Hotel Billia. It's been recently renovated and modernised and is now 3,500 sq.m over two floors in a building opposite this hotel.

Today the casino has over 400 slots, poker room and table games.

CASINO DI VENEZIA. The first gaming houses were established in Venice back in 1638 although in 1959 the Casino Ca' Vendramin Calergi (Winter casino) opened its doors in Calergi.

Housed in an elegant Palace which overlooks Venice's Grand Canal it is said to be one of the most beautiful gaming houses in the world. Then in 1999 the Ca' Noghiera (summer casino) opened its doors and was the first American style casino located in a 5,000 sq.m building on the mainland near the airport. The casino is owned by Vittoriosa Gaming Ltd of which 40 per cent is owned by Municipality of Venice and BetLive Ltd. The casinos have 600 slots in each and various table games plus online games.

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MARKET REPORT POLAND



Change for the better?

Recent changes in the gaming law means Poland's online sector is about to open whilst slot halls will now be permitted, however with some particular restrictions in place and a monopoly situation, bets are on whether it will be an economically viable solution.

Poland is sandwiched in the heart of Europe between Germany, Czech Republic, Slovakia, Ukraine, Belarus, Lithuania and Kaliningrad Oblast (a Russian exclave) whilst the Baltic Sea completes the jigsaw.

The Baltic coastline is marked by several coastal lakes and dunes and although largely straight is indented by the Szczecin Lagoon, the Bay of Puck and the Vistula Lagoon.

The country is made up of lowlands in the centre and north rising to four hilly lake districts. The Masurian Lake District is the largest of the four

and covers much of north eastern Poland.

Mountain regions lie in the south with the Carpathian Mountains amongst them. The Tatra Mountain is the highest mountain group in Poland and is in the Carpathian range and runs along Poland's southern border.

Poland has 21 mountains in total over 2,000m high, 23 national parks, one of the highest number of lakes in the world and a coastline of around 528 kilometres.

Poland also hosts one of only five natural

deserts in Europe. The Bledow Desert was created thousands of years ago by a melting glacier and has a total area of 32sq.km.

Poland is divided into 16 voivodeships (provinces) and it is the 69th largest country in the world and the ninth in Europe with over 38.5 million people, making it the 34th most populous country in the world and eighth in Europe.

Poland is considered to be one of the more resilient post Communist countries and one of the fastest growing in the EU. It has a strong



Meanwhile the number of tourists to Poland increased after it joined the EU and today contributes significantly to the country's overall economy whilst also making up a large proportion of the service market.

There are around 26 million tourists each year in total, of which six million are foreign tourists, who stay in some 10,000 tourist establishments with 710,000 beds from hotels to hostels.

It is the 16th most visited country in the world by foreign tourists ranked by the World Tourism Organisation and it offers a range of activities from skiing, sailing, mountain hiking, historical monuments and beach holidays. The majority of visitors to Poland come from Germany, UK and Ukraine and in total they spent 15 million nights in the country in 2016.

Tourism contribution to GDP was PSN75.3bn in total (4.4 per cent of GDP) whilst the sector supports some 273,000 jobs directly.

GAMING LAW CHANGES

Poland's gambling market is governed by the Ministry of Finance and dates back to the middle of the 18th century when the first classic lottery was established in 1748.

The income from this lottery went to the building of the Collegium Nobilium (College Hospital) and also the Infant Jesus Hospital in Warsaw.

The real beginning of numerical games began in 1768 with the aim of supporting the State Treasury. An agreement between the Treasury Committee and Genoa Company was made the following year and the first Polish agency of its kind was founded called Lotto di Genowa.

This enabled rich citizens to gamble and this went on until 1839 when the lottery dissolved. After independence in 1920 a permanent lottery was established and in 1936 the lottery operation was taken over by a state company under the name of Polski Monopol Loteryjny (PML).

The lottery was suspended during the war but after the second World War PML gained a competitor called Totalizator Sportowy and this company was later established as a state institution in 1955 and started functioning the following year. The same year saw the beginning of bookmaker bets in Poland.

For many years the Polish market operated in a largely unregulated situation especially during the 80s and 90s until a law was pushed through in 1992 which mostly tightened up the casino laws.

This law was later amended in 2003 and although there was no specific law for online gaming, in 2009 online gambling was banned after a scandal in the government and stringent anti online laws were passed brought in.

The Gambling Act 2009 (amended in 2011) was introduced by then Prime Minister Donald Tusk who banned gambling outside of casinos and online gaming. The law at the time essentially dealt with the land based sector and placed limits on casinos and their locations and game

domestic market, low private debt, flexible currency and is not dependent on a single export sector. It was the only country to have avoided the global recession.

The country saw a shock therapy programme initiated in the early 1990s to enable the country to transform its socialist style planned economy into a market economy. It became the first post communist country to reach its pre-1989 GDP levels which it achieved by 1995 thanks to a booming economy.

The country is headed by President Andrzej Duda who took office in 2015. Back in 2010 the then President Lech Kaczynski plus 89 other high ranking Polish officials died in a plane crash in Russia. Kaczynski had served as PM since 2005 and was the twin brother of former PM Jaroslaw Kaczynski. He was succeeded by three acting Presidents before Bronislaw Komorowski took office in August 2010 until 2015 before Duda took the helm.

Economic growth this year is expected to

increase to 3.1 per cent during 2017/18 up from the 2.5 per cent in 2016. The renewed growth, after a slump since 2013, is mainly attributed to reduced EU development funds and controversial domestic politics which saw a reduction in investment. GDP per capita was at €11,250 in 2015 whilst unemployment rate is 9.8 per cent.

Today Poland's most successful exports include machinery, furniture, food products, clothing, shoes and cosmetics whilst Germany is the largest trading partner.

Many small and medium state owned companies have been privatised and a liberal law on new firms setting up has allowed the private sector to develop considerably. Poland even overtook the Netherlands in 2010 to become Europe's sixth largest economy.

Poland became a full member of the European Union in 2004 and since this time there has been a mass emigration with over 2.3 million Poles now living abroad.

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offers. It also made all forms of online gambling illegal, although sports betting was permitted, albeit limited in terms of only permitting Polish based operators and with a high tax rate of 12 per cent on turnover.

It has been said since that because of this law "Poland suffered enormous multibillion losses". In turn it also caused problems legally and was brought up by the EU who claimed the ban on non Polish companies was in violation of EU free trade treaties. The ban was lifted in 2011 via an amendment which stated instead that companies had to be headquartered in Poland to receive a licence.

Despite this only four companies applied for a licence at the time meaning around 90 per cent of business was dealt with by unlicensed companies.

Meanwhile the 2009 law also saw a ban on slots located outside of casinos. Gaming halls could remain open until their permits expired and so some have still been in operation until 2015. Since then however it is believed a black market has simply appeared with tens of thousands of illegal slots operated throughout the country. Penalties are high, although rarely enforced.

There are still only a handful of state licensed betting sites in the market and many players simply find better value on other offshore sites where they can freely gamble.

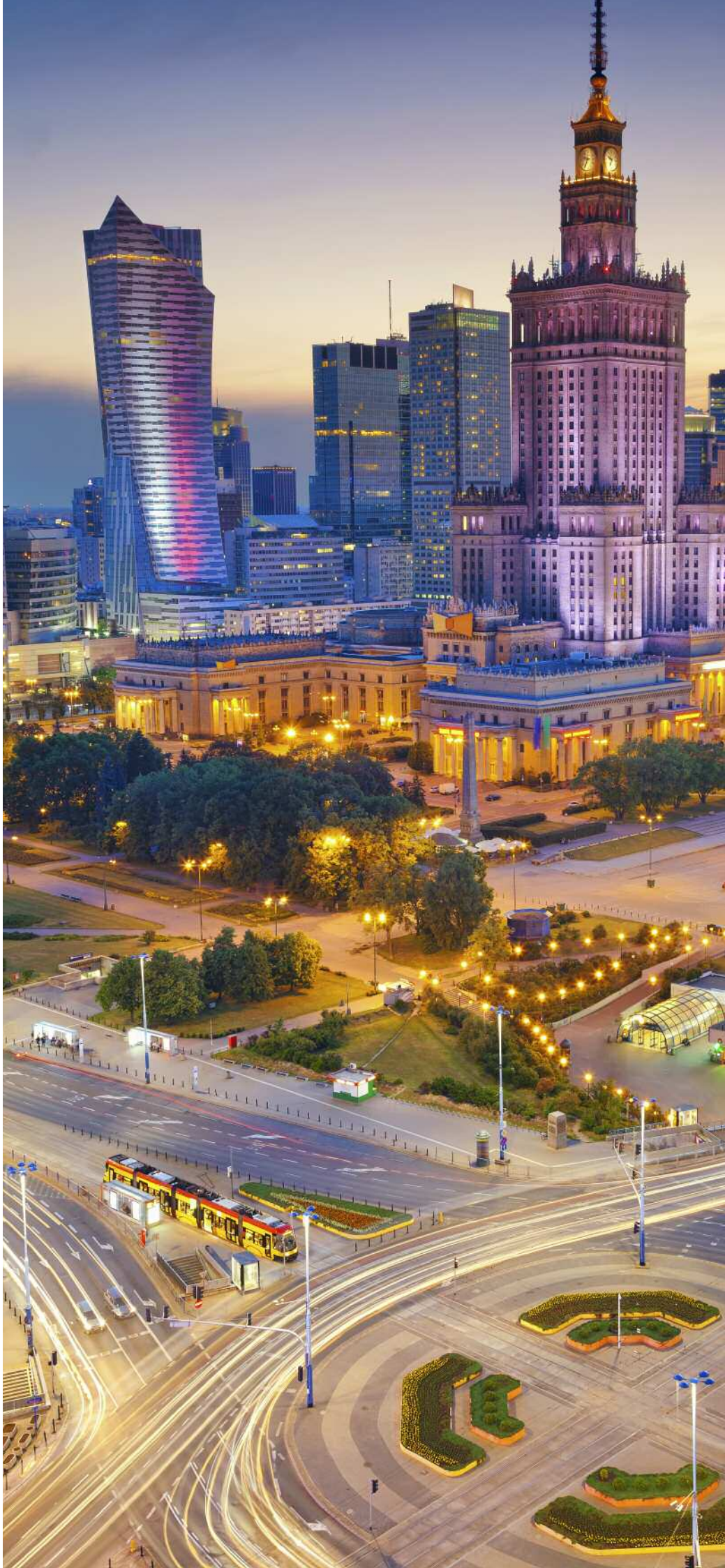
Operators were required to get a licence from the Minister of Finance to offer online betting and had to offer this via a Polish domain name whilst all money transactions had to be processed by a Polish bank or branch of credit institution. The company had to have a share capital of at least PLN2m.

Alongside the 12 per cent tax on stakes, locally based operators also had to pay 19 per cent corporate income tax and various licensing fees. Meanwhile a player must also pay 10 per cent income tax when winning more than €544.

With sports betting being the only legal form of online gambling it has become popular and the Polish have a big passion for football betting in particular.

Czech firm Fortuna Entertainment was issued a licence back in 2012 to cope with the demand and the company has since gone on to become a market leader with a 30 per cent market share.

In 2014 Poland also opened up to payment methods such as Skrill and Neteller as these were previously blocked in Poland so this made it easier for the Polish to bet on their favourite sites.





Impact on the lottery sector



Adam Lamentowicz,
CEO, Totolotek

How will the new amendments affect the sports betting sector?

"Totolotek and Intralot, as its dominating shareholder, are looking with optimism towards the future and welcome the new Gaming Act with hope and satisfaction. Since 2009 when the current valid Gaming Act was introduced the Polish market was flooded with illegal (offshore) dot com operators which have dominated the market. It is currently estimated that over 90 per cent of the GGR goes abroad in an uncontrolled manner.

At the same time legal operators have been nearly pushed out of the market by very high levies and game tax, the highest in Europe, which have forbidden legal operators to effectively compete with 'off licence' competitors, servicing the Polish market via websites hosted in tax havens.

The new Gaming Act introduces very strict IP and payment blocking measures clearly imposing responsibility for blocking non-licensed operators in Poland to be executed by telecom providers and financial institutions, including payment gateways. Non-performance of those obligations will be triggering criminal and pecuniary penalties in great values. This means that black market won't be of course totally eliminated in Poland but we trust that the market will normalise and a legal market will grow.

The gaming tax has remained very high which may limit interest in legalising itself by many pure dot com operators, but we trust that it's a matter of time that GGR taxation is introduced in Poland based on the best practices from other jurisdictions. If that happens it will allow a healthy and competitive market to emerge in Poland, after many years of waiting and tremendous effort from local legal betting operators, who are united in their association

Which brings us to the most recent changes which were announced last summer when a new Gambling Act was presented which will basically reduce the unlicensed market, provide higher consumer protection against the risks of excessive gambling and increase tax revenues.

It is said the treasury loses an estimated PLN6bn each year in potential tax revenue due to illegal gambling activities with about 90 per cent of the online market made up of entities operating in Poland that do not pay taxes.

The goal of the amended bill is to keep away any international operators who still operate in the

of Polish legal sports betting operators, and have been advocating for needed changes over the past years."

What are your thoughts on the introduction of online slots and casino games to be run by the state monopoly?

"Monopoly is not the best market setting in any industry, including gaming. It is rare for national giants to create the needed expertise to run competitive online casinos or retail slots or VLT venues across the country. I believe multiple licensees should be selected which could execute the desired strategy of the Polish state in a strictly controlled manner and with help of modern systems.

This would be a better strategy to create a competitive, oligopolistic market with strict rules, rather than impose a monopoly which I fear won't have the needed tools to effectively compete with the black market of slot venues which run approximately 60,000 illegal machines across Poland as we speak. I trust the Polish state will rethink its strategy within a year or two and a more competitive market will eventually be created in Poland in the VLT market as well."

What changes would you like to see for the Polish online gambling and betting market?

"Totolotek is focused on the sport book market and hence we would like to see a Gaming Act to lower the taxation to a more manageable level. The 12 per cent tax on turnover is roughly equal to 60 per cent on GGR. This makes the sport book business very fragile and challenging to manage on the risk management and cost side. Tax on GGR would allow the business to be more predictable and hence allow its shareholders to invest more in company growth and technological and product development.

Another major need is for the Gaming Act and its normative acts to be more precise in defining what are the legal means of marketing, and which are not. It is common for Polish gaming acts (including the new Gaming Act of April 1 2017) to be very vague and prone to interpretation, which again does not allow for a stable business or level fields to be created for all existing or new coming legal operators. After all, what we need is a predictable business environment and regulator which wants to cooperate with licensed operators."

Polish market by enforcing a set of new restrictions including domain and payment blocks from unlicensed sites which will take effect in July this year. Those who already hold a Polish licence will still be allowed to advertise but cannot promote any banking services on their domains.

In late 2016 Poland's legislators approved various amendments to the Polish Gambling Act and it was signed by President Andrzej Duda in early January and sent to the European Commission. The changes came into effect by April 1st.

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The main changes involve:

- A block of websites to those who aren't local licensed gambling operators and a block of payments on sites on non local licensed operators by July 2017.
- Introduction of responsible gambling regulations
- Introduction of more online gambling activities from casino games to lotteries. So far only betting and online promotional lotteries were permitted and now all types from bingo, casino and poker will be allowed.
- However all online gaming sectors will now fall under the responsibility of the state monopoly (Totalizator Sportowy), with the exception of online betting and promotional lotteries.
- There will be higher fines for those breaching gambling laws.
- The 12 per cent turnover tax will be maintained and this will be for online casino, bingo and poker games and the existing online sports betting and lottery products.
- There will be a partial liberalisation of poker tournaments. Land based games and tournaments will now be permitted outside of a casino with a licence but online poker will come under the umbrella of the state monopoly.
- Slot machines, outside of casino, will now be permitted but will also now fall under the responsibility of the state monopoly which will run a network of gaming venues. There will be 35,000 slots brought into the market over the next few years in 50 initial locations. It is prohibited to operate any slot without a licence as from April 2017.
- Banking services or advertising of such services will be prohibited in slot machine

COMPARISON WITH REGULATED MARKETS*

	POLAND	FRANCE	DENMARK
REGULATORY REGIME	TURNOVER TAX	TURNOVER TAX	GGR TAX
GGR channelling rate	30%	60%	90%
GGR 2015	€83.2m	€781m	€192.5m
GGR per adult 2015	€2.5	€14.7	€41.9
Betting tax 2015	€11.2m	€206m	€34.7m
Betting tax per adult	€0.3	€3.9	€7.5

*A report by Roland Berger for the RGA shows the following comparison with other similarly regulated markets.

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venues and on online websites.

- The Fund for the Development of Civil Society is to be set up to receive additional funding from the sector.

THE ONLINE MARKET

News last year that Poland was to become the next country to regulate its online gambling market wasn't what the local operators were hoping for.

Although the ministers voted in favour of certain amendments to the current gambling laws the changes restricted the provision of online casino games to the national lottery operator Totalizator Sportowy.

The provision of online sports betting options was legalised a while back and now online poker and casino games are now permitted. But international operators who hoped to enter the market with licences are sadly disappointed as there will be a block of access to non licensed operators as well as banning payment service providers from offering their services on black listed sites.

Totalizator Sportowy will be granted control over all games of chance provided online. Apparently the government say the state

monopoly over such games is to help them control gambling addiction in what they see as the 'most addictive form of gambling'. Totalizator Sportowy will have to introduce measures for the promotion of responsible gambling.

Poland's online gambling market was said to be worth €83.2m (GGR) although around 90 per cent of this is held by grey market operators at the moment. The government believes once the new law is introduced they will take control of 40 per cent of the market initially which will increase to 80 per cent within three years.

The government says it could bring in an extra PLN637m in tax revenues for the first year of operations increasing to PLN2.32bn by three years.

The government's aim is to accomplish three main goals:

- Reduce the size of the grey market by eventually capturing 60 per cent of the offshore market.
- Increase player protection through responsible gaming rules
- Increase tax revenue via a greater share of

locally licensed operators.

The problem is by blocking offshore companies it is not only labour intensive and largely ineffective but also limits not only the competition in the market but also could limit tax revenues ultimately.

Other countries who have introduced similar blocking schemes have since found that this system doesn't work. Meanwhile with a 12 per cent tax basically paid for by the players at source, the winnings for Polish players betting on onshore sites are of course lower than those placed on offshore sites

Poland has seen a huge increase in the number of internet users over the last decade and by 2015 it is said internet penetration was 67 per cent whilst smart phone penetration was around 58 per cent the same year. Around 60 per cent of gamblers are aged between 18 and 24 and there are some 2,200 betting shops across Poland.

Meanwhile there are now queries as to how the European Commission will react to Poland's state run online casino ruling. Although there are some precedents out there in Sweden for example there is local lobbying in Poland which could well see the Commission step in.



Essential information and facts about Poland:

Country	Poland
Capital	Warsaw
Total Area	312,685 sq.km
Population	38,523,261
Median age	40.3 years
Ethnic groups	Polish (97%), Silesian (1.1%) other
Religions	Catholic (87%), Orthodox (1.3%), other
Languages	Polish (official), Silesian, other
Currency	Zlotych (PLN)
Government type	Parliamentary republic
Chief of State	President Andrzej Duda (since 2015)
Head of Government	Prime Minister Beata Szydlo (since 2015)
Cabinet	Council of Ministers proposed by Prime Minister, appointed by President and approved by Sejm.
Elections	President directly elected by majority vote. Next election 2020. Prime Minister appointed by President and confirmed by Sejm.

There are currently seven companies in Poland which hold licences for organising online betting games which are E-Toto; Fortuna; Milenium; STS; Totolotek; LV Bet and Casino Games.

Apparently Pinnacle Sports has already exited the Polish market due to the regulatory changes whilst William Hill and Bet365 have also recently exited the Polish market whilst Bwin is apparently applying for a licence to remain in the market.

Clive Hawkwood at the RGA said: "The extension of the state's monopoly to online slots and casino games arguably constitutes a breach of EU law, mostly because it is inconsistent with the regulation of online sports betting.

"Importantly also, we fail to see how this extension will help the Polish government achieve a higher channelling rate of Polish customers playing with the regulated offer as the government has been claiming all along. The publicly run company that is to operate these

games has no experience whatsoever in this sector and will most likely be unable to deliver an offer that is sufficiently competitive and attractive to the Polish customers."

THE SPORTS BETTING MARKET

Association football and volleyball are among the country's most popular sports whilst track, field, basketball, handball, boxing, motorcycle, ski jumping and ice hockey are also popular.

The golden era of football in Poland was during the 1970s until the early 1980s when the Polish national team saw their best results in the FIFA World Cup whilst the men's volleyball team is ranked third in the world.

Sports betting tax is currently 12 per cent on turnover. Last year it was proposed that the current levy be replaced with a 20 per cent GGR tax much the same as Denmark implemented when it also regulated online gambling. However amendments to the Gaming Act have kept the 12 per cent turnover tax in place.

Traditionally it is found that markets with turnover based tax have lower channelling rates than those with GGR based tax although some believe the tax rate will be changed in the next few years.

The total betting market in Poland is said to be worth PLN348m in GGR in 2015 and this was for both onshore and offshore operators which has grown annually be around 28 per cent since 2012 and was estimated to reach €443m in 2016 and €736m by 2025. Offshore player share of GGR is around 70 per cent.

Meanwhile the total turnover for the betting market in 2015 was €3.8bn total estimated to reach €4.8bn in 2016 and €7.9bn by 2025. Offshore operators make up 90 per cent of this at the moment.

Up until recently, there were around 15 main offshore betting operators in the Polish market, including Paddy Power, Betfair, Betclix, Bet365 and Bwin, all offering various products from sports betting to casino games. In 2016 there

LOCATION DATA

TYPE	NO. OF OPERATORS 2014	NO. OF OPERATORS 2015	NO. OF LOCATIONS 2014	NO. OF LOCATIONS 2015
Casinos	8	7	51	52
Slot halls	13	12	97	54
Betting/bookmakers	9	8	1,722	1,995
Internet betting	5	5	-	-
Numbers Games	1	1	8	8



The total betting market in Poland was said to be worth PLN348m in GGR in 2015, which was for both onshore and offshore operators which has grown annually be around 28 per cent since 2012 and was estimated to reach €443m in 2016 and €736m by 2025. Offshore player share of GGR is around 70 per cent.

were eight licensed Polish operators active in the market:

FORTUNA Entertainment Group operates more than 500 betting shops in the country and obtained its licence in Poland in 2012. It has a 33 per cent market share and alongside STS is the largest bookmaker in Poland. Sports betting for Fortuna saw an increase in stakes in Poland by 17 per cent in 2016. The company recently acquired Hattrick Sports Group for a push into Croatia and Romania.

Inspired Gaming has extended its partnership deal with Czech's Fortuna Entertainment Group and will now see its Virtual Sports product go

live in Poland both in betting shops and online. The deal between the two is extended until 2019 and will see them offering virtual sports products on Fortuna's Polish licensed site in 200 retail outlets this year. It makes the company the first operator in Poland to deliver the Virtual Sports content from Inspired.

STS (Star Typ Sport) was founded in 1997 and is one of the largest companies operating sports betting. The company has some 420 betting shops and received its licence for online betting in 2011. The company provides around 1,000 sporting events to bet on.

TOTOLOTEK has been a promoter of sports

betting in Poland since 1992 and operates some 300 sales outlets across the country and is the third largest operator with a 20 per cent market share. Totolotek's online betting licence was granted in 2013 and since 2004 the company has been a part of Intralot. They offer sports betting Toto Mix and Toto Racing, football betting Toto Liga and Toto Gol and horse betting Toto Lotek and because they offer sport Toto on horse and dog racing are the market leaders in this field due to their competitors' focus on FOB.

The company has reshaped its retail outlets over the last three years and invested in shops and products with a strong focus on the horse and dog racing sectors. They are now preparing for virtual games to be offered in the shops, due to the new gaming act.

E-TOTO has been operating since 2011 offering sports betting.

FORBET (Casino Games sp) went live in Poland with SB Betting Software's platform in 2016 via iforbet.pl offering various sports betting for both pre match and live betting.

MILENIUM operates via milenium.pl offering

REVENUE DATA

TYPE	REVENUE 2014	REVENUE 2015
Number games	PLN2.8bn	PLN3.5bn
Casinos	PLN3bn	PLN3.7bn
Slot halls	PLN14.bn	PLN701m
Betting	PLN1.03bn	PLN1.2bn
Lotteries	PLN718m	PLN847m
TOTAL	PLAN9.0bn	PLN10.1bn

LOTTERY

Totalizator Sportowy

LOTTERY RETAILERS

15,000

BETTING SHOPS

2,200

BETTING OPERATORS

8

BETTING REVENUE

€348m (GGR 2015)

CASINOS

45

CASINO SLOTS

2,271

CASINO REVENUE

PLN3.7bn

ONLINE OPERATORS

7

ONLINE REVENUE

€83.2bn (GGR)

TOTAL GGR

PLN10.1bn



Totalizator saw company revenues of around PLN3.5bn in 2014 of which the Lotto was responsible for the biggest share of PLN1.3bn. Under the new amendments the company will also receive the online casino and slot monopoly and Totalizator will now extend its current offering of lottery products and sports betting to include online slots.

various sports with betting and sweepstakes.

TRAF – (Betting Mutual sp) is a company within the Totalizator Sportowy company organising bets on horse racing and since 2012 also bets on French horse racing via PMU. Horse racing is held at Poland's main horse racing track Sluzewiec Racetrack, which is also home to the Warsaw Derby. This is one of four horse race tracks in Poland which also includes Partynice in Wroclaw plus the hippodrome in Sopot (no horse racing held for some time) and a private race track in Krakow.

The most important races are held in Warsaw at Sluzewiec which opened in the 1930s and operates around 55 days of racing each year with almost 500 horse races. Partynice which was opened in 1907 is home to the Wielka Wroclawska Steeplechase, Hurdle and Oaks.

Finally LV BET offers sports betting and a range of international sports. The company has 17 betting shops or via online lvbet.pl.

THE SLOTS MARKET

Currently the operation of slot machines outside

of casinos is not permitted under the 2012 law.

However under the new gaming act slots will now be permitted, depriving casinos of their monopoly position.

However these slots will fall under the responsibility of the state monopoly (Totalizator Sportowy) and there will be increased supervision over the production, distribution and location of the slot machines. The previous cap of 60,000 slots has been lifted.

Totalizator Sportowy is the state owned lottery company which runs the Lotto brand and has some 60 years experience in the market with a network of more than 15,000 points of sales which now work with an online system.

Totalizator is currently the official sponsor of the Ekstraklasa football league and owner of the Lotto brand which can be purchased in 820 outlets. It also leases the Sluzewiec horse racing track and organises racing events. Other lottery games include Multi Multi with daily draws; Zdrapki scratch tickets; Kaskada with daily draws, Mini Lotto with daily draws, Keno and

Ekstra Pensja a unique game offering a monthly payment for 20 years as a prize. In addition in April the company will also start with Eurojackpot joining 17 other countries where this game is available – traditionally the draw is held every Friday in Helsinki with huge prizes.

Totalizator saw company revenues of around PLN3.5bn in 2014 of which the Lotto was responsible for the biggest share of PLN1.3bn. Under the new amendments the company will also receive the online casino and slot monopoly and Totalizator will now extend its current offering of lottery products and sports betting to include online slots.

In response to the new slot business for Totalizator Sportowy there are now some questions over who will supply the slot products to the state monopoly.

Despite rumours IGT Global Solutions Corporation and IGT Poland both stated in March that they have not entered into a contract for the supply of slots for the Totalizator group. Back in 2010 a consortium from Data Trans and GTECH won the tender for the operation of the



lotteries and systems for Totalizator to run until 2018.

Totalizator has now announced that it plans to open 50 gaming halls with low prize slots by the end of this year and will be partnering Polish companies – Exatel, Polish Security Printing Works and Military Communications Works – who will be responsible for the preparation and delivery of the machines.

The aim is to introduce a total of 35,000 machines into the market in the next two to three years. It seems the Polish companies developing the machines will develop the software and main components and buy in the game. The company plans to launch a prototype in late May or early June and after three to four months machines should be ready for mass production.

At the moment it is said the Polish market loses around PLN552m annually in gambling losses. According to sources in 2015 there were some 29,000 slots operating without permits in Poland.

The new slot hall market is expected to see repercussions for the casino market which is quite robust in Poland. There are currently a total of 45 casinos open at present (2017). The number of games in casinos and slots halls in 2015 was 146 cylindrical games, 218 card games, 2,271 slots in casinos.

Since the 2009 Gaming Act slots were only permitted in casinos and there are now

View from the bookmakers



Marta Kostka,
President,
Association of Bookmakers
and Bookmakers' Employees

How will the new amendments affect the sports betting sector?

“The Association of Bookmakers and Bookmakers' Employees (SPIPFB) has been closely following the changes underway in the Gambling Act. The amendment in question is particularly important considering the amount of losses incurred yearly by the Treasury due to illegal gambling offered online in Poland (with yearly turnover at around PLN6bn).

The conditions created by the existing law have been extremely favourable to those bookmakers who conduct their operation in a legal manner. This led to a situation where as much as 90 per cent of the online market

share belongs to entities that operate in Poland without proper permits, fail to observe Polish laws and do not pay national taxes. Such entities are unfair competition for legally operating companies that pay their taxes, employ thousands of people and sponsor Polish sports.

The Association believes that the amendment may lead to fairer competition on the Polish bookmaking market and may prove an efficient tool in reducing the many issues that plague the Polish betting industry. In addition the aforementioned changes may also bring improved social protection against illegal gambling. For this to be effective however, competent authorities must vigorously enforce the act. Demonstrating resolve in the proper enforcement of the new law is particularly important considering the news suggesting that blocking illegal operators' website and payments in line with the amendment, may prove ineffective.

What is more, further changes in law should be considered and applied. The Association has long been appealing for the tax modification in Poland. Rationalisation of tax rates and changing the tax base seem to be suitable both for the sector and state. We are convinced that GGR tax is one of the most efficient options.”



currently no AWP's outside of casinos as these have been filtered out of the market and have not been legally operated since 2015. In 2014 there were still 1,732 in slot halls.

Each concession issued for a casino operation states how many slots approximately can be offered in the casino and this is usually between 50 and 70.

The main casinos operators are Casinos Poland, Zjednoczone Przedsiębiorstwa Rozrywkowe (ZPR Group), Finkorp, Estrada Polska, Casino and Bingo Centrum.

The gaming law permitted a maximum of 70 slot machines per casino and licensees must re-apply for their licence every six years once it has expired. Gaming tax is 50 per cent on GGR and poker games have not been permitted unless for tournament use only.

The total number of licences in Poland for casinos is limited to 52 and subject to regional limitations.

One of the biggest operators is Casino Poland. US company Century Casinos holds a 66.6 per cent stake in Casinos Poland whilst Polish Airports holds the remaining and they operate eight casinos in seven cities operating some 500 slots between them and 75 table games. These casinos are the Casino Warsaw in the Marriott Hotel; Casino Warsaw in the LIM Center; Casino Sosnowiec in the City centre; Casino Wroclaw in the HP Park Plaza Hotel; Casino Krakow in the Hotel Dwor Kosciuszko; Casino Lodz in the Manufaktura; Casino Poznan in the Hotel Andersia and the Casino Plock in the Hotel Plock.

One of the biggest operators is Casino Poland. US company Century Casinos holds a 66.6 per cent stake in Casinos Poland whilst Polish Airports holds the remaining and they operate eight casinos.

Casino Katowice closed last year when its licence expired although Casinos Poland has applied for a new licence in the city to open by end 2017. The company has moved its casino operations to Sosnowiec casino until the new licence is received.

In the company's annual report it said: "The new Polish gaming laws will permit online gaming and slot arcades operated through a state run company. We do not anticipate the changes in the gaming laws to have a significant impact on our operations in 2017 though these changes could increase competition and adversely affect our results of operations in the future."

Net operating revenue for Casinos Poland totalled \$54.9m (39 per cent of total net operating revenue for the company) in 2016 which was also a 10 per cent increase on previous year due to increased gaming revenue. Casinos Poland has been in operation since 1989.

Another large operating company is ZPR SA which was established in 1973 and is one of the biggest media and entertainment companies in Poland. They operate 20 casinos under the brand HIT Casinos and one under Casino Palace. They are located across 16 cities with one in each city and two in Krakow and four in Warsaw.

There are a total of 100 gaming tables and 1,000 slots across the casinos.

Meanwhile Olympic Casino was forced to freeze active operations in Poland in September 2016 due to "lack of valid location specific activity licence". The company remains interested in the market and has applied for a casino licence and is awaiting the decision of the Ministry of Finance.

Olympic Casino operated the Warsaw Olympic Casino Sunrise via its Casino Polonia-Wroclaw sp z oo subsidiary. The application of their previous licence was rejected by the Ministry reportedly because they filed the paperwork after the due date. The casino had been operating for the last nine years.

Meanwhile the hotel industry is growing. According to reports some 20 new hotels are planned for the Warsaw area between 2017 and 2020 offering around 3,000 rooms whilst in Gdansk there are 15 planned new hotel openings with 1,500 rooms.

At the moment there are some 2,600 hotels in Poland offering a total of 125,000 rooms. Hotel operator Orbis reported PLN207.13m consolidated net profit in 2016 whilst sales stood at PLN1.38bn.



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PERU MARKET REPORT

What economic crisis?

In stark contrast to its neighbours in Latin America, Peru's economy has experienced growth for the last 18 years. Emerging from a profound debt crisis in the 1980's and facing rapid economic decline by the end of the decade the country has since then become one of the strongest performers in the region.

Today while Brazil experiences a deep recession and Venezuela spirals ever deeply into economic crisis Peru's economy has continued to grow. In April the IMF stated that it expects Peru's GDP will climb 3.5 per cent in 2017. While this is slower than the 6.1 per cent growth which the country experienced between 2002 and 2013 it is still one of the highest growth rates in the region putting it second only behind Bolivia.

Peru remains a centre of attraction for investment and crucial to Peru's strong economic outlook has been its strong economic ties with China and high global prices for commodities helping its economy to more than double in size since 2006. In 2015 China bought US\$7.4bn of goods in 2015 or 19.6 per cent of Peru's total exports.

Meanwhile, the tourism industry in Peru continues to grow and today makes up the nation's third largest industry after mining and fishing. Indeed tourism is growing in Peru faster than any other country in South America. According to the Foreign Trade and Tourism Ministry (MINCETUR), Peru's inbound tourism experienced an increase above 40 per cent

between 2011 and 2016 and 3.5 million foreign tourists visited Peru in 2016, outmatching the numbers of the previous year by about 7.5 per cent.

CASINOS AND SLOT MACHINES

LEGAL BACKGROUND

Slot machines were first permitted in Peru in 1991 and were allowed in hotels with the money generated by the industry aimed at raising income for the tourist industry.

During the 1990's laws were changed in order to allow slot machines in other small businesses after the Municipal Taxation Act was passed in 1993 which gave MINCETUR the right to issue regulations for slot machines and similar games. MINCETUR then approved regulations which gave the municipal governments the right to authorise and oversee companies in the industry. Under new rules slot parlours would be allowed in hotels with 3 stars and above as well as a number of other business establishments.

A special tax also went to the municipal

governments where they were located. As a result a large number of licences were granted and the number of slot parlours boomed. In order to create a more closely regulated industry amidst growing concern that gaming was spiralling out of control and unchecked the government passed Ley N° 27153 "The Law that Regulates the Operation of Casino Games and Slot Machines" in July 1999.

The law put much stricter rules in place when it came to the operation of slot parlours and slot machines nationwide and shifted control away from the municipal governments and back to the central government. It also established that slot parlours and casinos would not be permitted within 150 metres of a school or any other kind of educational facility, church or hospital. Casinos and slot parlours would only be permitted in the provinces of Lima and Callao in four or five star hotels and five star resorts as well as five star (rated as tenedores forks in Peru) restaurants. Meanwhile casinos and slot parlours in the rest of the county would only be permitted to operate in three and four star hotels and five star resorts (or their equivalent) as well as five star restaurants.



The 1999 act also included much stricter rules when it came to the operation of slot parlours and casinos including tighter security and player protection measures and it also put in place heavy sanctions for non compliance and set up a new tax regime for the industry. At the same time it created an interdepartmental body called the National Casino and Slot Machine Commission (CONTACTRA) which would form government policy on the issue from that point onwards.

The passing of the law was followed by a long period of legal uncertainty in the industry. Faced with closure as they no longer met with the legal requirements of the new act a large number of slot hall owners appealed to local courts and filed a writ of amparo – a remedy for the protection of their constitutional rights and were as a consequence able to remain open with the help of local courts. This situation lasted for over seven years and by the end of 2006, only 3,000 slot machines were officially registered with the Peruvian government and a further 59,000 slot machines were operating nationwide without a license.

As a result of an increasingly chaotic gaming landscape the Peruvian government was forced to take drastic measures and the clampdown really began in earnest in 2004. The government gave casino and slot machine parlour owners a year to get their house in order: pay tax, register their slot machines and provide evidence that they were operating fairly. But the new legislation was, in most cases, simply ignored. And when the government did intervene to try

NUMBER OF SLOT PARLOURS AND CASINOS IN PERU

2016	Slot Parlours	Casinos	Total Machines
Total	722	19	77,756
In Lima	409	15	48,015
In Provinces	313	4	33,535

and shut down a slot parlour, invariably the operator appealed to the courts and received an extension of their license.

In 2006 a court ruling which had allowed for slot parlours and casinos to remain open finally became void and in December the Peruvian government passed Law N° 28945 “The Reordering and Formalization of Casino and Slot Machines Law.” The law declared that court order granting stays of closure, under habeas corpus rulings were invalid. The new law also ruled that from January 1, 2007 onward operators had to register or face immediate closure and created a new gaming board called The General Directorate of Casino Games and Slot Machines (DGJCMT) which came under MINCETUR. The law allowed the new gaming board permission to grant express permits to operators which were granted within 30 days while financial findings regarding the operator were verified by Peru’s Financial Intelligence Unit. Express licences were granted for an initial period of five years and could be renewed for successive periods of four years.

In addition penalties were increased for non compliance including fines, closures, as well as

ten years to life long bans for those found to be breaking current rules. Those who had not applied for an express licence under the new regime faced immediate closure under the terms of the new act while slot machines and equipment which had not been authorised by the newly established gaming board would be destroyed within 60 days of the new act going into effect. Over the following months, MINCETUR received over 600 applications from slot parlour and casino operators for permission to formalise their businesses and register with the government.

To illustrate how effective these new measure were in 2007 there were just 36 gaming establishments which had been officially authorised by the government to operate. Meanwhile unauthorised establishments stood at 771. This meant that just 3.63 per cent of slot parlours and casinos were operating legally. By 2010 the number of registered gaming operations had risen to 741 meaning that the gaming control board had turned an industry that had previously operated almost entirely outside the scope of the law into an industry that was almost entirely legitimate within the space of just three years.

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ONLINE CONTROL

In September 2010, MINCETUR announced that slot machines would, in the future, be monitored online by a central government-controlled server. In late December 2012 the government released its first estimates on how the new system would impact gambling tax revenue stating that tax revenue could double by the end of 2013.

The new act gave all gambling operations six months in which to comply with the new law with gambling operators assuming the cost of ensuring that their slot machines and other gambling devices were compatible with the new online system. Meanwhile MINCETUR was responsible for developing and implementing the infrastructure necessary for monitoring the industry 24 hours a day 365 days a year.

Today the country's Monitoring and Control Systems model (SUCTR) connects 77,756 slot machines and gambling devices which report directly to MINCETUR's data centre, relaying information regarding revenue and significant events to better control the gaming industry nationwide.

OTHER CONTROLS

The DGJCMT as the regulatory body must ensure that:

- Casino games and slot machines are conducted with honesty, transparency and with equal treatment.
- It must establish protection measures for vulnerable groups.
- It must prevent the exploitation of casino games and slot machines from being used for illicit purposes.

Meanwhile, the National Superintendence of Tax Administration (SUNAT) is responsible for tax collection while the Financial Intelligence Unit of Peru (UIF) is responsible for monitoring illicit financial activity such as money laundering.

Money laundering and other financial controls over the industry have also been tightened further. Since June 1 2016 casinos and slot parlours now adhere to the Asset Laundering and Terrorism Financing Prevention System (SPLAFT) which establishes policies, processes and procedures to prevent products and services from being used for illegal purposes.

The rules are applicable for those operators who run 500 or more slot machines in total, as well as those operators whose gaming establishments are located in the regions of Tacna, Puno, Ucayali, Loreto, Tumbes and Madre de Dios. The new rules for gaming operations state that:



The government continues its crackdown on illegal gaming and now even more closely monitors the industry by carrying out frequent on-site inspections. As a result illegal gaming via slot machines only generates around US\$1.5m a year

- The money laundering prevention system must be overseen by a compliance officer.
- Operators must implement a money laundering prevention system by managing the risks to which they are exposed.
- Operators are be required to maintain a record of all those clients who make bets of US\$2,500 or over as well as the winners of high payouts.
- Operators must carry out due diligence on all staff.
- Operators must confirm the identity of their clients and maintain records for five years.
- Any suspicious financial transaction

regardless of the amounts involved, must be entered in a register of suspicious transactions and must also be reported to the Financial Intelligence Unit in a period not exceeding 15 working days.

TAXATION

Today operators pay 12 per cent on net win. 2016 was a record year for the industry and operators paid around US\$100m in taxes. Today, thirty per cent of all tax income generated by gaming goes to provincial municipalities. Thirty percent goes to district municipalities. Ten percent goes to the Peruvian Institute of Sports. Fifteen per cent goes to the public treasury, and the remaining fifteen per cent goes to MINCETUR. As a result of increasing government control tax income generated for the industry has gone up significantly year on year.



TAX REVENUE

Year	Tax in Soles Millions	Tax in US\$ Millions
2005	49	15
2006	50	16
2007	109	34
2008	170	53
2009	163	51
2010	187	58
2011	195	61
2012	218	68
2013	269	84
2014	278	87
2015	279	87

ILLEGAL GAMING

The government continues its crackdown on illegal gaming and now even more closely monitors the industry by carrying out frequent on-site inspections. As a result illegal gaming via slot machines only generates around US\$1.5m a year making up around 0.5 per cent of the total market – an extremely small amount compared to other jurisdictions in Latin America. In 2016 raids continued apace and the board closed down 17 slot parlours in 2016 and

confiscated 792 slot machines and 12 gaming tables.

OPERATORS

Due to strong guarantees regarding foreign investment and its openness to foreign trade the market has generated considerable interest from foreign operators. According to Manuel San Román Benavente the head of the DGJCMT in a recent interview investors from a wide number of countries including Bolivia, Korea, Ecuador,

Spain and many other countries are looking to get onboard.

Meanwhile, a number of foreign operators are already well positioned in the market including some of the world's leading casino operators. Thunderbird Resorts operates a number of establishments in Peru including the Fiesta Hotel and Casino a full service Casino/Hotel in Peru. The three story casino is located in the city of Lima. It houses 413 slot machines and 36 tables. The company also runs two Luxor Casinos as part of its Peru portfolio and two Mystic Slot parlours both of which have held a significant position in their respective markets for many years.

Another well established operator in Peru is Dreams. In January 2013 Dreams SA purchased the New York Casino for US\$24m. It was the first time Dreams had moved its main brand outside of its domestic market of Chile although it has operated some 800 slots in Peru for nearly five years through its subsidiary Advanced Gaming. The Casino New York, located in the district of Magdalena del Mar in Lima, is Peru's third largest casino with 500 slots and 20 gaming tables.

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The only law which specifically relates to sports betting dates back to 1942 in Peru's Civil Code which grants the private sector the right to enter the market as long as the company adheres to Peru's Civil code and adheres to the terms of their licence as granted to them by the municipal government.

In June 2016 after Dreams and South African Sun International merged forming Sun Dreams the company announced that it would invest US\$250m in the Peruvian market. Peru was seen as a key market for the new company once it had merged. According to a company statement the money will be used to improve its operations in Peru and be used to invest in a new Las Vegas style casino in capital Lima.

Other operators looking to become involved include Enjoy. In June 2015 the Chile-based operator said that it would open four casinos in the near future with one of them being developed in Punta Sal in Peru.

Meanwhile in March 2015 the Hard Rock Casino brand announced that it could soon open its first casino in Peru. Already in its advanced planning stages the director of Hard Rock Café Lima, Alberto Araujo, said that the company hopes to open the first Hard Rock Casino following the opening of a second local Hard Rock restaurant in Lima.

HORSE RACING

Horse racing is regulated by the provincial municipalities and have a long history in Peru but attendance is now in decline. There are two racetracks in Peru. The Hipodromo de Porongoche was located in the city of Arequipa in the far south of the country. It was first opened in 1929 and changed location to make way for a shopping mall in 2008 with the money used to pay off the debts which the track had accumulated over several years. The new track the Hipódromo Arequipa opened in 2009 in Cerro Colorado but has been plagued by a number of administrative problems. The other larger track, the Hipódromo de Monterrico, is located in capital, Lima. Horse racing though is still quite popular off track and there are around a hundred off track betting shops nationwide known as "telepódromos" which are run by the Jockey Club del Peru. Around 85 per cent of bets are made via the off track betting shops. In addition Monterrico Televisión, a cable television station, broadcasts races live from the

track in the capital. Players can also register to bet via the telepodromo.com website..

LAND BASED SPORTS BETTING

Sports betting centres are permitted via municipal licence and there is no specific authority that regulates them. The only law which specifically relates to sports betting dates back to 1942 in Peru's Civil Code which grants the private sector the right to enter the market as long as the company adheres to Peru's Civil code and adheres to the terms of their licence as granted to them by the municipal government. Apart from off track horse race betting shops there are a small number of other sports betting locations in Peru such as those run by Costa Rica International Sports (BetCris) .

In all there are ten BetCris sports betting outlets which either take the form of stands located in supermarket forecourts and in shopping centres or as small stand alone sports betting shops. However there is one BetCris sports betting



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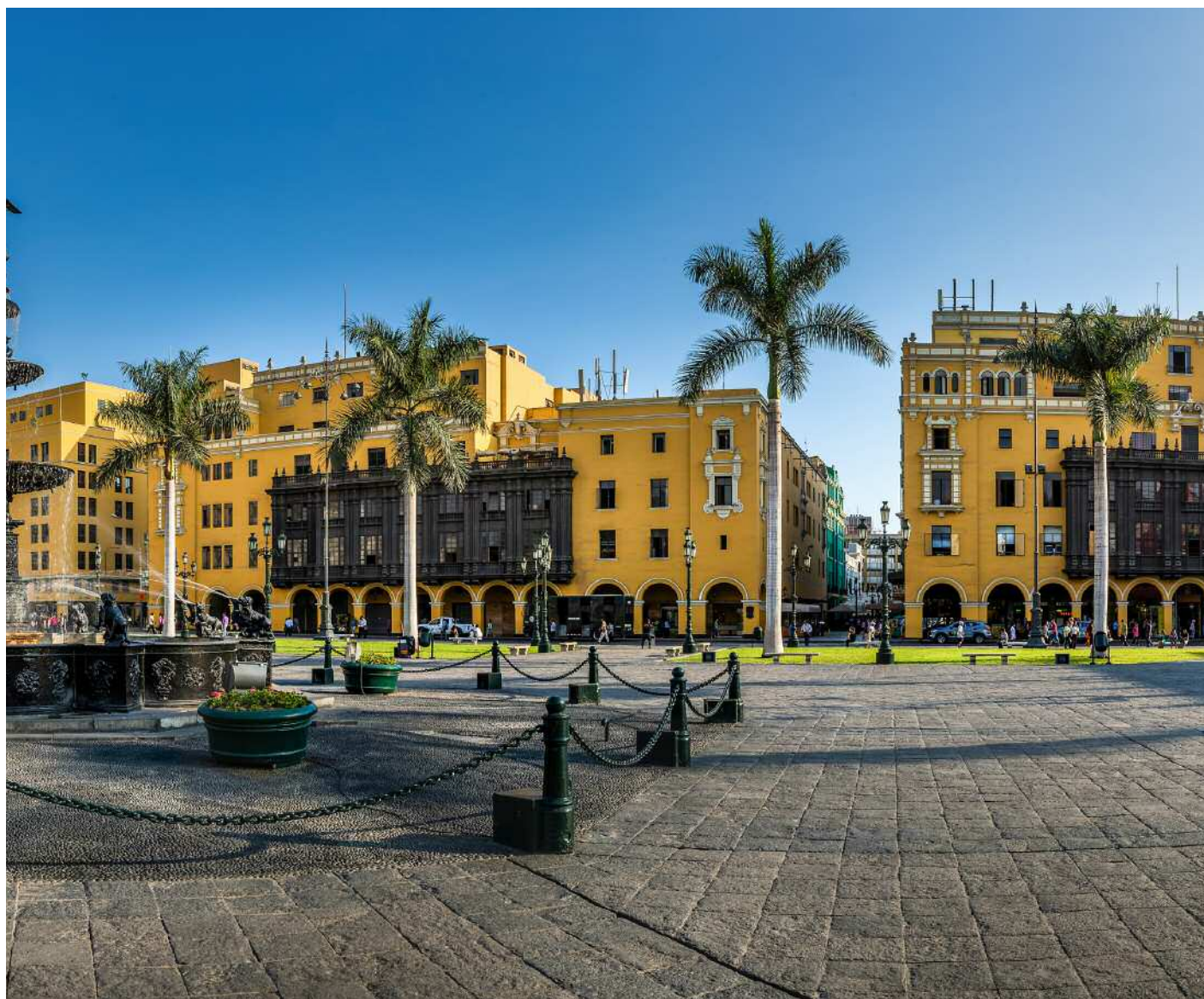
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CASINOS IN PERU 2016

Business Name	Casino Name	Location
Golden Gaming S.A	Casino La Hacienda	Four Star Hotel
Corporación Turística Peruana S.A.C	Atlantic City	Five Star Restaurant
Egasa Peru S.A.C	Casino Luckia	Five Star Restaurant
Dreams Corporation S.A.C.	Kingdom	Four Star Hotel
Inversiones Hanson S.A.C	Casino Fortuna	5 Star Restaurant
Dreams Corporation S.A.C.	Pachanga	5 Star Restaurant
Andean Slots S.A.C.	Winmeier Casino	Four Star Hotel
Red One S.A.C	Win & Win	Five Star Restaurant
Gaming And Services S.A.C.	Jokers Casino	Five Star Restaurant
Gaming And Services S.A.C.	Majestic Casino	Five Star Hotel
Dreams Corporation S.A.C	New York Casino	Five Star Restaurant
Sun Nippon Company S.A.C	Fiesta Casino Luxor	Five Star Restaurant
Golden Investment S.A.	Casino Golden Palace	Five Star Restaurant
Interstate Gaming Del Peru S.A	Luxor Casino	Three Star Hotel
Thunderbird Fiesta Casino-Benavides S.A.	Fiesta Casino	Four Star Hotel
Absolute Games S.A.	Luckia	5 Star Restaurant
Shady Entretenimientos S.A.C.	Casino "Astoria"	5 Star Restaurant

shop attached to a casino. In 2016 Sirplay announced that it had opened a new administrative offices and a sport betting bar in Lima.

Sports betting is also permitted via sports betting pools via the Intralot run games Te

Apuesto and Ganagol and can be played either online or via one of the many Intralot outlets located throughout Peru.

Lotteries

Lotteries in Peru date back to the colonial era

and first sprung up in capital Lima. The first officially organised lottery took place in 1826. The Peruvian constitution of 1993 guarantees open market conditions in any business segment, including lottery games. Lotteries are governed by Ley General de los Ramos de Lotería (General Law of the Lottery Trade)

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established in 1977 whereby lotteries can be established by non-profit organizations (Beneficiencias). According to law, lottery operations can also be established by private operators in partnership with an NPO.

Compared to many other jurisdictions in Latin America Peru has a wide number of lottery games and a sophisticated modern up to date sales network in place. This is thanks to Intralot which has been the leading lottery provider in Peru for many years.

As well as sports pool betting games the company operates the popular lotteries of Kábalá, Gana Diario, and Tinka as well as instants. In 2015 the company announced plans to further consolidate its operations in the region and strengthen its position as market leader. In order to achieve its goals the company said that it would invest over US\$4m to expand its outlets from 3,600 to 5,000.

In May 2016 Intralot Group announced that it had reached an agreement with Nexus Group a leading conglomerate with investments in supermarkets, construction and financial products in Peru to sell 80 percent of Intralot de Peru S.A.C., its 100 per cent owned subsidiary in Peru, but would continue to be the company's technological provider in return for US\$68.7m.

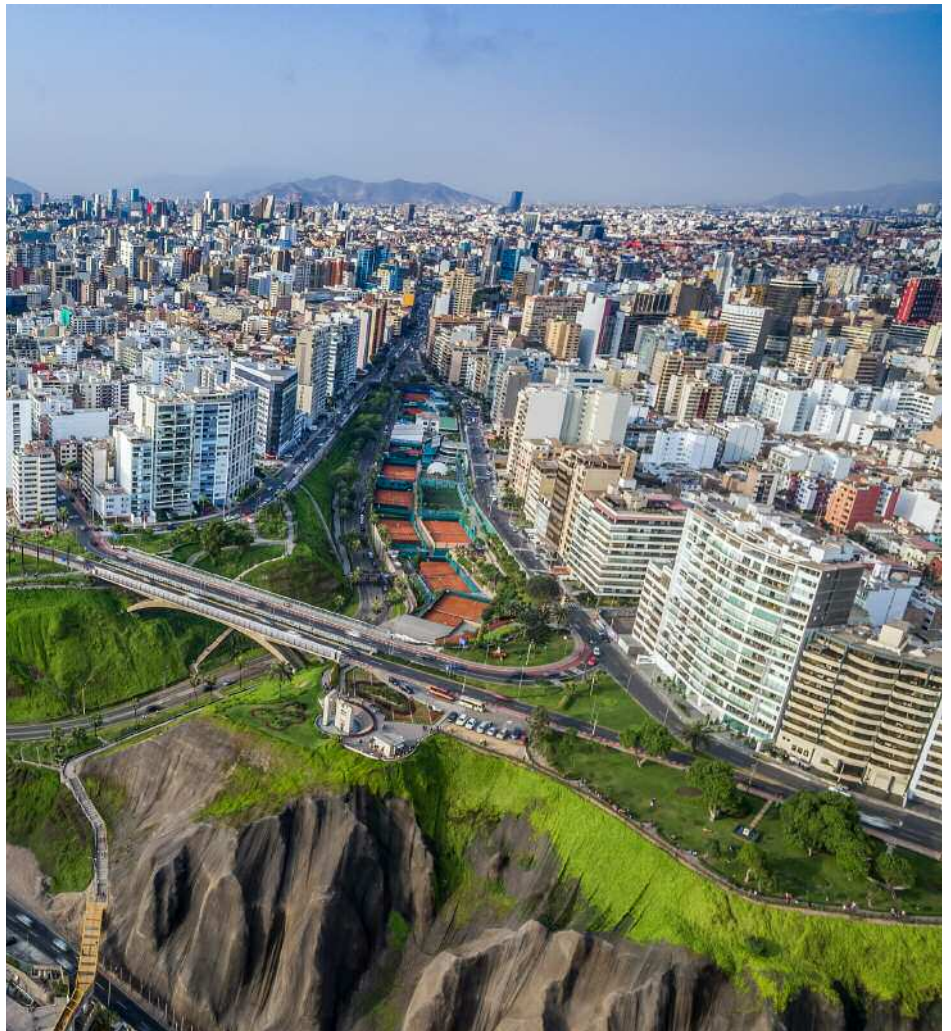
BINGO

Slot machines are not permitted in bingo halls. Bingo halls are regulated by municipal governments and pay 10 per cent tax on net win. There are only a very small number of bingo halls and bingo is becoming increasingly less popular.

ONLINE

A number of operators are already present and a number of sites are positioning themselves more strongly in the market including including Timberazo, Apuesta Total, and 24WIN. In 2008, Betsson launched its first online gambling site in Peru. The site offers poker, virtual instants, and sports betting, including betting on local football matches. The online site offers bonuses for new players and accepts a wide number of payment methods. In 2015 it was announced that the company had assumed full ownership of Betsson's Peru-facing site, which previously had been run on a B2B basis. The company is also increasingly present in local media via the marketing of its products in Peru. The site's "ambassador" is Nolberto Solano Todco a retired Peruvian professional footballer and well known local celebrity.

In 2012, Offsidgaming, a company which is also present in Eastern Europe and Africa, launched Inkabet.pe designed specifically so that it would



In June 2015 Director General of the DGJCMT Manuel San Román Benavente announced that the board was working on a set of new online regulations. Online gambling operators would stand to pay between 15 to 20 per cent. This would be significantly higher than land based operators which currently pay 12 per cent.

cater specifically to the Peruvian market. The company offers sports betting, casino and slot games as well as a live casino option. The site has also recently launched a number virtual games.

While there is no specific legislation in place which outlines how offshore companies may offer their services to locals offshore companies may offer their services as long as they adhere to local business practices and Peruvian law, and online gaming may be offered either from within or from outside of Peru. Indeed Peru was one of the first jurisdictions to officially allow for online gaming in the region and allows a number of online sites to offer their services locally. MINCETUR is, however, looking at regulating the industry further in order to generate additional gaming revenue and ensure that online gaming sites meet with money laundering requirements as well as player protection measures especially when it comes to the protection of minors.

In June 2015 Director General of the DGJCMT

Manuel San Román Benavente announced that the board was working on a set of new online regulations. According to local press reports the tax for online gambling operators would stand at between 15 to 20 per cent. This would be significantly higher than land based operators which currently pay 12 per cent. Licences would only be awarded on a national basis and not by local governments. According to board estimates the net win of a regulated online industry in Peru would stand at around 2,000 million soles (more than US\$584m).

Although the exact details of the new bill are unknown it is believed that any operators offering their services locally will need to have a domain name ending in .pe but servers will not necessarily have to be locally based. However, the board will implement a system whereby it will be able to be able monitor online transactions locally and in real time. Since then there has been little official word on the issue although it is believed that the board is nearing the completion of new set of regulations aimed at covering the online space.

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The need for uniformity in regulations to manage risk

G3 talked to one of the leading experts in the field Carlos Fonseca Sarmiento, who has participated in gaming regulation projects in the Dominican Republic, Nicaragua, Paraguay and Chile

What are some of the biggest problems which the gaming market has faced in Peru and what are the challenges that it faces in the future?

Peru is a country which has a very developed gaming industry. However, there is no national authority which concentrates all jurisdictions in the granting of all games. Casino games and slot machines come under the jurisdiction of MINCETUR. Horse race betting comes under the jurisdiction of the Provincial Municipalities. All other games that do not have a specific regulation, for example, online games and sports bets offered from Peru, come under the jurisdiction of the District Municipalities.

The main problem in the market is that there is no uniform regulation of all gambling games. While the regulations applicable to casino games and slot machines are very strict and developed "enforcement" does work regarding

other games, there are no specialised control authorities and the requirements to obtain a license are easy to comply with. For example, to operate a racetrack and to organise equestrian betting, it is only necessary to obtain a municipal license and there is no control by a state authority which is carried out for compliance when it comes to gaming rules.

Another major problem has been the establishment of excessive restrictions that created legal disputes between operators and authorities, especially in the slot machine sector. However this era of "learning" has been overcome.

Is there still room for growth for large scale casinos in the future?

I believe that at the Latin American level, Peru has the most developed regulation for betting

games – specifically when it comes to slot machines and casino games as it counts on the most technical authorities, and the most competitive entrepreneurs as well as the latest generation of slot machines. In Peru the main betting game is via slot machines and then casino games. Pursuant to Peruvian legislation, a "Gaming Room" is defined as the establishment where slot machine games or casino games are operated. The authority grants a gaming license for each type of activity. There are establishments that have two licenses, one for a slot machine rooms and another for a casino game room . . . In Peru the number of casino gaming rooms has never gone beyond twenty establishments. But we are a country of more than 30 million people and currently there are more than 700 slot machines and more than 70,000 slot machines. I believe it is feasible that the market can accept up to 100,000 slot machines and therefore more than 800 slot



parlours and twenty five casino gaming rooms. Consequently, the market is still not saturated. What the investor has to do is find the right place for new projects. There are many cities in Peru where it can still be developed.

How about online gaming? Are there any plans for the government to allow for online casino type gaming?

When it comes to online casino gaming there is some confusion. In Peru, the provision of online games from abroad or from Peruvian territory is legal. There is no type of criminal or administrative liability if an offshore company offers its games to Peruvian residents. The problem is that since it is not an activity that has a specific regulation, the provider has to establish a well-designed legal plan so that all the activities involved in the provision of internet games to Peruvian residents are carried out according to Peruvian law. For example, it is necessary to establish adequate processes for marketing services, payment processing, and customer services.

MINCETUR is interested in regulating this activity in a more detailed way but it is currently allowed. In addition it depends on how you want to plan your project because there really is no need for a law to regulate online games more specifically.

As I mentioned according to Peruvian law casino games are those games which MINCETUR qualifies as such. As a result if MINCETUR wanted the Director General of Casinos and Slot Machines could approve a directive stating that gaming via the internet and or sports betting

qualifies as casino games in which case only the owners of casino gaming rooms would be able to operate these games. But if it wants to regulate them in a more open way the most advisable way is to do it by means of a Congressional Law.

Do you think that the online market could be open to off shore operators?

The market is already open to offshore operators. Currently there are many offshore operators offering their services to Peruvian residents. There are advantages and disadvantages of operating offshore. Companies have to assess which business model is most appropriate, whether to do so from abroad or from offshore. But I reiterate today one can offer gaming online to Peruvian residents in both forms

And now onto online sports betting. Do you think that online sports betting will be restricted to locally land based operators or will the market be opened up to offshore operators as well?

To date, online sports betting can be offered from abroad as well as from Peru. There is no restriction. If an Act is passed in Congress, companies will obviously have to obtain a license from the Peruvian authority to offer their games. In my opinion, if it were to be regulated by an Act, Peru should avoid mistakes such as in Colombian law, for example, and allow any independent registered person to play independently of the fact that they are or not a Peruvian resident, establish a reasonable tax, allow the server to be in any place subject to the verification and control by the Peruvian authorities and so on.

And finally . . what is the potential size of the online gaming market?

It is very high. We are in an incipient market that has some barriers such as payment methods. But the first foreign operators that decided to offer their services to the Peruvian market have not stopped growing. Growth has no ceiling, the market is not saturated and demand is increasing rapidly. Be it offshore or from Peru, this sector will grow in the following years by leaps and bounds. I guarantee it.



Carlos Fonseca Sarmiento

Mr Fonseca Sarmiento was a gaming regulator in Peru from 1995 and 2001 and is the author of the Book "Gambling and Betting. Technical and Legal Aspects"(Juegos de Azar y Apuesta. Aspectos Técnicos y Legales). He has a Masters degree in Public Administration and is also a member of the Advisory Board for the Gaming Law Review Journal for the University of Nevada Las Vegas.

New market growth through a cost effective proposition

In order to obtain a clearer picture of the market we talked to one of the main players in the Peru gaming market, DR Gaming Technology

Five years ago, Alex Stiglich, Managing Director of DRGT for Latin America & the Caribbean, together with CEO Jurgen De Munck and CTO Michiel Van Dam, began operations in Peru. After just five years on the market, DRGT now has more than 12,000 connected machines throughout Latin America and the Caribbean. Today DRGT is one of the most well known and trusted names for systems in Peru.

DRGT has regional offices in many countries including Peru. Could you tell us more about your Peruvian office? Why was the decision made to open the office and how has a local presence helped you offer better service to your customers in the region?

DRGT has offices in Belgium, Austria, South Africa, Australia, Malta and in the near future Mexico. The Peruvian office is celebrating the fifth anniversary of operations this year. We started the company with less than five employees and now we have more than 30. This office manages sales, support and operation for the region of Latin America and the Caribbean.

It all started in the 2011. DRGT came to the Peruvian Gaming Show in the midst of talks that the market was going to be regulated. With 80,000 machines in around 600 casinos, Peru was a really interesting market for the company. The office was opened a year later and is the Latam headquarters for all operations in the region, providing service and support for more than 12,000 machines.

How do your integrated casino management solutions help your customers in Peru and the region?

Our system was created to be completely scalable to work in a small site with 1 machines all the way up to the largest casinos, making it a great solution for any operator in the region. Also our system is modular so the casino can choose which functionality they want to give their customer and as their demand changes it is easy to upgrade to new features. But most importantly our systems aren't reliant on a server and can work without the need of the server being online.

All these benefits makes DRGT a far more cost effective proposition, requiring less ongoing support, and the system can be installed in a mater of hours anywhere.

We have accounting, ticketing, cashless, player tracking, jackpots, bonusing and tournaments modules, all of these features, unitise our cutting edge wide area technology allowing companies to link multiple locations Also as there is no requirement to have a DRGT server on site , the sever can be centralised, with everything running through the internet to a server located in the main office of the customer.

With this functionality it is not only casinos that are interested in our solution, but also companies that supply machines for participation or rental, who use our system to

monitor the machine performance, wherever they are located.

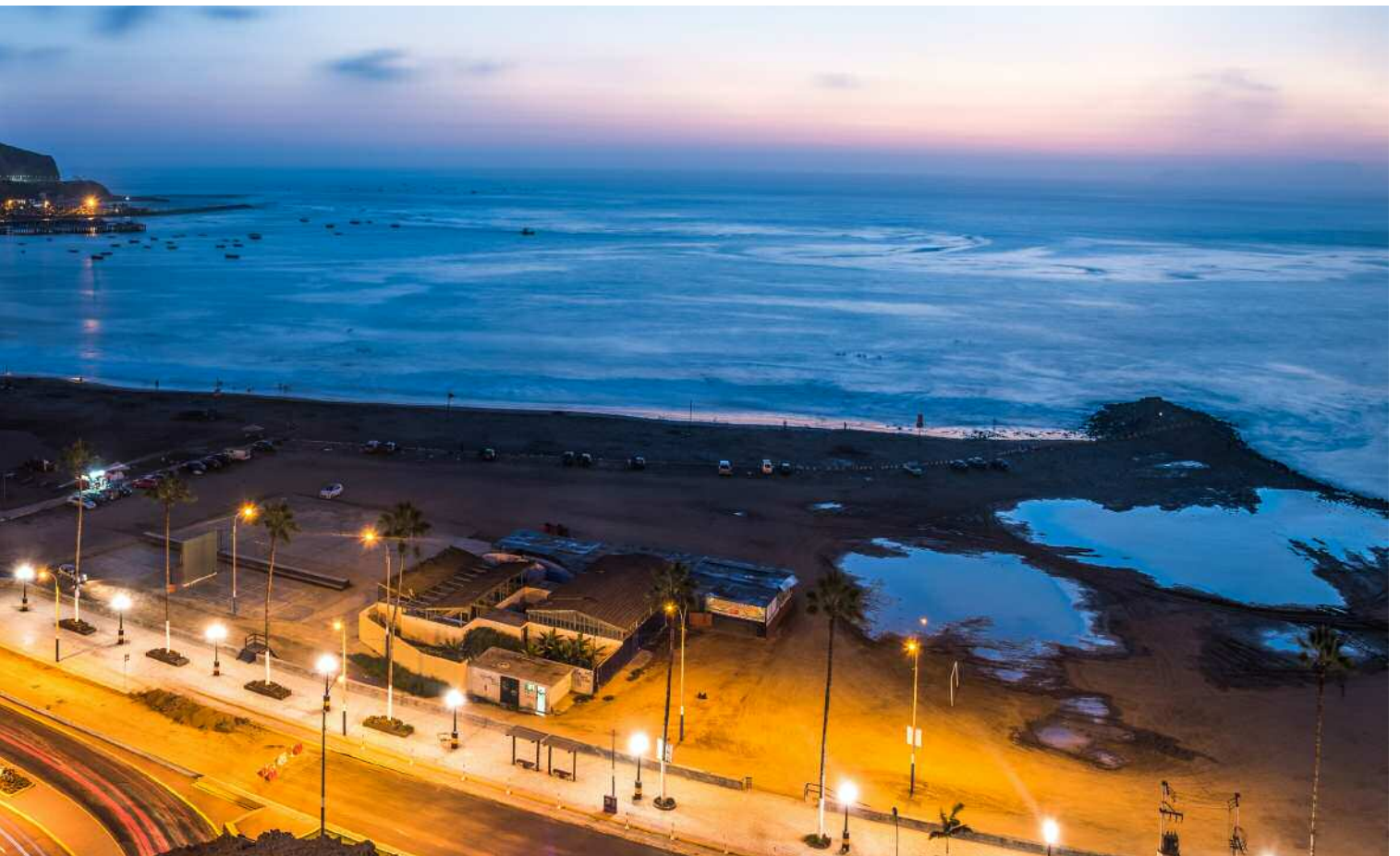
With the DRGT system they know in real time the performance of their machine even controlling them remotely and in case of a lack of payment they could even lock them.

In our experience, Peru is one of the toughest markets to compete in, but with our Jackpots, Bonusing and Player Tracking system the casino is able to give something extra to the player which other casinos don't offer. For example, the operator is able to completely personalise the promotion and target players they should be rewarding, with rewards the player actually wants.

Over the five years since the office was opened, the customers in Peru know what our solutions can do for them. They see our systems installed in venues and are contacting us with increasing regularity to talk about switching. Another great factor is reliability; customers love the stability of product, and problems do arise, our 24/7 support team is always able to fix problems straight away, so the casinos don't waste time and assets trying to fix issues themselves, or suffer the cost of machine down time. This is why the DRGT System is one of the best options for the market.

What about your most recent products? How they have fared so far in Peru. What inroads you have made into the Peruvian market?

We started last this year commercialising the



DRGT came to the Peruvian Gaming Show in the midst of talks that the market was going to be regulated. With 80,000 machines in around 600 casinos, Peru was a really interesting market for the company.

drScreenMicro which is a 3.2ins. colour Player Tracking touch display, that comes with an RFID reader. This entry level product makes it great for the casinos that want to start using this system at a really affordable price for small operations, making it perfect while the casino learns how to reward their player. Later on the casino could upgrade this solution to a bigger screen with more functionality. So the upgrade cost is affordable to anyone.

For the PGS (Peru Gaming Show) 2017 we were able to show our latest product, drScreenUltra, which is a beautiful 8.8ins. colour touch LCD screen that is the largest currently used in gaming for player tracking. The display also has an embedded RFID reader that allows "Tap & Pay," which is the same technology used in bank cards, but here it's utilised for player tracking and casino cashless transactions. The other advantages of the large screen include exciting bonus games running in conjunction with the game, TV channels at the slot, interactive promotions, voucher printing, bar service and even Jackpots on the system. This is by far our best new solution for casinos to date and this is going to be available to the market before the end of the year.

This year we had a lot of customers migrating to drScreenMicro, one of them is Casino Tahiti, and

they upgraded more than 400 machines alongside Accounting, Ticketing, Player Tracking, Jackpots and Bonusing modules. Making more than 1,000 machines already migrated to the player tracking system in the region.

Tell us more about how your products appeal to customers?

Each of our products are meant to increase the performance of the machines using different methods, including: Jackpots, whereby we have more than 16 different jackpots to choose from using different types of features that allow them to be completely personalised to suit the casino's requirements.

Player Tracking and Bonusing personalise the

experience from the player's point of view, enabling you to know the different type of players you have in the casino and reward them with the things they like to be rewarded with. Ticketing & Cashless boosts up the operation speed in your casino so that you have less procedures, making the operation save time and money. Finally, Wide Area is a product that allows the same players club within all of your casinos and make Wide Area Progressives or Mysteries that will attract other players to the venue.

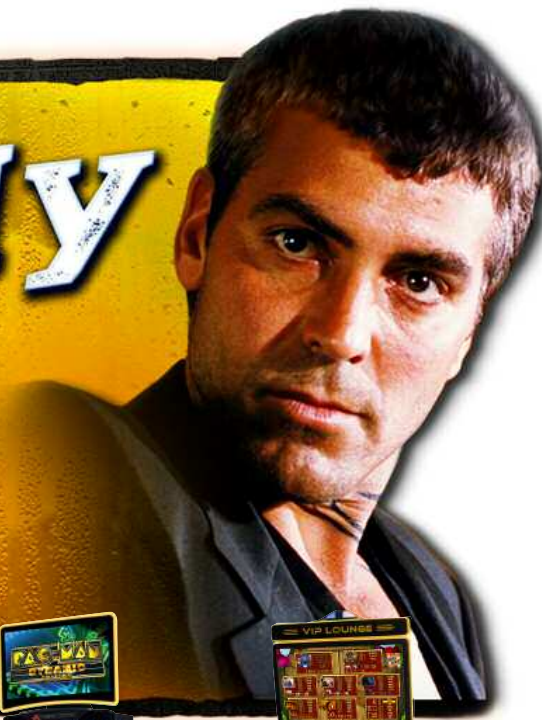
What plans are there for the company in the near future?

As it's the fifth year since the office in Peru has been open, we are still a relatively new company, so our main focus is still on growth. At the PGS we launched the highly anticipated new module which is a bar redemption system. Players will be able to order food or beverages on the screen of the system using their points or comps. This could be installed at the bar, on coffee machines, soda dispensers or even vending machines. We also displayed this on the drScreen Ultra Player Tracking Display at the show, which generated a great deal of interest and excitement.



Alexander Stiglich, General Manager of DR Gaming Technology for Latin America & the Caribbean. DRGT is a global supplier of integrated casino management solutions for the gaming industry. Being an independent systems provider means that DRGT is able to focus its strategy around gaming systems and the devices interacting with these systems. DRGT provides a unique gaming system answer which is the ideal partner to improve a current operation regardless of the machine number, type, or age.

Everybody BE COOL



Taking centre stage for NOVOMATIC will be the international premiere of *From Dusk Till Dawn*, following the recent partnership with Miramax. This enthralling theme resurrects the Quentin Tarantino and Robert Rodriguez classic on the casino floor as the cult film celebrates its 20-year anniversary. Presented on the NOVOSTAR V.I.P. III and V.I.P. Lounge cabinets, the game has all the elements to inspire players with its fiery gameplay, Dusk and Dawn jackpots, and exciting features and bonuses.



A major highlight for Ainsworth will be *Pac-Man Dynamic Edition* that sees one of the most recognisable figures in arcade game history on the A640 cabinet. This title follows the success of *Pac-Man™ Wild Edition*, which has seen significant uptake in the US, and adds even more fun with thrilling bonus features and massive jackpots. The A640 will also feature exciting new titles such as *Desert Dawn*, *Desert Dusk*, *Rumble Rumble Eagle* and *Nostradamus*, and new brands *QuickSpin* and *Power Shot* will debut at the show.

From the NOVOMATIC V.I.P. line of speciality cabinets will be the NOVOSTAR V.I.P. Royal that features a standout 65ins. upright full HD LED screen. Presenting a selection of feature games such as *Asian Fortunes* and *Treasures of Tut* – two player-favourites in the US – this attractive cabinet unfolds the Very Important Player Experience on a grand scale. The hit NOVOSTAR V.I.P. II and V.I.P. Lounge cabinets will also be on show with a selection of new games such as *Dancing Dragons* and *Hold your Horses*.

The full range of Ainsworth cabinets, including the A640, A600 and A600 Slant Top, will display more than 130 games, for both Class III and Class II markets. Highlights on the A600 include *Hao Yun Dao*, a new Asian-themed linked progressive series, as well as new brands

NOVOMATIC and Ainsworth unite at the Global Gaming Expo for an extensive US showcase

For the first time at the Global Gaming Expo in Las Vegas, NOVOMATIC and Ainsworth Game Technology will team up to showcase a combined booth, brimming with market-first innovation. Presenting a comprehensive product portfolio that features best-in-class technologies from both companies, visitors to Booth #1259 will see the latest range of cabinet innovations, premium branded slots, electronic table games, linked progressive jackpot solutions, system tools, online and social content, as well as a few surprises in store.

FirePower and *Big Hit Bonanza*, which make their international debuts at the show. Undoubtedly the Class II highlight will be the unveiling of *AnyBet*, a linked progressive system that offers players the chance to win progressive jackpots on any Ainsworth game.

Developed in collaboration with teams in the US, Austria and worldwide, a selection of content for the US will be previewed by NOVOMATIC Americas. New titles include *Empire VTM Superior*, *Red Dream*, *JackPOP!™* and *JackPOW!*, as well as *Jackpot Edition* deluxe games. Leading technologies for global markets will feature the hit *GAMINATOR Scorpion* and *DOMINATOR Curve* cabinets, the redesigned *NOVOSTAR II*, and the new *Lotus Roulette Pro* –

a live gaming experience that combines slots and table games, and features a high-speed roulette wheel that boasts the world's fastest game frequency.

The latest selection of online, mobile and social gaming solutions will be exhibited by Greentube, the NOVOMATIC interactive division. A highlight of the presentation will be *Greentube Pro* – the private-label social casino built from the ground up for the US. Cutting-edge bingo machines will be on display by the video bingo subsidiary *Otium*, as well as leading bingo titles, standalone and linked jackpots. In addition, *Octavian* will demonstrate its latest tools on the ACP – Accounting Control Progressives – casino management system.

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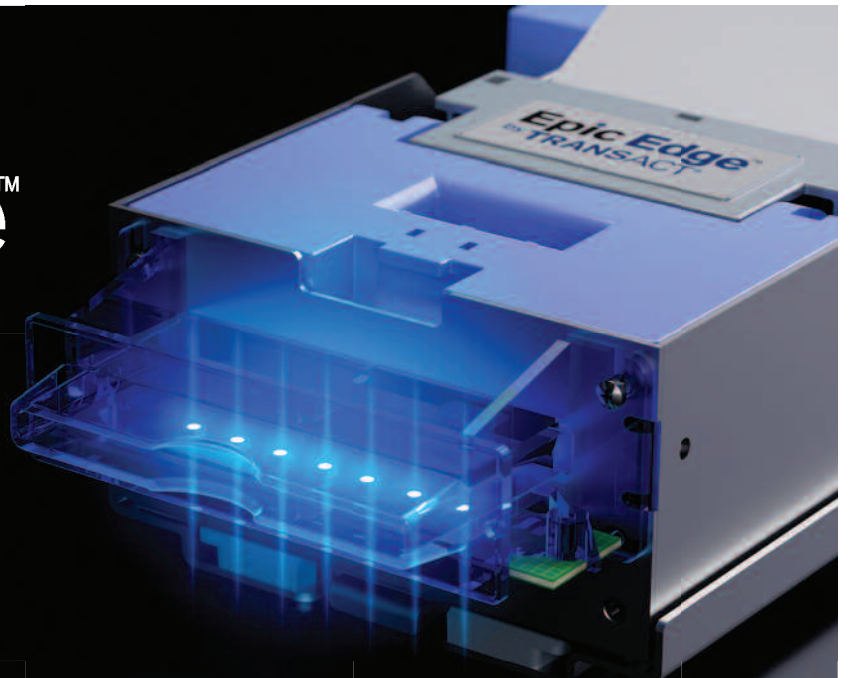
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For Aristocrat and VGT, at the G2E show in Vegas 2017, 'It's All About What's Inside'

"Every element. Every innovation. Everything we have." That's what Aristocrat and VGT bring to their customers, and at G2E 2017, the companies will show the gaming industry that it is truly all about what's inside.

"It's about hardware, games, licenses, mathematics – it's all those elements coming together in a strong design philosophy. That has been at the center of what we bring to our customers, and that is how we have helped them succeed," said Aristocrat Managing Director of the Americas Matt Wilson. "Now, at G2E, we will present a deep and broad portfolio of products that gives our customers an integrated experience and allows them to speak to every type of player."

In booth #1141, Aristocrat and VGT will show more of what works for their customers and their players, such as new titles with globally popular themes, the rock-solid Oasis 360 gaming systems solution, leading-edge cabinets to transform the floor, and the new breakthrough OVATION product line.

Aristocrat's best titles take a step up in Aristocrat's new RELM XL reel spinner cabinet. Building on the success of the RELM cabinet, RELM XL features a dynamic topper wheel, a range of denominations to cover the floor, and games players love, such as the Buffalo and Britney game themes, to make it the hottest spin in stepper entertainment.

Aristocrat's popular RELM cabinet is

expanding with thrilling extensions of the Burning Spins and Forever Free game brands; new brands for the low and high denom space; and new Asia-themed games from the popular Lucky Destiny and Fortune Prosperity themes.

Aristocrat's Arc Single cabinet entertains with titles including the global sensation Dragon Link game theme, which was recently named to Casino Journal's list of the Top 20 Most Innovative Products for 2016. Also appearing on Arc Single is the Great American Treasure Hunt game theme.

Aristocrat's elegant and sleek flame55 cabinet entertains players with 55 inches of curved screen wonder. Aristocrat's royally successful Game of Thrones slot game is back in an all-new version created specifically for flame55. Also appearing on flame55 is the Mariah Carey game theme, and a new version of the acclaimed Tim McGraw slot game. Additionally, Aristocrat will debut a completely new, globally recognised license on the cabinet at G2E.

Aristocrat's The Walking Dead slot game is one of the most successful franchises in the company's history, and now The Walking Dead 3 slot game presents all-new thrills and chills

in Aristocrat's new EdgeX cabinet. Aristocrat will also premiere two earth-shattering pop culture licensed titles on the cabinet at G2E.

The fun and entertainment on Aristocrat's Arc Double cabinet includes all-new X Files and Tarzan games created just for Arc Double, a rocking party licensed title to be revealed at G2E, and titles such as My Cousin Vinny and The Big Lebowski.

The Helix cabinet will showcase game titles including the award-winning Lightning Link, and the Wonder Wheels cabinet will feature the Candyland game theme, and the Wonder Wheels Cashman game theme.

Aristocrat's award-winning Oasis casino management system is now stronger than ever with a new suite of products called Oasis Loyalty, which won the platinum award at the 2017 GameChangers Marketing Awards at Casino Marketing & Technology Conference. This premier loyalty solution showcases Aristocrat's customer-centric perspective, as it works to increase efficiencies across its customer's gaming floors. Aristocrat will introduce and demonstrate new products to help manage and more efficiently operate casinos of every size. Aristocrat will introduce a new mobile enrollment product (EnrollMix), a new mobile Slot Dispatch system (FloorFocus) and continued enhancements to the ONE LINK media/progressive system. Aristocrat will continue to focus and build products to make the casino more efficient, and better serve its customers in creating a winning atmosphere in any sized casino where Aristocrat products are used.

VGT will exhibit alongside Aristocrat at G2E. Wilson said, "For us, bringing together Aristocrat and VGT was a marriage of capabilities and complementary skill sets with core values, and we see that manifest itself in many exciting ways, including the RELM stepper cabinet and the new OVATION video game platform for Class II."

The landmark OVATION Class II gaming platform brings player-favorite Aristocrat content to the Class II space, combining market-proven brands with field-proven math models. Each of the OVATION games appears in Aristocrat's innovative Helix+ cabinet, which has been lauded by operators for its look, performance, and ease of maintenance. The OVATION platform and its games are backed by VGT's superior service model.

At G2E, VGT will show the OVATION line featuring Aristocrat player-favorite game titles including Electric Boogaloo, Golden Peach, Golden Zodiac, Journey of Fire, Spirit of the Fox, 8 Wishes, Rocket Riches and Wild Texa'Coins, among many others.

VGT will also showcase its Super Hit\$ Jackpot\$ wide-area progressive titles including Mr. Money Bags Super Hit\$ Jackpot\$ and new 3-reel mechanical titles including the Mr. Money Bags Sparkling Wilds game.

Discover what's inside at Aristocrat's and VGT's booth #1141 at G2E.

Preview

G2E LAS VEGAS 2017

"We are anticipating G2E with vast collection of land-based and online gaming titles, jackpots, roulette, multiplayer developments and casino management software," said Stanislav Stanev, sales & marketing director of EGT. "Since the previous show our company and its highly esteemed partner for the US – Reel Games Inc., have advanced further into the market with more installations in Miami that paved the way for further deployment in other jurisdictions with a wider EGT portfolio."

Over 200 slot games will be awaiting the visitors, creating fun with their visually impacting graphics, engaging storylines and utilized advanced math. The Collection and Premier series multigame mixes will be presented with a wide range of cabinets. The Super Premier and the appearing for the first time at G2E Super Premier 75 are both following the most recent tendencies in the contemporary industrial design, at the

Two Chinese-themed jackpots will add more diversity to the display of EGT. The Cai Shen Kingdom jackpot of 5 levels (stand-alone, linked, progressive and non-progressive) walks the players into the realm of the God of Wealth – Cai Shen. Its games are based on the Exciter III platform and will be housed in the good-looking P-24/32H Up cabinet, having a Rainbow jackpot panel. Fu Gui Rong Hua is awaiting several installations in the US.

Euro Games Technology's booth 2452 set to reveal the company's superb product diversity

It is again this time of the year when all the gaming world is celebrating its reunion in Vegas, eager to debut its newest products and boast about the presented next level of technologically advanced solutions.

same time they have some distinctive and highly elegant attributes of their own. Super Premier brings the attention to its 42-inch landscape curved displays and Super Premier 75 to its extraordinary 75-inch portrait-oriented curved monitor, designed by engineers of EGT with players' best gaming enjoyment in mind. Both models deserve the approval of the audience also for their incorporated comfortable multimedia chair with high-quality stereo sound, coming from the headrest, and main game controlling buttons, included in the armrests.

THE LATEST CURVED CABINETS

The curved cabinets P-42V St and Up will come

to life with different jackpots of EGT. The 4 Happy Hits has already been installed in several casinos and its ultimate selection of bet patterns, base game percentages and progressive contributions please the operators, while the symbol driven progressive and 4-level mystery jackpots, together with the Multi Hits I mix of 4 games entertain the players.

The 3 Happy Hits is a 3-level mystery progressive jackpot system. The first two Minor and Major levels are stand-alone (individual for each of the cabinets) and the third Grand level is common for all gaming machines, connected to the network. The Multi I gaming mix of six titles and some of their customizable parameters, like denomination and minimum/maximum bets, add more convenience to the players. Except with the curved cabinets, the 3 Happy Hits could be also enjoyed with the P-27/27 St and St Slim, P-27/32H St and P-24/24 Up models.

PREMIUM LINK

The Premium Link jackpot is common for all EGT products and games that are based on



Exciter III, Exciter II and Exciter platforms, offering the option for a mystery jackpot of 1, 2, or 3 levels that is common for all denominations and for a progressive jackpot of maximum 4 levels that correspond to a specific denomination. The operator may configure everything needed to have an individual gaming solution - the number of jackpot levels; whether they are linked, or stand-alone; to set, or not a minimum bet for any of the mystery levels, etc.

Two Chinese-themed jackpots will add more diversity to the display of EGT. The Cai Shen Kingdom jackpot of 5 levels (stand-alone, linked, progressive and non-progressive) walks the players into the realm of the God of Wealth - Cai Shen. Its games are based on the Exciter III platform and will be housed in the good-looking P-24/32H Up cabinet, having a Rainbow jackpot panel. The Fu Gui Rong Hua is awaiting several installations in the US.

The 4-level progressive jackpot, inspired by the ancient eponymous charm said to bring glory, splendor, riches and prestige, grants them frequently to the players. For the show it will be presented in the P-42V St Curved and P-24/32V Up models.

MULTIPLAYER PRODUCTS

EGT Multiplayer will complete the display, exhibiting its renowned STORK terminal and the Premier R8 automated roulette with 8 gaming stations. In the spotlight will also be the T-Line series touch screen table that has now grown bigger, accommodating 12 players at a time. The newest development of the multiplayer

EGT Interactive's portfolio is now of over 100 games for desktop and mobile devices, including slot titles, video pokers, automated roulette wheels with in-screen video streaming and keno. The latest releases - 30 Spicy Fruits, Like a Diamond, The Big Journey and 100 Super Hot, made a splash during the iGaming Super Show in Amsterdam, while many operators were exploring the mini video slots, aiming at the sports betting websites niche.

division's R&D team will be shown for a first time at G2E and will have an automated roulette wheel. Its completely new look can be arranged in three colours - classic green, dark red and dark blue, having now more user-friendly game controls, better graphics, improved software for smoother play, two modes for placing the bets and the progressive jackpot Diamond Number of 2 levels. The renewed larger playfield can switch between wheel betting mode and traditional betting. The statistic vertical display has been redesigned and the multi-language support has now increased capacity. High quality video streaming provides better remote play on the STORK terminals that can be connected to the touch screen roulette table. The online monitoring and control system is based on the TCP/IP protocol suite with the latest safety standards in SSL certificate data encryption.

The Spider casino management system is gaining speed, attracting more and more customers across Europe with its easy customization to operator's requirements and well developed modules, delivering different reports and managing a vast array of casino

operations, including accounting, security, all cash transactions, user access levels, real-time notifications, and the local, or wide-area progressive and mystery jackpots.

EGT INTERACTIVE

EGT Interactive will again fuse the excitement of trying a well-developed and engaging online casino content with the satisfaction of having an efficient return-to-player strategy, attracting and retaining many new users. The company's portfolio is now of over 100 games for desktop and mobile devices, including slot titles, video pokers, automated roulette wheels with in-screen video streaming and keno.

The latest releases - 30 Spicy Fruits, Like a Diamond, The Big Journey and 100 Super Hot, made a splash during the iGaming Super Show in Amsterdam, while many operators were exploring the mini video slots, aiming at the sports betting websites niche.

With over 130 gaming stations at its booth EGT is ready to present a vast gaming diversity to the US audience at G2E 2017.

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Casinos worldwide trust in Dallmeier. And they have good reason to do so. Over the last two decades the company has successfully implemented numerous complex security systems with thousands of channels each.

For the realization of such demanding projects the German manufacturer draws on the expertise of its casino specialists.

The international Casino Project Team includes system planners and technicians with long-term experience in casino technology and an understanding of industry-specific requirements. The team is complemented by practiced sales managers with profound knowledge of the casino business and regulatory matters.

The Dallmeier experts support you right from the start of the project planning and up to the technical implementation. Moreover, they are available to answer questions and offer advice at any time beyond the project closure.

Our customers demand versatile solutions for diverse applications and peak performance from their security systems. For us, going the extra mile to deliver just comes with the territory.



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CasinoCam

Preview

G2E LAS VEGAS 2017

JCM brings operators the next level of connection at G2E

JCM Global's line of transaction solutions has been helping operators make real connections with customers for decades. Now in booth #4039, JCM is showing the bill validators, printers, promotional solutions, and digital media operators need to take customer connections to the next level.

JCM Global's award-winning line of transaction solutions has been helping operators make real connections with customers for decades. Now in booth #4039 at G2E 2017, JCM is showing the bill validators, printers, promotional solutions, and digital media operators need to take customer connections to the next level.

Leading the way to the future is JCM's revolutionary FUZION technology, which stole the show last year in a back-room preview. Now fully realized, FUZION is ready to adapt onto any provider of the casino management systems and address any regulatory challenges. When paired with JCM's iVIZION bill validator and GEN5 printer, the transformative FUZION technology unleashes the power of what if. With FUZION, each slot machine could become a multi-line profit center with the current potential to:

- Vend and redeem lottery tickets
- Vend and redeem race & sports betting
- Facilitate Daily Fantasy Sports (DFS) wagering, the casino's own or a 3rd party's
- Conduct cross-enterprise promotional couponing for carded and uncarded players
- Streamline tax forms processes by printing system-generated tax forms and deliver required documentation to the customer



while the back-end system stores the signature forms and data that needs to be delivered to the IRS

- Enable real-time currency exchange with exchange rates that could be preset or could be real-time

Powering FUZION is the iVIZION bill validator, the foundation of intelligent validation. iVIZION is field-proven globally with more than 250,000 units shipped to date. Its CIS technology scans the entire note or ticket, reading more than 9.5 million data points on every note, more than twice that of the nearest competitor, plus it has a unique capability to read 2D barcodes, and its intelligent bezel enables mobile connection for additional FUZION functionality.

FUZION's capabilities come to life when paired with the GEN5 printer. Field-proven, the GEN5 builds on the successful foundation of the universally successful GEN platform and has a faster CPU and faster print speed, resulting faster customer connections. It has the flexibility to print TITO and promotional tickets, plus various wager tickets and templated promo coupons.

FUZION integrates with JCM's ICB 3.0 drop management system, which is field-proven to save operators 100s of 1000s of dollars annually. FUZION takes ICB to the next level by providing real-time health monitoring data and predictive

drop and maintenance scheduling to dramatically increase operational efficiency.

Next, JCM's PromoNet 2.0 is the field-proven, floor-wide couponing solution that delivers the right promotion to the right customer at the right time. It allows operators of all sizes to identify high-value anonymous players, direct promotions to most valuable players, enhance player experience, and maximize results using business analytics. PromoNet increases amount of play, decreases un-earned awards, and lets each individual operator control levels of compensation.

Last, JCM's booth will outshine the rest thanks to its stunning array of digital displays from PixelPro technologies. With completely configurable PixelPro Max displays, operators can deliver their message their way anywhere across the property – casino floor, bars, entertainment venues, sportsbook, bingo hall, convention area, and more. PixelPro displays are lightweight, have low energy usage, no noise, and ultimate flexibility. PixelPro FLEX empowers operators to unleash video creativity because each panel can flex convex or concave by 30 degrees for incredible displays anywhere you can imagine them. PixelPro Cubes have a flexible modular design that allow operators to configure video cubes to into interesting 3-D shapes. Whichever configuration JCM takes connections to the next level in booth #4039.

Golden Race explores new markets at G2E '17

Virtual sports are a huge part of the future of the sports-betting industry. And despite the current saturated marketplace, virtual sports growth continues to expand, at different rates, all around the world.

Although in Latin America has taken more time than anticipated, today the market is growing rapidly, which is why Golden Race will open its second Latin America office in Peru.

While the European market has felt some slow down, Latin America, Eastern Europe and Asia are huge, and Golden Race is already operating

in these markets and seeing great success in all of them. How can growth continue? How can we ensure the future? Instead of going for a pretty picture, our focus is on creating the perfect betting experience – because that is what players want.

The company made a decision more than 10 years ago to do things differently. The market is full of companies whose main goal is purely visual. Admittedly, the products are truly beautiful, but more important, and what Golden Race focuses on, is the complete experience for players, and the most flexible and cost-effective solutions for operators. While Golden Race will never lose enjoyment

from real sports, and players will always enjoy betting on them, the future of virtual sports remains bright for any company that delivers the same betting experience in a lightweight and flexible way.

Martin Wachter, CEO at Golden Race, commented: "The next 12 months will be very important months for us because we are going into some very big markets, like North America and other areas. We believe that we have found the right partners and are very close to adding 35 licences in this market. Since we unveiled our MMA fighters in London in 2015, everybody is asking what Golden Race will do next? I just can tell you come to the shows G2E Las Vegas 2017 and ICE in 2018 – you will be really excited. Something is gonna happen that you will never forget!"



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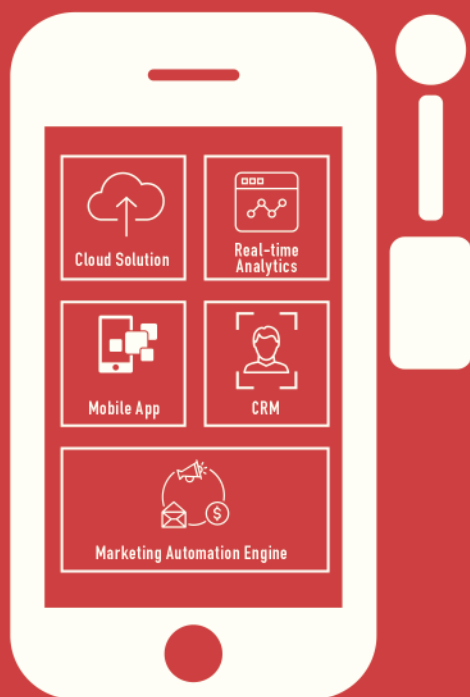
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YEARS OF
MANUFACTURING
EXCELLENCE



Merkur Gaming delivers a games landscape to the Las Vegas floor of Global Gaming Expo '17

Having recently celebrated the 60th Anniversary of the Gauselmann Group, Germany's world famous Games Makers, Merkur Gaming will bring what is being described as a 'games landscape' to G2E in Las Vegas, showing some 100 themes as this top line brand company for the Americas and international markets leads the line in what will be a proud presentation of the entire Group's range of gaming solutions and capabilities.

On booth 3353 at the Sands Expo Center, from October 3rd - 5th, Merkur Gaming will present a century line-up of 100 games, displayed on a stellar product line-up of its Avantgarde - and its latest Avantgarde Trio -, Merkurstar, the Evostar and Black Series cabinets. These units will present, in primarily single but also multi-game formats, a game range that will vibrantly demonstrate the huge strides that Merkur Gaming has taken in producing exciting and enthralling top of the lines game themes that will meet and even exceed the expectations of players from across the entire spectrum of casino floor attractions.

Predicted to be the 'star of the show' in terms of engineering excellence and highest quality will be the latest addition to the Merkur Gaming cabinet portfolio, the Evostar. As its Evo title suggests, Evostar has a shared innovation heritage with both the already hugely successful Avantgarde, Avantgarde Trio and Merkurstar models; being a unique hybrid service-friendly upright with the added player comfort factor of a slant top player position. Providing an added player attraction, Evostar also features a built-in USB port that allows guests to conveniently charge their mobile devices, free of charge, as they play.

The games that these cabinets will show will display suites grouped into Random Lines, Asian themes, Fruits & Sevens, Egyptian and Space Age themes, as well as some brand new standout

games that will be making their G2E and world debuts. Without doubt, there will be games to suit every taste: games from A- Z, Achilla to Zentaurus, and so much more besides.

The Merkur Gaming booth will also feature displays from across the entire Gauselmann Group. Cash handling experts GeWeTe will show a range of innovations from across their wide range of solutions; sports betting maestros Cashpoint, the betting professionals, will illustrate their many areas of activity and their established excellence in sports betting entertainment.

Based in Hamburg, Germany, edict egaming GmbH is the online gaming arm of the Gauselmann Group, a market leader and true innovative trendsetter holding multiple licenses in various markets and who will present the edict Game Solution, via which the popular Merkur games are marketed internationally for online casinos and betting operators.

In keeping with the Gauselmann Group's hugely significant position on corporate social responsibility, specifically in support of the protection of minors and measures to deal with problem gambling, there will be on-booth demonstration of the innovative Face Check, a contactless admission control system based on biometric facial features: currently the only system that allows youth protection without the need to present documents.



Interblock showcasing 15 new G2E products

Interblock, has announced its presence at this year's G2E - booth #1239. Interblock will showcase 15 new revolutionary products and features, designed to bring even more new carded players to the casino floor and increase the hold/handle the industry has historically seen from ETGs.

"Innovation and increased service will remain the focal point of our company as we invest tens of millions into R&D and infrastructure. With the opening of offices on five continents and a substantially increased product portfolio, Interblock's ability to support the growing demand for ETGs within the gaming sector has never been stronger." said Interblock Global CEO, John Connelly.

One such product for this year's G2E will be the revolutionary Stadium configurations. Unlike previous offerings, Interblock will unveil Keno, Bingo, Tournaments and Live Craps where a player can actually throw the dice within a Stadium environment. The definition of Stadium gaming will reach new heights at G2E!

In addition, Interblock's award winning StarBar will also be exhibited at this year's show. The StarBar has an enhanced portfolio of game content, designed to attract a new type of player to the traditional bar environment. Games such as Baccarat, Multi-Hand Blackjack, Craps and others have already demonstrated to outperform the traditional product offerings players have become accustomed to.

Next up, the PULSE ARENA, a fully customisable multi-game stadium environment that focuses on both entertainment and engagement. It uses lights, music, and ambassadors to create an elevated environment that extends the gaming experience for customers. It pulls in not only new players, but also pre-existing players who are simply ready for a new gaming experience.

Another critical segment to the ETG portfolio relates to Dice games offered globally. Interblock will showcase over four new dice games, designed to leapfrog traditional ETG Dice concepts. Pick 2 Win Craps, a three-dice generator, NUTZ a five dice game and a new Micro-dice Generator will all be released at this year's show. These games will offer a new shooter button, equipped with a motion-activated sensor, designed to enable a player to control the dice of an ETG. This patented technology has significantly enhanced a player's ability to interact even more with an ETG.



At G2E, Zitro will showcase its capacity for innovation and differentiation by presenting unseen products which will confirm that 2017 is definitely going to go down as the best year in the company's history. "At G2E we won't just be showcasing to the global gaming industry the products that we already presented to our customers and friends who attended our Zitro Experience. We will be unveiling new products, such as our new Show Prize games which will mark a before and after in the way people play video bingo, amazing games specifically designed for the Fusion platform such as Western Express, or our Bryke LAP video slots under the brand Blazing Pearls," stated Johnny Ortiz, President of Zitro. "G2E will be further proof of Zitro's commitment to the rapid growth of our product range. Month on month we continue to launch new games, new concepts and new ideas, with our focus set on offering casino operators all over the world a series of successful products."

While at Zitro Experience 2017, Zitro unveiled its new range of Show Time video bingo games, mainly conceived for being compatible with the Blackwave platform and with the amazing Fusion Slant 23/27 platform, now Zitro will be introducing its new Show Prize concept, a new way of playing bingo that combines a frequency of prizes that has never been seen in a bingo game, with vast simplicity for the player to understand the prizes that have been won. Show Prize is not a new library of video bingo games, but a true change in the form and manner of playing video bingo.

At G2E the company will launch Western Express to everyone's surprise, and will also present its amazing games Kingo, Gran Tesoro, Wonderful Lamp, Spin Win & Fire I, II and III, which have been specifically designed for the Fusion Slant 23/27 platform. Far beyond its technical features, this platform offers players an incredible gaming experience thanks to its ultra-slim unit design, its HD screens, and its large console that provide the player with maximum comfort and vital space.

Zitro celebrates its best ever year and forecasts a spectacular Global Gaming Expo in Las Vegas

Just a few months after Zitro presented its amazing new range of products at Zitro Experience and having taken the industry by storm, the company has advanced what will be the most breathtaking edition of G2E Las Vegas for Zitro so far.

Zitro will also present to the world its new promotional systems Bobby Hour, Big Hour, Crazy Jerrydot, Super Botin and Mega Air Cash, and the new functionality Wild Crush, available for clients subscribing to the Zitro Partnership Program, alike the Club Vip Zitro, the loyalty system that provides operators with a powerful tool for attracting and retaining their audience. Club Vip Zitro does not require the players to register, the system recognises them automatically, and makes available to Club members a series of prizes such as My Grand & Minor, My Jerrydot, or the spectacular community game Spin Party, in which all players win prizes simultaneously. "A few months ago, we revolutionised the video bingo market with our Show Time games and our new platforms, enriching the ZPP promotions offer and launching Club Vip Zitro, the only loyalty system that allows players to have, among other things, progressive jackpots of their own," commented Johnny Ortiz, President of Zitro. "We are now launching Show Prize, a new way of playing video bingo that goes far beyond mere innovation. This is a true paradigm shift in the way people played video bingo up until now".

With regards to its Bryke video slots range, Zitro continues to expand its multi-game packs within its already extensive collection of Pick & Win games, as well as its new multi-game family Spin Hit with four progressive jackpots, all of which are available in the superb new Fusion Up Right 23/23 and Fusion Slant 27/27 cabinets. At G2E, Zitro will be presenting its LAP Blazing Pearls, which comes with three oriental-themed titles that include elements of great

symbolic richness and excellent graphic representation. The games Dragon Princess, Dragon Warrior and Fu Charms share four progressive and shared jackpots, and a differentiated and unique gaming mechanics inspired by the legendary dragons found in the Chinese culture that struggle to reach the blazing pearl, symbol of well-being, prosperity and richness.

Sebastián Salat, CEO of Zitro, said that "as we announced at Zitro Experience, our range of Bryke video slots has now matured. Bryke is now an established video slot stand-alone product, and we are now adding to the Bryke range our LAP product under the name Blazing Pearls, a product of distinct personality and carefully thought-out mathematics, available in our eye-catching Fusion Up Right 23/23 and Fusion Slant 27/27 cabinets. At G2E it will become evident to all casino operators worldwide that Bryke is now a real option for those who want high performance video slots. After G2E, our staging at SAGSE Buenos Aires will confirm our commitment with South America, to then reach the ICE exhibition in London in 2018 where, with more products than ever before, we are sure to be in a position to compete with any other global supplier."

Zitro continues celebrating its tenth anniversary, the best year in its history, with what will be a spectacular G2E, an important milestone for the path which Zitro has taken with the clear objective and determination to be among the most important players in the global gaming industry.



Konami's focus on enduring entertainment value leads to an overflow of new releases

Top casino gaming manufacturer showcases an exciting suite of entertainment built for fun and rewarding player experiences over time

Konami Gaming, Inc. announced a strong lineup of multi-station developments, skill-based games, premium slots, and advanced casino systems technology set to arrive at the Global Gaming Expo (G2E) in Las Vegas on October 3 – 5, 2017. Konami's popular Concerto Collection of video slots continues to expand with an extensive library of proven game themes, novel progressive bonus options, and premium releases such as Castlevania. These core product innovations will be showcased alongside a high-demand mix of multi-station and skill-based games, including Crystal Cyclone, Beat Square, Frogger: Get Hoppin', and more. An estimated 27,000 gaming professionals and executives from markets across the globe will have the chance to see and experience Konami's latest gaming developments and advanced SYNKROS casino systems solutions live at Konami Booth #1154.

"Over the years Konami has become known for games and systems that stand the test of time, and now as our creative technology expands, that legacy supports even greater possibilities for properties and excitement for players," said Steve Walther, senior director, marketing & product management. "Whether it's a new progressive game, an emerging skill-based concept, or specially targeted player loyalty incentives, players and operators are looking for new entertainment that is not only unique, but also has the substance to sustain excitement beyond an initial attraction. Which

is why at G2E 2017 Konami is showcasing a suite of captivating gaming options that welcome players to play on and enjoy the full experience each casino has to offer."

Konami's Concerto Collection will highlight a variety of never-before-seen game mechanics and captivating art styles, as well as exciting new iterations on proven classics. Concerto Stack and Concerto Crescent will feature a large volume of single screen games, including China Shores Great Stacks, Lucky O'Leary Jackpots, and Konami's next releases for its Castlevania series.

"A considerable depth of creative opportunity remains to be explored for large portrait-oriented game content. It's opened up new game play possibilities for our developers to create and casino players to enjoy," said Walther. "Our team has also placed a considerable focus on standalone and linked progressive games. During this year's show we'll have upwards of 20 different types of progressives on the floor."

Continuing a decades-long tradition in innovative entertainment, Konami has expanded its product offering to include new multi-station concepts and skill-based products designed to deliver player experiences that are uniquely memorable and rewarding. Last February, Konami's Frogger: Get Hoppin' became the first primary skill-

based game to launch in Nevada and has since arrived to several additional markets.

Konami's next skill-based gaming innovation is a rhythmic dexterity game called Beat Square, which challenges players to compete for top scores by tapping lighted square buttons to the beat of the music. This latest release will be a centerpiece attraction for Konami's 2017 display, alongside a high-entertainment multi-station game called Crystal Cyclone.

"Whether it is a new product category or a new game theme release, our focus is to create satisfying game play experiences that bring new levels of excitement to the gaming floor," said Walther. "What makes these next-generation developments uniquely enjoyable for players goes beyond a novelty appeal—it's how the individual play mechanics, mathematics, bonus events, and entertainment delivery styles work together in harmony for continued excitement and engagement over time."

Konami systems technology—like its gaming product—is designed to deliver the utmost reliability while maximizing every touchpoint to keep players interested, active, and engaged. At G2E 2017, Konami's award-winning SYNKROS casino management system will display expanded features across an array of areas from marketing to table games—all with a focus on giving casino operators greater flexibility and control to reach targeted player audiences based on advanced, agile, data analytics. This along with the latest tools and features will be available for guests to explore first-hand within a live, comprehensive demo environment. Attendees are encouraged to visit booth #1154 at the Sands Expo & Convention Center on October 3 – 5, 2017 to explore these and more important new Konami releases.

Preview

G2E LAS VEGAS 2017

A focal point within IGT's booth will be its award-winning TRUE 4D product portfolio. Anchored in SPHINX 4D, TRUE 4D offers immersive gameplay through its use of 3D graphics combined with gesture recognition and mid-air haptic technologies. IGT will introduce new TRUE 4D titles on the CrystalCurve TRUE 4D cabinet including the blockbuster licensed theme Ghostbusters 4D.

IGT will highlight its expanded premium content portfolio by introducing new games for the CrystalCurve ULTRA, AXXIS 3D, CrystalDual + Stepper, CrystalCurve and S3000 cabinets. IGT will highlight its extended game library for the CrystalCurve ULTRA cabinet with game themes such as The Goonies Video Slots and Blake Shelton Video Slots. A revamped version of Jurassic World 3D, along with new TRUE 3D games such as James Cameron's Avatar 3D and Wheel of Fortune Wild Sapphires 3D are highly anticipated games on the AXXIS 3D cabinet. IGT's Dubble Bubble and Super Bankroll Slots games on the CrystalDual + Stepper cabinet, and the Fortune Gong and Golden Goddess linked progressives on the CrystalCurve cabinet are also among the many product highlights from IGT's Premium portfolio. IGT will also reveal the three new games that comprise Red Hot Cantina, IGT's spicy new linked progressive on the S3000 cabinet.

G2E attendees can "go big" in IGT's booth with the Company's newly released large-format cabinets – the MEGATOWER and S3000 XL. Inspired by proven IGT hardware, both colossal cabinets are supported by player-favorite game themes such as Wheel of Fortune Slots and IGT Pinball.

IGT will further propel its momentum in delivering top-performing video core titles with new content for the CrystalSlant, CrystalDual, CrystalCurve and AXXIS 23/23 cabinets. IGT will also reveal its new content segmentation model that removes the guesswork from creating game banks by differentiating IGT's video core segments: Jackpot Games, All-Star Evolution Games, Waterfall Games, Pure Core Games and Innovation Games. Standout, for-sale titles on IGT's CrystalCurve cabinet include Wild Fury Jackpots, a vibrant, five-level progressive that will make its G2E-debut; Ocean Magic Grand, a new take on the player-favorite Ocean Magic theme that introduces a 2X2 Super Bubble feature; and Cleopatra Gold which leverages one of the most popular slot themes of all time and incorporates an expanded matrix and free games. IGT's Elephant King, Dancing Reels Salsa, and Golden Gecko are dual-screen titles that have earned the distinction "Proven Performer" by excelling in the company's test banking process, and will be available for G2E attendees to enjoy in the Company's booth.

Additionally, IGT will extend the success of "Proven Performer" titles such as Big 5 Safari and Golden Egypt by introducing them in a single-screen format on the CrystalCurve cabinet.



It's playtime for IGT at G2E Las Vegas with the debut of a vast portfolio and 'Let's Play' theme

Under the "Let's Play" theme, IGT will offer a vast portfolio of innovation-packed gaming solutions in G2E booth #3659, with a focus on introducing compelling new content on the industry's hottest hardware. IGT's commitment to solutions that drive play and help casino partners engage players and achieve business goals will shine through in the hundreds of products that the Company will feature at G2E.

IGT is building upon its leadership in mechanical reels with the ongoing expansion of its content library for the S3000 cabinet. At G2E, IGT will dedicate a portion of its booth to the Company's new, single and multi-line Class II titles for the S3000 such as Double Topaz, 2x3x4x5x Ducks in a Row, and Wild Bill. Additionally, IGT will reveal a new version of the S3000 cabinet that is equipped with a spectrum meter and backed by content with iconic mechanics, pay tables, graphics and sounds. IGT will apply its content segmentation model to its mechanical reel portfolio as well, including an additional "Play Up" classification.

As the market leader in video poker, IGT will continue to introduce novel video poker themes that put a new spin on a classic casino offering. Must-see video poker innovations in IGT's booth include Wheel Poker, a must-have game for every casino floor that leverages a virtual wheel

in the game's top box for added entertainment, and Stack the Deck Poker, a game that compounds the thrill and chances of hitting three, four and five-of-a-kind hands. IGT's PlaySpot mobile solution will be the anchor innovation of IGT's interactive product portfolio at G2E. The award-winning technology powers MGM Resorts' playMGM mobile sports betting app and can be deployed to put engaging casino experiences such as live table betting, casino games, virtual sports and more on players' mobile devices. The Company will also spotlight its ever-growing content library of mobile games. From new casual games and top-tier licensed game such as Breaking Bad and Baywatch, to "Proven Performer" Ocean Magic, the Company's new mobile content is diverse and dynamic.

As a leader in new and emerging gaming technologies, IGT will highlight a series of



innovative gaming concepts designed to attract an expanded demographic of players to the casino floor. G2E attendees should make time to explore IGT's "Virtual Zone," a dedicated area that highlights the Company's new virtual reality, tournament and e-sports betting applications, and will feature IGT games such as Arcade Saga and Tournament Archery.

IGT's Systems area will showcase a range of solutions that will enable operators to deliver delightful customer experiences, and frictionless access to funds, rewards and loyalty programs. IGT solutions such as Cardless Connect, Resort Wallet and IGT Advantage, will all be on display and exemplify how IGT systems can help operators streamline operations, drive revenue and cultivate world-class casino-patron relationships. IGT will also highlight how its location-based marketing technology can be coupled with other IGT systems solutions to maximize ROI and cultivate personalized marketing messages.

Guests to IGT's booth can experience the thrill of the Company's multi-platform tournament offering that extends across video, spinning reels and video poker games. IGT will also feature an array of specialty gaming products such as skill-based games, Video Lottery Terminals, Amusement with Prize (AWP) solutions, Interactive content and Electronic Table Games (ETG) including Dynasty Blackjack. For more information visit IGT.com.



CPI brings the 'Future of Payments' to G2E

Crane Payment Innovations (CPI), a Crane Co. Company, continues to empower the Gaming industry with its proven range of currency validation technologies and real cash management solutions.

This year at G2E, the company is unveiling a breakthrough set of capabilities and portfolio enhancements that will revolutionize the way operators connect with their players, their business processes and, ultimately, their revenue.

"2017 has been a transformational year for CPI," said Eric Fisher, president of Gaming. "Not only did we launch our Crane Connectivity Solutions business, but we also grew our technology portfolio through the recent acquisition of Microtronic AG. G2E is the perfect venue to showcase the products we have developed as well as our roadmap for the future of payments in the Gaming industry."

CPI is dedicating an entire section of its booth to innovation and connectivity. Visitors will have the opportunity to evaluate an array of cashless and emerging payment technologies, including potential solutions for table games and real-time data delivery.

"Although the Gaming industry continues to rely heavily on physical cash, the player's wallet continues to become more diverse as technology evolves," said Fisher. "As new payment methods are approved for and utilized on the Gaming floor, we want our customers to know that we are more than ready to assist with a powerful suite of products and services that will deliver unprecedented value to their operations."

From its traditional product portfolio, CPI is also highlighting its SC Advance note acceptor. SC Advance sets the gold standard for performance, reliability and total cost of ownership. It is part of the winning SC product line, of which more than 2 million units have been sold worldwide. It features the industry's highest first-pass acceptance rate for valid street-grade notes – including those that are damp, dirty, crinkled or torn. Its robust recognition system is built to effectively read

the high-tech security features that are, and soon will be, introduced on new banknotes around the world. And, its expansive memory accommodates new banknote introductions as well as new security algorithms that will protect operators against emerging criminal threats.

SC Advance is also accompanied by a growing suite of modular extensions – including EASITRAX, the industry's smartest cashbox system that is now installed in more than 200,000 games worldwide.

EASITRAX provides the critical insight needed to drive faster, smarter and more profitable efficiencies from the gaming floor to the back room. It works by collecting transaction and performance data directly from the note acceptor and then generating reports through its intuitive web portal. Reports are customizable and can be used to streamline the drop process, facilitate asset evaluations, optimize asset performance and improve maintenance programs.

Automated asset tracking through EASITRAX eliminates the need for dedicated cashboxes, helping operators reduce drop time by up to 40%. As a result, it regularly delivers a return on investment in less than one year.

Now, a new Maintenance Alerts feature for EASITRAX allows operators to set their ideal note acceptor performance thresholds and receive automated email notifications based upon these critical metrics. This feature helps users save time and interpret data so problems can be identified and prevented before they even occur – further strengthening the payback associated with EASITRAX.

CPI continues to expand the EASITRAX smart cashbox system with new features and functionality not just for Casinos but also for a wider range of Gaming markets – including VLT networks and route operations. In fact, thanks to a new set of reporting features that create efficiencies in distributed environments, EASITRAX is currently being rolled out in massive numbers to VLT operations around the world.

To learn more, please visit CPI on booth 1850 at G2E or visit www.CranePI.com.

Preview

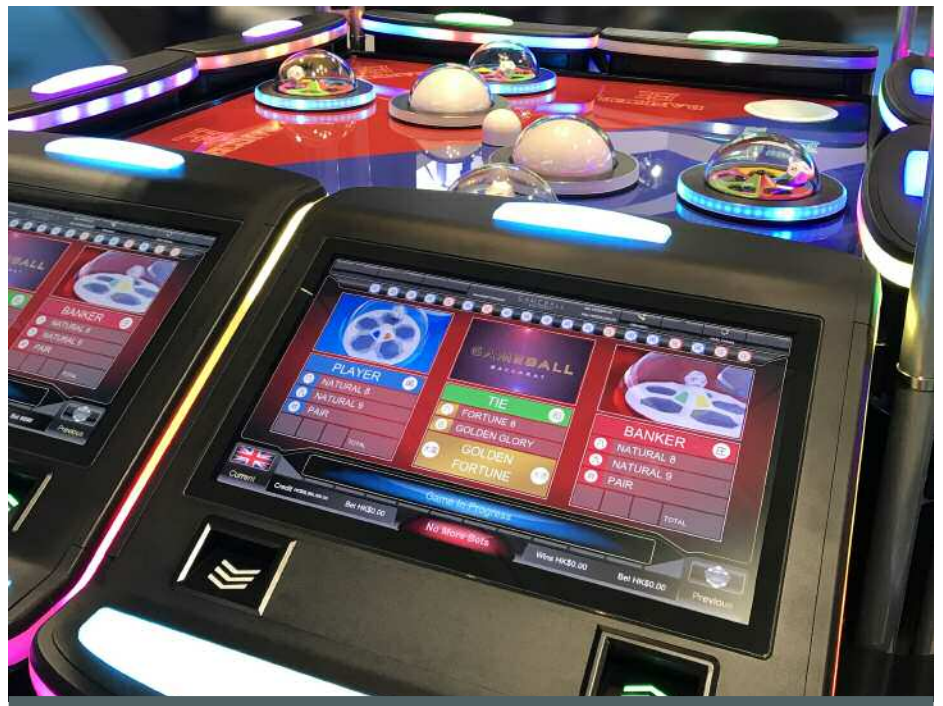
G2E LAS VEGAS 2017

Powered by the GFL Gaming module, the ergonomically designed Qorex Terminal is now available in a 23" cabinet as well as the existing 27" version. The new 23" cabinet incorporates all the features of the original larger terminal, but has been designed to provide a more space-saving footprint – ideal when space is at a premium or there's a restriction on the number of tables.

A variety of terminal configurations will be showcased at G2E, clearly displaying the flexibility of Qorex. Center stage will be an 8-player Qorex carousel featuring Gameball, the exciting custom developed new Baccarat style game. This new version brings excitement and entertainment to the traditional game as special 12-sided dice are automatically shaken to establish winning hands. With the added benefit of 3 types of jackpots, Gameball is set to create as much of a stir in the US as it did when it was unveiled in Macau at G2E Asia recently, winning a 'Hot Product' award.

Alongside the developments of the Qorex terminal is the completely redesigned Qorex Tablet Table. Now designed as a flexible modular system that can be built into custom designed furniture or bars, Qorex Tablet Table features an integrated bill validator system, eye-catching LED's and a consistent user interface which allows players to easily transition from Qorex terminal to tablet and vice versa.

Tristan Sjöberg, Executive Chairman comments, "We are really excited to showcase an even greater array of Qorex solutions at this year's G2E. The flexibility of the system is perfect for operators to pick and choose various options that maximise floor space and revenues. Now, in



TCSJOHNHUXLEY brings innovation to G2E

Innovation continues to be a major focus for TCSJOHNHUXLEY at G2E 2017. Following on from the worldwide launch of Qorex Electronic Gaming Solutions at last year's show, the company will be debuting a host of new additions to the range.

In addition to traditional games such as Roulette and Baccarat, Qorex can incorporate customised game content which increases players' choice whilst adding excitement to the gaming floor."

Also, being presented is the next generation Blaze LED Surface Technology and Saturn Glo Roulette Wheel. Visitors will be able to see the eye-catching patented animations of Blaze that can be customised to display a variety of themes or promotions, as well as clearly indicating game status and winning numbers with the synchronised colour changes of Blaze and Saturn Glo.

A new games showcase will feature a range of proprietary and side bet innovations which includes some Crown Resorts games, such as Dice Duel, Nutz and S7REAK that form part of an exclusive table games distribution agreement. Tried and tested on the Crown Melbourne gaming floor, these fast-paced games have proven popular with new and existing players alike. Alongside these will be AxMan, the fun and easy to play side-bet which adds an exciting Poker twist to the classic game of Blackjack and the progressive, 3 Card Draw Poker which will allow visitors to experience the power of the GFL Bonusing platform.

AMD rises to meet the challenge of creating immersive player experiences

At the G2E event in Las Vegas, AMD will show the Embedded Radeon E9170 family, delivering 4K immersive multi display with high performance and low operating costs

Casino gaming systems are rising to the challenge to create a fully immersive end user experience, providing high-quality graphics reminiscent of traditional PC gaming environments. However, with these advancements there is a real need to limit operating expenses to keep these machines running 24/7.

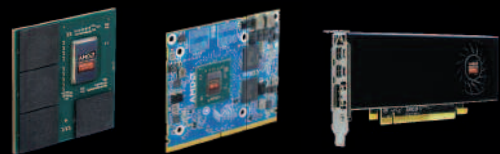
Designed to help lower power consumption, AMD's new Embedded Radeon graphics processing unit (GPU) delivers up to 3X the

MORE SCREENS
MORE PIXELS
MORE ACTION

Powering your
4K Immersive Multi Display
with **High Performance** and
Low Operating costs

NEW

Introducing the **AMD Embedded Radeon™ E9170 Family**



performance-per-watt over previous generations, and is available in an ultra-compact multi-chip module (MCM) form factor for additional energy efficiency.

The high performance, reduced latency and higher frames per second features of the AMD Embedded Radeon E9170 enable casino gaming companies to create eye-catching experiences with crisp, seamless 4K resolution.

Additionally, the power efficient qualities of

this GPU help to cut operating costs throughout the life of the system by improving the reliability of heat-sensitive components within the gaming cabinet.

With support for five distinct, simultaneous displays, the E9170 minimises design costs and complexity by eliminating the need for more processors and duplicate hardware to drive multiple displays. The new AMD Embedded Radeon E9170 will be made available in October 2017.



Ganlot to unveil new 4K Gaming Mixer at the Global Gaming Exhibition 2017 in Las Vegas

Ganlot, the professional and well-experienced gaming hardware manufacturer, is set to at G2E Las Vegas debut "GMO", the company's frequently inquired 4K gaming mixer.

GMO stands for Gaming Mixer of Outputs, which is able to mix gaming contents together with a player tracking system or sub-gaming

contents and utilise the original display of the slot machine by integrating video, touch and audio- all together. Combining the multi-scalar function, Ganlot's GMO supports wide input modes from 800 x 600 all the way up to 1080P and 4K. For the outputs, it can support automatic upscaling to 4K, which satisfies the global leading gaming contents.

As its professional and innovative role in this

vivid gaming industry, Ganlot brings a wide range of product lines and deliveries a huge variety by providing solutions from different hardware and software segments. At this October's G2E show, Ganlot will not only showcase its most popular all-in-one gaming boards and systems, it also will demonstrate its iGaming KIOSK, skill-based applications, sports-betting as well as self-service solutions and further diverse technologies.

In the past years, Ganlot has performed well throughout the European market. By dedicating itself to the jurisdictions and regulations, it also takes a strong position in Asia. Now, Ganlot is ready to focus its aim on the US market. In addition, leveraging its scale from its parent company and international branches, Ganlot is able to provide the efficient local support to meet its customers' requirements from all over the world. Furthermore, Ganlot's Sao Paulo, Brazil branch's on-time local sales and technical support as well as dedicated gaming know-how, has gained a reputation in the booming gaming industry of Central and South America.

This market is always seeking more exciting and vivid ways to present games, making gaming more fun. Various demonstrations will be presented at Ganlot's booth to deliver an advanced interactive experience. At Ganlot's booth #3026 the audience will definitely be able to find the best solutions.

GLI continues to pave the way for innovation in the gaming industry

Gaming Laboratories International (GLI) provides world-class testing, certification and assessment services to the gaming industry with the highest levels of independence and integrity

Gaming Laboratories International's (GLI) dedication has enabled the company to become a trusted business partner to over 475 jurisdictions worldwide. With 20 labs strategically located on six continents around the world, our 1,000+ professionals are dedicated to bringing a truly global perspective to each and every client, 24/7.

We are proud to say we have pioneered many of the trends in the gaming industry. Since 1989, we've paved the way with our widely accepted gaming technical standards and work in the iGaming realm. The company holds U.S. and international accreditations for compliance with ISO/IEC 17025, 17020, and 17065 standards for technical competence in the gaming, wagering and lottery industries.

Our experts have years of experience testing and certifying every type of electronic gaming equipment and technology, including:

- Amusement with Prizes (AWP)
- Bingo – Charitable / Class II / Class III
- Bingo/Keno



- Bonusing
- Casino Management Systems
- Electronic Bingo Systems
- iGaming
- Lottery Gaming
- Mobile / Wireless Gaming
- Networked (Server-based) Gaming
- Pari-mutuel
- Peripherals
- Slot Devices and Systems
- VLTs

Beyond testing, our consulting staff is also prepared to help with complex issues, such as:

- Rule Writing
- Annual Rule and Regulation Review
- New Technology Consultation

- Development of Test Standards
- Development of Auditing Procedures for Accounting and Security Plans

GLI is your global resource for constant learning and constant change. With regulators in mind, we created world-renowned GLI University® to help keep our clients as up to date as possible on new technologies; we can even develop customized training to fit your specific jurisdictional needs. We produce critical, in-depth seminars and events designed to empower attendees with industry fundamentals that will keep them on the leading edge of information and knowledge. GLI's expertise and experience help give our clients a competitive advantage that is unmatched in the industry.

Preview

G2E LAS VEGAS 2017

Advantech-Innocore, the specialist in computer platforms for casino gaming and lottery, announces the latest member of its highly successful DPX S-Series products, the DPX-S445.

Based on the new Intel 7th generation high performance embedded platform, the DPX-S445 gives the gaming OEM the processing power to enable the next generation of gaming machines.

We know performance matters. It's why we continue to focus on improved performance, delivering significant increases over previous generations and over any other gaming platform in the market – up to 20–30 percent for processing performance and gaming, with 4K, VR and 360-degree content.

The single-board integrated solution has a full feature set of I/O, COMs, storage and advanced security designed specifically for the gaming industry. Three independent monitors are supported via three DisplayPort 1.2 DP++ ports and for even higher performance the standard PCI-Express graphics card slot allows the DPX-S445 to support the latest graphics cards for up to eight additional displays and cutting edge graphics technologies.

Featuring the Intel 7th plus 6th generation Core-I CPUs the DPX-S445 provides:

- More speed.
- More responsiveness.
- More security.
- More immersive experience.
- New technology on your own terms



Advantech-Innocore pushes the performance bar with its latest Casino Gaming Platform including Intel 7th Generation Core Processors

The Intel Embedded platform, lifecycle now up to 10 years for the processors, ensures customers a long-lived and future ready platform. As the latest member of the field proven DPX-S Series, the DPX-S445 is backwards compatible with previous models. The long lifecycle and backwards compatibility ensures customers that they can move to new technology on their own terms rather than being pushed along. Another way the DPX-S445 benefits customers is the support for 6th generation CPUs as well as the newest 7th generation. The DPX-S445 supports Windows 7, Windows 8.1, Windows 10 and embedded Microsoft operating systems as well as Linux. However only the 6th generation processors have support for Windows 7 and Windows 8. Indeed the DPX-S445 is notably the last embedded platform with Windows 7 support. For gaming customers with a large

investment in Windows 7 codebase, the DPX-S445 allows them a last "lease of life" with that platform while they migrate to new versions of Windows.

The all-in-one platform offers all the hardware interfaces, onboard features and security needed for a typical slot machine in the regulated casino gaming market. The gaming subsystem is field proven and approved by regulatory labs for markets worldwide (GLI, BMM, NVGCB, NJ, MT etc). Leveraging this proven technology combined with the latest high performance Intel processors, the gaming OEM can benefit from low risk, fast time to market for their next generation gaming product.

Please visit us at G2E Las Vegas, 3rd – 5th October 2017. Both No: 3841 "

Elo Touch Solutions 'Goes Large' at G2E

Elo will show two recently launched large-size gaming touchmonitors, the 4343L and 5543L, extending size options of the open frame product line from 10.1-inches to 54.6-inches.

Available with Elo's industry-leading TouchPro Pro-M Projected Capacitive (PCAP) touchscreen, the 42.5 inch 4343L and the 55 inch 5543L both offer up to 12 touches recognized simultaneously with a consistently fast, accurate and drift-free touch response. With the sleek edge-to-edge architecture, the surface is easy to clean with no edges to trap dirt or grease and with the touchscreen sealed against dirt and dust, integration into an enclosure is simple.

The large format open frames offer multiple mounting options, 24/7 operation and support touch through glass making them ideal for self-service kiosks and gaming applications.



UL60950 ball-drop test compliance supports applications in demanding public access venues such as busy casino environments. The full HD displays and high contrast and brightness panels ensure crisp images and vibrant colours that will catch the player's attention. The seamless glass front and the option of through touch capability allow for modern cabinet designs.

All large format PCAP products are not created equal so it is important to pay attention to the construction and materials used. For example, products using so called wire mesh have visibly embedded wires that distract the user and take away from the aesthetics of the display.

The Elo Pro-M PCAP touch screens use a highly transparent metal mesh film with ultra-thin electrodes carefully arranged in an irregular grid pattern on layers of plastic film. The metal mesh electrode sizes are so small that they cannot be seen with the naked eye, which allows Pro-M designs to deliver a very sensitive touch experience.

As all other Elo gaming products, these new touchmonitors are built and designed for touch, backed by a 3-year standard warranty. Elo is proud to be the only company in the world that produces its own touch screens, ASICs, firmware and software drivers in-house.

The new TITAN cabinet from Casino Technology will be ready to roll out at the G2E Vegas show

Casino Technology is to roll out the new luxurious ARCH TITAN cabinet with two 43ins curved monitors at G2E in Vegas. The boutique premium product is making a spectacular entrance on the gaming stage. This unique one-of-a-kind slot machine stands out from the crowd with its impressive size and design

As a successor of the premium ARCH slot machine of Casino Technology, the ARCH TITAN is another proof of the company's innovative approach in the product development. ARCH TITAN delivers the same immersive experience of ARCH, but brings another dimension to the gaming experience with the added 43ins. vertical curved top box.

The slot machine is offered with the latest multilevel progressive game of Casino Technology - FIVE BLESSINGS DELUXE. The game was launched at G2E in Macao, receiving excellent feedback from customers and operators. ARCH TITAN will be further enhanced by a portfolio of new multilevel progressive games.

Rossi McKee, Vice President of Casino Technology commented: "We are very proud to present our newest gaming solutions at G2E in Las Vegas and eagerly anticipate their premiere on the American market. Our concept is to deliver new level of gaming experience to the players, and ARCH and ARCH TITAN reveals our commitment to innovation."

Another product – the new hybrid slot machine, EZ MODULO, will be launched for the North American market by Casino Technology. With modern design, advanced ergonomics, build-in specially designed slot stand, EZ MODULO is a great solution for every casino floor. The cabinet has an option for adjustable height and modular design, allowing for easy

conversion. The first release is introduced with two 27ins. HD monitors and optional 24ins. or 27ins. HD video topper. EZ MODULO will be presented with the latest series of the company's bestseller GAMOPOLIS SPEED KING – new multigame pack with 60 High Definition unique games.

A bundle of games, designed with a particular focus to the North American customers, will be presented jointly by Casino Technology and its affiliate, Alternative Gaming Solutions. Amongst them is the unique HOT ROD slot machine driven by the exclusive ARCH cabinet and wrapped up in the custom crafted famous hot rod – the 1932 Ford Roadster is making a successful inroad in Europe and soon in USA. HOT ROD with its spectacular posture and modular design of the decorative housing is highly appreciated by operators, seeking diversity and flexibility on the casino floor. Other games from the North American bundle are WILD SUNRISE, JUNGLE FORTUNE and MAGIC PEARL, which will be showcased at company's booth 2050 at G2E.

Alongside the products for the brick-and-mortar casinos the company is presenting its interactive portfolio of products, including the Social Gaming portfolio of more than 100 HTML5 games, the new LEOPARD online platform synced with the other 4 system sets from the complete suite THE BIG 5, offering a seamless landbased to online casino systems solution. "In the online corner we will be



demonstrating the omni channel seamless systems solution. Combining five sophisticated systems, THE BIG 5 suite offers a full range of tools for both traditional and online businesses. True to our desire to deliver new gaming experience, we will be demonstrating at G2E our latest development – the Virtual Reality gaming room, which will be launched for the online players next year.", said Rossi McKee, Vice President of Casino Technology.

PAC-MAN to set the Ainsworth stand alight at G2E 2017 expo

Ainsworth Game Technology will showcase an array of new content for its sleek and innovative A640 and A600 cabinets in booth #1529 at the Global Gaming Expo

In total, Ainsworth will display more than 130 games – including titles for both Class III and Class II jurisdictions – as well as new sign package options, linked progressive brands and premium branded slot games sure to attract attention. Highlighting the booth will be PAC-MAN Dynamic Edition. This title follows up on the incredible success of PAC-MAN Wild Edition, which has seen tremendous game performance at casinos throughout the US.

The iconic PAC-MAN character is one of the most recognisable figures in arcade game history and was the basis for the most successful arcade game of all time. Now, PAC-MAN has chomped on to casino floors on the A640 cabinet. PAC-MAN Dynamic Edition adds even more of the fun that's made PAC-MAN a global phenomenon with increased player interaction, thrilling bonus features and an enormous wheel that awards massive jackpots. Throughout the game PAC-MAN makes appearances offering players wilds and other fun ways to win. PAC-MAN Wild Edition and PAC-MAN Dynamic Edition are part of a strategic partnership

between Ainsworth and BANDAI NAMCO Entertainment. In total, Ainsworth's Class III game library now tops 250 unique titles, giving casino operators a wide selection of compelling game content for the Company's full line of innovative cabinets, including the A600, A640 and A600 Slant Top.

In addition to PAC-MAN, among the titles on display for the A640 will be the exciting new games Desert Dawn, Desert Dusk, Rumble Rumble Eagle and Nostradamus. Additionally, entirely new brands like QuickSpin and Power Shot will debut at the show.

The games take full advantage of the stunning A640, which features optimal viewing on a 40-inch high-definition LCD game screen and an attractive design creating powerful game experiences with eye-catching game art.

The cabinet comes standard with a touchscreen LCD button deck and a mechanical "bash button" to combine the ease of new technology with the excitement of traditional slot play. An optional 27-inch LCD topper will attract players across busy casino floors.





The road to the 2017 G2E Las Vegas is full of anticipation as Alfastreet readies its exciting new products to be unveiled at the show. The build-up before the event will be extra special for Alfastreet's partners, distributors and friends, as they're invited to a dedicated event in appreciation of their hard work and dedication.

Alfastreet's single terminal range will be expanded with the new Felix T single terminal, boasting an attractive design and a 27ins. touchscreen, incorporating the latest hardware and new software, which will enable players to play up to four games simultaneously. The exact same technical solutions are shared with a table top terminal, which represents an ideal solution for optimal space utilisation, given its modular design and space-efficient outer dimensions.

Alfastreet prepares to delight visitors to G2E with a new product range and colour scheme

For the G2E Alfastreet has prepared a dedicated coffee table version, showing a modern alternative application of this technology.

All of the machines at the show will be presented in a new colour scheme, aimed at the virtually infinite customisation options now available to Alfastreet clients. The novelty count doesn't stop there as attendees will have a chance to try and test the new Multi-touch roulette table, upgraded Lucky 8 roulette machine and Felix S slot cabinet, which is already showing excellent results from the first installations in different parts of the world.

The company's registered Multigame and

Simultaneous Play options will of course be available, simulating the most powerful and versatile casino floor in a confined space. Full inter-connectivity between equipment gives clients virtually endless possibilities for system expansion. Alongside the cabinets, a new online management system and an evolved remote play solution is being unveiled, providing a complete packaged solution for future gaming venue requirements.

The company extends a warm invitation to everybody involved in the gaming industry worldwide, to make space in their calendar to meet the Alfastreet team at the forthcoming show at the Sands Expo in Las Vegas, NV.

Gaming Partners International is to highlight its new and innovative product offerings

G2E is one of GPI's most anticipated annual gaming shows, using the opportunity to meet with customers from around the world. This year GPI will be showcasing its full suite of table game products including the newest currency features, line of playing cards and RFID solutions at booth No. 4433

GPI has a suite of gaming currency offerings, unmatched in the industry. Customer options include multiple currency lines under the well recognised brand names of Paulson, BG, Bud Jones, Gemaco and Dolphin. Each line offers its own set of innovative design and security features giving customers the ability to design a one-of-a-kind piece of currency with multiple layers of security. The BG V-Series, produced with a new, innovative and highly durable injection material formula, was developed to provide customers with a gaming currency option including advanced chip design flexibility. BG chip customers can now include the new Focus security feature into their chips. Focus is a new and advanced

covert security feature that will be demonstrated to select customers. In addition, V-Series customers can also include Hollow Shot in their chips. The Hollow Shot serves a dual purpose in the chip's design and counterfeit deterrence.

Customers will be able to see firsthand demonstrations of our exclusive high-frequency SMART RFID products and solutions. SMART offers the latest advancement is casino currency RFID technology and when used with the Chip Inventory System (CIS) software, SMART delivers a complete currency tracking and authentication solution. GPI has developed



new and advanced solutions using SMART to provide customers with some of the highest level currency security options available.

Since doubling the size of GPI's playing card manufacturing facilities in Blue Springs, MO, GPI used the time during and post expansion as an opportunity to enhance the features of its existing playing card offerings. Customers who visit the G2E booth, will see these new enhancements firsthand. GPI is also excited to introduce a new line of premium paper playing cards under its Paulson brand, Paulson Aces. Paulson Aces are manufactured using a heavier, high-grade European paper stock and offers superior handling.



BetConstruct invites guests at G2E '17 to enter 'the door'

BetConstruct joins G2E Vegas 2017 with a whole set of additions to its offerings to cement its reputation of an award-winning provider and supplier of gaming and betting solutions.

This year BetConstruct brings to the Las Vegas G2E event the latest release of its Fantasy Sports, enhanced with such features as live updating of points, auto calculation of contests, user-created contests, licensed headshots for players, compare and live transfer modes and more.

Fantasy Sports is a unique product focused on entertaining the players and increasing operators' profitability. For partners, it creates more gaming activity and more revenue. So does BetConstruct's Skill Games offering. It now includes three separate games in one software package: Backgammon, Poker Classic and Open Face Chinese Poker.

Fantasy Sports and Social Gaming suites, Sportsbook and Skill Games all widen the path to growth for operators worldwide. BetConstruct's Social Gaming suite provides access to the widest range of products – Social Sportsbook, Poker, Casino and Skill Games. It presents an amazing opportunity to unearth new players and new revenues.

What's new this year is BetConstruct's Spring BME (Business Management Environment).

Introduced on 11 July at the iGaming Super Show in Amsterdam, Spring Business Management Environment (BME) creates a complete management infrastructure for gaming operators. Everything they need – including marketing, legal, accounting, risk management and bookmaking services – is at hand on one user-friendly dashboard, with operators given the chance to deliver new gaming and betting products to their players with a single click.

"By introducing Spring BME, we are extending the concept of an online gaming platform with built-in business services, multi-tenancy support and B2B marketplace," said BetConstruct CTO David Gasparyan. "Our primary goal is to bring all vendors, technology providers and operators into a friendly and comfortable environment. All we have developed so far is incorporated into Spring BME: products, tools, knowledge and expertise."

BetConstruct's team will be happy to meet you at Stand 4823 and share its expertise and knowledge with you.

E-gaming's pixel perfect products

E-gaming, Czech machine manufacturer, specialist in SBG system and online game content, whose achievements have exceeded the borders of the Czech Republic and Europe, is entering the autumn season of 2017 with great success

The company is currently focusing mainly on the Spanish and the Latin American market. E-gaming launched its own operations in Spanish autonomous region Andalusia, where they acquired several arcades. In the same area the company has starting to roll out AWP machines, generating great interest from the customers. At the same time, the company is installing a significant quantity of machines in Panama and they are already monitoring the positive impact in prestigious casinos in the Central American country.



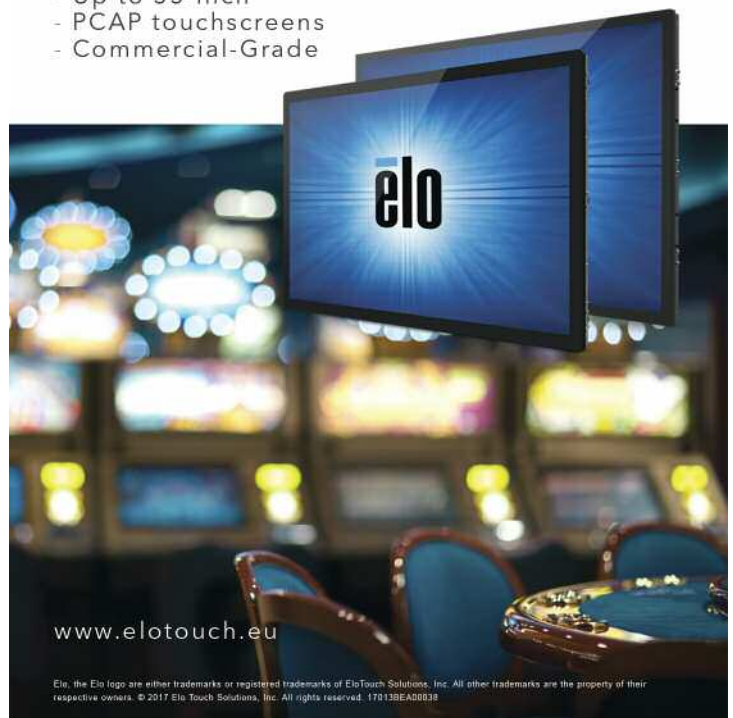
E-gaming also already started the preparations for the ICE exhibition of 2018, where will be presenting again, and is ready to amaze its customers as well as delight new potential clients with intriguing novelties.

elo

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Big Money Issues: Settling your bills

G3 seized the opportunity to discuss online payment solutions at both the global and local level with Paysafe's CEO of Digital Wallets and Income Access, Lorenzo Pellegrino



Lorenzo Pellegrino,
CEO Digital Wallets & Income
Access, Paysafe

Lorenzo Pellegrino is CEO of Digital Wallets & Income Access, at Paysafe. Prior to assuming his current role, Lorenzo was the Executive Vice President for Digital Development for Optimal Payments plc from 2012 to 2015. Before joining Optimal Payments, he held executive level positions at Skrill (previously known as Moneybookers), first as Vice President for Sales and Account Management in the UK and then as Vice President of Business Development in the US. Lorenzo earned his degree in Public Administration and International Institutions Management from the Università Commerciale "Luigi Bocconi", located in Milan. He also attended the University of Westminster in the UK, where he completed a Business English Certificate & Diploma, with a concentration in Marketing.

How do operators strike a good balance of local / global when it comes to payments?

This year, 2.2 billion gamers around the world are expected to generate \$108.9bn in revenue. If operators are not providing a seamless digital experience to their customers, they may potentially lose out on their share of that revenue. The payments stage is often the last thought about, but arguably amongst the most important. If it is not optimised to include the payment methods most regularly used by their customers, operators are likely to see a high drop-off rate when it gets to the important part – the payments and depositing page. That's because not all payment methods are created equal. Especially when you consider different cultural preferences towards methods of payment.

Trends don't happen in isolation. There's always something driving them and fundamentally altering the behaviour of large groups of people and payments are no different. The challenge for businesses is understanding the trends and adapting to them alongside their customers' needs. The key is the localisation of the payment needs while still allowing customers to connect to a global economy. Innovation in this industry means trends can change very quickly in local markets.

With so many payment methods on offer, it can



be daunting for an operator to narrow it down, but considering the cultural context, attitudes to security and authentication, and economic circumstances in the markets in which they operate can be the difference between success, or losing out to a competitor.

How can an operator successfully tackle cross-border payments?

Offering innovative, engaging and localised payment solutions can help differentiate businesses looking to compete in international markets. Competition is fierce across all sectors of e-commerce, including online gaming and gambling, and merchants vying for attention require innovation and alternative payment acceptance solutions that meets both consumer expectations and regulatory requirements. Offering a large number of payment methods isn't always feasible. The cost of implementation, set-up, and maintenance can be high with some payment methods requiring operators to register a bank account in certain countries, and difficulties associated with managing multiple



PSPs providing different payment solutions rather than through a single platform with many payment methods. For some operators, the potential return on investment may not be enough to justify the expense, but trusted payment partners can advise on popular payment methods and guide operators with the right strategy. Prepaid, digital wallets or bank transfers are great alternative payment examples that allow consumers to make online purchases, without a credit or debit card. By 2022, the global prepaid card market will be worth over \$3.5 billion, with Europe dominating the global market in terms of revenue and demand, accounting for half of that figure.

Why do payment methods matter when operators are expanding internationally?

Put simply, not offering the region's preferred payment method can have an impact on the operator's bottom line and conversion rates. With 46 percent of drop-offs occurring at the payment stage, it's essential that operators adapt to the diversity in international markets and

consumer behaviour, or they risk losing out to competitors. Local consumers are more likely to abandon their transaction if they can't find their preferred method of payment at the payment stage, and this is particularly relevant in Europe where local solutions such as direct debit, debit cards, and bank transfers are sometimes more popular than global credit cards. There is a wide variety of alternative payment methods available for operators to integrate and accept today. Combined with the increasing number of devices which consumers use to pay, it can be a challenge to identify the relevant portfolio of payment methods to accept when growing a business abroad. Businesses should rely on the support and knowledge of their Payment Service Provider (PSP) to secure the relevant offering according to their targeted markets and help navigate the international regulatory environment. Local alternative payments are often operated by local banks, use local currencies and are designed for their market's unique applications, settlement processes and country regulations. In addition, they also carry significant brand equity and trust.

Prepaid, digital wallets or bank transfers are great alternative payment examples that allow consumers to make online purchases, without a credit or debit card. By 2022, the global prepaid card market will be worth over \$3.5 billion, with Europe dominating the global market in terms of revenue and demand, accounting for half of that figure.

What are the new forms of alternative payments that operators must be aware of?

In the fast-paced industry of fintech, there are constantly new products coming to market, but an uptake in usage can be a longer process. While it's important for operators to have a finger on the pulse of payments, it's imperative that they be aware of the methods in use. Operators looking to expand further across Europe, for example, need to consider including payment methods such as SEPA Direct Debit, GiroPay and Sofort in Germany and BACS in the UK. In Italy, the majority of debit cards do not allow online payments as they are purely chip-and-pin, so methods such as Rapid Transfer or iDEAL (in The Netherlands) which allows customers to transfer money online from their bank to the operator's bank may serve this customer base better. Other newer forms of alternative payments include mobile payments and wallets such as Android Pay and Apple Pay. E-wallets such as NETELLER and Skrill can also be considered as part of a merchant's alternative payments portfolio. These quick and efficient payment methods are already used by millions of consumers in more than 200 countries and provide additional options to add, withdraw and transfer funds.

Control of gaming sites is increasingly being exerted by government bodies through denial of access to online payment facilities. How does this affect the services Paysafe provides?

Paysafe invests significant efforts into monitoring and assessing the legal and regulatory framework for gambling services across the markets in which our merchants operate. Recent changes to gambling regulations in a number of jurisdictions show increased desire to enforce local licensing regimes through limitations on access to payments. However, the approach taken broadly varies from country to country and the exact requirements remain unclear in many cases. Nonetheless, we see that technology-driven payment companies like Paysafe, with strong risk and fraud management tools, are better suited to apply targeted restrictions on payments than other providers of payment services such as banks.

Interactive

GLOBALISATION AND LOCALISATION



In general, it's our position that local licensing of the gambling market leads to fragmentation and increased costs of compliance. We're therefore supportive of a European licencing regime that would allow for passporting or a single market for gambling. A single market approach would increase transparency around how decisions to blacklists are made. We endorse a formal process whereby a court proceeding allows both parties to be represented, and a ruling is made subject to appeal. Clarity can only help the consumers and the merchants that may be affected by these regulations.

To what level is AI currently being exploited within financial services? And what role will it play in the future, especially in terms of risk and fraud?

The digitisation of commerce has been a catalyst for new capabilities, new technologies, and new thinking from the fintech industry. One such technology has been Artificial Intelligence (AI). There is still room for growth in how AI is used in the payments industry. It can be used to automate the last remaining elements of manual processing, and through that, bringing cost, efficiency and risk reduction benefits, as well as reducing expensive, time-consuming, and error-prone human intervention. It also plays a major role in some of the elements of real-time payments – such as compliance checks and various customer service-related activities.

On the risk front, there are two key drivers for AI

in payments: the increased risk of fraud generally, and financial services and online merchants being particularly susceptible to sophisticated attacks. Merchants saw over 600 attempts of fraud per month in 2016 – a third of which were successful, and the impact on the bottom line as well as brand reputation can be exponential. While AI can be used to try win the fight against fraud, it can also be used to authenticate genuine transactions that may otherwise be mistaken for fraud, and reduce genuine transactions being declined. One in six

Merchants saw over 600 attempts of fraud per month in 2016 – a third of which were successful, and the impact on the bottom line as well as brand reputation can be exponential. While AI can be used to try win the fight against fraud, it can also be used to authenticate genuine transactions that may otherwise be mistaken for fraud

shopping experiences are declined because of suspected fraud, and these false declines can lead to around \$188 billion loss per year – 13 times the cost of actual fraud. In the online gaming and gambling industry, brand loyalty is key to success, and AI being used in this manner could potentially improve consumer experience without compromising safety.

It's becoming increasingly difficult for a single provider to deliver universal payment solutions, so how are banks, fintech companies and payment networks repositioning themselves to provide customer value?

Providing customer value is more than simply processing a payment. PSPs such as Paysafe provide end-to-end payment solutions for businesses and consumers around the world. Providers must offer a suite of processing and acquiring solutions including access to a global payment network, best-in-class fraud and risk management tools, management of the burden and complexity of compliance, and frictionless payments for customer. Established PSPs, banks, and fintech companies that have been at the centre of innovation in payments understand how to stay ahead of the curve, by anticipating customer needs, reacting to regulatory changes and leveraging new technologies with a portfolio of products that is always growing. These benefits can be passed on to their customers and bring seamless transactions to merchants and customers alike.



GO 2 ENGAGE

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LOTTERY

When is a lottery not a lottery? When it only has two legs...

ZEAL Investment's James Oakes describes a lottery market that's ripe for a shake-up

That the lottery industry is sorely lacking innovation is hardly news. For example, when was the last time that you wrote a cheque? If banking has made the transition to becoming entirely digital, why is it that in 2017 95 per cent of the \$300bn lottery industry still involves having to buy a paper ticket?



James Oakes,
Director, ZEAL
Investments

James is an experienced entrepreneur, executive, economist, and is fascinated by all things lottery. He is the co-founder of Geonomics, a location-based lottery start-up that raised over £20m in funding and was sold to ZEAL Network in 2016. Prior to that James developed a statistical arbitrage trading system for equity derivatives and worked as an economist for a boutique London consultancy that was acquired by Experian.

The answer lies in understanding just how fragmented the global lottery market is. Every single country that allows lottery has its own unique set of regulations, and typically a single monopoly provider. This explains why lottery has resisted the revolution that technology has wrought on almost every other industry over the last 20 years. Even industries such as taxis and hotels, themselves no strangers to highly fragmented byzantine regulations, have succumbed to the relentless march of progress.

So long as this fragmentation exists there can be no UBER or AirBnB of lottery because it is impossible to piece together a patchwork of different, protected territories into a business with real scale and reach. At least that has been the conventional thinking that has led to entrepreneurs avoiding the space, and to the incumbents becoming increasingly entrenched.

THE THREE LEGS OF GAMBLING

Gambling is typically defined by a framework with the existence of three elements, or "legs":

- **Payment** – players must pay to participate

- **Chance** – the result must be largely determined by chance
- **Prizes** – players must be able to win a prize of value

Whenever a product has all three legs then it is typically defined as gambling, and regulated as such. This is important as gambling needs to be regulated; to protect children and to protect people that are susceptible to addiction.

TWO-LEGGED FRIENDS

Something very interesting happens when you remove one of the legs. Not only does the resultant product become less risky it is also unlikely to be classified as gambling. If a product is low-risk and not classified as gambling, then regulators stop caring about it and it can transcend the fragmented landscape.

It also means that start-up companies can move faster, and introduce genuine innovation. We have already seen this play out in sister industries to lottery.

Social casino companies like Playtika have





created freemium games that never pay out a prize. They realised that for many people the basic casino games are fun to play, even without the prospect of a prize.

Fantasy Sports companies like FanDuel and Draft Kings have increased the skill level to move their products away from chance. And whilst it is a stretch to say that every regulator has welcomed their model with open arms, they have created a genuinely new area with a very bright future.

THE LOTTERY OF THE FUTURE

At ZEAL Investments we have been paying very close attention to these developments. We go so far as to say that being “two-legged” is almost a pre-requisite to being the dominant lottery innovation of the future. It is hard to see how a conventionally regulated lottery product will ever be able to reach critical mass.

But that is not to say that simply removing one of the legs is enough. Fundamentally lottery play is defined by the desire to dream. This is the human need that every successful lottery

Something very interesting happens when you remove one of the legs. Not only does the resultant product become less risky it is also unlikely to be classified as gambling. If a product is low-risk and not gambling, then regulators stop caring about it

product has been able to meet. So it is critical to keep that characteristic benefit. It is therefore difficult to imagine a lottery product that removes the prize element entirely, as Playtika has for casino games. Even removing chance and adding skill feels like a bit of a stretch, as lottery play is characterised by its beautiful simplicity.

Removing the requirement to pay to play, however, appears to be a very ripe area for innovation. The Free Postcode Lottery, ZEAL Investments' first investment, fully funds all of its prizes through ad-revenue generated from users on its site. It is applying the most prevalent business model of the web, ad-funding, to lottery to create a true disruption.

Others are allowing people to play for free and

changing the nature of the dream prize at the same time, to attract millennials. Omaze, an LA-based start-up, lets people enter sweepstakes to win money-can't-buy prizes such as having Arnold Schwarzenegger become your life coach. And if Arnie isn't to your taste then there are plenty of other A-list stars offering incredible experiences to tempt you.

The whole thing is done to generate money for charities and players are encouraged to donate alongside entering to play.

More and more entrepreneurs are starting to realise the potential in taking a two-legged approach to innovation in lottery. The growing success of these start-ups points towards a future where having two legs will be better than three.

Interactive

SPORTS-BETTING

Andy Purkiss, Head of Production and Data Operations at SIS, explains how modern technology is providing retail operators with a much more personalised and cost-effective in-shop TV solution

Thinking outside the box



Andy Purkiss,
Head of Production
and Data Operations, SIS

Through improved technology and out of the box thinking, operators will soon be able to flick the switch on a TV service which is both tailored to their needs and at a price which doesn't stretch the budget.

Innovation has been the watchword in the online betting world in recent times as operators look for new features which will provide them with a competitive advantage to improve their product offer to their customers and profits.

The challenge for many omni-channel operators is how does that innovation enhance the customer experience, across a diverse set of channels like retail, online and mobile.

Retail outlets have been a key part of the betting experience around the world for decades, and adopting new technology can play an important role in attracting the next generation of customers.

In-shop TV channels have been a popular tool for retail operators over the years, with high-quality production values enhancing the retail customer experience.

However, the costs to operators for their own branded TV channels can be a challenge for some, as operating the traditional gallery-based

production studio requires a high headcount.

But through improved technology and out of the box thinking, operators will soon be able to flick the switch on a TV service which is both tailored to their needs and at a price which doesn't stretch the budget.

AFFORDABLE CONTENT

One of the key costs of a dedicated betting shop channel are the galleries with their banks of screens and their teams which control the content that goes out. But new technologies can now provide a more cost-effective way to fill the schedules.

Complex Automated Production (CAP) is a new software solution developed by SIS, which allows operators to have their own bespoke



branded TV channels at a relatively lower cost than previously and which can be delivered to any broadcast system required.

The cost of deploying a customer channel through the CAP system is significantly less than it would be through traditional broadcast technologies, which opens up the opportunities for operators to take the service for the first time.

PERSONALISED TOUCH

Personalisation is becoming an increasingly important part of the customer experience. With many major companies such as Amazon, Netflix and YouTube placing a huge amount of focus in this area with recommendation engines and a personalised experience, it's a model most operators are looking to adopt too.

Many online sportsbooks have in recent times introduced personalised features to enhance the sports betting experience, which in turn has led to an increase in turnover for some as players appreciate the tailored approach. None more so than cash out, which gives users control over the

destiny of their bet and has become a standard feature for many sportsbooks. Request a bet style markets have also grown in popularity too, particularly with millennials who request odds via an operator's social media account.

Advancements in technology can also provide a customised approach to the in-shop betting experience too, giving operators greater flexibility.

With CAP, the system allows operators to choose which events and schedules to show across their retail estate. Plus, the multi-platform can provide outputs to any distribution platform on an individual basis, matching each customer's own requirements.

There's a greater variety of content to choose from too, with the opportunity to combine content distributed by SIS, an operator's bespoke content and virtual sports. Not only can this provide companies with a competitive edge, it can also help to broaden the appeal of shops and open up the opportunity to capture a new audience for retailers.

The cost of deploying a customer channel through the CAP system is significantly less than it would be through traditional broadcast technologies, which opens up the opportunities for operators to take the service for the first time.

The technology is already live with Paddy Power across its retail estate, with the new bespoke TV service allowing the bookmaker to show different events in different shops. With a new streamlined process and tailored approach, Paddy Power TV is creating a more fulfilling customer experience. With its flexible functionality at an affordable price, CAP more than fits the bill for operators big and small looking for a cost effective branded TV channel solution.

Interactive

DAILY FANTASY SPORTS
IN EUROPE

What does FanDuel's 'Brexit' mean for DFS in Europe?

Oulala's Valéry Bollier judges the impact of the decision by FanDuel to exit the UK Daily Fantasy Sports market once its planned merger with DraftKings fell apart in the United States



Valéry Bollier,
Co-founder and CEO, Oulala

Valéry Bollier has over 13 years of experience in the iGaming industry. He is a regular speaker at industry conferences and seminars, as well as a contributor to various B2B publications. Equipped with a passion for Daily Fantasy Sports (DFS) and "Big Data", Bollier is the co-founder and CEO of Oulala, a revolutionary fantasy football game which was launched four years ago.

It is known that FanDuel is currently short on funds and is presently working on ways to raise their capital. As a result, they are faced with no other option but to halt their internationalisation

I have received numerous questions recently regarding the way FanDuel's "Brexit" may affect the Daily Fantasy Sports (DFS) sector in Europe.

Naturally, I am sympathetic towards the departing DFS giant, however it would be ill-advised to leap to a market conclusion as a result of a corporate issue.

FanDuel arrived at the decision to exit the UK market once it became evident that the merger between FanDuel and DraftKings was not going to materialize. With the merger process being blocked by federal regulators, the world's biggest pair of DFS companies had no choice but to call it off.

So, why FanDuel decided to enter the UK market in the first place? Expanding into the international markets was the next logical step for both, FanDuel and their rival, DraftKings. The UK appeared to be the perfect target for various reasons, despite both operators having to apply for a gambling licence (the latter went on to cause a rather heated commotion in the US due to the ongoing debate on whether DFS can be considered a game of skill or not).

It is known that FanDuel is currently short on



funds and is presently working on ways to raise their capital. As a result, they are faced with no other option but to halt their internationalisation (and likely be forced to execute a serious reduction in their work force imminently if they do not raise money quickly) by pulling out of the UK with less than a year under their belt, releasing an official statement affirming that "they hope to be back in the future." Thus far, FanDuel has not elaborated any further or provided any timeline for when they plan to return, however, I think if they were to raise \$100M by tomorrow, they would undoubtedly be back in Europe immediately.

The other question that now stands is whether FanDuel's "Brexit" is considered a blow to the DFS sector in Europe. Should this be considered an indication that DFS will never work in Europe



because of the decade long roots sports betting holds in sports culture? The short term outlook sees this "Brexit" possibly slowing down the European market's growth, however I do not foresee any major long term impact. In actuality, sports betting operators are struggling to attract the younger generations of today. The iGaming sector may not be pleased about it, but the younger generations have been raised playing fantastic skill games on their game consoles while also maintaining constant social interaction on their smartphones. They are not looking to play games of luck against the house but, rather, they are expecting us to offer a social skill game, which is, in fact, exactly what DFS is. One could say that DFS is the sports betting of the new generation.

An essential point to also bear in mind is that

FanDuel never had a particularly large presence in Europe, holding a much smaller marketing budget than DraftKings, for instance. The latter appears to be facing smooth sailing so far. The start of July saw a Boston-based firm announce a new partnership with Euroleague Basketball, meaning that they are looking to further expand their outreach in Europe.

In Oulala's case, FanDuel's "Brexit" is not considered particularly good or bad news since we did not have a close rapport with them. Nevertheless, with all of us in such an early phase of the market's growth, it is more beneficial to see more dancers than less on the dance floor. Ultimately, we share a common goal, that is, to develop the market. At Oulala we firmly believe that we can achieve that by partnering up with iGaming operators,

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particularly sports betting companies. Thus, we are currently putting a noteworthy number of deals into place – some of which will go live at the beginning of the new football season – enabling Oulala to become the first DFS network in football.

Interactive

ITALIAN MARKET FOCUS
VIRTUAL SPORTS

The reality of Virtuals in Italy

Delivering our Italian market report this month, G3 took the opportunity to speak to Kiron Interactive's Steven Spartinos about the Virtual Sports market in Italy right now and discuss the gaming sector in general



Steven Spartinos
Co-founder & co-CEO
Kiron Interactive

Steven Spartinos is co-founder and co-CEO of virtual games provider Kiron Interactive. Established in 2001, the specialist supplier now services web, mobile, and land-based sportsbook and casino operators on five continents. Prior to joining the betting and gaming industry, Steven worked in banking and finance.

Football Leagues are a recent introduction into the regulations by ADM as an evolution of the single game format and are widely expected to drive further growth of virtuals in the Italian market.

How are Italian operators using Virtual Sports? Is it a supplemental product or has Virtuals found its own dedicated player base in Italy?

Both. For the Italian player it is fair to say that virtual sports are primarily a complementary product when profiled alongside real sports, but they have certainly drawn widespread interest from a broad base of players across gaming disciplines. We have witnessed significant success in the popularity of our games identifying amplified growth in a dedicated fan base from groups including football fans, racing punters, lottery and VLT players.

Our unique product offering allows operators to present our virtual games in isolation or alongside other gaming products that Italian players have become accustomed to. The performance of our virtual sports has continued to grow ahead of our competitors' products.

How popular are Virtual Sports in Italy and which sports are the most popular and why?

Undoubtedly, virtual sports are very popular in the Italian market and that popularity is only going to increase as the experience for players continues to improve with new game formats, following further liberalisation of regulations, and new technologies.

Since becoming the first virtual sports provider to go live in the Italian regulated market in 2013, in partnership with Intralot Italia and Vermantia, we found football, horse racing and greyhound racing to generate the bulk of the revenues.



You only have to turn on the television to see that Italians love football. Serie A features some of the world's greatest players, with heavyweights including Juventus and Napoli. As such, it is little to no surprise to see that the number one performing virtual sport in Italy is football. However, our horse and dog racing products are similarly performing exceptionally well, to the extent that they come very close to football in terms of overall market share, delivering close to 40 per cent of total revenues. Interestingly enough the virtual versions of other popular betting sports such as table tennis and basketball have not fared as well from a virtual sports perspective.

We recently expanded our reach in Italy, launching a dedicated football leagues satellite channel, in collaboration with VSoftCo, to the Italian market through leading operator Sisal, across their online and retail estate. We are very excited about the prospects of this new format with their customers. Football Leagues are a recent introduction into the regulations by ADM as an evolution of the single game format and are widely expected to drive further growth of virtuals in the Italian market.

We are confident that the growth seen in real sports betting in Italy will have a direct impact on the growth of the virtual sports sector.

How experimental with new virtual sports, different types of bets, is the Italian market?

The Italian market is highly and effectively regulated. This means it is somewhat rigid in



terms of the permitted array of bet types and the total number of daily events, limited currently to 2,000 across all channels. As such, the Italian market leans more towards the traditional in terms of the virtual sports and bet types offered, and away from what you refer to as experimental.

However, that is not to say that the market shies away from new opportunities – far from it. It is opening up to variety of new product types, highlighted by the early success of Football Leagues, which is driving virtual revenues to new highs.

Why was the adoption of Virtual Sports in Italy so quick and widespread – and now – as a mature product, how is Kiron continuing to support operators?

We are delighted at how rapidly a broad cross section of the Italian market took to our Virtual Sports products through both online and retail channels, including a large number of traditional VLT customers.

Speed to market has been a key factor, but, most importantly, offering a superior product has secured our customers repeat business. We have invested a significant amount of time and effort in making sure our product is appropriately designed and positioned with our clients.

We offer a large variety of games for fans of football, racing and everything in between, all built on a foundation of advanced maths-modelling and real to life animation. At all times

our focus is on maximising the gaming experience for the Italian customer.

A lot of time and effort has also gone into assisting our clients with marketing the games and ensuring they are appropriately and prominently promoted across a comprehensive selection of marketing channels. Initial revenues for the first year of operation in the Italian market were originally forecast by ADM at €600 million. Actual revenues achieved for the same period came in just shy of €1.2 billion. We would call that a success.

Despite widespread growth, it is too early to consider the Virtual Sports market a mature one. There is still plenty of progress to make, both in technology and new products. We therefore expect to see more growth in the market, especially in light of recent new product launches.

The government is making a tax grab on the gaming industry in Italy right now – is sports-betting and Virtuals affected and do you see the changes helping or hindering the sports-betting sector?

Whether or not it is fair to characterise it as a “tax grab,” the Italian government certainly has ramped up the financial contributions it expects gambling companies to make to the state coffers. Slot machines saw an increase in taxation from 13 to 15 per cent, while the tax levied on VLTs grew from 5 to 5.5 per cent.

However, this could prove beneficial for live

The Italian government has not moved to restrict virtual sports. In fact, they have amended the virtual gaming legislation to expand the number of virtual events permitted per day as well as allow new game formats, such as virtual football leagues. A change we welcomed as it underlined the Italian government's open-minded stance regarding innovation and technological advancement in the betting and gaming sectors.

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How does the Kiron offer in Italy compare to other international markets?

We always aim to offer a product tailored to the specific requirements of each jurisdiction, and our approach to Italy is no different. We have several years of experience in the Italian market, and ensure that the events and betting markets that we offer are streamlined to suit the preferences of Italian players. Of course in Italy many of these elements are strictly governed by legislation offering a high number of events per day, well-structured presentation and a fixed return-to-player.

Can you reveal any of your forthcoming plans for the Italian market – what's the next big thing?

The Football Leagues product we recently released, in partnership with VSoftCo, has proved tremendously popular with Italian players. The future certainly looks bright for this new innovative product. We will continue to weigh opportunities to expand our presence in the Italian market, and are confident of capitalising on some interesting existing opportunities.

Enjoying a tailored relationship with entertainment services has become the new norm. Allowing users to customise their experience is something we must embrace in order to stay ahead of the competition.

As a market-leading provider in the virtual sports industry, Kiron Interactive is always investing in improving and innovating its product range, and we are focused on creating more diverse products targeted to new jurisdictions, while also improving our product offering to our current clients.

Products

LAND-BASED AND INTERACTIVE GAMING

Intelligent Chatbot Online Gaming Comtrade Gaming

This summer, Comtrade Gaming welcomed students to the 21st generation of Comtrade Group's summer school program, EDIT. Established in 1996, EDIT (Education for Innovative Thinkers) complements participants' academic knowledge with workshops and programmes to create software solutions and provide business experience. Today, EDIT is the largest summer programme for IT in Southern and Eastern Europe.

Aligned with current industry trends, this year's module challenged participants to develop a chatbot that supports the gaming industry's emphasis on multi-channel gaming and player life-cycles. Microsoft, the technology multinational, co-sponsored the programme as their open source Bot Builder SDK and Cognitive Services, served as the technical foundation for the product's development. The business communication interface simulates human behavior in customer service and data acquisition and uses natural language processing systems (NLP) for refined communication capabilities. Developed as an extension of Comtrade Gaming's iCore – The Enterprise Gaming Platform, the chatbot will enable players access to casino-based games, e-wallet management, customer service and bonuses.

"Through its history, Comtrade Gaming employed a talented pool of EDIT students that now influence our product development," explains Aleš Gornjec, General Manager of Comtrade Gaming. "By leveraging the region's technology-focused talent, we enrich the market and our products. EDIT shows that our emphasis on innovation and technology is engrained in all facets of the business."

The EDIT summer school programs are located in Ljubljana, Maribor, Belgrade, Kragujevac, Sarajevo and Banja Luka and welcomed over 100 students whose studies mainly focus on computer science and information technology.

King of Games UK Pub Sector Blueprint Machines

Blueprint Machines' digital Category C Compendium has been crowned market leader, with 75 per cent of the UK pub sector market share. With 10,000 King of Games now on site, the Gauselmann subsidiary reigns supreme in converting the UK retail sector to the benefits of digital.

"Despite our significant market share, we are not resting on our laurels, as we are aware that there are others who are following in our wake," says Simon Barff, Managing Director Blueprint Machines. "We are releasing a new menu for King of Games at the ACOS show this Autumn, which we anticipate will increase revenues still further. Our position as the UK's favourite digital Cat C compendium comes from the considerable investment in R&D and hard work analysing the data that comes in from the huge number of machines on site. Operators are not just buying a cabinet and games, they are investing in the games design might of the Gauselmann group and the unique player data, that only a company with this number of online connected games on site can lay claim to."

Some of the UK's top operators such as Bob Rudd, Essex Leisure and Mecca have confirmed significant orders for King of Games during 2017 so far. The reasons for the success of King of Games include the player recognition and acceptance of the game content due to cross channel presence online, in LBOs, AGC, Bingo Cat C, B3 and on analogue Category C machines.

"Our game menus provide a unique balance of random and controlled games with higher RTP (return to player) delivery to enhance player attraction," says Nicola Wallbank, Blueprint Machines' Content Test Manager. "We offer the

player more choice with slots style and more traditional types of games. Industry performance tables have shown that the performance on King of Games is higher than the competition – even with a greater return to the player.

"Our compendium is designed to return to player at a level which is at least six per cent higher than the average, yet despite this the revenue has increased across a significant number of machines on site within the pub sector. We can confirm that we are attracting new players to the machine, who are drawn by the quality and variety of the product mix," adds Simon Barff.



King of Games is furnished with a range of game styles, from traditional hi-tech titles, through to slot-style games. The figures show that around 80 per cent of all plays on King of Games is on the slot games with the other 20 per cent on the traditional hi tech offer from our sister company Betcom. There are a variety of menu choices from 9 to 32 games.

"We do a lot of cross fertilization of game styles, so players on our platform will recognize titles that they will have seen before at the AGC, bookies or online," adds Simon. "We believe this is a significant and unique factor in attracting new pub players, as people see a title that they recognize. When you factor in that the games we choose are best in class within each sector before we convert them, then you can see why we are attracting more players and growing the VTP and overall venue income."

"Our evidence shows that players are also moving around the compendium to take winnings from one game to play on an alternative. This would not happen on a standalone AWP. We can only deduce that what we are seeing is a satisfactory player experience leading to more of them. We are now therefore challenging the reality, where only 2 per cent of all people visiting a pub plays the machine, then this has got to be the Holy Grail that we have all been seeking," adds Nicola Wallbank.

Coral Connect App Mobile Apps Coral

Coral has launched the Connect app, available to download in the App and Google Play stores. The app is the mobile companion to the single wallet Coral Connect card, which was launched in 2014, designed for use across all channels, including gaming machines, bet stations and over the counter.

The app is the perfect retail companion for all Connect account holders providing up to the minute information pre and post bet. The hero feature of the app is the bet tracker, which can monitor over the counter bets. Punters can track their bets either by inputting their bet number found on their receipt or simply by scanning their receipt bar code. The most popular coupons have cash out features putting them in control of those bets.

The new app also boast a news and features section



highlighting current form and streams live events, including football, racing and tennis, as well as other markets. An account balance will be available at the touch of a button along with any promotions and cash out options. On a selection of the football coupons there will be updates available on game stats that will include: number of corners, possession percentage and shots on target.

Darren Calvia Head of Omni-Channel Product, LadbrokesCoral commented, "The Coral Connect App is a market-leading way for our customers to enhance their shop experience with us."

Products

LAND-BASED AND
INTERACTIVE GAMING



Play Mount Airy Social Casino Greentube

Mount Airy Casino Resort, Pennsylvania's first AAA Four-Diamond casino resort, has announced the official launch of its social casino, Play Mount Airy. The social platform was built using Greentube Pro, Greentube's private label social casino solution.

Mount Airy Casino Resort looked to Greentube to create a customised solution that enabled players to experience the resort online. The platform provides a true branded experience that reflects the physical appearance of Mount Airy Casino Resort. Players who visit the site will instantly recognise a virtual rendition of the property's lobby and main casino. In addition, the site offers popular games from Greentube and other providers.

The social casino – available on PC, tablet or mobile device – provides multiple in-game and external marketing channels that enhance the player experience through live operations. In addition, Greentube's marketing expertise assists with in-house promotions. The Mount Airy social casino is the third social platform for a major casino created by BlueBat Games.

"Our goal was to build a social platform that delivered part of the Mount Airy Casino Resort experience into players' homes and hands," said John Culetsu, Exec. VP and General Manager for Mount Airy Casino Resort. "We are proud to offer this platform to our regional players as well as casino enthusiasts across the country."

"Social Casinos are the gateway to attracting new players to visit a casino property and the means by which casinos can entice previous players to return," said Gabriel Cianchetto, President of Market Development, Greentube North America. "With our assistance, Mount Airy Casino Resort is aptly positioned to deploy the latest marketing technologies and game content."

AMANET Online slots Amatic Industries

AMANET – the online gaming division from AMATIC Industries – has been approved for play in Romania. The approval follows on from the recent announcements of AMANET being ready for play in Spain and the UK as well.

"With our great experience and proven track record with our MULTI GAME brand of games, it is of utmost importance to us that we enable our customers to play these games online as well. We are



showing the market that tried and tested land-based games make up the foundation for success in the online gaming market", explained AMATIC's online gaming manager Mrs. Tatjana Bauer-Engstberger.

Ready for play – the drive for approvals in key jurisdictions is following to plan and the AMATIC team is proud that players in Romania can now enjoy MULTI GAME on an online basis as well.

Midnight Stampede Casino Slots Aristocrat

Players everywhere who love Aristocrat's E*Series line of entertainment-style games now have two new reasons to stampede to your casino: Aristocrat's new Midnight Stampede family with the launch titles Midnight Rumble and Super Stampede.

Both titles in the Midnight Stampede family offer a two-level "Must Hit By" jackpot with achievable levels of \$1,250 (major) and \$250 (minor). Jackpots can be won randomly on any bought game, and when the player increases the wager, it proportionally increases the odds of winning jackpot prizes.

Adding to the fun, both titles have a new game mechanic – 2X Symbols that multiply multipliers with up to 32x wins on each pay line.

Players will be entertained with the exciting STAMPEDE, MAX Stacks, and Free Games features. Plus, two mini-games replace all of the major

symbols on the reels with a randomly selected major symbol or player-selected major symbols. What's more, a new "blackout" win cycle shows winning symbols and blacks out non-winning symbols.

Midnight Rumble and Super Stampede are the first E*Series games to allow players to use "auto-play," a new feature that enables players to select a number of games to play on auto-play. The auto-play feature can be stopped at any time.

Midnight Rumble and Super Stampede also offer flexibility to the operator, with different denomination set-ups and two progressive set-ups to choose from.

Midnight Rumble and Super Stampede are available now on Aristocrat's Helix, Helix+ and ViridianWS cabinets.



Giovanni's Gems Online Slots Betsoft Gaming

Mine for an unbelievably good time with GIOVANNI'S GEMS, Betsoft Gaming's latest addition to their Slots3 collection. Follow the adventures of the charismatic Giovanni the Gem Hunter, who, after many years, has discovered an incredible cave of uncut prismatic gems in the deep Valtara forest, long rumoured to hide treasures beyond imagination.

This fast-paced 7x7 Cascading reels video slot features cluster wins, where 5 or more contiguous matching stones explode in a shimmering sparkle of colour and light, making room for more gems to fall in from above. This game features big chances for fantastic chain wins.

GIOVANNI'S GEMS is accompanied by a captivating, themed soundtrack featuring a climactic celebration for big wins, which increases the sense of gratification as the winning stones are counted up and clusters explode.



Diamonds are the most sought-after gemstone in the game, and they are transformed by the awesome pressure of the win from mere coal to high-paying Diamonds.

In addition, Giovanni appears in his own symbol, where 3 or more pay anywhere on the reels, and 5 or more will unlock the Free Spins feature, where the serious pressure is on and EVERY coal symbol is already converted into Diamonds.

Products

LAND-BASED AND INTERACTIVE GAMING

Booster Online Slots iSoftBet

iSoftBet's Booster combines the best of classic casino gaming with a modern design to create an engaging experience which gamers old and new will love. This 25-line game features single, double and triple bar symbols along with a gold star and red and blue 7s – but it's the diamond and Bonus symbols where the real action is. Landing five of the diamond symbols on a win line will award the player 2,000 coins while three or more Bonus symbols will trigger the exciting Bonus Round. The player can win a massive 6,000 coins on the Bonus board – or trigger up to 100 Free Spins or Free Spins with multipliers added to all wins.

5502L Signage Touchscreens ELO Systems

Touchscreen pioneer Elo has unveiled its new 5502L, 55-inch touchscreen signage, delivering a large-format tablet-style platform for immersive interactive applications in commercial markets.

The 5502L is available in three configurations, including the new TouchPro PCAP, IR and a non-touch version, enabling a mixed-deployment unified design. At a depth of only 2-inches, the ultra-thin profile integrates seamlessly into modern interiors for retail, corporate, hospitality and healthcare applications, and offers system integrators and value-added resellers a touchscreen that is easy to deploy, energy efficient and built to withstand 24/7 use in public environments.

"Demand is growing for attention-grabbing, immersive interactive



experiences in high-traffic and multi-user environments," said Greg Sosinski, product manager at Elo. "Elo's groundbreaking new TouchPro PCAP version is our most responsive 55-inch, and optional accessories make it ideal for retail endless aisle, connected fitting rooms, conference rooms, wayfinding, and self-service. Deploying multiple touchscreens across all locations is simple with EloView software for instant set up with remote device management and content delivery."

High-performance computer modules are available to transform the 5502L into an integrated, all-in-one computer – with no additional cables or mounting hardware needed. The commercial-

grade modules are available for Microsoft Windows using Intel Core processors or Android using Qualcomm Snapdragon processors. Customers using an Android-powered computer module receive the added benefit of secure remote device management with EloView software.

EloView is an online portal that makes it easy to provision Elo displays across a chain of stores, hotels, and museums, malls and airports and quickly deploy, change or lockdown specific web pages for consistent and upto-date messaging. Customers can also add payment capability using an optional EMV cradle kit, instantly transforming an Elo display into an integrated, in-store ecommerce solution. Accessories for the 5502L and every O2-Series touchscreen include an integrated cradle for Ingenico or Verifone EMVs, NFC/RFID reader, 2D barcode scanner, magstripe reader, fingerprint reader and web camera.

Elo's proven quality and durability is backed by a 3-year warranty with on-site exchange.

Dirty Dancing Online Slots Playtech

Playtech has launched a premium branded progressive slot game based on the 1980's classic film Dirty Dancing loved by millions worldwide. The hit dance romance was the first film to sell more than one million home videos when it was released in 1987 and celebrates its 30th anniversary this year. Playtech's new slot remains true to the original film and contains a host of memorable scenes, including the film's climactic lift set to a classic ballroom soundtrack.

The game contains a series of incredible features, including the chance to win big across two jackpot levels, a Johnny and Baby jackpot, as well as the Dirty Dancing Jackpot Game, Whirling Wilds with up to six random wilds in any spin, dancing wilds stacked in free games, and up to 35 free games with expanding wilds.

Retro-style symbols include all the film's main characters, dancing shoes, vinyl records, a classic 1950s sports car, and jewels that award a large pay out if you manage to get three in a row and enter the Dirty Dancing Jackpot Game.

James Frendo, Casino Director,



Playtech said: "Dirty Dancing is such an iconic brand that it was an obvious choice for us to transform into a leading branded slot. The game is sure to be an instant hit with our licensees' players both old and new."

Peter Levin, President of Interactive Ventures and Games, Lionsgate, said: "Thirty years after its arrival, the original 'nobody puts Baby in a corner' Dirty Dancing remains a deeply memorable classic that helped define a generation of cinema. We're proud to work with great partners like Playtech to leverage our unique properties to connect with fans around the world."

Playtech, the world's leading gaming software, systems and services supplier, has unveiled a series of best-performing, feature-rich Omni-channel slot games so far in 2017, including its stunning Age of the Gods™ suite that is storming up the charts.



Rainbow Ryan Online Gaming Yggdrasil Gaming

Get ready to rock with Yggdrasil Gaming's rebellious new slot, Rainbow Ryan, featuring a pint-sized superstar who jams perfectly in tune with the reels.

The game's main feature is synced reels, which sees Ryan shred riffs at any time in the base game to sync up to six reels.

Even sweeter tunes await during Free Spins, where players will have at least two synced reels every spin, with the chance for more synced reels with each consecutive spin.

The game's main character might be small but the wins are big as players can win up to a staggering €510,000 with a single spin. Rainbow Ryan also features high-quality animations,

including the title character reacting to winnings during gameplay, and a world-class soundscape that raises the bar for what is possible with audio in slots. It marks a new approach to traditional leprechaun themed slots, with a rock 'n' roll setting creating a perfect backdrop for Ryan's solo riffs.

Head of Slots at Yggdrasil Gaming, Jonas Strandman, said: "Rainbow Ryan is a great game in many ways, but its most outstanding feature is the way the game's soundscape harmonises with the visuals.

"Our miniature superstar Ryan reacts with rocking tunes to the reels, delivering players a sound experience that's previously unheard of in slots."



Oink Country Love Online Slots Microgaming

Microgaming brings some southern charm to players this August with Oink Country Love. Oink Country Love will have players tapping their feet to the country beat with the lovable Oink Bros, Willy and Chancho, who are trying to win over the heart of Miss Southern Charm in this five by three reel, 45-line online slot.

The game features rich graphics and an ornately designed background, featuring subtle but impactful animations throughout. In addition a foot-tapping soundtrack sets the stage for a spectacular showdown.



Zitro Bingo Video Bingo Zitro Interactive

Casino Magic, a casino operator in the province of Neuquén, Argentina, belonging to the Casino Club - Hapsa Group, has just added the Zitro video bingo games to its online casino offer. The agreement between Casino Magic and Zitro Interactive makes it possible to offer Zitro's most famous Bingo games on its on-line casino, making this popular gaming option available to players of that jurisdiction. Currently Zitro video bingo games are already on important Latin American online casinos such as Big Bola, Caliente or Vera & John, among others.

Sebastián Salat, CEO of Zitro: "The Argentine market is a priority for Zitro, as demonstrated by our presence in the country for many years, the development effort we have been making in video bingo product and video slots suitable for the market, and now with our presence in the online market through Casino Magic, to whom we greatly appreciate the opportunity they offer us."

Busca Premios Mobile Apps Zitro Interactive

Zitro has announced the release of a new version of its mobile app "Busca Premios". The application was, to date, focused on the Mexican market, but the new version of this application, unique in the gaming industry, extends its scope to the Spanish market, making it easier for Spanish players to find locations that have Zitro BET systems for electronic bingo, dynamic bingo or other individual Bingo Hall solutions. The application will also show Spanish venues that offer "Big Time" promotions, as it has been doing successfully in Mexican casinos.

As for the new services added to "Busca Premios" for Mexico, the application allows the location of the gaming venues where the new "Show Time" prizes and the recently launched "Club VIP Zitro"



loyalty system are offered, new products which were presented at the Zitro Experience 2017 event held in June in Mexico City. Another new feature that incorporates this new version of "Busca Premios" for Mexican customers is the location of the venues that have the Video Slot machines, BRYKE, with the multi games having great success in the country.

The app continues to offer the services it has been offering since its launch. It allows the player, through a geolocation service, to identify the casinos closest to their location, displays on the screen the day and time of the available

promotions, their nature, and the economic value of the prizes offered in each establishment.

Johnny Ortiz, President of Zitro, adds, "With this new launch, we have taken a step further in our cooperation with operators. We have expanded the services we offer to Mexican operators, and have begun offering services to Spanish operators, with the intention of gradually enriching them, all for the benefit of our customers."

Busca Premios is available for Android and iOS devices (both iPhone and iPad).

The Book Online Slot Greentube

Greentube is now offering the magical StakeLogic slot title - The Book to all B2B partners. The latest addition to the company's extensive B2B slot offering is the 10 win line, 5 reel, 3 row video slot game - The Book. The game is available from August 1st and combines the enchantment of fairy tales with the excitement of magical wilds, free spins and big wins. The colorful reels are filled with wizards and lovable animated characters.

Game features include a MAGICAL WILD BOOK FEATURE, where the magician's book can award WILD symbols randomly on any reel spin. On any given spin, a regular card symbols can



be randomly chosen to be a WILD symbol, and every symbol on the reels that matches that symbol turns into a WILD symbol for that spin.

Players will be taken on a unique journey based on which symbol the book reveals. If the book reveals a MOUSE symbol, the FREE SPINS will be played in the

kitchen of a French bistro, the LION symbol represents the African savannah, and the DRAGON symbol represents the medieval castle setting.

Top quality graphics combined with the chances of winning up to 135 Free Spins guarantee that your players will be spellbound by the magic of The Book.

The Dead Escape Online Slots Habanero

Quality slots and table games developer Habanero is taking players on an apocalyptic journey with its thrilling new release, The Dead Escape. The 5x3, 30-line horror movie-inspired slot follows a father and daughter as they bid to escape the blood-thirsty zombies who have taken over the world.

Lines pay both ways - left to right and right to left - with a free spin mode triggered when three scatter



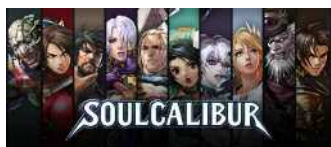
symbols are hit. The bonus feature produces 15 action free spins, which sees the family duo battle against the zombie enemy in a fight for survival. Toni Karapetrov, Head of Corporate Communications at Habanero, said: "The Dead Escape is one of our most thrilling releases yet, with players spinning their way to safety from the zombie invasion.

The gory graphics and spine-tingling soundtrack will keep players on a knife-edge, in what is sure to be an intense gaming experience."

The Dead Escape is the latest in a raft of releases from Habanero, including Panda Panda, Bird of Thunder, and Fire Rooster. It joins the supplier's stable of over 75 video slots titles, 9 table games, and 50 video poker titles, which are integrated into over 45 operators and aggregators and available in 21 European and Asian languages.

Products

LAND-BASED AND INTERACTIVE GAMING



SOULCALIBUR II VGMs GameCo

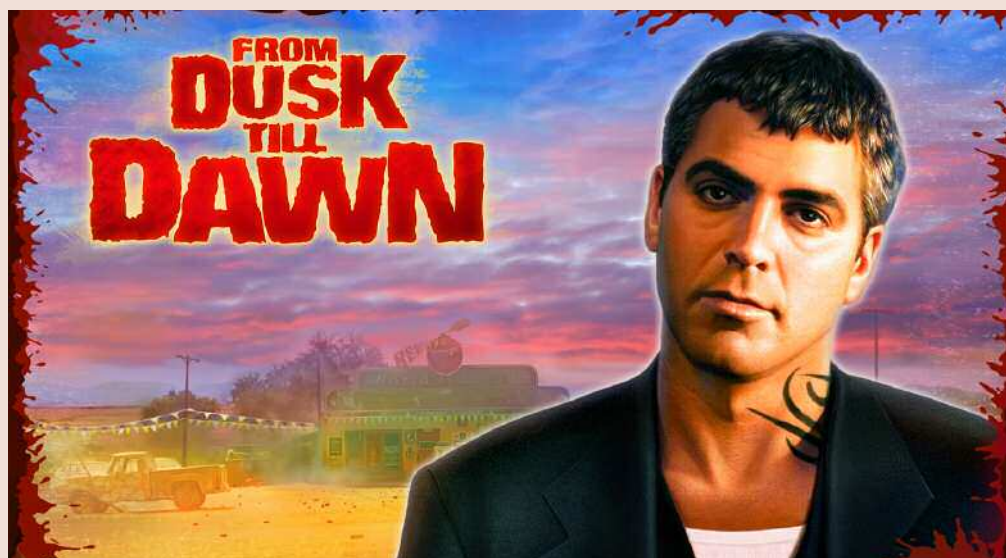
GameCo has entered into a license agreement with BANDAI NAMCO Entertainment, pursuant to which the companies will jointly develop a skill-based gambling video game based on one of the world's most popular fighting games, "SOULCALIBUR II". Ranked as one of the best fighting games of all time, "SOULCALIBUR II" is the third installment in the popular video game series of weapon-based fighting games that originally debuted in 1995. GameCo's SOULCALIBUR skill-based video game gambling machine is expected to debut in late 2017.

The SOULCALIBUR (tentative name) VGM will feature a faster-paced take on the classic 3D fighting experience of the popular SOULCALIBUR series, while maintaining the same feel and core gameplay elements of the franchise that veteran gamers will appreciate.

The game, which will take approximately 45 to 60 seconds to play, is being designed with game play features that will be entertaining and familiar to existing fans of the series, while also being easy for casual players to grasp and enjoy.

BANDAI NAMCO will leverage its original engineering, production, and creative teams to adapt the game to GameCo's innovative VGM. This marks the first time that a AAA fighting video game will be adapted for skill-based gaming at land-based casinos. The popular SOULCALIBUR fighting game experience from video game consoles and arcades will now be available at casinos worldwide.

"SOULCALIBUR is a fan-favorite among video game enthusiasts, and we're excited to bring the franchise to casino floors, where we can present the brand in a completely new environment with GameCo's revolutionary VGMs," said Yoshiyasu Horiuchi, Executive Officer, AM Business Unit, of BANDAI NAMCO Entertainment.



From Dusk Till Dawn Casino Slots NOVOMATIC

NOVOMATIC has entered a licensing agreement with Miramax for the rights to produce casino games based on the infamous crime and horror film From Dusk Till Dawn.

As part of the multi-year agreement, NOVOMATIC is able to develop and distribute From Dusk Till Dawn branded games for both land-based and online casino platforms.

Directed by Robert Rodriguez and written by Quentin Tarantino, From Dusk Till Dawn celebrated its 20th anniversary last year, providing an ideal time to resurrect the film on casino floors worldwide. Rodriguez more recently developed From Dusk Till Dawn into an original

series that has gained rave reviews and recently concluded its third season.

NOVOMATIC has started work on a slot game that features George Clooney, Quentin Tarantino, Harvey Keitel, Juliette Lewis, Danny Trejo and Salma Hayek in footage from the film. Taking players on a journey to Mexico, the game breathes new life to the cult film with fiery gameplay, Dusk and Dawn jackpots, and a raft of features. Players can experience the game from the comfort of a V.I.P. chair on the luxury NOVOSTAR V.I.P. III and V.I.P. Lounge™ cabinets that control the action and provide captivating surround sound.

In addition to various features happening during the base game, three bonus symbols trigger the Bonus Twister wheel that players spin to find themselves in one of

two major bonus features. Sit back and watch the sensual dancer as she moves around the reels in the Dancing Bonus, acting as a roaming wild symbol that can fill up to three reels and rack up big wins by doing so. Then, in the Mugshot Bonus, reels spin to uncover Clooney and Tarantino mugshots that match various credits.

From Dusk Till Dawn will make its international debut at the upcoming G2E in Las Vegas.

Thomas Graf, CTO NOVOMATIC, said: "From Dusk Till Dawn is a cult film that has regained attention due to its 20-year anniversary. We are very pleased to be partnering with Miramax on this great brand and are excited to combine our world-class gaming technology with this distinguished film and bring it to casino players around the world."

Stellar Serengeti Lions Slots Lightning Box

Lightning Box's latest release is set to transport players into the heart of Africa, taking in the sights of the Serengeti with a pride of lions.

Stellar Serengeti Lions is a 4x5 reel slot featuring an immersive soundtrack and a host of colourful animals, including elephants, rhinos, zebras, the lions of the game's title – and even spaceships! Successfully tracking down 5 diamonds will trigger the game's 'Diamond Pick Bonus', adding an extra layer of excitement as players pick from a selection of glittering gemstones that conceal multipliers and free games.



Peter Causley, Lightning Box's managing director and co-founder, said: "Stellar Serengeti Lions guides players through a beautiful game-world, allowing them to test their luck while taking part in an African adventure. We're sure they will love its spectacular design and innovative bonus features."

Stellar Serengeti Lions will initially be offered to players exclusively by brands operated by GVC Holdings including bwin, partypoker,

PartyCasino and Sportingbet, before being made available to Lightning Box Games' partners across the globe from 30 August.

Andy Whitworth, GVC's Head of Content, said: "We've been highly impressed with Lightning Box's content and so we are very pleased to be able to offer the great looking Stellar Serengeti Lions to our customers for an exclusive period."

Stellar Serengeti Lions also contains a unique 'Keep or Swap' feature, giving players the opportunity to swap their selection and take the chance for bigger prizes. Though it may be tempting to focus solely on the plains, players should also look to the stars, as from any bet, three spaceships will trigger our much-loved Stellar Jackpots Bonus.

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Ladbrokes Live Casino Live Casino Playtech

Ladbrokes and Playtech have worked closely to re-launch Ladbrokes Live Casino, to deliver a new studio design and improved app functionality. In an industry first, a new video system will allow customised messaging with players direct from the casino table.

The main areas of change are a bigger and improved product range and a planned schedule of new releases as well as increased interaction with players to create an authentic live casino experience. To support the growing interest in gaming, the Live Casino will have greater prominence on the Ladbrokes.com home page.

In keeping with Ladbrokes' deep sporting heritage, the look and feel of the new studio will pay homage to some of the best-known sporting events.

"Our gaming customers want an authentic casino experience and that is why we've updated our live casino offer and increased player interaction to create the ultimate live gaming experience," said Antonio Ruggeri, Live Casino Product Manager for Ladbrokes Coral.

Perfect Pairs BJ Mobile Gaming OneTouch.io

Games Developer OneTouch.io has released Perfect Pairs Blackjack, designed to provide the most intuitive user experience to date via single-touch ergonomics. Embracing a mobile-first philosophy, Perfect Pairs Blackjack offers players a side bet which pays out immediately, giving players the chance to use their side bet winnings on a double or split in the same round.

OneTouch's latest creation, which is available in low, medium and high limits, pays 5-1 on non-coloured pairs, 12-1 on coloured pairs and 25-1 on perfect pairs. Its design provides an unrivalled experience across desktop, tablet and mobile, with the latest front-end technologies making it perfect for on-the-go betting.

RoboCop Online slots Playtech

Playtech, in partnership with MGM Interactive, has launched a thrilling new RoboCop slot game based on the iconic 1980s classic movie that tells the story of bionic policeman 'Murphy' who swears to "Serve the public trust, protect the innocent, and uphold the law".

Brought back to life and rebuilt into the world's most advanced cybercop after being shot and left for dead by a gang led by ruthless criminal Clarence Boddicker, RoboCop promises to bring Boddicker and his OCP mega corporation boss Dick Jones down in a bid to clean up the city once and for all.

In this new RoboCop online slot,



players help him bring justice back to a crime-ridden, corrupt Detroit with an arsenal of crime-fighting features and free games modes.

Blast out extra wild symbols on any spin and add multipliers of up to five times, crash the 3x3 ED-209 Wild onto the reels for high-powered pay-outs, and break into the OCP boardroom to track down corrupt executives for even more cash prizes. Dead or alive, they're coming with you!

James Frenzo, Casino Director at Playtech, said: "Many players will have grown up watching this iconic film which none of us will forget for its, non-stop action sequences and the incredible presence and sounds of RoboCop himself.

"The Playtech content team has worked incredibly hard to deliver a game that stays true to the original film, includes some stunning new features and brings players right to the heart of the action."

Entertainment Gaming Expo Slots NOVOMATIC

Returning to Bucharest for the eleventh edition of the Entertainment Arena Expo, NOVOMATIC will take centre stage at the Romanian trade show to display a complete range of products for Central and Eastern European gaming markets. On Stand #201 at the Romexpo Fair Ground in Bucharest, NOVOMATIC will display its latest product innovations for the market.

As the leader in the Romanian casino market with more than 60 per cent floor share, the NOVOMATIC brand is well established in the country, as new products are launched that enhance the gaming experience. Visitors to the Entertainment Arena Expo 2017 will have the chance to see the latest product highlights and understand first-hand why NOVOMATIC products continue to be top performers.

New for the market is the GAMINATOR Scorpion cabinet that will be on display with the Impera Line HD Edition 5 game mix. The successor to the GAMINATOR that is highly popular in Romania and

surrounding markets, the new cabinet is compatible with a vast array of NOVOMATIC content and, set in a matte black finish with first-class graphics and game-dependent LED glow, has a high visual appeal.

Product highlights also include the international hit DOMINATOR, IMPERATOR TM S3, NOVOSTART M II and NOVOSTART M SL3 cabinets featuring a selection of classic and new games such as Book of Ra, Dolphin's Pearl, Amazon's Diamonds and Upward.

From the V.I.P. cabinet suite is the V.I.P. Lounge that offers a space-optimized lounge format and will present a range of market-leading game titles.

Specific areas will be used to display TIP&CASH terminals that have been making their way into sports betting operations throughout Romania. Another area will be used for the Ainsworth brand highlighting the A600 and Multi Win 14 game mix featuring a 2-level mystery progressive jackpot. In addition guests are invited to enjoy a great variety of special contests, prizes and awards that will take place on the NOVOMATIC Stand #201 over the three-day event.



Next Six & Virtual Motorcycle Speedway Sports-betting NSoft

NSoft has launched its two new virtual games on web channel for Superbet - Next Six and Virtual Motorcycle Speedway.

The Next Six, presented during the Belgrade Future Gaming Expo, is a revolutionary live betting in a draw based games of chance. Next Six allows players to join at any point providing a unique excitement of betting since the betting period is open almost all the time and odds



change after the each drawn ball.

The Virtual Motorcycle Speedway is an exciting novelty from the NSoft laboratory. Players love its simplicity - pick a winner or a forecast. The random number generator works in the background to produce the race outcome with a number of aggregated features.

By developing its state-of-the-art software solutions NSoft is devoted to creating a business environment that will maximise its customers' sales opportunities and empower their company to reach new levels of growth. Next Six and Virtual Motorcycle Games, together with other games in NSoft game palette, are presented on the NSoft website.

Products



EmotiCoins Online Slots Microgaming

Microgaming has launched EmotiCoins, an online slot developed through a staff-powered innovation initiative. Based on the hugely popular emoticon phenomenon, EmotiCoins is a five reel, 30 payline online slot born from an idea pitched by two members of staff, Anna McChesney and Rob Mercer, at the Microgaming Idea Factory, a staff-powered innovation initiative which won The Spark Award 2017.

Fast forward and EmotiCoins is ready to delight players with a mixture of vibrant graphics, upbeat soundtrack and exciting wilds, brought to life by a crew of cheerful emoticons including favourites such as Tears of Joy, Kiss and Winking Face.

DRAGON EGG Casino Slots APEX gaming

Apex Gaming has just installed its Dragon Egg slot and jackpot system at Casino Skull King in Kyrenia, Northern Cyprus.

The hardware behind this Dragon Egg jackpot system is known as the Pinnacle Premium Jackpot with Pinnacle Premium SL. Two banks of four Pinnacle Premium SL slots adorn each side – each is equipped with 3 x 27" monitors.

Gökhan Parlak, Slot Manager at Casino Skull King, said: "The Dragon Egg island is a wonderful addition to our casino floor. We have never seen anything of this class before. It simply has everything we are looking for – class, style, a brilliant game, fantastic graphics and a very clever jackpot system. Our customers literally stand in line to play this."

The game has been designed especially for this jackpot island and the game makes full use of all the game screens as well as the large overhead display. Four individual core jackpot levels have been



Gökhan Parlak – Slot Manager at Casino Skull King in Northern Cyprus with the APEX DRAGON EGG jackpot island

created in such a way that the player has the chance of winning on 16 different jackpot levels. The game, the suspense, the enjoyment, the sheer APEX quality – these all go together in taking gaming to the next level.

A further 15 Apex Pinnacle SL slant top slots adorn Casino Skull King as well. APEX gaming makes full use of its dedicated games design team in Austria to create such a wide range and choice of games. The EVO3 platform brings them accordingly to life so much so that players are astounded about their look and sound.

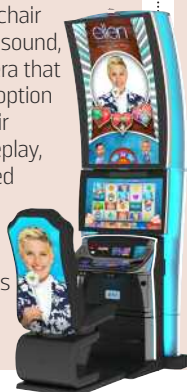
"We are proud to have made such a major impact to the casino success so quickly," Kubilay Özer, Global Sales Director at APEX gaming, added. "We have pooled all our experience together to create a solution that is a game changer and the feedback we have received has exceeded our expectations".

This casino from Oscar Resort is very proud to have the DRAGON EGG jackpot island. "It is not often nowadays that something new can cause such a positive effect. The Dragon Egg jackpot island has quickly become the highlight of our casino", concluded Mr. Parlak.

Ellen DeGeneres Show Sharing the Love Video Slots Casino Slots IGT

IGT's towering CrystalCurve ULTRA cabinet with The Ellen DeGeneres Show Sharing the Love Video Slots can now be enjoyed on casino floors across the US.

First revealed at G2E 2016, the technology-rich cabinet features a 50-inch, ultra-HD 4K curved top display, and a 32-inch, ultra-HD 4K curved main display. The CrystalCurve ULTRA cabinet is also equipped with an adjustable player chair with 5.1 surround sound, an in-game camera that gives players the option to incorporate their images into gameplay, and a sophisticated Dynamic Attract feature that engages passing patrons and invites them to enjoy the game.



Casino Seating ICM distribution StylGame

Finnish state-owned gambling operator Veikkaus OY has launched a new arcade project called Feel Vegas with live casino tables such as Black Jack-Roulette and slot machines.

Formerly RAY, Finland's Slot Machine Association who operates an international casino and 200 restaurant table game locations and tens of arcades around the country, the operator choose to work with Swedish casino distributor company ICM Casino management AB (ICM) to secure the seating for the project. ICM distributes chairs which are manufactured by Italian chair manufacturer StylGame.

Product Specialist at Veikkaus OY Miikka Mäki said: "We are very satisfied with the quality and we especially like the colour scheme that StylGame provides as it fits our needs perfectly. Also Wolfram has worked very closely with us to ensure that we got our needs and



specifications accommodated."

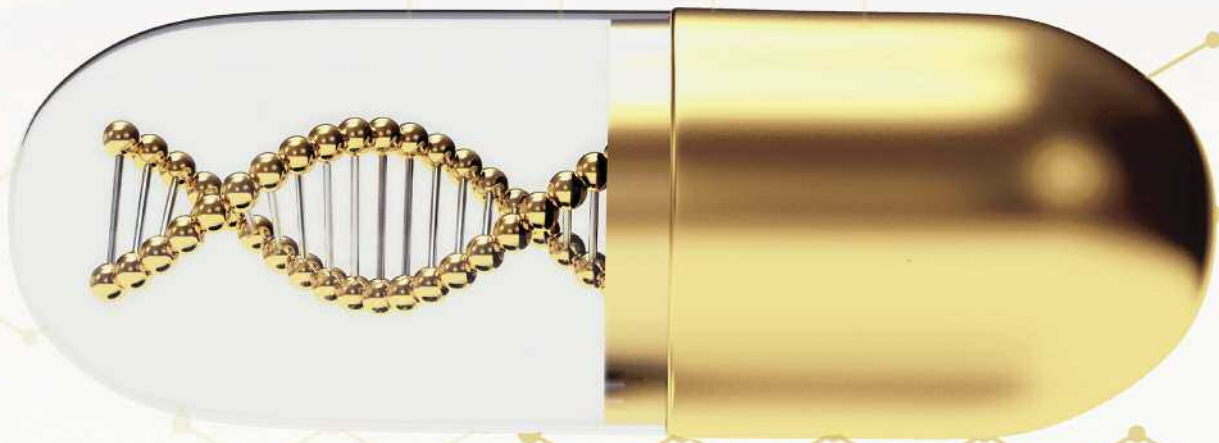
CEO of ICM Wolfram Dahlström commented on the install: "We are proud that Veikkaus have chosen us as their preferred distributor of chairs and we are thankful that Miikka has guided us by being very specific when placing the order. This way we can ensure that all parties are satisfied. The StylGame products has yet again proven to be a great choice for the operator."

CEO of StylGame Giorgio Iulita added: "We are very honored to supply Veikkaus OY with our Interchangeable product line and we thank our exclusive distributor ICM for doing a great job in this region. Having delivered 100's of chairs to Veikkaus OY it is an acknowledgment of our continuous efforts in research and development in order to keep on improving the quality level of our chairs for the casino and gambling environment.

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KONAMI

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The image features two Konami Concerto slot machines in the center, glowing with a red light. The machines are positioned between the profile of a smiling woman on the left and a smiling man on the right. The word "PLAY ON" is written in large, white, sans-serif capital letters across the middle of the machines. The background is dark, making the red glow of the machines and the white text stand out.

PLAY ON

When it comes to your casino floor, there is nothing more important than keeping players engaged and excited. No one knows that better than Konami. With an amazing suite of alluring Concerto™ cabinets, larger-than-life multi-station releases, and robust SYNKROS® systems solutions, Konami continues to develop the most enthralling games and powerful technology to date. Designed to captivate any type of player that hits your floor, Konami's proven products keep your customers playing and having fun.

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