

November/December 2018

- How **Technology Shapes** the future of Gaming in Retail
- JUMBO Funds WILL **\$50,000 Scholarship**
- **Lottery** in Latin America, Caribbean, Asia-Pacific

FEATURED INTERVIEWS

Thank you Jean-Luc for your Leadership and Service



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NATIONAL DIRECTOR OF LOTTERIES AND POOLS OF
THE ORIENTAL REPUBLIC OF URUGUAY
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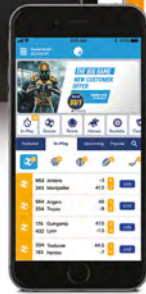
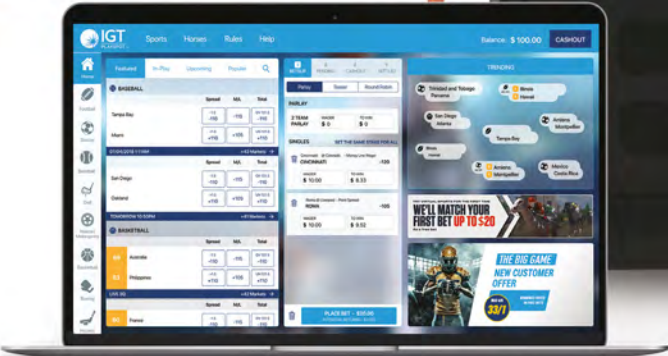
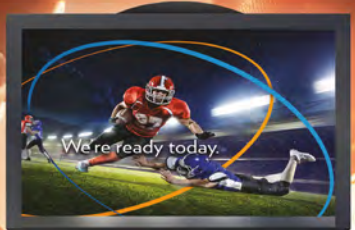
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From the Publisher

The World Lottery Summit (WLS) convenes on November 18 in Buenos Aires. This will be a very special event. First and foremost is the opportunity to honor the service and leadership of our current WLA president, **Jean-Luc Moner-Banet**. Jean-Luc's six years of tireless dedication have produced an association that is poised to continue to shape the course of this industry. We are pleased to feature an in-depth interview with Jean-Luc in this issue in which we review the issues of today, and discuss the future of an industry in transition.

We feature two other interviews with world-class industry leaders. **Luis Alberto Gama Hernández** was just elected to the Lottery Industry Hall of Fame and will be inducted on November 20 at a ceremony at WLS Buenos Aires. Our discussion spans regional and global issues as well as the industry issues most relevant to his jurisdiction of Uruguay. Also featured is a wonderful interview with **Seah Chin Siong**, CEO of Singapore Pools. Chin Siong was recently elected to be Chair of the Asia-Pacific Lottery Association (APLA). In a nice sequence of events, Mr. Seah will say a few words of introduction for his friend and colleague who will be inducted into the Lottery Industry Hall of Fame. **Dato' Lawrence Lim Swee Lin**, CEO of the Magnum Group which operates the Malaysia Lottery is the immediate past-Chair of APLA, and will be inducted into the Lottery Industry Hall of Fame along with Mr. Gama. The bio's of Lottery Industry Hall of Famers including Mr. Gama and Mr. Lawrence can be viewed at www.lotteryindustryhalloffame.com.

Let's also congratulate **David Gale** and **Team NASPL**, and **Dennis Berg** and **Team Ohio Lottery**, for a **fabulous conference held in Cleveland**. Dennis Berg is now president of NASPL and we look forward to a great year with Dennis at the helm.

And a very special thanks to everyone who participated at **PGR Lottery Expo NYC** and especially to our presenters. The audience and I so appreciate the excellence and hard work that went into your presentations. And honestly, I have been told by everyone that your extra efforts paid off and made this the best Lottery Expo ever!

Thank you to **Mike Veverka, Brian Roberts, and Team JUMBO** for your **most generous donation of \$50,000 to fund the JUMBO WILL Scholarship**. What a tremendous gesture that will make a huge difference to many talented and deserving women in leadership. WILL is marching onward and upward. Read about it on page 12. The next networking Event will be at WLS Buenos Aires, immediately following the Hall of Fame induction ceremony.

It appears that we may be moving to a next stage of regulatory actions in Europe. Legal decisions and judgements are affirming the rights of governments to prohibit illegality on the internet. The next stage will be installing mechanisms that enable those judgements to be enforced.

The Dutch Gaming Authority Kansspelautoriteit (KSA) has imposed a fine of 350,000 euros on two i-Gaming operators for offering unlicensed and illegal gambling services to players in the Dutch market. One is based in Cyprus and the other in Curacao. ZEAL Group (parent company to a family of online B2C "grey market" operators like Tipp24, Ventura24, and MyLotto24, and online B2B technology platform providers like Lottovate) just lost a court ruling that said its Ventura24 lottery brokerage service requires a license from Sociedad Estatal Loterías y Apuestas del Estado (SELAE), the operator of the Spanish national lottery. No such license has been granted, and according to a statement from Zeal "is unlikely to be granted in the future". Germany has been besieged by 'bet-on-the-outcome-of-the-lottery' operators. And now, Lotto

Rheinland-Pfalz in Germany has just prevailed in a lawsuit against a "Gibraltar-based operator which sells bets on the outcome of the lottery draw". Oddly, the news story does not state who the operator is, but Lottoland is based in Gibraltar and sells bets on the outcome of the lottery. In any event, it is great news that governments are taking legal action to prevent online criminality and violation of gambling laws and regulations.

Now comes the next step. Fines and legal action against those who violate the laws need to be enforced in order to be effective. The Czech government, for instance, has levied over \$20 million USD (CZK455 million) in fines against illegal gambling operators. But out of \$20 million in fines, they have collected only \$10,750! The problem is that some jurisdictions (possibly including places like Curacao, Cyprus, Malta, and Gibraltar) do not respect the laws of other countries and refuse to domesticate judgments against companies which are based in their jurisdiction. If illegal operators are given safe harbor, they will be able to continue to violate the laws of markets where they make a lot of money by illegally offering online gambling products, even in spite of legal judgements against them.

- Visit PGRItalks.com to view videos of the presentations and panel discussions at PGR Lottery Expo NYC.
- Mark your calendars for February 26 to 28. PGR SMART-Tech will be held at the Hilton Fort Lauderdale Hotel in Florida. See PublicGaming.org for details like hotel reservations, conference registrations and program. 

Paul Jason, Publisher
Public Gaming International Magazine

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Women's Initiative in Lottery Leadership

JUMBO WILL Scholarship Funded with \$50,000 Donation

Letter from Rebecca Hargrove

Founder and Chair of WILL

President and Chief Executive Officer, Tennessee Education Lottery Corporation

Senior Vice President, World Lottery Association (WLA)

The mission of WILL has moved from the 'taking shape' phase to the taking off stage. The first planning session for **Women's Initiative in Lottery Leadership (WILL)** was held at a meeting in London in February 2017. Joining me were Stéphane Pallez, Lynne Roiter, May Scheve, and other industry leaders to clarify objectives and formulate action plans for WILL. It's mission is to drive high-performance business growth through the advancement of women in the lottery industry. That has led to an exciting series of networking events in London, Krakow, Prague, Nashville, Portland, Atlanta, Orlando, and Cleveland. It continued with an incredible three-hour session of presentations and speeches by high level female captains of industry (from outside the Lottery industry) in Atlanta in October of 2017. Rebecca, with assistance from Tennessee Lottery COO Wanda Young and IGT, launched the Mentor/Mentee program with a training webinar in March 2018. Since then, over 70 lottery participants have signed up for the Mentor/Mentee program and embarked on their new partnerships. Stay tuned for the next round of Mentorship relationship-building.

And now another milestone to this amazing journey has been achieved. **JUMBO's gift of \$50,000 to fund scholarships** will



enable emerging female leaders to participate in training and educational seminars. We want to acknowledge that others have expressed a desire to financially support WILL and we look forward to streamlining the processes and structures to convert your financial support into a highly productive engine for helping women move into leadership positions, and enabling business enterprises to benefit from the positive impact of talented female leadership. And for the financial sponsorships that have already moved WILL into the high-profile role that it is destined to perform, we want to thank the **EL (European Lottery Association), NASPL (North American State and**

Provincial Lottery Association), IGT, and Scientific Games for their financial support. We would not have gotten to where we are now without your most valued financial support, and your active engagement, leadership and guidance. And we want to thank JUMBO for turning the vision of WILL scholarships into a reality. Creating a culture of diversity and inclusion will benefit everyone - all the stakeholders of our industry who value the principle of inclusiveness and smoothing a path for women to achieve their goals, and for businesses to benefit from their talent and commitment.

And we want to thank all of you for your active engagement with the mission of WILL. It is your participation and support that is the ultimate measure of success.

Next up: We hope to see you at the **WILL Networking Event at the World Lottery Summit (WLS)** in Buenos Aires. 5:00 pm at the Ballroom Atlantico A in the Hotel Hilton Buenos Aires, the WLS Conference Hotel. The WILL Networking Event immediately follows the Lottery Industry Hall of Fame ceremony which will be held in the same ballroom at 4:30 pm. 📍

Photos from left to right:
Rebecca Hargrove at EL Networking Event in Prague
Younes El Mechrafi, Rebecca Hargrove,
Antonios Kerastaris, Stéphane Pallez at WILL Prague
Mike Veverka, Founder & Chief Executive of JUMBO
WILL Networking Event in Orlando



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Jean-Luc Moner-Banet

Chief Executive Officer, Société de la Loterie de la Suisse Romande
President of the World Lottery Association (WLA)

The Lottery Industry is operated at the jurisdictional level. But the issues we face are global.

PGRI Introduction:

This is a special time indeed. Jean-Luc Moner-Banet has been leading the WLA through six years of challenges and progress as the Association evolves to meet the needs of its membership. The world has changed so much, and the rate of change is not likely to slow down anytime soon. Or, anytime ever. I am one of so many who thinks of himself as a friend. And I am thankful to have the privilege of bringing this far-reaching discussion to our readers. I hope I asked some of the question that you might have asked!

More important than any question I ask, though, is to thank Jean-Luc Moner-Banet for his tremendous service to the membership of the World Lottery Association. Jean-Luc has been a tireless and fearless advocate for our interests during a tumultuous time. We so appreciate your dedication to this industry and our global association and hope that you realize the high esteem and affection held for you by so many people all across the world.

Paul Jason: How important is it that U.S. lotteries convince legislators to authorize them to offer sports betting?

Jean-Luc Moner-Banet: Let's keep in perspective that 80% of sports betting is still conducted in land-based venues. 20% is

on the Mobile. The operator of traditional games who moves into sports betting must prepare to undergo profound organizational changes.



Sports betting is an entirely different business than traditional lottery games. The difference in complexity is a whole order of magnitude. In spite of the challenges, sports betting is a game category that adds tremendous value to the portfolio of the gaming operator. If sports betting is going to be offered in your jurisdiction, then you absolutely want to be the one, or one of the ones, who offer it. The sports betting player constitutes a huge and very important segment of the games-of-chance market-place. One may argue about the degree of dynamic day-to-day cross-over between sports betting and traditional lottery products. What is not arguable, though, is the fact that player preferences change over time. People's lifestyle and

the games they like to play change as they mature. If they didn't, then there would not be so many lottery players! We depend on that evolution to bring people who may have preferred long-play interactive video games in their twenties to migrate over to the ease and convenience and fun of lottery play in their thirties and forties. Likewise, a portion of sports betting players will desire something different as they have less time to spend on betting, as their circle of friends changes and their focus on career and family changes their priorities. It is important for lottery to be there when that happens. The sports betting operator is in the perfect position to offer alternatives to sports betting when the player gets in the mood to experiment with other game categories. As the operator of traditional lottery games, you want the players to be on your website when that happens, and not the website of a competitive commercial operator.

Unfortunately, it's challenging for U.S. state lottery operators to petition for the authorization to offer sports betting.

J.L. Moner-Banet: Of course it is. It is challenging for European state operators to convince the government that they should be the ones to offer sports betting. Commercial operators invest heavily in lobbying and public relations campaigns to convince the government that they are the ones who should be licensed to offer sports betting, and that the Lottery should not be authorized to offer sports betting. They point out that they have experience operating sports betting in other countries and that the Lottery does not have that experience. They do not point out that the business is actually operated by a small number of



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technology partners who can perform the same services for Lottery as they perform for the commercial operators. They do not point out that government lotteries now operate 70% of the sports betting everywhere in the world except the United States. They do not point out that the reason why states should operate sports betting is because their commitment to responsible gaming, integrity of sport competitions and public service is proven, and the state operator channels far more economic benefit back to society. We can't expect commercial operators to represent the interests of Lottery stakeholders – that's our job! We are the ones who must represent the interests of our stakeholders and make sure legislators understand the nature of their decisions and make fully informed decisions that recognize the value of their state-owned lottery operator. When the decision-makers are fully informed, they will come to the same conclusion that the majority of governments around the world have come to – that is that sports betting should be operated by the state government lottery operator.

You make a persuasive case!

J.L. Moner-Banet: There already exists a vast underground sports betting market in the U.S. U.S. lotteries do not want to cede this vast player base over to commercial operators. For one thing, even though the margins are much lower than for traditional

if competitors are able to offer the complete range of gaming products and Lottery operators are boxed into a limited portfolio of traditional games.

Have you observed migration from sports betting over to traditional games as people go from twenties to thirties?

J.L. Moner-Banet: Absolutely. We do find that sports betting as a game category appeals even more to the young adult. And that trend is accelerating. So for Lottery to be able to offer sports betting is part of the solution to our perennial challenge of how to connect better with the young adult.

We all want to optimize the lifetime value of a player whose preferences change over time. Clearly, that means we must offer a variety of games that will meet those needs as they change over time. If Brand X is the operator who engages the player in sports betting, that puts Brand X in the premium position to be the supplier of choice when the player's preferences migrate to new games. Lottery can't afford to cede that premium position to competing commercial operators. Of course we all want the players to play our higher-margin traditional games. But having sports betting in our portfolio of gaming options is key to being available for the players when they become receptive to trying out new gaming experiences.

interesting people. It's hard to do that if you only sell the same games you've been selling for decades.

This brings us to CRM (Customer Relationship Management).

J.L. Moner-Banet: Exactly. Whoever is best at capturing, organizing, and leveraging the consumer data to provide the best products to the right players at the right time is going to win the competition. Amazon has shown us the power of data that is leveraged to enhance the interactive relationship with your customer. The future will be all about CRM. My concern is that if the competition is the one that is capturing the player data when the consumers come of age and enter the games-of-chance market, that will put Team Lottery at a severe disadvantage when the players mature. At least some of them will get tired of sports betting and become receptive to changing over to new games as they grow into their thirties. But how will we even know that if we do not have a relationship with them? How will the players even know about Lottery if their sports betting operator is offering other games that are similar to lottery and giving them good reason to stay with them and not switch to the lottery operator?

CRM is all about knowing how to meet the needs of your customer. Operators of the future will be doing everything they can to know what those needs are, probably even before the customer herself knows how and when they are evolving. That is the first step. The second step is having the product - in our business that means the games - to meet those needs as the change over time. The key business asset of the future is data and effective CRM. And effectively leveraging that asset is the key to maximizing the lifetime value of the customer, the player. That begins when they enter the market as young adults and continues as long as the operator succeeds at meeting the needs of their customer. This is the way our competitors view the world and their mission to control the market-place. Is Team Lottery prepared for this level of hyper-competition?

I'll give you an example of how this is working already. The Lottery website typically has its portfolio of games displayed on the home-page in as organized way as possible to enable the player to easily see what game they want to play and to click on that link. That's fine but compare that to what the sports betting websites do. They identify your

“Government lotteries now operate 70% of the sports betting everywhere in the world except the United States... For Lottery to be able to offer sports betting is part of the solution to our perennial challenge of how to connect better with the young adult.”

lottery games, the turnover is typically much higher and so the actual income is still considerable and should be channeled to the benefit of good causes.

The main thing is that the operator wants to build the interactive relationship with the broadest base of games-of-chance players possible. Consumers are now exposed to the widest variety of gaming options ever offered in history. Fortunately, traditional lottery games have demonstrated a resilience and consumer appeal that is greater than any other game category. But in this world where players migrate from one category to another as they decide which games they like to play, it will be a problem

Affiliating with the up-and-coming games like sports betting would also help to modernize the image of Brand Lottery.

J.L. Moner-Banet: That's absolutely right. Young adults tend to perceive Lottery to be old-fashioned, the game their parents played. It is important that we modernize the image of Lottery for it to align with the self-image of our customers. Integrating sports betting with traditional games, even if it is just in the form of branding and proximity in the POS and advertising, confers positive brand-enhancing value to Lottery and helps us connect with the next generation of players. We want to be perceived as forward-looking with the kind of product that appeals to smart,

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primary interests based on the transactions, on the betting patterns. Of course, they make all the products available to you since those patterns will change over time. But let's say you are into soccer and do not bet much on other games. You're a soccer fan and you only want to know about soccer. The website reconfigures to put soccer front-and-center, to serve up the information that you are most interested in, customizing the front page to appeal to your particular focus. And

working 24 hours, seven days a week and performing a variety of IT functions that we could never afford to do on our own. We pay much less than we would otherwise have had to pay to build our own, and FDJ off-loads some of their operating costs to us. Win-win. FDJ has a similar arrangement of sharing resources and costs with Portugal and Israel as well.

So the answer to your question is that yes, the investments required to compete in the

Many of our members are in both the technology partner and the operator sides of the business. B2B technology companies on the "vendor" side are applying their assets to add value directly to the B2C customer-facing operator side of business. And customer-facing B2C operators are monetizing the assets they have developed in the course of serving their customers by selling their services, products, and in-house IT to other B2C operators. The arrangement between Loterie Suisse Romande and Française des Jeux is an example of that.

More relevant and useful than the distinction between technology partner "vendor" and government operator now is that the WLA member comply with all laws of all jurisdictions everywhere in the world. It is not enough to be legal in Malta or Gibraltar if you are not abiding by the laws of all jurisdictions. And the criteria for legality is determined by the nation-state where the player/consumer resides. Period. Full stop. It is not enough to abide by the laws of the jurisdiction where the operator is based, or one's own interpretation of EU laws or principles. The applicant must comply with the laws of each and every jurisdiction in which its games are played. We feel that this is the defining characteristic of the WLA membership: respect for the law, values and objectives of WLA.

Our standards when it comes to compliance with the laws of all jurisdictions, as well as the protection of vulnerable populations against addiction are uncompromising and inflexible. This "true north" principle will guide us as we evolve to integrate new business models into the WLA. The world is changing, the market-place and the games-of-chance industry are changing, and the World Lottery Association is changing to ensure that the service and support it renders to its membership remain relevant and meaningful. We want to welcome new players with new ideas, new technologies, new solutions and strategies.

What is an example of someone who is not eligible for membership under the current system who will be eligible under the new by-laws?

J.L. Moner-Banet: They would need to go through the application process, and I can't predict what the outcome of that would be, but a likely example is the French PMU (Pari Mutuel Urbain). PMU is one of the biggest betting operators in the world. But with a focus on betting on horse racing and sports betting instead of Lottery, their application would be denied under the

“ As important as freedom of the internet is, nobody wants it to obliterate the rules that organize and govern a civilized society and protect the people from illegality. ”

to offer promotions that cause you to feel like you're a special VIP player being given considerations that others are not. And chat rooms that are made accessible to the select audience of insiders that includes you but not the visitor of the standard website. That is the kind of interactive relationship that the players of the future will come to expect.

It seems to me that there's no small cost to developing the tools, IT infrastructure and the competencies to do that. Increased investment typically needs increased revenues to pay for it. Will scaling up become an increasingly important component to gaining strategic advantage in the games-of-chance industry?

J.L. Moner-Banet: There are different ways to manage the increasing costs of IT and operations. Look at our jurisdiction in Switzerland. We are barely over 2.5 million people in the French speaking part of Switzerland. We are not a large enterprise and yet we have a very complex and technologically sophisticated operation that manages to make money out of sports betting operations. How do we do that? The way for smaller lotteries like ours to leverage the benefits of large scale, and expensive, technological infrastructure required for sports betting is to share resources. Collaborations can be forged with commercial technology partners, with other lotteries, or with some combination of both. We share resources, and costs, with Française des Jeux (FDJ) which has a robust IT system to support its much larger sports betting enterprise. They have an excellent risk management team

games-of-chance industry are increasing, but there are different ways to manage those costs.

Can the WLA play a role in facilitating these kinds of collaborative arrangements?

J.L. Moner-Banet: The WLA is helping already by providing the platform and channels that enable lotteries to communicate with each other and begin the process of deepening collaborations. That is really the primary purpose of the WLA – to facilitate communication and the development of cooperative relationships that add value to our businesses. I would add, though, that it is not for the WLA to put in place structures and investment instruments ourselves. What we do best is to organize the conferences, workshops, trade-shows, and activities that bring people together and enable our members to forge productive relationships.

What are some of the current key initiatives for the WLA?

J.L. Moner-Banet: The World Lottery Summit in Buenos Aires will be a very significant event. Of course, we will have the trade show and conference which will all be bigger and better than ever. And the General Assembly is expected to pass some important changes to the by-laws which define a profile for applicants to qualify for membership.

The defining characteristic of the past was whether the member is an operator or a "vendor". Those distinctions have become less relevant or useful than they once were.

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current by-laws even if it is determined that they comply with all laws of all jurisdictions everywhere in the world and their methods of operation uphold a high standard of integrity.

It is my hope that opening up the membership to new business models will stimulate the innovation process and open up new pathways for all of us to build the sustainable future we strive for. It is vital, of course, that the WLA maintain the integrity of the selection process, and continue to stand firm in its commitment to all the principles we hold dear, like Responsible Gaming and Technical Security as well as respect for all jurisdictional laws. The WLA and all its members will always uphold the highest standards and values in the games-of-chance industry. Further to this, it is my hope that expanding the WLA's sphere of influence to include a broader variety of business models will export our values to other sectors and elevate the standards of the entire gaming industry.

What will the WLA position be with regards to "Charity", also called "Society" lotteries?

J.L. Moner-Banet: There is no clear-cut answer to that. Insofar as they are legally regulated, I would propose that it is better to have them within our community of regulated and law-abiding gaming operators. On the other hand, the WLA has always supported the majority opinion of WLA lotteries which prefer to maintain the exclusivity model because it aligns with the public policy goals of responsible gaming and optimizing funds for society. We are not necessarily ready to move our support to the multiple licensee model.

The Swiss people just voted to allow your government to enforce laws against online illegality. Could you explain what that was about and why the outcome is so reassuring to those of us who feel that online operators should be required to abide by the laws?

J.L. Moner-Banet: The Swiss people were asked to vote on the question of whether they wanted the government to exercise authority to ensure a safe and secure games-of-chance environment, whether it is on the internet or in the land-based retail world; and also whether they wanted the entire profit to be allocated to good causes. It was a double question. Do you want it to be secure, safe, reliable, with protection against excessive gambling behaviors and illegal gaming, and do you want the profit to go to good causes? Or do you want a

more open system that allows Swiss players to have access to other types of operators located offshore, are not regulated by the Swiss government regulators, and who do not allocate their profits to good causes? And the answer was overwhelming: 83% of the Swiss population said that they do want a regulated games-of-chance environment that protects the public and tries to minimize social costs and problem gambling and illegality like money laundering. And we support the right of the government to block access to websites operators who do not have valid license to conduct business in Switzerland. A resounding victory for the cause of enforcing the laws against illegal online gaming operators.

There are those who want to turn the issue enforcing laws in the digital world into one of freedom versus censorship. We all do want to preserve freedom in the internet space. But the only way to ensure freedom for all is to enforce the laws against those who abuse that freedom to the detriment of society and its law-abiding citizens. As important as freedom of the internet is, nobody wants it to obliterate the rules that organize and govern a civilized society and protect the people from illegality.

It seems that Europe is taking a more aggressive posture over against companies like Google and Facebook than the U.S. is. And requirements for transparency and protection of consumer information are much more rigorous in the EU than in the U.S. Don't Europe and the U.S. need to get on the same page when it comes to regulating the online world?

J.L. Moner-Banet: I think so, but I also think that it is the U.S. that needs to catch up to Europe when it comes to implementing the laws that protect the consumer in the world of online commerce. The U.S. has always had a more laissez faire approach to economic regulation than Europe. Combine that with the fact that the internet and social media giants are all U.S. companies which prefer a less regulated online world, and it's not surprising that the U.S. is a little slower to adopt the measures that Europe is implementing now. I do believe that the U.S. will apply stricter online regulations to protect the consumer and prevent illegality. Hopefully sooner than later! To your point, yes it will be important for the U.S. and Europe to work together to create a uniform regulatory system and collaborative enforcement mechanisms that ensures a safe and secure online world.

What are some public policy objectives that seem to manifest wherever you go?

J.L. Moner-Banet: All members of the WLA support the regulated environment that has as its top priority service to society, protection of the consumer, and optimizing economic benefit for good causes. Everything else may vary globally from region to region. But responsible gaming, security, integrity, and support for the regulations installed to serve the best interests of society are universally embraced by the membership of the WLA.

The internet has made games-of-chance available to everyone everywhere. This has caused governments everywhere to come around to the conclusion that it is better to regulate than to prohibit. Prohibition doesn't prevent the activity from happening. Instead it just sends the activity underground so the consumer is playing on unregulated websites. I was invited to the Kingdom of Bhutan to advise on how to start a lottery. There is no modern gaming culture in Bhutan. But like many countries, they realize that it is better to regulate and tax the emerging internet gambling industry than to try to prohibit it. And as the public policy trends towards more regulation, the role of the WLA to promote best practices will become increasingly important. First among those practices is to clearly define what exactly is legal and what is illegal. That has proven to be difficult for many jurisdictions! Second is to install the enforcement mechanisms that prevent illegality.

On behalf of the whole industry, I would like to express heart-felt gratitude for your six years of service. We know it has not been easy. Being president of the WLA is never easy, but we know the last six years were especially difficult and so appreciate the dedication, hard work, and time it took for you to lead the WLA.

J.L. Moner-Banet: And I would like to conclude with a big Thank You to the WLA Executive Committee for all the support they provided me and especially two people, Lynne Roiter and Rebecca Hargrove, whose leadership and hard work have been key to my success and the success of the WLA. Their service to this industry and the WLA is so appreciated and I look forward to many more years of friendship and collaboration. I would add that serving this organization has been a pleasure and a privilege. Becoming friends with the leaders of the lottery industry from all around the world and seeing the results of what the WLA does to support its members is its own reward which I will treasure forever. 🍷

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Luis Alberto Gama Hernández

National Director of Lotteries and Pools of the Oriental Republic of Uruguay
President of the Ibero-American Corporation of Lotteries and State Bets (CIBELAE)
Member of the Executive Committee of the World Lottery Association (WLA)

The Digital and Online Connection with the Consumer as the Universal Key to Sustainability

PGRI Introduction:

Luis Alberto Gama Hernández began his Lottery and Gaming career in October 2008 when he was appointed Advisor to the General Directorate of State Casinos under the Ministry of Economy and Finance. In February 2012, Luis was appointed by the President of the Republic to the position of National Director of Lotteries and Pools. He is a member of the Board of Directors of the Ibero-American Corporation of State Lotteries and Bets (CIBELAE), where he has presided since October 2013 and was recently re-elected for the third consecutive period. In chairing the Regional Association, Luis is one of the thirteen members of the Executive Committee of the World Lottery Association (WLA).

Luis was elected to the 2018 Lottery Industry Hall of Fame. He will be admitted to a ceremony to honor the newest members of the Hall of Fame on November 20 at the World Lottery Summit in Buenos Aires. We hope to see you there!

Paul Jason: Could you describe the Lotteries and Pools business of the Oriental Republic of Uruguay? What games do they offer, what distribution channels and what does it include online / internet?

Luis Gama: First of all, I must point out that the National Directorate of Lotteries and Pools acts as a Regulatory Entity, controls and supervises the operations concessioned to private companies and markets and administers the lottery games. The monopoly of the State is carried forward through the



Executing Unit that I direct, and also the games granted to the Collective Support Banks of Pools (numbers), "Tómbola" (keno), "5 de Oro con Revancha" (lotto), Instantaneous (scratch) and "Supermatch" (sports). For the marketing and distribution of all these products we have about 7,800 points of sale that cover the entire country, distribution Agents, Sub Agents and Brokers. The Bets are received by way of three channels: electronic (terminals), telephone, and the internet/web in the case of the games of "Quinielas", "Tómbola" and "5 de Oro Revancha".

Instant Games are distributed through physical Cartons and internet/web. In the case of "Supermatch", bets are received in 2 forms: electronic terminals and internet/web. Lottery games are marketed by physical and electronic network gaming terminals.

Which games are the most successful and why? Will that trend line change in the future?

L. Gama: The games offered by the National Directorate Lotteries and Pools is orderly, designed to meet the needs of players and to take into account the size of the market. The game with the largest participation in Uruguay is the "Quiniela", which accounts for around 40% of the total. Quineilea is followed by the games of "Tombola" and "5 de Oro con Revancha" which are 20% and 18% respectively. The sports betting game called "Supermatch" represents 13%. Lottery and Instant games come it at a lower level.

The game of "Quiniela" is deeply rooted in the culture of our people. Its frequency makes its level of bets the most important (11 weekly lot). It is noteworthy that each game has its own public and in the case of the game "5 de Oro" there is a particularity that when the well is larger, a sector of the public that is usually not a player is added. In the case of Instant Games (scratch cards) and "Supermatch", there was growth in the betting volumes, and the tax collection increased as well, when the form of settlement of the Value Added

Continued on page 26

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Seah Chin Siong

Chief Executive Officer, Singapore Pools (Private) Limited
Chair of Asia-Pacific Lottery Association (APLA)

PGRI Introduction:

Singapore Pools was formed in 1968 for the dual purpose of countering illegal gaming activities and to channel economic benefits back to society. Singapore Pools is owned by Singapore Totalisator Board (Tote Board), a statutory board which reports directly to the Ministry of Finance.

Singapore Pools offers three different draw-based games with a total 2016 revenues of SGD 5,678,000,000 (€3,500,000,000). €1,262,070,041 (36% of revenues) was turned over to the Singapore Treasury.

Seah Chin Siong has served as deputy chief executive of Singapore Pools since Oct 2012 and was appointed chief executive of Singapore Pools on January 1, 2015. Additionally, Mr Seah was appointed Chair of APLA, effective Oct. 12, 2018.

Before joining Singapore Pools, Mr Seah was the founding chief executive of IDA International, a subsidiary of the Infocomm Development Authority of Singapore. He led the company in helping public agencies around the world harness infocomm-enabled capabilities to improve their socio-economic situations.

Mr Seah was also formerly managing director of Accenture's Public Service Operating Group for Asia-Pacific and Country Managing Director of Accenture Singapore. His 25-year experience spans across strategic planning, business development, change management and strategy formulation.

Integrating games-of-chance, social responsibility, and a commitment to Community

Paul Jason: Which of your games are increasing in sales?

Seah Chin Siong: Sports Betting is growing, and this is in line with the global trend. Three quarters of Singapore Pools' sales are draw-based games with sports betting growing in the past few years. The sales of 4D game is flat and Toto 6/49 currently hovers around \$850M. Sports is expected to grow further in line with global trends and our efforts to close the gap with the illegal online operators.

How would you describe some of the differences between markets within the Asia Pacific region?

Mr. Seah: Asia Pacific's government-authorised lotteries are mostly either state-owned or licensed in the jurisdictions in which they operate. They are governed by a set of laws which includes restrictions on promotion of the games. In Malaysia and Singapore, advertising of lottery or sports betting is not permitted and communication on lottery or sports betting matters in Singapore is subjected to regulatory approval. The majority of the lotteries' revenue are from draw-based games, except for HKJC (Hong Kong Jockey Club) where only 4% of its total revenue is from draw-based games.

The Asia Pacific lotteries offer almost every type of gaming and lottery products, from draw-based numbers games and instant scratch cards to video lottery terminals,

online pokers, sports betting and horse racing. The 4-digit game is the flagship game for Malaysia and Singapore only, while Lotto is the flagship for New Zealand and is also a major product for China Welfare Lottery and China Sports Lottery.

HKJC, Singapore Pools, Lotto New Zealand and South Korea Nanum Lotto have all attained World Lottery Association (WLA) Level 4 Responsible Gaming certification. China Sports Lottery has also started to develop and implement a responsible gaming framework that will be customised for China's unique market conditions.

Growth in internet and online gaming will shape the future of gaming in

Asia-Pacific and lottery operators must incorporate digital capabilities as part of their strategy for serving their customer base. Online gaming will continue to grow, and traditional lottery operators continue to face the risks of being disrupted if they do not find appropriate ways to respond.

Instant scratch cards have been the biggest driver of growth in the U.S. over the past twenty years. Do they have the same potential in Asia-Pacific?

Mr. Seah: Singapore Pools has ceased the sales of Instant scratch cards game since Dec 2011. The game was introduced in 2004, with proceeds going towards the establishment of a national zoo and football association, as well as the National Heritage



Board. We used to specially design the scratch cards in conjunction with specific events, for instance: F1. However, as our customers' interest are still on draw-based games, we have withdrawn our scratch-game.

It is hard to generalize when comparing one global region to another. Still, does anything strike you as an interesting difference between the gaming markets of Asia Pacific and, for instance, Europe or North America?

Mr. Seah: Asia Pacific has a population base of 3.2 billion with a median age of 33.3 and a per capita GDP of USD 13,471. The sales generated was USD 110.1 billion with 37.5% share of the global lottery market for the year 2016. The money to good causes amounted to USD 28.6 billion. Similar with the European lotteries, sales of draw-based games predominated, accounting for 56.1% of 2016 sales. Sports betting represented 38.8% of 2016 sales whereas it accounted for a relatively small percentage of total sales in Europe and North America.

In Asia Pacific, government-authorized lotteries are run at the federal level except India and Australia where it is operated at the state level. Approximately half are operated by the state except in Australia where private operator TabCorp operates lotteries in all states except Western Australia. A key marker for lotteries is the role played by sports betting. In addition, cultural and religious sensibilities -- particularly those related to Islam, which prohibits gambling, play a key role in differentiating lotteries in Asia Pacific from those in Europe and North America.

How do you retain retailer support for the omni-channel model that includes selling lottery products online?

Mr. Seah: Our retailers are actively involved in our digital transformation journey where digital self-serve capabilities will also be implemented in the retail channel. This will readily help to alleviate manpower related challenges faced by them and to meet the expectations of the new generation customers who will use multiple channels for our products.

How do you expect the channel mix to evolve over the next three years? Will land-based sales continue to increase alongside growth in mobile and online?

Mr. Seah: Migration of Sports customers to digital channels will continue while

the retail channel will remain to be the preferred channel for Lottery products. This also is in line with the industry trends in other countries.

You were recently appointed to be Chair of APLA. How do you think the needs and expectations of APLA members will be changing over the next three years?

Mr. Seah: APLA will continue to be the platform for operators in the region to exchange knowledge and best practices in the industry. As technology continues to disrupt and impact the lottery industry, APLA will be the platform for members to share and collaborate on initiatives for collective benefit or which can positively impact their home countries.

Singapore Pools is also a global leader when it comes to Responsible Gaming.

Mr. Seah: We strive to uphold the highest standards as a responsible gaming operator. We have achieved the highest standards in the World Lottery Association (WLA) Responsible Gaming Framework (Level 4) in 2012 and reaffirmed it again in 2015. Endorsed by the WLA, this is the highest form of recognition from the international assessors. Singapore Pools is in the privileged group of being one of the three operators in Asia to achieve this certification. Committed to being a world-class responsible gaming company, our professional conduct and business behaviours must be held to the very highest standards, ensuring a fair and safe gambling experience to protect our customers.

Singapore Pools plays a role in the community that is more than an operator of games that channels funds to good causes. How would you describe your mission?

Mr. Seah: As a fully-owned subsidiary of Tote Board (a statutory board that reports to the Ministry of Finance), all gaming surplus generated from Singapore Pools' operations are channelled to Tote Board for the funding of worthy causes in the arts, community development, social service, education, health and sports.

Being present for the community is important to Singapore Pools and in this respect, we have

evolved with the needs of the community. Building upon our foundations as an enabler, we have leveraged our resources, expertise and manpower (e.g. our office space, outlets, IT infrastructure) to do good and to do good better.

An example of that would seem to be iShine Cloud. What is the mission of iShine Cloud? (Visit ishinecloud.sg)

Mr. Seah: Singapore Pools wants to use its resources to help the social sector embark on digitalization. iShine Cloud Limited is a charity set up by Singapore Pools to provide charities with an affordable and integrated suite of sector-specific solutions via a secure cloud-based IT platform. iShine Cloud aims to improve the productivity, governance and efficiencies of charities, thus enabling them to focus on serving their beneficiaries better. Its services are open to any charities regardless of their sector and size, it is a way for Singapore Pools to share its technological capabilities with other charity organizations. We hope that by offering a flexible, affordable, and scalable platform to others, it would also pave the way for a stronger social sector in Singapore. PH



At Singapore Pools, Responsible Gaming (RG) is more than complying with a set of written policies, rules and manuals. It's staff also serve as RG Ambassadors where they help to increase awareness on the importance of responsible play and spending within one's means.

Tax (IVA) was modified and the percentage paid in prizes increased. These modifications generated very positive changes in the marketing and consumer acceptance of these products. Since the Parliament approved sports betting (Supermatch), and the Executive Power implemented regulations and enforcement instruments to combat illegal gambling and prohibit advertising of sports betting, sales of the state-operated Supermatch have increased considerably. So far, the regulatory regime has proceeded to block 97 betting sites that operated in our country without having the required authorization license. 81 more are in the process of being blocked. Using the best tools to combat illegal gambling is the best way to defend the legal games.

What is the growth rate of online sales?

L. Gama: Since 2002, the sports betting game called “Supermatch” has been operating in our country. It is the only game sold online. As a result of the actions developed under the current legislation, it has been growing satisfactorily. If we compare the first semester of the year 2018 with the same period of the year 2017 it has had a year-over-year growth rate of 99.42%. This growth was mainly driven by two factors: the blocking of almost 100 non-authorized betting sites and the development of the World Cup.

Is Uruguay's regulatory framework established so that it is not likely to change in the coming years? Or do you expect to expand your gaming portfolio, or could there be other significant changes in the business model?

L. Gama: It is our understanding that the regulatory framework, although it may have some shortcomings, is generally correct and effective as it is now. Our great challenge is to seek the approval of a proposal that was raised to the National Parliament by the Executive Power which -among other things - separates the operating functions from those of regulation and control of the Executing Unit. It also applies administrative sanctions and penalizes the marketing of the game without proper authorization and license, and ratifies the monopoly of the State for all types of games and bets marketed to the general public.

We must also review and analyze the current portfolio of games, in order to make possible the granting of new licenses related to the online games.

What do you consider to be the greatest opportunities and the highest priorities for the business in the next three years?

L. Gama: I am convinced that the greatest business opportunities will be presented to us through online games. We are working to address the phenomenon of online gaming that has been growing at an incredible rate. Only two countries in the region have made much progress in the online channel. In the year 2000, online games were almost non-existent. Eighteen years later we see a global internet betting level over \$70 billion USD a year. To the extent that we regulate this modality effectively, consumers will benefit, our Organization will be stronger, and we will channel more economic benefit to the state.

How would you describe some of the differences between markets in Latin America? The differences in promotional methods and media, commercial operations, regulatory frameworks and political attitudes, responsible gaming, etc.?

L. Gama: In general, there are no substantial differences between the different markets of our Region. I think we share the same problems and the issues that go with how we address and solve the problems. Like everywhere else in the world, regulatory frameworks are not always keeping up with changes in technology and the market-place. There are many bills that are currently being studied in the different parliament, which can cause decisions to be delayed and in many cases inefficiency in management.

In addition, not everyone has tackled the issue of online gaming, the need to define communication strategies and the need to include new products to meet the demand of the consumer whose play-styles and preferences are changing. The lack of clear policy guidelines or government agenda for the gaming Sector creates uncertainty about the future. This means that, in most cases, government policy is largely conditioned to the personal imprint of the Hierarch on duty. The changes in the political conceptions cause changes in vision for the Gaming Sector. The uncertainty that creates makes it hard to clarify and invest in strategies and objectives and action-plans that position the Organization for the future.

It is difficult to generalize when comparing one global region with another. However, is there anything that surprises you as an interesting difference between the gaming markets of Latin America and, for example, Europe or North America or

Asia-Pacific?

L. Gama: Compared with other global regions, the difference is that our region has more capacity for growth. We have countries of great influence and potential at the regional level that have not yet adequately resolved the problem of illegal gambling and online games. The lack of regulations that clearly address current technologies, methods of distribution, and market-place realities make it difficult to effectively combat illegal gambling. These are some of the issues that we must address both individually and collectively to enhance the performance of our Lotteries, apply more resources to modernize commercial operations, and evolve with the consumer market-place.

We are moving in this direction and taking action to strengthen the State through our Institutions. A lot of work awaits us. But I visualize a great commitment on the part of all of us who cooperate together within Cibelaé to create solutions and productive pathways forward that will benefit everyone. Working towards these goals, transforming our organizations, preparing them for the immediate future and investing in training and technology are the great challenges that lie ahead.

How do you think the needs and expectations of the members of Cibelaé will change in the next three years? And how will CIBELAE evolve to meet the needs of its members and the changing market?

L. Gama: Cibelaé has been making great progress in terms of cooperation, integration, professionalization and training of all its members. Our academic programs have grown in terms of the quality of speakers as well as in the theme and the topics addressed in each of the events. As a result, lotteries from countries that did not much participate very much in Cibelaé have come forward to contribute experiences to the other participants. This increased participation has meant a growth and strengthening of the Cibelaé as a whole and its members individually. In this period, we have focused our actions on everything related to management and the generation of value from all our actions and investments. Cibelaé is an Organization that represents 33 Regulators from 30 Ibero-American countries plus 30 commercial companies of the Gaming Sector. All its members are dedicated to optimizing the contribution of Cibelaé to the responsible growth and integrity of the Sector, to its members commercial success, and to the Institutions that benefit from the operations of Lottery. ■



MOMENTUM

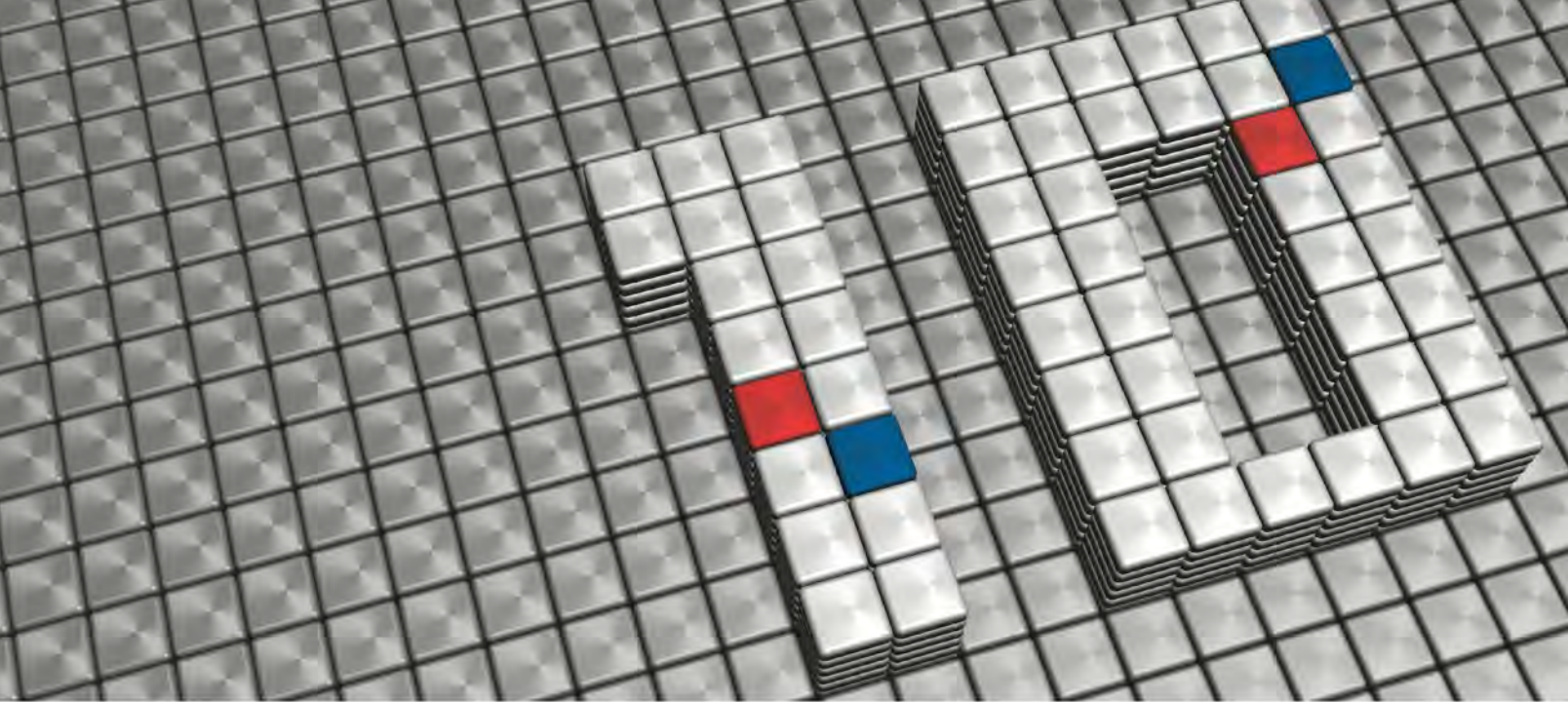
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**Scientific Games' Momentum™ is grounded by AEGIS®,
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And now, thanks to a number of strategic acquisitions, our Momentum portfolio of systems-based products and services is stronger and more versatile than ever.



MOMENTUM
Move Your Sales Forward



1. Next Big Linked Game: DEAL OR NO DEAL™

From the creators of the *WILLY WONKA GOLDEN TICKET™* linked instant game beloved by players in 17 states, comes the next BIG linked game! Coinciding with the exciting return of the *DEAL OR NO DEAL* television show, the new linked game offers players a second-chance opportunity for the chance to win a theme park vacation for four to Orlando, Florida (5 days/4 nights) to attend the *Million Dollar DEAL OR NO DEAL* winner's event of a lifetime on the set of the show. And it gets better! Every player at the *Million Dollar DEAL OR NO DEAL* event in Orlando has the chance to play a non-broadcast version of *DEAL OR NO DEAL*—and a chance to win up to \$1 million!

2. Hot Licensed Property: LOTERIA™

Based on the perennial favorite that extends far beyond its Hispanic cultural roots, the authentic Don Clemente *LOTERIA* is a colorful addition to any instant game portfolio. Similar to traditional bingo, the instant game has a fun, new look with folk art symbols. *LOTERIA* continues to offer entertainment value year after year to players and lotteries around the world.

3. Rose Gold Ink: 18K Rose Gold

The popularity of the color 'Rose Gold' spiked when Rose Quartz was named Pantone's 2016 Color of the Year. Also called 'Millennial Pink', Rose Gold is extremely popular with the Millennial generation—and can be found on everything from social media filters, to clothes, food packaging, cosmetics, home décor and even automobiles. Now, thanks to Scientific Games, this trendy color adds a rich, modern touch to instant games.

4. HD Games™: 12 Days of Christmas

Just in time for the 2018 holidays, Scientific Games' Dream Team came up with another new instant game playstyle called *VariPlay*, AND added the vibrance of high-definition imaging and play symbols in an all new, *12 Days of Christmas* series from the *HD Games* portfolio.

5. Top Performer: Lady Luck

Luck be a lady, and it's been a big hit in the *Lady Luck* games. In just the last year-and-a-half, eight different lotteries have launched *Lady Luck* games at various price points. The games are performing well and it doesn't get much prettier than that!



GAMES TO EXPERIENCE NOW

6. Family of Games: Hit Series

It's all in the family! There's strength in numbers, and families of games prove this over and over again with players who become loyal to a game at all price points. There's no better example of this than the *Hit Series* family of key number match games that are indexing great over the last few months at \$1, \$2, \$3, \$5 and \$10.

7. Extended Play: Crossword

No longer the quirky cousin of instant games, the extended play category has exploded over the last decade. Extended play games are now a staple in most product portfolios, appealing to a broad base of players and contributing significantly to a lottery's bottom line. Leading the charge are uber-popular crossword-themed games like *Cashword* and *Cashword Doubler* featuring Scientific Games' *ClearMark™* system for ease of play. These strong performers keep consumers coming back for more entertainment.

8. Draw Games: PlayNow Games™

Creativity and flexibility make terminal-generated instant games a strong add to product portfolios. The innovative line of *PlayNow Games* from Scientific Games offers lotteries new ways to engage players and help drive revenues. Carefully engineered for fun and security, *PlayNow Games* can be instant wins or progressive payouts with a variety of different play styles—and even feature the excitement of a licensed brand like *JACKPOT PARTY®*.

9. Monitor Games: RaceTrax®

The thrill of horse-racing in a virtual sports monitor game that's similar to Keno in draw frequency and wagering. Every three to five minutes, *Racetrax* shows a different race with 12 numbered horses. Each horse has a fixed probability of winning, and a prize based on odds. Players can bet on up to 20 races at a time using a playslip or mobile phone. *Racetrax* has been a proven performer for lotteries for more than 10 years.

10. iLottery: Monster Wins

Scientific Games recently launched the most commercially successful iLottery program in the U.S.—and *Monster Wins* is one of the most popular games in an entertaining portfolio of iLottery experiences. The portfolio appeals to every kind of player with a diverse offering of games ranging from simple to extended play. Everyone's favorite, *Monster Wins* delights with a 'free game' mini-game when bonus symbols are revealed in match-three and match-four style play online or via mobile.

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Stepping Up To Stay Ahead

To support sustainability within and beyond the gaming industry, IGT is expanding its corporate citizenship to participate in a set of United Nations Sustainable Development Goals.

Across the globe, organizations in all sectors have been accelerating efforts to frame their operations within the broader context of shared societal challenges. At the same time, more and more customers, investors, and suppliers are seeking to work with companies that demonstrate a commitment to operate responsibly and sustainably, recognizing the importance of these values in ensuring long-term growth and success for all.

IGT recently released its 11th annual Sustainability Report to detail the Company's progress in increasing sustainability in our business, our communities, and the world. With more than 12,000 employees and operations in over 100 countries, we view each edition as an important part of the ongoing dialogue we are engaged in with a wide group of stakeholders. As we

continue to shape our role in a dynamic industry, our efforts to deliver growth while operating responsibly continue to evolve as well.

In 2017, IGT took a further step in strengthening our corporate citizenship by committing to a set of United Nations Sustainable Development Goals (SDGs), part of a larger United Nations program to engage diverse organizations from around the world in creating greater economic, societal, and environmental sustainability. Determining which of the 17 SDGs should be the focus of IGT's efforts involved a year-long process of benchmarking against other companies and focusing on nine that we can influence as part of our long-term plan. Year by year, IGT will define specific targets and initiatives to progress toward these goals and achieve material results.

Photo: Carlo Panachia

The United Nations Sustainable Development Goals (shown below) are part of the U.N.'s 2030 Agenda to end extreme poverty, fight inequality and injustice, and protect the planet. IGT has committed to those shown in color.



Here are some of the other ways that IGT has worked to stay ahead of the game and foster sustainability in the past year:

Recognizing We Are Stronger Together

IGT values diversity and inclusion, important drivers of innovation and growth. In 2017, we expanded our Executive Diversity & Inclusion Council to meet the evolving needs of our customers, our people, and our communities.

Staying Mindful of Our Resource Use

Our teams around the world collaborated to enlarge the scope of the sites included in IGT's environmental data-collection tool, one of the reasons why IGT has been recognized by the CDP as a leader in addressing climate change.

Supporting Responsible Gaming

The collective efforts of the Company's global Responsible Gaming Working Group made IGT the only vendor with distinct industry certifications for responsible gaming across the Lottery, Digital, and Gaming segments.

“IGT is committed to helping our customers and communities stay ahead of the game with sustainable practices that reflect our values.”

—Marco Sala, CEO, IGT

Helping to Build A Better Future

IGT has made education a top priority in our community support, collaborating with schools and colleges on a wide range of initiatives, including the launch of a Women's Entrepreneurship Program in Costa Rica in 2017. Through our After School Advantage program, IGT has built more than 300 digital-learning centers since 1999 to support at-risk children in gaining competitive skills.

Ensuring Security & Engaging with Customers to Drive Growth

IGT keeps well over 100 billion transactions safe annually with cutting-edge cybersecurity technologies. Through dialogue with customers, we focus our research and development on products and services that engage players and help transform the gaming world.



To learn more, visit the [Global Responsibility](#) section of [IGT.com](#) for the full IGT Sustainability Report.



Beyond GLI's Latin American and Caribbean Regulators Roundtable

Charting a Course Toward Industry Modernization in Latin America and the Caribbean



GLI's 2018 Latin American and Caribbean Regulators Roundtable team

Gaming and lottery regulators and government lotteries across Latin America and the Caribbean are facing many of the same challenges and opportunities as they strive to modernize gaming and lottery regulations in the face of unprecedented social, technological, and cultural change in the region's gaming and lottery industries.

The rapid development of online gaming (iGaming), online lottery (iLottery) and sports betting; maintaining effective anti-money laundering (AML) controls; cybersecurity; preventing fraud, and protecting the public; mitigating illegal gaming/lottery operations; understanding the impact of new technologies such as virtual reality, blockchain and cryptocurrencies; grappling with job creation, social responsibility, and social causes; and acquiring tools and skills to enhance the professionalism and integrity of the industry are just some of the many common themes and issues that unite regulators and representatives of government lotteries across the region in their common pursuit of regulatory modernization.

Roundtable Becomes an Important Agent of Change

Eleven years ago, Gaming Laboratories International (GLI®) recognized the need to provide a forum for Latin American and Caribbean lottery and gaming regulators and government lotteries to share ideas, collaborate, network, learn best practices, and join in common interest to tackle issues and drive the future of lotteries and gaming in the region. As a result, GLI customized its highly successful North American Regulators Roundtable model to meet the unique needs of the Latin American and Caribbean gaming and lottery sector. The Latin American and Caribbean Regulators Roundtable has since grown to become the region's premier networking and educational event drawing regulators and government lotteries from across the sector for two days of stimulating discourse enlightening educational sessions and collaboration.

Through the years, GLI's Latin American and Caribbean Regulators Roundtable

has become an important agent of change, helping to spur action to modernize regulations and establish a risk-based approach to benefit of new technology and new sales channels, by giving regulators and representatives of government lotteries valuable tools and knowledge, as well as creating common bonds of cooperation, collegiality, and collaboration among like-minded professionals.

This Year's Roundtable Sets Attendance Record

The most recent Latin American and Caribbean Regulators Roundtable was held this past August 6-8 in Lima, Peru. This year's educational and networking conference set new attendance records, welcoming more than 80 representatives from 33 government entities and 19 countries representing Latin America, the Caribbean, and Spain. This included representatives from Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Curacao, the

Dominican Republic, Guatemala, Jamaica, Panama, Paraguay, Peru, Puerto Rico, Saint Kitts and Nevis, Spain, Turks and Caicos, Uruguay, and the U.S. Virgin Islands. Representatives of CIBELAE (Corporation of Iberoamerican State Lotteries) also attended GLI's two-day regulatory conclave.

Roundtable a Year in the Making

Karen Sierra-Hughes, GLI's Director of Latin American and Caribbean Government Relations and Business Development and her team of Latin American and Caribbean gaming and lottery experts marshaled GLI's prodigious global resources to ensure the event's success, spending nearly a year meticulously planning for the Roundtable. Presented by GLI University®, the Roundtable featured 28 speakers representing some of the most respected and brightest names in the Latin American, Caribbean, and Spanish gaming and lottery industries. These experts were joined by GLI's President and CEO James Maida, and GLI's global team of experts representing Latin America, the Caribbean, Europe, Australasia, and North America, providing the event with a global view component that adds to the uniqueness of its content.

"We are overjoyed with the results of this year's Roundtable," said Sierra-Hughes. "We were very pleased to have such a diverse range of government sectors

represented, which included gaming and lottery regulatory entities and government lotteries, as well as the financial and AML supervision bodies that participated with a strong local representation. The Roundtable traditionally shines for its learning, collaboration and networking qualities, and especially on this occasion, it became a window into the current status of the gaming and lottery industries of the countries represented in the conference; and it has contributed in building to the efforts we are all doing toward the legitimization of our industry."

Sierra-Hughes noted that cooperation and collaboration with the host country's regulatory body are essential to the success of the Latin American and Caribbean Regulators Roundtable.

"We are extremely grateful to Mr. Manuel San Román Benavente, General Director of the DGJCMT and his team, for working with us hand-in-hand in the months prior to the event, and for the warm welcome and hospitality as a host regulator, Sierra-Hughes noted. "We are thankful to all the regulators who collaborated to create the agenda and to the speakers who contributed to the content of the conference with their knowledge and experience."

Lotteries a Key Focus of the Roundtable

According to Sierra-Hughes, the Latin American Regulators Roundtable provided an opportunity to discuss a variety of important issues affecting the expanding lottery industry throughout Latin America, the Caribbean, and Spain.

"Several key topics throughout the conference addressed specific issues regarding lotteries, including a discussion of the policies and regulatory framework of lotteries to allow for a thriving industry: online lottery and sports betting, the preference of a new generation, a risk-assessment approach for the incorporation of new games and products, regulation/supervision, mobile, player identification and protection, and security concerns," explained Sierra-Hughes. "Additionally, the conference also covered other important lottery-related issues, such as best practices in technology, certification, and approval for lottery and sports betting operations; as well as the role of security in the lottery industry; professionalization and institutional strengthen-

ing of government lotteries; and responsible gambling. Of significant relevance on the panel were representatives of lotteries across the region and CIBELAE discussing the importance of the dissemination of the industry's facts by providing factual information on job creation, social responsibility and revenue generation for social causes."

GLI's Latin American and Caribbean Regulators Roundtable Strives for Maximum Value

She also noted that great care is taken to craft an event that resonates with the attendees to ensure they receive maximum value.

"Every year we challenge ourselves to make the Roundtable better than the previous year by soliciting input from attendees on the key topics and issues affecting the gaming and lottery industries throughout Latin America, the Caribbean, and Spain. We ask them what they want to talk about and learn about and then customize the Roundtable's agenda to reflect those desires," Sierra-Hughes explained. "We do this because of our strong commitment to gaming and lotteries in the region. Our goal is to provide our attendees with the information they need to make responsible and informed decisions in their respective jurisdictions that will lead to greater prosperity and success. This, in turn, has a positive impact throughout the region; benefiting not only regulators but the entire spectrum of gaming and lottery suppliers and operators."

"From the beginning, our strategy has been to deliver the most comprehensive, thought-provoking, and exceptional educational and networking experience for regulators and representatives of government lotteries throughout the region," added Sierra-Hughes. "Over the years, the Roundtable has evolved and grown, providing a unique balance of world-class speakers, engaging educational sessions, and networking opportunities that foster a spirit of cooperation, dialogue, and collaboration among regulators and government representatives and their peers. What makes this Roundtable such an effective and popular event is that each year the focus is different. We strive to concentrate on the latest issues and important topics that continue to shape the gaming and lottery landscape throughout the region, embracing challenging questions and tackling tough issues, such as money laundering, illegal gaming, sports wagering, interactive gaming, and the emergence of



GLI's Karen Sierra-Hughes speaks at the 2018 Latin American and Caribbean Regulators Roundtable



GLI President & CEO James Maida welcomes 2018 Latin American and Caribbean Regulators Roundtable attendees

2018 Latin American and Caribbean Regulators Roundtable attendees sign in

cryptocurrencies. This keeps each Roundtable experience fresh, different, and unique.”

Roundtable Focuses on New Technologies

According to Sierra-Hughes, how regulators proactively respond to the rapid advancement of gaming and lottery technologies is an ongoing focus of the Latin American and Caribbean Regulators Roundtables.

“We strive to provide regulators with the latest and most up-to-date assessment of the

current state of gaming and lottery technology to give them a deep understanding of the impact of technological innovation on current and future regulatory development throughout the region,” Sierra-Hughes explained. “GLI’s goal is always to provide a framework for the establishment of strong, effective, yet prudent, regulations without restricting technology. From our perspective, it is imperative that future technology can develop freely. This is a cornerstone of our highly regarded GLI Technical Standards, which embrace the concept of technological innovation, allowing for constant revision as new gaming and lottery technologies emerge. This provides direct policy, regulatory and technical support

to regulators by informing them of our newest testing methodologies and how they affect the overall process of certification and approval; especially as it pertains to the testing and certification of new gaming technologies as they emerge onto the scene.”


Ultimately, explained Sierra-Hughes, the purpose of GLI’s Latin American and Caribbean Regulators Roundtables is to empower regulators and representatives of government lotteries to return to their own jurisdictions armed with the information, skills, tools, and knowledge they can employ to address the many pressing issues facing this dynamic and growing Latin American and Caribbean lottery and gaming market.

GLI Demonstrates Commitment to Latin America’s Lottery Industry

Gaming Laboratories International will once again have a strong presence at this year’s World Lottery Summit (WLS) in Buenos Aires. GLI’s team of North America, Latin American and Caribbean lottery and gaming experts will be on hand at GLI’s booth BH to demonstrate how attendees can benefit from GLI’s tested, proven, and trusted lottery experience.

“GLI began nearly 30 years ago with the South Dakota Lottery as their first client and they are still a valued client today,” said Sierra-Hughes.

“Since then, GLI has partnered with lotteries across the globe, providing a comprehensive suite of services such as policy and legislation consultancy, testing and certification, and security audits. In fact, no other lab in the world can provide global reach to all the jurisdictions in the world for the benefit of lottery operators, regulators, and suppliers than GLI.”

“Participating in the region’s most important and prestigious lottery conference underscores GLI’s commitment to the Latin American and Caribbean lottery industry, as does GLI recently being named to be the first test laboratory to be accredited by the Lottery of the City of Buenos Aires (LOTBA),” Sierra-Hughes concluded. 



the
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intralot

From Physical to Digital:
how technology shapes the future
of gaming in retail

From Physical to Digital: how technology shapes the future of gaming in retail

LIVING IN AN EVOLVING WORLD

Technology is the determining factor of today in all aspects of life; it gears evolution, it simplifies life and offers new opportunities. From everyday tasks to media content consumption and from goods purchasing to games of chance playing, the digital world is well-established:

more than 6 out of 10 consumers globally prefer to conduct any task digitally, if possible, while online purchases are conducted by 60% and mobile purchases, through apps, by 29%; such purchases are not confined to the expected "digital" products and services, but also include goods that are easily found in physical stores.

Smartphones lead the way to digitalization, accountable for 53% of non-physical purchases and for 64% of daily media content consumption. Taking a step further, innovative technologies, such as virtual reality, seem exciting, especially when offering tangible benefits: almost 5 out of 10 would be willing to use virtual reality to navigate a personalized in-store experience and shop

hand-picked products without being physically present while virtual assistants are already used by 16% of global consumers.

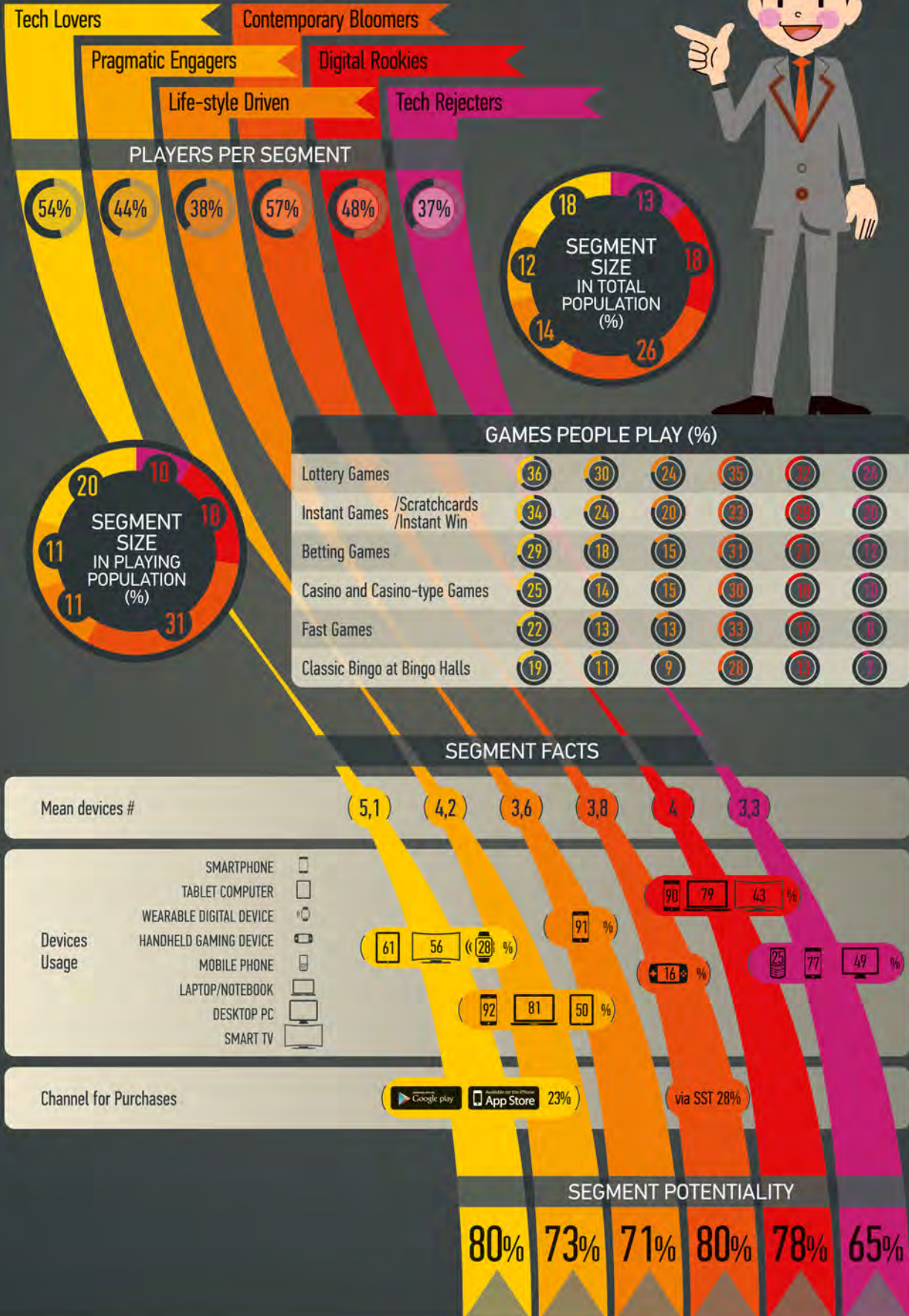
Although digitalization's eminent presence in everyday life, consumers still value physical interaction to a great extent. For example, the notion of receiving guidance and advice on personal or professional matters by an artificial intelligence system is appealing to less than 3 out of 10 consumers; meanwhile, less than 4 out of 10 would consider using internal sensors/implants to augment their senses and capabilities.

Physicality and tangibility are quite strong when it comes to making purchases, mainly due to global retailers' persistence, who seem to prefer more "traditional" ways of operating: only mainstream technological applications are used by 7 out of 10 retailers while almost 3 out of 10 do not engage in any digital activity at all [e.g. social media, online site, mobile app, etc.]. More than half of retailers also demonstrate strong preference to cash, as a means of payment, even if its share of contribution to stores' turnover does not exceed 40%. As a side-result, physical purchases are still conducted by 9 out of 10 consumers and cash is the core payment method used by 70%.

A multi-gear world offers alternative solutions and, as such, the same person may easily shift from the digital to the physical world. Even if technology has become an everyday necessity, consumers recognize that there is life without it, to a great extent, as well. Less than half consumers get anxious when they can't have access to the internet, while, even though heavily used in everyday life, electronic devices are not perceived as indispensable by 5 out of 10.

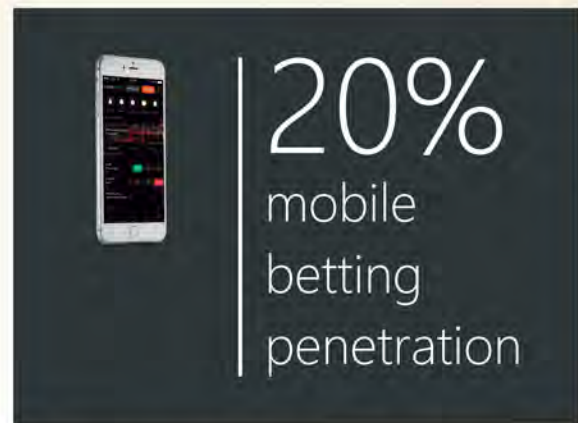


The Consumer Segments towards Technology trends and Innovation



ARE GAMES OF CHANCE MULTI-GEARED, TOO?

As we all know, digitalization of gaming is an established and evident trend nowadays, in line with all other aspects of contemporary life; online betting penetration has already reached 36% among players while, mobile betting through apps, 20%.

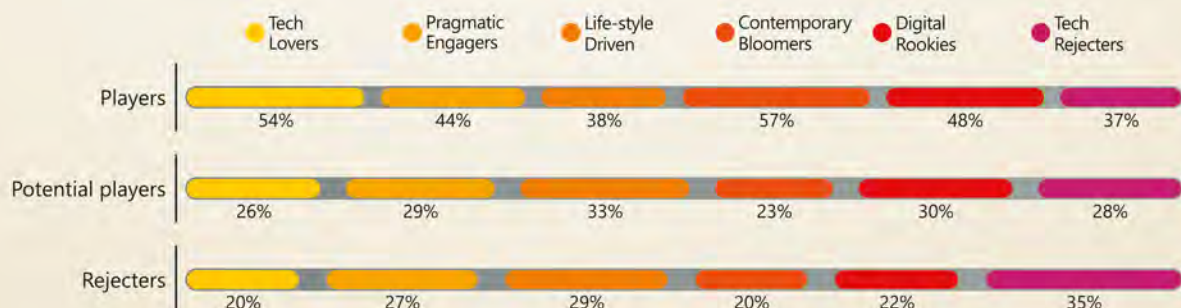


What is most important, players around the globe tend to demonstrate a more tech-integrated profile, beyond gaming as such. Players are more open and willing to endorse embrace technology in their everyday life and eager to enjoy its benefits to a much greater extent. At the same time, retailers that offer games of chance, except "exclusive" gaming retailers, demonstrate a more high-tech profile, as well. For them, eagerness to push their business forward leads them to advanced technology integration [53% vs. 27% among total retailers], preference over non-physical ways of payment, higher online presence and investment in advanced store equipment, such as barcode scanners TV screens, vending and self-service terminals and of course, gaming terminals.

On the other hand, traditional gaming channels are a core ingredient of the market mix, as well. Exclusive

lottery-offering retailers tend to address the more classic, less tech-savvy player, using technology applications for their own convenience, rather than as part of the user's experience. As a result, most players, along with online or mobile access means, tend to also visit physical locations, especially for betting & number games.

In sum, physical and digital channels coexist, each attracting a core group of players that feels at ease with it, while at the same time, there is an enlarged group that represents the majority of players, which can easily "transcend" the barriers of the two worlds and adapt to both the physical and the digital experience according to the occasion. In this context, the gaming market seems to be successfully and seamlessly leading the way towards digitalization, while maintaining a strong and robust physical presence.



WHAT DOES THIS MEAN FOR THE FUTURE OF THE GAMING MARKET?

Today's reality demands for "co-existence", rather than segregation, and adaptation rather than rejection. Operators are called upon to develop platforms that enable smooth and seamless customer experiences offering similar excitement and total effect in the physical and the digital worlds.

To this respect, INTRALOT focuses its product development on the customer experience, either digital or physical, aiming at supporting operators worldwide in their dual role.

At the same time, digitalization is clearly becoming an asset for any operator that understands the current dynamics of the gaming market, wants to expand their reach to new audiences or offer new alternatives to existing clientele. INTRALOT has decided to invest in an entire new generation of products enabling lottery digital transformation, including the new lottery central system solution and the new betting platform. INTRALOT's new investments are based on a holistic approach the involves cross-platform and cross-vertical infrastructure, facilitating, thus, fast go-to-market and reducing total cost of ownership for the operators.



THE PROFILE OF THE STUDY

A quantitative online study conducted via distinct pre-structured questionnaires that addressed 11.000 consumers, aged 18-54 y.o., residents of urban centres, in 11 countries and 2.107 retailers, either involved in gaming or not, in 12 countries, across 5 continents (North America, South America, Europe, Asia and Australia), during August and September 2017. The study was led by Focus Bari S.A., a leading Greek market research agency, with the cooperation of SSI and Isra Center.



Lottery Success: A Kaleidoscope of Possibilities

Even with the advent of iLottery and sports betting, there is no doubt that retail sales will continue to be the main source of revenue for lotteries for the foreseeable future. Improving player experience with a focus on further cultivating retail excellence, outstanding games, and digital innovation—and finding opportunities in where these dimensions intersect—will help drive growth at retail. Each lottery operates in its own unique environment, with a kaleidoscope of possibilities to achieve further growth. Pollard Banknote can help focus that kaleidoscope for each lottery.

Pollard Banknote envisions the continued success of lotteries in driving sales and reaching new players to rely on a comprehensive approach that involves strategic action in the three key dimensions. That is, excellence at retail by executing effective in-store strategies and expanding the retail network, outstanding games that excite players, and digital engagement using a true omnichannel approach. Further, we recognize that for all lotteries, there is a fluid connection between these three dimensions, with many combinations leading to greater lottery success.

To act on this vision, we relentlessly pursue opportunities in each area, a vital starting point, while also looking for ways to create something truly special by focusing on strategies that fall across intersecting dimensions.

RETAIL EXCELLENCE

Achieving excellence at retail with the goal of attracting new players and supporting

the expansion of a lottery's retail network requires a multi-faceted approach that works to not only optimize facings, number of activations, product visibility and launch plans, but also the incorporation of new retail concepts and fresh promotions. Pollard Banknote's recent acquisitions, Schafer Systems Inc. and Diamond Game, will be key in continuing to help our lottery partners strengthen retail strategies to drive growth.



Schafer Systems, the leading manufacturer of lottery ticket dispensers and point of purchase displays for the lottery industry, has helped shape the lottery retail arena. As the newest member of the Pollard Banknote family, Schafer Systems will continue to create solutions for unique and challenging retail environments. Their latest product innovation, The Lottery Center™, is already making a big impact, providing a centralized all-in-one display solution to promote both instant and draw games in one modular solution. Putting all products front and center in a clutter-free design instantly strengthens ticket promotion and can in turn help increase sales.



Diamond Game, which designs, produces and services games, gaming systems, and tickets for various North American lotteries and alternative gaming markets, meets consumer wants and needs for lottery entertainment in convenient and non-traditional locations such as veteran's clubs and social establishments, greatly increasing a lottery's retail footprint. Game terminals, which dispense pre-printed instant scratch or pull-tab tickets, bring new, yet familiar technology to such environments.

OUTSTANDING GAMES

New print innovations, creative game concepts, and attractive prize structures help drive product development in the lottery industry, supported by promotions that keep instants exciting and engaging at retail. Pollard Banknote's unique and proactive approach to innovation has resulted in the creation of some of the industry's most sought after instant products, including two of our newest products, Scratch FXtra™ and Clear Play™.

Scratch FXtra™ is joining Pollard Banknote's wildly successful Scratch FX® family of products. It is a new process that combines the shining brilliance of Scratch FX® with the depth of a hologram—providing a distinctive feature on tickets, enhancing



consumers' perception of the game and overall ticket value. Holograms enable striking visual effects that are innovative and difficult to replicate, garnering attention and increasing purchase consideration. This can refresh existing ticket themes and bring new life to past favorites in a dazzling new way.

Clear Play™ is the lottery industry's first-ever clear and transparent ticket. This innovation can be used to create stunning designs that effectively showcase images such as diamonds, water, ice and more! This truly distinctive look and feel definitely stands out. Most recently, the North Carolina Education Lottery leveraged our Clear Play™ innovation to launch its one-of-a-kind *Holiday Cash* ticket. Its unique design will be eye-catching to regular players and non-players alike this holiday season.

DIGITAL INNOVATION

Digital strategies using a true omnichannel approach offer players new ways to engage with a lottery and helps to support the existing player base, as well as attract new players. Pollard Banknote is an established leader in this dimension, and continues to bring innovative products to market as evidenced by its new ScanActiv™ product and proven PlayOn™ Player Engagement Solution.

Pollard Banknote's exciting new ScanActiv™ product is an in-lane instant ticket solution that expands the retail network by effectively providing lotteries a new way to merchandise tickets at retail. Recognizing that lottery products are primarily impulse purchases, ScanActiv™ is an easy way for players to purchase tickets at self-check-outs and multi-lane retailers. For non-players, it's a new and different opportunity to entice



them to give instant scratch tickets a try! With an activation process similar to gift cards, players can purchase a ScanActiv™ game card at the register and immediately begin playing! By scanning the card's digital game code, players are given a digital play experience to determine if their card is a winner. Winners are given a digital validation code that they can then redeem at a lottery retailer—creating a full-circle process that begins and ends with the Lottery's retail partners. Our ScanActiv™ program provides lotteries and their retailers with an untapped sales opportunity that is practically risk free—since cards are not active until purchase, there is no concern for theft.

Pollard Banknote's PlayOn™ Player Engagement Solution rewards player interactions across all marketing channels, increasing customer engagement and sales. This functionality allows lotteries to reward players for every activity, across mobile, social, web, in-store, and more. With advanced segmentation and predictive analytics, PlayOn™ allows our lottery clients to get a 360 degree view of who their customers are and how they behave. The data captured by the platform provides lotteries with insight into their player's favorite games and formats, preferred price points, purchase behavior, play frequency and preferred reward options. The data allows the lottery to personalize messaging and offer relevant

rewards to their customers. This leads to increased customer engagement, which in turn means increased customer life time value.

WHEN DIMENSIONS OVERLAP

Strategies that intersect across retail, product and digital dimensions are indeed a case where the whole is greater than the sum of its valuable parts; bringing more color and sharper focus to an already bright future. The Michigan Lottery, for example, uses a forward-thinking strategy to acquire new players by connecting retail and online sales channels to create an engaging offering that promotes growth across channels. Many of the Lottery's retail-based scratch games feature a promo code for free online play. If the player then makes a minimum deposit into an online account, they receive a free play coupon to be redeemed at retail, effectively driving players between channels and appealing to those that may not have otherwise considered crossing into a new channel. This concept completes the virtuous circle of retail and online and has proven so effective that the Lottery has expanded the cross-promotion to include more games over time.

FOCUS EQUALS SUCCESS

Just as a kaleidoscope creates unique views, Pollard Banknote's strategic vision supports lotteries in finding the right combination of innovative approaches to retail excellence, great games and digital innovation, based on their unique legislative, regulatory and market conditions. Discovering where these strategies intersect to create something special supports even greater lottery success!



Growing the **KENTUCKY** Lottery's Instant Games

Three days after NASPL 2018 in Cleveland, Ohio wrapped in late September, the Kentucky Lottery announced what it described as the beginning of the state's full instant product category management program for Scratch-off tickets, the first such change in the Lottery's 29-year history.

Some 350 miles south, the Kentucky Lottery and Scientific Games had just celebrated a ribbon-cutting on a 41,000-square-foot, state-of-the-art facility in Louisville, Kentucky where 20 of the company's employees will fully manage instant products across the Commonwealth. The Scientific Games team will handle every aspect of the Kentucky Lottery's Scratch-off tickets, including game development and portfolio management, advanced logistics for warehousing and distribution, and retail optimization across the Lottery's network of 3,200 retailers.

"For any consumer product business, having the appropriate levels of inventory in stores is crucial," says Kentucky Lottery President and CEO Tom Delacenserie. "This proven system of predicting exactly what individual retailers need and ensuring that their supply meets consumer demands will absolutely help us grow sales of this essential product."



Tom Delacenserie
Kentucky Lottery



Fueling Imagination.
Funding Education.

Kentucky joins more than 20 other lotteries globally—including some of the top performing lotteries in the industry—that have taken a deeper, partner services approach to growing their instant

game revenues. In 2018, Scientific Games and its full instant category management partners in the U.S.—about 25 percent of domestic lotteries (excluding Puerto Rico)—together generated 36 percent of U.S. instant product retail sales.

Experience Matters

When Delacenserie accepted the leadership role at the Kentucky Lottery in 2017, annual instant game sales were about \$600 million. Looking at opportunities for growth, he set a goal to hit a billion dollars in annual instant game sales within five years.

“This is a partner services program that has been refined over the last several decades, in part by developing advanced technologies to help our customers create more growth with their instant product category and responsibly grow their proceeds to good causes,” shares Sam Wakasugi, Vice President, Strategic Business Management at Scientific Games.

With the newly launched program, the Lottery’s instant games are now shipped from Scientific Games’ new Louisville facility, and all Kentucky Lottery retailer orders are taken by an inside “Tel-Sel” team and processed there as well. While retailers are still able to call and request certain games, the company’s advanced predictive ordering technology means retailers will receive inventory based on their players’ game demand.

“My experience with this partnership program during my 17 years with the Florida Lottery was really what gave me the confidence that this program would work in Kentucky. We had great success with this program, particularly the last six or seven years with its predictive ordering technology, which helped us deliver record years in Florida,” said Delacenserie.



Ribbon-Cutting

He shares his thoughts with the same transparency that has made him a highly respected leader in the industry, “When I arrived at the Kentucky Lottery, we were telemarketing, shipping, and packing internally. The shipping and packing was great. But I saw problems immediately with the retailer tele-marketing because we did not have the right equipment, so they really couldn’t get the right inventory levels out to the stores. With any business, inventory and distribution are the keys to success.”



Performance-driven Inventory

To optimize the product mix and inventory levels at retail, over the years Scientific Games enhanced its instant category management program with *OrderCast*™, a predictive ordering system informed by analytics from the company's *MAP*™ (*Marketing Analysis Planning*) platform which tracks how and why an instant game performs.



OrderCast combines traditional inventory estimation methods with economic and mathematical prediction models. The system actually “learns” over time, getting smarter and smarter with every set of data collected. *OrderCast* continually adjusts recommendations based on the data it receives, and then communicates revised recommendations to the Tel-Sel team.

The bottom line benefit of efficient inventory ordering is there is no guesswork involved in this very important aspect of managing instant products. Using nearly 100 variables, *OrderCast* tailors data-driven, adaptable orders. The system predicts the ideal product mix and inventory levels required for a specified sales period for each individual retailer in the lottery's network to help ensure optimal sales at each location.

The forecasted sales then integrate with operational considerations, such as pack sizes, order cycles and “safety stock” to generate a final recommended order for each game. The Tel-Sel team can review the order and customize further based on their communication with the retailer before the order is finalized and shipped.



Cherie Norman
Scientific Games

Deepening the Partnership

“When we partner closely with a lottery to provide consumer insights, game design and manufacturing and product distribution, we’re delivering full category management, our proven formula for success,” explains Cherie Norman, Executive Director Cooperative Services, for Scientific Games. “We’ve worked very hard with our lottery partners and their retailers to advance the technologies behind our full instant product management, and we are driving growth like no other program in the industry.”

Norman said that with the deeper partnership, everyone who touches the instant product throughout its lifecycle is put in the best position to succeed.

Full Instant
Category
Management

All U.S. lotteries using the instant game program's services are generating per capita sales that are outpacing the industry by 40 percent, the program's operating scale accounts for approximately one-third of total U.S. retail sales. Based on real results achieved for customers, it is currently the most successful and effective category management program in the industry.



Louisville, KY

"You know, moving our distribution center and ordering center from internal to external was easier than expected. There was a lot of coordination that took place between our IT team and Scientific Games' IT teams. I was very pleased with how smooth the transition went from our warehouse to their warehouse," said Delacenserie. "Overall, I don't think it could have gone any smoother."

Aggressive Goals

With Delacenserie's vision to hit \$1 billion in instant game sales in five years, and Scientific Games' instant product management strategies, the team set about building better games and selling them smarter. Similar to their work together in Florida, they aligned to optimize prize structures and introduce the six-week game cycles in Kentucky. Delacenserie is also a big fan of families of games, like the *Lucky 7's* family and a family of holiday games. He's also pumped up about the new \$30 game that will soon launch to celebrate the Lottery's 30th Anniversary.

Delacenserie believes the Kentucky Lottery's bottom line will be helped not only by increased instant game sales, but also through the efficiencies realized through the partner services program.

"Any savings and additional sales we realize are vital to our mission," he says. "The Kentucky Lottery isn't a faceless corporation making profits for investors – the more profits

we make, the more kids get to go to college here in the Commonwealth. That's something which drives us every day."

Behind Delacenserie and the Kentucky Lottery are advanced technologies that are now powering its full instant game operations.

"Scientific Games takes a very hands-on approach with our customer relationships," says Norman. "We mean business when it comes to managing instant games. There is no other program out there that comes close to the growth that is possible through our full category management."

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New 30th Anniversary Game





Helena
Pereira

Marketing Director of Szrek2Solutions

Szrek2Solutions

Independent Review of Security and Non-repudiation of the Szrek2Solutions Electronic Draw System (EDS) by Bulletproof, a GLI Company

PGRI Interviews Helena Pereira

Marketing Director of Szrek2Solutions, about the significance of the independent security review performed by Bulletproof

Paul Jason: Helena, can you tell us the motivations for why Szrek2Solutions did this review with Bulletproof?

Helena Pereira: Yes, of course. In 2005, Szrek patented a method for random number generation that generates unpredictable random numbers with verifiability of those same random numbers. Szrek developed this into a technology and offered it to many lotteries. Elsewhere in the industry, there have been problems with electronic draw results which were difficult to trace and conclusively detect. More generally, we believe that the reliability of electronic random number generation must be related to whether the random numbers can be verified for integrity. To say that a problem has not been noticed is not to say that one has not occurred, as random numbers all look the same!

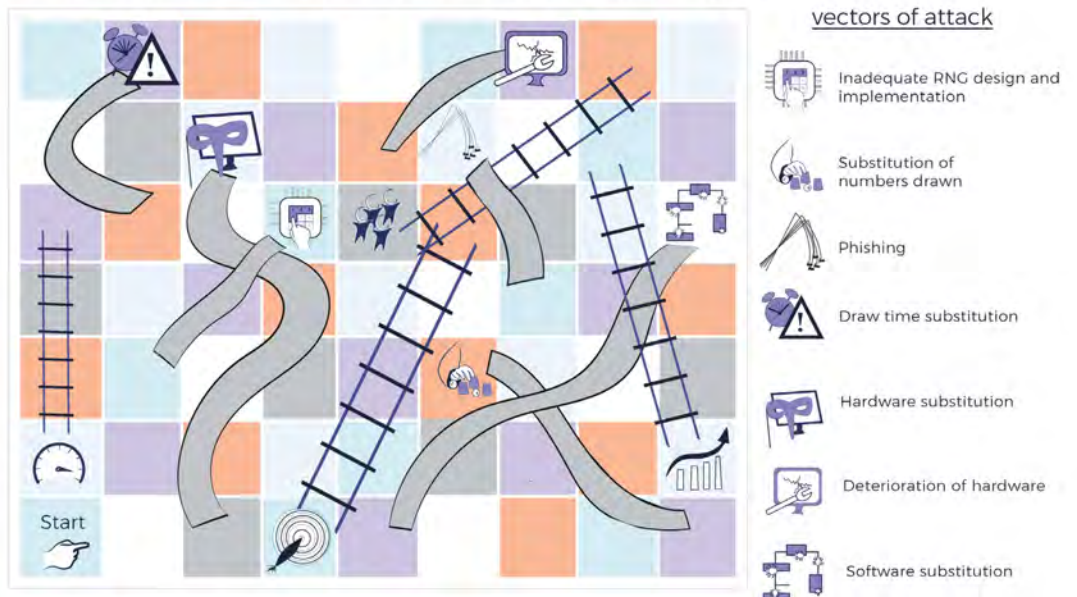
For this reason, we believe the industry as a whole would benefit from transparency in the draw process through proof of integrity which guarantees the integrity of the whole random number generation process. This independent review by Bulletproof highlights the importance of proof of integrity in draw systems and confirms that our technology provides this unique value proposition. Lotteries that use our Trusted Draw and Trusted Audit systems are guaranteed that they will not have any undetected draw problems, whether they

are due to hardware faults, software faults, or fraud.

Who is this Review most relevant to—who are you trying to communicate the results of this Bulletproof independent review to?

Helena Pereira: We need to reach security directors, IT directors, and draw staff, but our audience is very much the executive directors and key decision makers in lotteries who are determining whether to use an electronic draw system. We want to make them all aware that the risks of

The chutes and ladders of electronic draw systems



© Szrek2Solutions

See Figure 1

using random number generators can be eradicated by using RNGs which provide nonrepudiation of draw outcomes. We believe that transparency and 100% fault and fraud detection need to become a standard required from any RNG solution used by the industry. The industry continues to be exposed to security risks, unless transparency and nonrepudiation of the draw outcomes is being enforced.

We hope to change the way of thinking regarding electronic draw systems: with proof of integrity for every draw and consistent verification, electronic draw systems provide a viable, secure alternative to mechanical machines at a much lower price point. Similarly to how gaming systems use an independent ICS system to ensure gaming system integrity, an electronic draw system must also provide nonrepudiation and independent verification of integrity for the draw process.

At the PGRI conference in NYC, you illustrated this differentiating factor of your technology using a game. It was a wonderful presentation.

Helena Pereira: Yes. I illustrated the potential risks and benefits of an electronic draw system using the game Chutes and Ladders. (See Figure 1.) In this game, “the Chutes and Ladders of Electronic Draw Systems” lotteries can benefit from the unique opportunities offered by electronic draw systems - the ability to develop new games, reach new customer segments, to make draw processes more efficient, and to save money. In the game, the benefits are represented by ladders, and each time the lottery climbs a ladder it moves closer to meeting its goals. However, there are different risks associated with using electronic draw systems as well. These are the vectors of attack or ways that a draw system can be compromised and they are

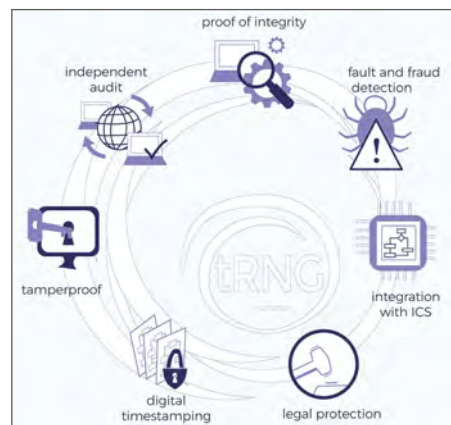
represented as chutes. They include software substitution, hardware substitution, draw time substitution, phishing, hardware deterioration, substitution of numbers drawn, and inadequate RNG design and implementation. Each time a lottery encounters one of these risks, it falls behind in the game, moving away from its goals.

However, when the electronic draw system that the lottery uses has nonrepudiation with proof of integrity, all of these risks can be eradicated - immediately detected by a verification process on an independent system. We illustrate the playing field for an electronic draw system with nonrepudiation and verification in Figure 2: you will notice that the risks still exist, but there are no chutes. This is because all faults and attacks are immediately detected, and thus the risks are greatly mitigated. ■

The outcome: Lottery benefits from the advantages of electronic draw systems without worrying about the risks.

Bulletproof, a GLI company, recently evaluated Szrek2Solutions’ RNG solution, Trusted Draw™ and Trusted Audit™. The final report ‘Independent Review of Security and Non-repudiation of the Szrek2Solutions Electronic Draw System (EDS)’ validated Szrek’s RNG draw solution as meeting or exceeding the best practices by providing conclusive auditability and proof of integrity.

To quote from the executive summary of the report: “The assessed electronic draw system, Trusted Draw, utilizes cryptographic hardware and algorithms in its methodology to provide proof of integrity through non-repudiation in the generation of random numbers. It creates unpredictable, unmodifiable data which is independently verifiable. Hardware as well as software faults and attacks against the RNG and its components are conclusively detectable.



The use of the *independent Trusted Audit system* completes the chain of trust in random number generation through validation and independent audit of the draw results. It verifies the seed for the random number generation and the supplied result data. Then it recreates the draw results and thus *provides conclusive proof of integrity and non-repudiation in the random number and draw result generation process.*”

Bulletproof identified the key integrity factors of the Szrek RNG: “The capability to detect hardware faults, software



problems and fraud attempts, and to reproduce or verify the draw results, are key integrity factors in the Szrek2Solutions EDS. In Bulletproof’s experience, *primarily protective security measures have been the focus in EDS solutions in the industry so far, lacking reproducibility and conclusive verifiability of the draw results.*”

Figure 2

Lottery Explodes into the World of Casino Gaming

IMAGINE A WORLD where the slot machine can be utilized in new ways to unlock greater value for the operator and the players. That is the game-changing technology called JCM FUZION. When you connect JCM's new GEN5 printer and the iVIZION bill validator to the compatible back-end CMS, you unleash the power of FUZION. Every machine on your slot floor has the potential to deliver a server-driven suite of player-focused, revenue-driving features. FUZION can turn every slot machine into a multi-line profit center, with lottery tickets, sports wagering, promotions, and more at your players' fingertips. FUZION is at the core of the future-ready casino floor.

The makers of last-generation slot machines would not recognize the slot machines of today and their enhanced capabilities powered by **JCM Global's new FUZION™**. This breakthrough technology turns slot machines into multi-line profit centers. They can vend and redeem lottery tickets, conduct race and sports betting, deliver cross-enterprise promotional coupons, enable real-time currency exchanges, streamline IRS tax form processing, and allow players to participate in Daily Fantasy Sports. And players don't even have to leave their seats!

FUZION-powered slots can also be connected by Mobile I/O™ technology, which allows casinos with legacy, reel spinners, or other games without picture-in-picture capabilities to use FUZION to enable players to connect with the game via smartphones through JCM's Intelligent Bezel.

JCM Global Vice President of Worldwide Marketing Tom Nieman said, "You can take your smart phone, tap it to the bill validator bezel, and your phone creates a temporary digital connection with the FUZION interface through a Bluetooth connection. When your mobile device is in close proximity to the slot machine, you can do all the things that you would be able to do on the video screen attached to the newer machines. Now you're carrying around a screen on your mobile device and you can do all of the things that you would be able to do on the video

screen attached to the newer machines. And when you walk away, the communication is automatically disconnected."

With their capability to combine multiple features, and services, slot machines fueled by FUZION technology are well-positioned to attract non-traditional slot machine players, while also giving traditional slot players more entertainment options right at their fingertips.



Here are some of the features:

Lottery: Slots with FUZION technology have the ability to sell and redeem lottery tickets and trigger targeted promotional messages before large jackpot drawings

Race and Sports Betting: Slots with FUZION technology have the potential to place race and sports bets and print a wager ticket. Casinos also may enable daily fantasy sports gaming through their own platform or through a third party's.

Promotions: FUZION ties the enterprise together with system-generated promotions, delivered directly to the player, both carded and non-carded. This can include drawings, collectible promotions, special events, and player outreach.

Currency Exchange: The system's bill validator accepts the world's currencies, with exchange rates that can be preset or calculated in real-time.

Enhanced Ticket Templates: FUZION delivers server-based graphic templates that can be updated as often as needed, like sports book tickets, promo coupons, lottery tickets, etc.. High quality graphics enhance the customer experience.

In a recent interview, Nieman described the thinking that propelled the development of the FUZION technology.

"At JCM, we took a step back and asked how could operators better leverage the most incredible asset this industry already

has – the massive footprint of tens of thousands of slot machines. These devices are already bought and paid for, and they already have the attention and engagement of millions of consumers.

"Instead of figuring out how to launch new products and struggle through the high-cost and unprofitable introduction and growth stages of the product life cycle, why not figure out how to extend the mature stage, which is the most profitable stage. The costs of product development, launch, building the brand, acquiring the early adopters, and investing to drive for mass-market acceptance are in the past. Slot machines are in the stage where all these costs have been borne and you have a product with mass-market appeal. It's time to innovate for the purpose of reaping the rewards from decades of investment and massive consumer engagement."

The FUZION-powered slot machines not only benefit the casino by expanding profit-generating capabilities, but they also dramatically improve the gaming experience for the player. The player is provided the convenience of conducting all types of transactions at the slot machine. The player no longer has to interrupt their gaming experience to walk across the room to buy chips, exchange currency for tickets, place a wager on their favorite sports team, cash-out, or report winnings to tax authorities.

JCM Global is the world's leading transaction technologies supplier for the banking, retail, kiosk, and gaming industries. With unsurpassed service and support, JCM Global is trusted by operators, manufacturers and integrators on six continents. Its extensive line of award-winning products set global standards with ground-breaking peripheral transaction components, innovate digital media hardware, and the systems to tie them together.



For more information, visit www.jcmglobal.com.

Kambi commitment to Regulated Markets Pays off for its Partners and Players

Kambi's growth is being driven by a growing global customer base. Now poised to become the leading sportbook in the U.S., Kambi customer-focus is paying off for all Lottery industry stakeholders. Kambi appreciates the opportunity to serve and appreciates the thoughtful and intelligent approach to regulation that U.S. jurisdictions are implementing.

The U.S. market is Kambi's primary focus. Kambi's product and value proposition have been molded to meet the needs of its U.S. partners and its U.S. focus will continue to drive its strategic direction and initiatives. The New Jersey launch has been fantastic for the industry and for Kambi which now has more than 70% of the New Jersey online market. U.S. customer-facing operators like DraftKings and Rush Street rely on Kambi sportbook to ensure reliability and profitability.

And as markets like Sweden open up to multiple licensees to serve the players, there is also tremendous global potential for Kambi's expertise to drive success for its partners.

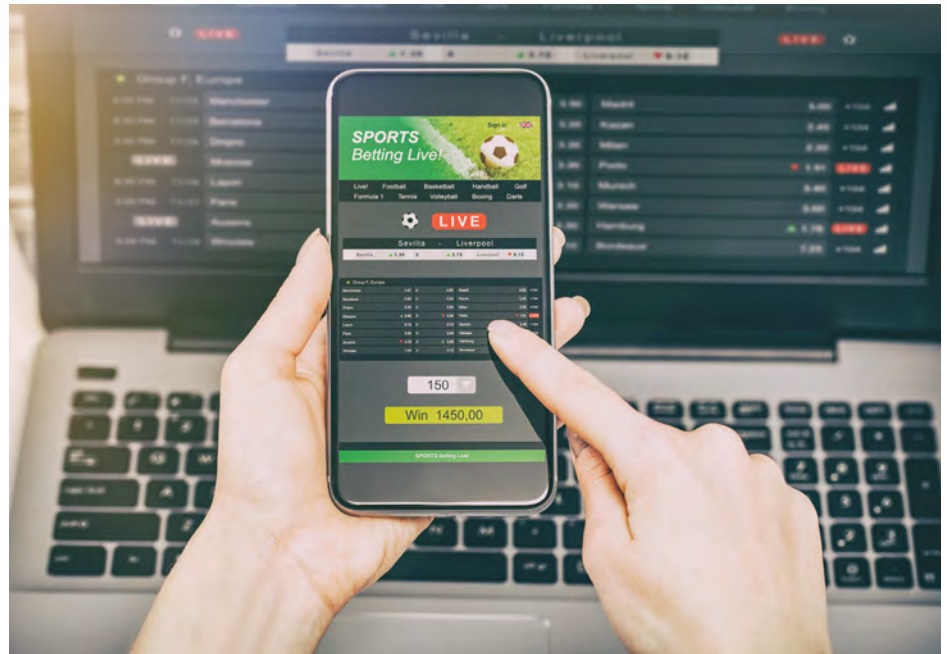
Kambi powers 888's New Jersey sports betting launch

888sport becomes the third Kambi-powered wagering brand in the U.S. state. Kambi has strengthened its long-standing relationship with 888 Holdings after the operator launched its Kambi-powered 888sport wagering brand into the U.S. state of New Jersey.

The launch sees 888sport become the seventh online wagering option in New Jersey and the third operator to leverage Kambi's flexible sports betting platform and range of managed services in the Garden State.

In addition to offering players the widest selection of pre-match and in-game wagering options, 888sport has access to Kambi's price differentiation tool, giving it the freedom to adjust odds across all major sports in line with their market strategy.

Furthermore, Kambi will provide 888sport with its Cash Out product, which hands players the opportunity to trade their wager for a live cash valuation, as well as the recently launched Teaser+, which delivers greater value on teaser parlays.



The launch comes after Kambi and 888 received a Transactional Waiver from New Jersey's Division of Gaming Enforcement, the third time Kambi has successfully completed the thorough regulatory process, highlighting its clean technology and corporate probity credentials.

Kambi and 888 will look to replicate the success 888sport has enjoyed across a number of regulated markets in Europe, including Spain, Denmark and the UK, which has transformed 888sport into a tier-one sports betting brand.

Kambi

888sport switched to the Kambi Sportsbook from its previous sports wagering supplier in May 2013 and has since seen its sports betting revenues grow 10-fold to \$75m in 2017.

The performance turnaround led to Kambi and 888 agreeing a new commercial agreement in 2017, which extended the partnership for the long-term.

Kristian Nylen, Kambi Chief Executive Officer, said: "I'm delighted the Kambi and

888 partnership, which has been successful in Europe, has been extended to support 888's visionary sports wagering plans in New Jersey and further afield in the U.S.

"As the only operator active in the country's three regulated online gaming states, 888 is already a recognised brand in the U.S. and I'm confident that, with a Kambi Sportsbook, 888sport will establish itself as a successful multi-state sports wagering operator."

About Kambi: Kambi is a provider of premium sports betting services to licensed B2C gaming operators. Kambi Group plc is listed on First North at Nasdaq Stockholm. Its services encompass a broad offering from front-end user interface through to odds compiling, customer intelligence and risk management, built on an in-house developed software platform. Kambi's 22 customers include DraftKings, Rush Street Interactive, ATG, Kindred Group, 888, LeoVegas, Mr Green and Napoleon Games. Kambi employs more than 600 staff across offices in Malta (headquarters), Bucharest, London, Manila, Stockholm and Sydney.

Abacus in-lane:

The lottery point-of-sale whose time has come

The games-of-chance industry and retailing is rapidly changing to adapt to changing consumer behaviours. Thankfully, the consumers' love for lottery games continues to grow. The key is to make Lottery easier to play for its core players, and more accessible to a broader range of consumer groups. And Lottery is making all the right moves

And all operational methods have been vetted over five years of real-world successful execution in Europe and other parts of the world. And now, the time has come for in-lane sales to transform the U.S. market-place. It's game-on!

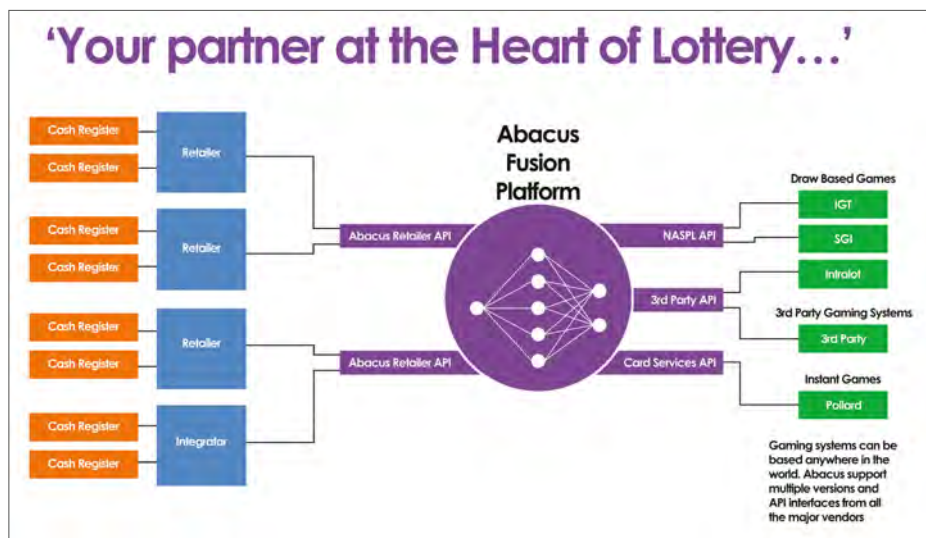
ABACUS has been the technology partner enabling in-lane lottery sales in Europe for over five years. Our blue-print for success is

Today, ABACUS is working with all the major lottery system suppliers. We are likewise engaged with many national retail chains and we partner the largest retail vendors working within their new retailer 'Ecosystems'. We are also preparing to roll out in-lane to our first American jurisdiction, using the NASPL API technologies in early 2019.

One of the things that makes ABACUS unique is that we are vendor agnostic - we want everyone to be successful.

- For multistate retailers, we offer the exact same experience, regardless of the states they operate in or the lotteries whose tickets they sell.
- For lotteries we want to help expand to new retailers and grow sales to new records.
- For players we want to create a hassle-free, fee-free purchase, as easy as cornflakes.

ABACUS makes this easy, we are already integrating with your vendor, and may already be integrating with your dream retailer. Take a look at your system contract, you may have in-lane sales as an offered option today, in which case sales growth is an email away. [\[link\]](#)



to accomplish that mission-critical goal. Increasing the number of retailers and the diversity of POS and trade-styles has long been viewed as the key to increasing lottery sales. That is why the impact of enabling in-lane POS is so transformational. In-lane has become a truly vital initiative for Team Lottery to open up these new channels of distribution and meet the needs of its players and its retail partners alike. Whatever obstacles existed in years past that impeded the implementation of in-lane have all been overcome.

fine-tuned and ready to apply for the benefit of U.S. lotteries, retailers and consumers.

ABACUS shares the NASPL values and principles for in-lane sales: Make it easy for players, with no additional cost and no difference from a terminal-ticket, no new hardware for retailers, easy for retailers to sell tickets, supporting both instants and draw-based games (DBGs). And in-lane must have MUSL-approved security and be expandable to new trade-style retailers.

So, when NASPL started the API initiative, ABACUS was an eager and active participant. We worked with lotteries and vendors to develop a well-thought-out API framework, together with the governance and administration. Abacus is the only technology partner whose sole focus and mission is API. We have always been pleased to share the insights, experience, and expertise gained from five years of successfully implementing APIs in the banking industry.

Give us a call and we can walk you through the details and the potential new sales opportunities for your lottery.



Simon Butler

Email: s.butler@abacus-bv.com
Website: www.lotteryeverywhere.com
Tel.: +44 1604 212314



On-property sports betting:

Laying the groundwork for greater US success

sbtech.com



With a string of successful US launches under its belt, leading sports betting technology provider SBTech is now eyeing further growth, building on early achievements in NJ and MS. CEO Richard Carter explains the company's stateside strategy.

SBTech has been busy working with its partners in the US, launching five on-property locations in two states for Churchill Downs, Golden Nugget and Resorts Casino, and the stage is now set for us to leverage our early momentum and expand across the US.

We will spearhead this strategy with our best-in-class betting kiosks, which have proved to be very popular with our partners and their patrons, complementing the strength of our sportsbook with the sector's best UI.

Across all our clients' US properties, players appreciate the huge choice of events and markets on offer, and the percentage of bets placed as parlays is already far higher on self-service terminals than via cashier. This trend has been key to delivering higher margin return for our operators and will be crucial to future performance across all touchpoints.

We've been delighted with the response from players across all five properties. US sports have been a key element of our sports product for many years and by fine-tuning our offering in line with local regulations and promoting a wide range of player props, enhanced odds parlays and competitive spreads, we've been able to tap into the passion of American bettors through an intuitive understanding of their preferences.

Leading-edge tech

Our core proprietary technology, all built in-house, will continue to underpin our on-property and online success. The modular construction and flexible architecture of our systems power the varying approaches of our

US partners, with integrations for both full platform and sportsbook-only options.

For example, Churchill Downs has chosen SBTech for both on-property and online to make full use of both our market-leading sportsbook and platform solution, utilizing the Chameleon360 iGaming Platform's full array of player management services, analytics, AML safeguards, and configurable responsible gambling functionalities.

In addition, with tailored front ends, bespoke trading strategies, non-pooled risk management and the industry's most



advanced automation technology, all three operators offer unique pricing across all sporting events as they increase market share and build the foundations of success in other states.

Masters of in-play

Another critical dimension of the SBTech solution is our industry-leading in-play product. Thanks to the talent and hard work of our R&D teams, which consistently go above and beyond to build innovations that move our industry forward, we've dominated the live betting field for many years, winning every award going and leading the line in the development of new features that rapidly become industry staples.

Action Betting, our bet recommendation engine based on a proprietary machine learning algorithm, provides players with real-time suggestions, derived from their previous behavior and – above all – their prior successes. Pulse Bet, meanwhile,

redefines the in-play experience by offering incrementally rising payouts during a chosen period. Inspired by the dynamics of casino gaming, it's set to become the ideal way for casino brands to introduce their players to the thrill of sports betting.

In-play is at the heart of both the on-property and mobile experiences, and one of our primary goals is to use live betting to unite the two touchpoints through a true omni-channel offering that exceeds the expectations of all key demographics.

Regulation-ready for the omni-channel future

As the proud partner of Tier 1 operators and state lotteries in 15 of the world's most competitive regulated markets, our unrivaled experience of achieving full compliance, unmatched speed to market, the depth and breadth of our event coverage and range of markets, and our proven track record of delivering exceptional ROI all stood us in good stead as we prepared to enter the US arena. We're now looking forward to many years of close collaboration with our partners in multiple states, inspired by a shared vision of creating the very best customer journeys.

As the US market grows, we'll be rolling out additional mobile and mobile on-property solutions over the coming months, complementing our retail product as we construct America's most complete sports betting offering, one that constantly evolves to meet the targets of our clients and the demands of their players.

With in-state server hosting, data centers and geo-compliance protocols in place, we have already established the technological and regulatory infrastructure to deliver full omni-channel betting that both partners and players know they can rely on, setting the industry gold standard for years to come. ■

NASPL Conference

September 25 to 28 in Cleveland, Ohio



1. Rose Hudson and Jim Kennedy 2. Barbara Hutchins and Jan Kirk 3. Doug Pollard and Leo Mamorsky 4. Mike Pinkus and Art Kiuttu 5. Tamika Ligon and Rose Hudson 6. Karen Fournet, Anne Marie Hayden, Rose Hudson and Charles Armstrong 7. Carole Hedinger 8. Chryssa Amanatidou and Chista Estrella 9. Nicole Kostura, Pat McDonald, Gregory Bowers, and Byron Boothe 10. Paul Ostendorf, Jennifer Bohlig, Rollo Redburn, Annette Redburn 11. John Pollard and Steven Fingold 12. Nikos Nikolakopoulos, Emmanuel Bailey, Charles McIntyre 13. Rose Longo-White, Vasia Bakalis, Linda Plante, John Conforti 14. Gordon Medenica, Tom Spiegel, and Randy Marriner 15. Flora Jones, Carole Hedinger, Sarah Taylor, Carrie Stroud 16. Linda Saferin, Steve Saferin, Carole Hedinger 17. Beth Bresnahan 18. Brian Roberts 19. Tom Spiegel and Gretchen Corbin 20. Dennis Berg and Jocelyn Kremer 21. Michael Capen and Armando Perez Cruz 22. Adam Caughill and Paul Jason 23. Peg Rose and Marty Morrow 24. Bill Breslo 25. Jennifer Westbury, Teresa Immel, Shay Wahl, Doug Pollard 26. Sylvia Main and Dr. Stephen Wade 27. Gardner Gurney, Nancy Bettcher, Byron Peterson, Herb Delehanty



28. Shay Wahl, Doug Pollard, Teresa Immel 29. Darrell Smith 30. Helena Periera 31. Scott Bowen, Robert O'Neil, Paul Sternberg, Bill Hanson 32. Paul Riley, Angela Wiczek, Michelle Carney, Wendy Montgomery 33. Rebecca Hargrove 34. Jay Gendron 35. Pat McHugh 36. Antonios Kerastaris 37. Doug Pollard 38. Charles McIntyre 39. Dennis Berg and Charles McIntyre 40. Renato Ascoli, Gerry Aubin, Jay Gendron 41. James Hutchinson and Nat Worley 42. Bret Toyne and Robert Tironi 43. Wendy Montgomery and Cameron Waldie 44. Stefano Monterosso, Gary Grief, Larry King 45. Fabio Celadon and Robert Vincent 46. Gerry Aubin, Wendy Montgomery, Gary Grief 47. Todd Handzo and Michael Capen 48. Scott Jensen and Chris Robertson 49. Peg Rose and Vernon Kirk 50. Nick Papadoglou, Nikos Nikolakopoulos, May Scheve Readon, Antonios Kerastaris 51. Fabio Celadon, Tom Spiegel, Renato Ascoli 52. Rhonda Muehlenbruch and Simone Harrison

NASPL Conference Continued



53. Angela Wiczek and Lisa Levine **54.** Gayle Kennedy and Jeanna King **55.** Keith Cash, Michelle Carney, Renato Ascoli
56. Rachel Barber and Renato Ascoli **57.** Edith McCarthy and Arjan van't Veer **58.** Michelle Carney, Fabio Celadon, Arjan van't Veer,
 Rachel Barber, Renato Ascoli **59.** Joni Hovi and Paul Jason **60.** Ron Borusso, Fran Gruden, Patti Gruden **61.** David Barden,
 May Scheve Reardon, Bret Toyne **62.** Gordon Medenica **63.** Emily Fussell, Bonnie Fussell, and Steve Saferin
64. Randall Lex and Leo Mamorsky **65.** Andrew White, Mackenzie Whitacre, Tamika Ligon, David Gale **66.** Angela Wiczek and
 Renato Ascoli **67.** Lorne Weil, Rebecca Hargrave, Brooks Pierce **68.** Antonios Kerastaris, Rose Hudson, Jeff Anderson
69. Chris Sfatos and Chryssa Amanatidou **70.** Scott Hoss **71.** Emmanuel Bailey, Byron Boothe, Nikos Nikolakopoulos
72. Chryssa Amanatidou and Nick Papadoglou **73.** Greg Smith and Antonios Kersastaris **74.** Team Missouri Lottery and friends
75. Jeff Anderson and John Donahue **76.** John Barrett, Brendan McCarthy, Dennis Miller **77.** Craig Fitzgerald and Carole Hedinger
78. Gordon Medenica, Randy Marriner, Renato Ascoli

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Using holography with higher value instant games will quickly boost your lottery's profits. That's because the cost of the holography will be fully paid for with less than a 3.4% increase in sales.

Because they are "eye catching", holographic games typically generate 15% to 30% sales increases vs. plain board games and have proven to generate sales increases as high as 79%*. Holographic games are certain to increase your lottery's sales and profitability.

\$10 LOTTERY \$10
\$10 GAME

ASSUMES A 4" X 8" TICKET WITH A HOLOGRAPHIC COST OF 8 CENTS

3.4%
SALES INCREASE NEEDED TO FULLY PAY FOR THE COST OF HOLOGRAPHY

75% PAYOUT

Your Lottery Will Win

Additional profit per million tickets sold:
\$278,000
With a 15% increase in sales
\$636,000
With a 30% increase in sales

\$20 LOTTERY \$20
\$20 GAME

ASSUMES A 4" X 8" TICKET WITH A HOLOGRAPHIC COST OF 8 CENTS

1.8%
SALES INCREASE NEEDED TO FULLY PAY FOR THE COST OF HOLOGRAPHY

77% PAYOUT

Your Lottery Will Win

Additional profit per million tickets sold:
\$593,000
With a 15% increase in sales
\$1,266,000
With a 30% increase in sales

\$30 LOTTERY \$30
\$30 GAME

ASSUMES A 4" X 8" TICKET WITH A HOLOGRAPHIC COST OF 8 CENTS

1.4%
SALES INCREASE NEEDED TO FULLY PAY FOR THE COST OF HOLOGRAPHY

80% PAYOUT

Your Lottery Will Win

Additional profit per million tickets sold:
\$803,000
With a 15% increase in sales
\$1,686,000
With a 30% increase in sales

Check out Hazen's PROFIT CALCULATOR to see exactly how much you can grow your lottery's bottom line. Just enter your ticket's size, price, payout percentage, and quantity for your holographic game and you'll instantly see a custom profit chart created for you.

For US Dollars, visit:

www.holographyx.com/profit

For Euros, visit:

www.holographyx.com/EUprofit

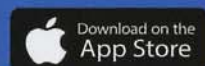
* The Tennessee lottery generated a 79% sales increase in a quantitative test that isolated holography as the only key variable. For details, visit: www.holographyx.com/TN



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Lottery Industry Hall of Fame Induction Ceremony

NASPL, Cleveland, Ohio



LOTTERY INDUSTRY HALL OF FAME



1. Paul Jason and Bret Toyne 2. Steve Saferin 3. Chuck Kline 4. Hall of Fame Audience
5. Chuck Kline 6. Paul Jason 7. Don Sweitzer 8. Rebecca Hargrove
9. Matt Whalen 10. Hall of Fame Members

Global Gaming Expo (G2E)

October 9 to 11 in Las Vegas



1. John Donahue, INTRALOT and Robert Vincent, IGT 2. Michael Capen and Karen Sierra Hughes, GLI 3. Team GLI
4. Tom Nieman, JCM 5. David Delgado and Team Arrow International 6. Rachel Barber, IGT 7. Max Goldstein and Team Carmanah Signs 8. Moti Malul, NeoGames on right side 9. Lorne Weil, Aimee Remy, and Team Inspired Entertainment
10. Barry Cottle and Pat McHugh, Scientific Games 11. Barak Matalon, NeoGames and John Pollard 12. Michael Conforti, Scientific Games 13. Pat McHugh and Sean Athey, Scientific Games Corp. 14. Jay Gendron and Marco Tasso, IGT 15. Max Goldstein (Carmanah Signs) and Tony Fontaine (InComm) 16. Julien Boinet, Francaise des Jeux 17. Warren Allen and Team Grover Gaming
18. Colleen Stanton and Aimee Remy, Inspired Entertainment 19. Nick Weil, Inspired Entertainment
20. Tom Napolitano (IGT), Scott Bowen (NeoPollard), Yariv Sarig (NeoGames) 21. George Kerrigan and Tom Shortall, IGT
22. Yariv Sarig and Moti Malul, NeoGames

Loterie Nationale  Nationale Loterij



The Success^{of} Chance

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Navigating Towards Digital Opportunity



1. Arjan van't Veer 2. Hansjörg Höltkemeier 3. Robert Chvatal 4. Arjan van't Veer & Jutta Buyse 5. Antonios Kerastaris
 6. Jutta Buyse & Wendy Montgomery 7. Kamil Ziegler 8. Paul Riley 9. Younes El Mechrafi & Thierry Gabarret
 10. Robert Chvatal 11. Hansjörg Höltkemeier 12. Dermot Griffin 13. Jari Vähänen 14. Hansjörg Höltkemeier and audience
 15. Joni Hovi 16. Robert Chvatal & Hansjörg Höltkemeier 17. Antonios Kerastaris 18. Chrysta Amanatidou and Jeanna King
 19. Women's Initiative in Lottery Leadership Reception 20. Rebecca Hargrove and Catherine Barba Chiaramonti

The European Lotteries Industry Days 2018, held in the beautiful city of Prague from June 4-6, was a huge success, drawing 323 delegates from over 60 lotteries - a record to date for the European Lotteries.



7. Robert Chvatal & Hansjörg Höltkemeier 8. Paul Riley 9. Robert Chvatal 10. Pall Palsson & Agnieszka Rylska
 11. Younes El Mechrafi & Marine Egnel 12. Robin Bowler 13. Stéphane Pallez & Rebecca Hargrove & Antonios Kerastaris
 14. Jannie Haek and awards presenters 15. Catherine Barba Chiaramonti 16. Pall Palsson 17. Younes El Mechrafi & Jeanna King
 18. Rebecca Hargrove & Catherine Barba Chiaramonti 19. Jutta Buyse & Arjan van't Veer 20. Paul Riley
 21. Catherine Barba Chiaramonti 22. Arjan van't Veer & Jutta Buyse & George Vassilaras 23. Olli Sarekoski 24. Younes El Mechrafi
 & Stéphane Pallez 25. Hansjörg Höltkemeier 26. Jack Skinner & Olli Sarekoski & Matthew Forsyth

Pulse of the Industry



These news stories comprise a very small fraction of the gaming and lottery news stories posted every day to PublicGaming.com. Too, these stories are the highly edited short versions. You can visit our news website PublicGaming.com and access all of its departments for free, including search to read the full version of the articles. Sign up for our free e-newsletter by sending your e-mail address to sjason@publicgaming.com.

WORLD NEWS

Patrik Hofbauer appointed CEO of Svenska Spel in Sweden

The Board of Directors of Svenska Spel has named Patrik Hofbauer as the company's new CEO. Patrik succeeds Lennart Käll who previously announced that he was resigning to pursue his own business interests and directorships. Patrik Hofbauer is 49 years old and is currently CEO of Telenor Sweden. He will be taking up the position as President and CEO of Svenska Spel no later than mid-December 2018.

Patrik Hofbauer has extensive senior management experience and, in addition to his current role as CEO of Telenor Sweden, he has previously been CEO of Telenor Broadcast, Canal Digital, NEC Scandinavia and Clear Channel. Patrik's CV also includes a 10-year career as a professional ice hockey goalkeeper with Örebro, Björklöven and Djurgården.

"I'm delighted to welcome Patrik Hofbauer to Svenska Spel. The experience he brings with him both from commerce and the world of sports will be invaluable, especially given the exciting prospects facing Svenska Spel as the new Swedish gambling legislation enters into force in the new year. I am convinced that Patrik Hofbauer is the right person to lead the company into this new gambling market," says Erik Strand, chairman of Svenska Spel.

"Svenska Spel occupies a strong position, enjoys a strong brand and is facing exciting challenges as a result of the new gambling legislation. I enjoy the connection between business and sport, something that is very close to my heart. I am now very much looking forward to leading the company into the next phase together with the employees of Svenska Spel," says Patrik Hofbauer. Svenska Spel's previous CEO Lennart Käll departed on 19 July.

Jesús Huerta Almendro was appointed President and CEO of Sociedad Estatal Loterías y Apuestas del Estado (SELAE).

The Lottery is one of the most profitable businesses in the Spanish State. It is responsible for the management of state-controlled games of chance such as the Euromillions, the Bonoloto, the Gordo de la Primitiva, the Quiniela and, of course, the National Lottery. In 2017, it generated an annual turnover of almost 9 billion euros and redistributed 2.4 billion euros back to the State.

Jesús Huerta Almendro was born in Cadiz/Spain in 1965. He holds a Law degree, a Master's degree in Healthcare Management and a diploma in People Development & Management. Previously in his career, he has been the economic and general services director of the Hospital-University Puerto Real, managing director of the public company Hospital Alto Guadalquivir, and General Secretary of Andalusian Healthcare Public Services, with an annual budget of around 10 billion euros.

In 2012 he was appointed managing director of Andalusian Social Services and Dependence public company (The Agency's mission is to improve the social welfare of citizens and guaranteeing the care and protection of people in situations of dependency).

From 2013 to 2017, he was Director of Digital Policy for the Junta de Andalucía (government of the Autonomous Community of Andalusia). During the past year, he worked as General Director for the Budget in the same Junta.



Moti Malul appointed NeoGames CEO

NeoGames, a global leader in providing iLottery and iGaming solutions and services, announced the appointment of Moti Malul as CEO to replace Ilan Rosen, who resigned after

six successful years in the role. Malul has been with NeoGames for 10 years and has served as executive VP of sales and business development. "We are grateful to Ilan Rosen, who has been with us for nine years, serving as CEO for six of them, for driving the company to its current strong position as market leader in many segments and we wish him continued luck and success in his future endeavors," commented NeoGames founder and chairman Barak Matalon.

"Moti has been pivotal to the success of NeoGames in the last decade, opening new markets and ensuring that our customers see significant growth in their operations with our products and services. We have no doubt that he is the right person to lead the company's growth and expansion into exciting new business opportunities."

"I'm honored and thrilled to be given this vote of confidence by the company and the board," said Malul. "It has been an amazing opportunity to lead the relationships with our customers for the past 10 years, as our customers are our biggest asset and will always continue to be. The growth opportunities we have are phenomenal – especially with current developments the US market, in which we have been operating successfully for several years already, and with the recent strategic deal we signed with William Hill."

Malul joined NeoGames to establish and lead sales, marketing and customer growth. His prior experience included 12 years in the telecom and Internet industries, serving in key sales, marketing and product management positions in companies such as Ericsson and Smile Media. Moti holds an MBA from Tel Aviv University.

UK Gambling Commission: Sixteen European, US Gambling Regulators Teaming Up to Tackle Loot Boxes, Skin Gambling

Agreeing to work together to address the "risks created by the blurring of lines between gaming and gambling," the collaboration will also tackle

third-party websites that offer players the chance to gamble or sell in-game items.

Jean-Luc Moner-Banet, WLA President, announces the appointment of Luca

Luca Esposito Poleo named WLA Executive Director

Dear WLA Members,

I am pleased to announce the appointment of Luca Esposito Poleo as the new WLA Executive Director. Luca is no stranger to the lottery world. Having worked the past ten years for IGT, he brings with him a wealth of lottery knowledge.

Luca hails from Italy, where he received a Master's Degree in Computer Science and Telecommunication from the University of Calabria in 2003. Shortly thereafter he began working as a consultant for such major global concerns as Accenture and Cambridge Technology Partners. In 2009 he joined IGT Switzerland, working the first four years as Technology Director for the Central European region. In this capacity he served the technological needs of gaming-industry clients in Switzerland, Germany, Belgium, and Luxembourg. In 2013 Luca assumed the position of Country Manager for IGT, where he remained until joining the WLA. In his role as Country Manager for IGT, Luca worked closely with the lotteries of Switzerland, Belgium, and Luxembourg. It is here that he gained deep insight into day-to-day lottery operations and developed a sensitivity for the needs and concerns of lotteries.

Owing to his solid technological background and his close ties to the lottery sector, we are certain that as WLA Executive Director, Luca will be an asset to the Basel Business office and a great value to the WLA as a whole. Please join me in welcoming him.



INTRALOT signs 10-year contract with Croatian State Lottery Hrvatska Lutrija

INTRALOT was awarded a 10-year contract for the implementation of the new integrated Lotos10 ecosystem with the Omni Channel capability, the deployment of innovative Retail technology and the provision of operational support. All of the above will be customised to the specific needs and requirements of Hrvatska Lutrija and the Croatian gaming market, supporting the strategic and operational objectives for the extensive growth and future expansion of Hrvatska Lutrija in the verticals of Numerical &

Instant Games, Betting and Online Casino.

Hrvatska Lutrija is the state licensed lottery organization, with a long and successful tradition of 45 years in organizing games of chance in Croatia, offering full variety of gaming products, including the lotteries, instant lotteries, betting, casinos and slot clubs, participating also in the multijurisdictional lottery games, EuroJackpot. In 2017 Hrvatska Lutrija generated over €150 million in stakes. The chosen model of cooperation is a Gross Gaming Revenue share model where Croatian lottery and INTRALOT share investment cost, responsibility, risks, and ultimately profits according to a pre-negotiated split.

Specifically, the agreement includes the deployment, customization and integration of INTRALOT's holistic and cross-channel Lottery Gaming Platform based on the L10 Product, the next generation of LOTOS platform, along with the terminal software for the operation of its 3.000 terminals, the Interactive Gaming Platform (based on the Player PULSE CRM-Platform) supporting all Hrvatska Lutrija gaming verticals, the innovative cross-channel Content Management System (based on the CANVAS Platform) and the Retailer Management System (based on the Retailer PULSE CRM-Platform), including full subset of the respective software components. INTRALOT will also provide the Lottery with dedicated training and knowledge transfer, as well as related system operation, software maintenance and supporting activities.

French grocer Casino goes cashierless in a preemptive move against Amazon Go

Facing the looming threat of ecommerce giant Amazon's automated stores, French grocery chain Casino has opened its first cashier-free location in Paris.

"The retail business is now innovation-centric, and this goes beyond mere technology," said Jean-Charles Naouri, chair and CEO of the Casino Group, in a statement. "In the future, the gap between brick-and-mortar and digital stores will close. Physical and digital distribution channels will not only need to adapt to tastes and trends but also to anticipate them."

Poland Totalizator Sportowy announced its iLotto will be launched in November

Following the launch of non-cash payments at official terminals earlier this year, Totalizator Sportowy has continued to roll out card payment options with partners like Carrefour stores, Inmedio, and Totolotek. Additionally, Polish people will soon be able to play the state lottery online.

Albania passes law banning sports betting, online gambling

The legislation will force the closure of slot machine parlors, betting shops and all other forms of sports wagering including via online sites. It will, however, allow gambling at casinos in large hotels and a televised bingo game and national lottery will continue to operate because they have an ongoing concession.

Casinos Austria International earnings up 17.6 per cent in first half of 2018

The Swedish administrative court of appeal (Sw. Kammarrätten) upholds decision to impose fines against Swedish evening papers for providing links to offshore gambling services

The Swedish administrative court of appeal concluded that gambling advertisements are of commercial nature and, as such, not protected by the Swedish Fundamental Law on Freedom of Expression. Furthermore, the court did not assess that the prohibition against promotion of offshore gambling services is incompatible with EU law. As such, the Swedish administrative court rejected the appeal and upheld the Swedish Gambling Authority's decision to issue the injunction.

Majority of New Gambling Accounts in Sweden Registered with International Operators

Nearly 60% of all Swedes aged between 18-74 have an online gambling account, up 12% from last year. Svenska Spel, the state-run operator that holds the monopoly over most of the gambling services provided in Sweden, still holds the largest share of all registered accounts. However, international operators seem to be gaining momentum as approximately 60% of all new registrations made over the past twelve months were namely with companies targeting Swedish gamblers from outside the country.

Israeli Court Takes Aim at Online Gambling Domains

Three unauthorized gambling domains – p2ybet.com, 1xbet.com, and totobet777.com – were blocked from targeting Israeli customers by a court-ordered injunction. As a result of the domain blockage, visitors to the sites are met with a message stating the sites are prohibited by law. However, experts say there are easy workarounds. Israel is just the latest country to blacklist gambling domains. Poland's blacklist is comprised of more than 2,400 domains, while Italy's new coalition government

is anti-gambling and has enacted a ban on gambling advertisements. Meanwhile, Greece and Bulgaria have blacklists of more than 400 and 100 domains respectively.

Swedish Gaming Regulatory Receives Over 60 Applications from Gambling Operators

The Swedish gaming regulatory body Lotteriinspektionen has received more than 60 applications from gambling operators. Sweden's regulated gambling market will present an opportunity for gambling operators to reap legal revenue from next year. At least 55 of these applicants are seeking online casino and sports betting licenses in the liberalized gambling market, which will kick in action on January 1, 2019.

Czech Govt Struggling To Collect Fines Levied against Unlicensed iGaming Operators

Czech Republic's online gambling market had undergone a regulatory revamp which took effect in January last year. A report claims that the Ministry only collected CZK240k (\$10,750) out of CZK455 million (\$20.4 million) in fines imposed on some gambling operators since new regulations were implemented. The report says that the Ministry does not have adequate tools and legal recourse to compel companies operating without a physical presence in the country to hand over the money. With the regulated market in place for close to two years now, the Ministry has gathered 116 names on their blacklist of illegal operators who make money from Czech punters without local approval.

NORTH AMERICAN NEWS

John Myers appointed Director of the West Virginia Lottery

One day after lawmakers asked tough questions about leadership at Lottery, Gov. Jim Justice has named John Myers as director of the agency. He replaces Alan Larrick, who resigned Sept. 1. Myers has been serving as Secretary of Administration for the Justice Administration, but he has a long work history with Lottery. He worked at the West Virginia Lottery from 2008 to 2017 and was acting director from 2015-2017. Before working at the agency, Myers was the manager of corporate administration for Toyota Motor Manufacturing in Buffalo, West Virginia.

Ontario Lottery & Gaming breaking sales and profit records

Net profit to the province was \$2.49 billion in the 2017-18 fiscal year, an increase of more than five per cent from the previous year. Casinos, slots and online gaming all showed higher profits, while the take from lottery ticket sales was down slightly, says OLG's new annual report.



Maine Lottery sets record for sales and net funds transferred

The Maine Lottery recorded its best 12 months ever in the fiscal year 2018 that just ended, setting records for sales, prize money, commissions to retailers and funds transferred to the state. Total lottery sales were \$294.1 million, with retailers earning \$19.4 million in commissions — both all-time high totals since the lottery was established in 1974. Instant ticket sales totaled more than \$223.5 million, also a record. Total sales in 2018 were almost \$22 million higher than the previous high of \$272,339,484.

"This has been the Maine Lottery's best year ever, which resulted in a contribution of \$62.3 million to Maine's general fund, the highest total to date," said Gregory Mineo, director of the Bureau of Alcoholic Beverages and Lottery Operations.

Massachusetts State Lottery returned \$997 million in net profit for the Commonwealth

Record-setting revenues result in second-highest net profit in Lottery's 47-year history. The Lottery produced its record net profit of \$1.039 billion in the 2017 fiscal year. Lottery revenues rang in at a record high of \$5.291 billion, surpassing the previous record of \$5.233 billion in FY 2016 by \$58 million and topping last fiscal year's total of \$5.097 billion by \$194 million.

Ontario Lottery and Gaming (OLG) is investing in a new digital foundation

Greg McKenzie, OLG's Chief Operating Officer: "This platform will allow OLG to add new games, improve our online offering and enable mobile responsiveness. We are looking forward to developing our relationship with Bede as OLG continues its digital transformation." The new digital platform will add to OLG's existing digital capabilities in areas like

player registration and player accounts. It will also have world-leading Responsible Gambling (RG) options built in, giving players the ability to set limits, self-exclusions and other supports tailored to their needs.



Loto Quebec Posts Strong Fiscal Q1 2018-19

Loto-Québec reports positive results for the start of the 20182019 financial year. Consolidated revenues reached \$686.5 M, an increase of \$41.6 M (+6.4%) compared to the same period last year. Net income amounted to \$359.8 M, a gain of \$34.7 M (+10.7%). "Loto-Québec was able to attain positive results during this first quarter thanks to the efforts of all of its sectors. I'd like to thank all our teams for their excellent work," said Lynne Roiter, Loto-Québec's President and CEO. The lotteries sector performed best: Increase of 22.5% in revenues and 28.7% in net income. Lotto Max offered record prizes, and the \$60 M jackpot was once again won in Québec. The 100 \$ ULTIME lottery was also very popular and produced several millionaires. Instant lottery sales are growing thanks to original concepts that customers love. Casinos revenues and net income were stable at increase 1.4%. Revenues from the lotoquebec.com website, all types of games combined, rose by 34.9%.



Scientific Games announced that major national retailers continue piloting the Company's new SciQ@lottery instant game retail technology

"Lottery instant games are an \$87.5 billion a year global consumer product, including \$50 billion sold in North America, and they are a major driver of consumer retail store visits. Now for the first time in the lottery industry, SciQ offers unit-level technology that provides inventory control, security, speed-of-service, merchandising and simplified accounting functions for retailers," said Jim Kennedy, Group Chief Executive, Lottery for Scientific Games. "SciQ is set to revolutionize the way

lottery products are sold at retail. We believe that the lottery retail environment will never be the same.”

SCiQ is an intelligent instant game ecosystem developed by Scientific Games that modernizes how the instant game is sold at retail. It improves the performance of lottery products and eliminates existing challenges to selling lottery in retail stores. To sell lottery instant games using the SCiQ system, the retail sales associate simply selects the games the customer wants to purchase through the digital ordering screen, dispenses the games with the touch of a button, and gives the games to the customer. Scientific Games’ proprietary SCiQ technology automatically tracks every unit, providing lotteries and retailers greater visibility into the management and sales of instant games in real-time.

For retail customers, SCiQ also brings the ease and convenience of mobile technology to retail lottery purchases. The SCiQ ecosystem offers user-friendly features that, depending on the options selected, can further speed the purchase process and even offer customers the ability to advance-order games before arriving at a lottery retail store.

SCiQ is now operating as part of pilot programs in Arizona, Georgia, Maine, New York, North Carolina, Pennsylvania, South Carolina and Texas, with a 300-store production rollout currently underway in Ohio.



IGT Senior Manager, Global Communications, Michelle Schenk, Honored by Global Gaming Women

International Game Technology PLC announced that Michelle Schenk, IGT’s Senior Manager of Global Communications, Gaming, has received a Great Women of Gaming Award in the Rising Star category from Global Gaming Women. The award was presented to Schenk at the Global Gaming Expo (G2E).

“Michelle is strategic and intelligent in her approach to provide media results that expand the scope of coverage for IGT,” said Renato Ascoli, CEO, North America. “She is a proven performer who continuously maximizes on opportunities to drive the business forward through global gaming communications.”

“Receiving the ‘Great Women in Gaming’ distinction is a tremendous honor, especially among the many inspiring and talented women within the gaming industry,” said Schenk. “Working in communications for IGT provides me with

an opportunity to help drive IGT’s success, and a meaningful platform to cultivate the next generation of women in gaming.”

Schenk has more than 14 years of experience in public relations and strategic communications. In her current role, she drives awareness for IGT products by managing global gaming communications including partnership agreements, game and systems installations, and new game launches. She also fosters thought leadership by creating, identifying, and facilitating executive speaking opportunities to contribute to the overall success of IGT.

The Great Women of Gaming Awards bring global recognition to meaningful contributions by exceptional women in the gaming industry by annually recognizing a highly vetted select group of women for their outstanding contributions.

Schenk earned two bachelor’s degrees in journalism and communications studies from New Mexico State University, and a master’s degree in communications studies from University of Nevada, Las Vegas.



The Kentucky Lottery Corporation and Scientific Games Corporation officials have cut the ribbon on a new facility to manage the Lottery’s Scratch-off tickets across the Commonwealth

This signifies the beginning of a full product category management program for instant games in the state, the first such change in the Lottery’s 29-year history.

The new program, called Scientific Games Enhanced Partnership (SGEP), covers every aspect of the Kentucky Lottery’s Scratch-off tickets, including game development and portfolio management, advanced logistics for warehousing and distribution, and Lottery retailer optimization. The Kentucky Lottery’s instant game product line last year realized \$613 million in sales.

Scientific Games has constructed a state-of-the-art 41,000-square-foot warehouse in Louisville to serve as its hub in the Commonwealth. Scratch-off tickets are shipped from the new location, and all Kentucky Lottery retailer ticket orders are taken and processed here as well. While retailers are still able to call and request certain games, the Company’s predic-

tive ordering technology included in the new program means retailers will receive inventory based on their individual players’ game demand.

“For any consumer product business, having the appropriate levels of inventory in stores is crucial,” said Kentucky Lottery President and CEO Tom Delacenserie. “This proven system of predicting exactly what individual retailers need and ensuring their supply meets consumer demands will absolutely help us grow sales of this essential product.”

“We are honored that the Kentucky Lottery has trusted the full category management of its Scratch-off products to Scientific Games,” said Jim Kennedy, Group Chief Executive, Lottery for Scientific Games. “This program has been refined over the last several decades, in part by developing advanced technologies, to help lotteries create more growth within the product category and responsibly grow proceeds to their good causes, like education in the state of Kentucky.”

The Lottery’s bottom line will be helped not only by these increased sales, but also through the efficiencies realized through the Scientific Games Enhanced Partnership program. The program is used by more than 20 lotteries globally, including some of the top performing lotteries in the world.

“Any savings and additional sales we can realize are vital to our mission,” said Delacenserie. “The Kentucky Lottery isn’t a faceless corporation making profits for investors - the more profits we make, the more kids get to go to college here in the Commonwealth. That’s something which drives us every day.”

NHL to announce plans to dive into lucrative sports betting industry

Scientific Games Creates Sportsbook Operations Team in Gibraltar

The new team will be led by Stuart Weston, VP, Sportsbook Operations for SG Digital and will support customers directly with a sportsbook operations service to help grow their sportsbook businesses.

The creation of SG Digital’s Sportsbook Operations team instantly builds on the company’s world-class sports betting products and ignites a fast-to-market, full-stack sportsbook portfolio that includes sports betting, portal, mobile betting, and retail services. SG Digital can now manage an entire Sportsbook operation for multiple customers, enabling long-term success with less heavy lifting for installations and ongoing sportsbook management.

Keith O'Loughlin, SVP Sportsbook for SG Digital, said, "Given the massive opportunity in the U.S. and the continued success of existing markets, the addition of Sportsbook Operations is a natural step up for our business. The team will work directly with our partners to operate and run their sportsbooks, ramping up the value of sports betting for everyone involved. It's a new ball game, and our partners have asked to tap into our vast knowledge to help with day-to-day sportsbook operations. Now, we're completely equipped to offer that capability and support customers in growing their business like never before."

Stuart Weston has been appointed to Vice President, Sportsbook Operations for SG Digital. Stuart brings with him two decades of industry experience, most recently as Managing Director for Superbet and previously as Sportsbook Product Director at William Hill. Weston will lead the Sports Operations team to maximize sports betting operations output and gear up for continued global growth in the sports betting market. The Sportsbook Operations team's capabilities now span decades, industries and extensive expertise to better serve our customers' needs.

The move reflects Scientific Games' deep commitment to the sports betting industry as well as its Gibraltar office, where the team will be based.

POLLARD banknote limited

Pollard Banknote acquires Schafer Systems

Pollard Banknote Limited has signed a definitive agreement, subject to closing conditions, to purchase substantially all of the operating assets and business of Schafer Systems, Inc., the leading global provider of lottery ticket dispensers and play stations. Schafer was founded in 1986 in Adair, Iowa and has built its business largely on creating innovative products including lottery ticket dispensers and point of purchase displays for the lottery industry. As the foremost supplier of lottery ticket dispensers, Schafer has partnered with all 44 existing U.S. lotteries and over 50 lotteries in other countries during its three decades in business. Based in western Iowa, Schafer employs approximately 50 full-time employees and is the recognized leader in assisting lotteries to efficiently and effectively distribute their instant-win scratch tickets to consumers.

With a focus on solutions to increase sales at the retail location for the lottery industry, and on the development of innovative and proprietary products, Schafer is a leader and key partner to the lotteries for on-counter and wall mounted modular dispensers with promoters, in-counter

dispensers, ticket menu boards, check writers, literature holders, promotional products, mounting fixtures, pop-ups, stands, play stations, and game centers in a variety of sizes, configurations, and materials.

"We are extremely excited about bringing the Schafer team into the Pollard organization and believe it will be a strategically important new product for us to help lotteries maximize their retail sales and generate greater proceeds for their good causes," said Doug Pollard, Co-Chief Executive Officer of Pollard Banknote. "The addition of the world's leading lottery retail dispensing experts is another key component in Pollard's strategic focus on being the partner of choice for the lottery industry. We welcome our new team members from Schafer and are confident their three decades of setting the standard with innovative leadership and award-winning products will continue to drive retail lottery excellence. This acquisition ticks all of the important boxes for us, both strategically and financially."

"Schafer's business will be extremely complimentary to our existing portfolio of lottery products such as loyalty solutions, sales force management and warehousing and distribution services currently offered by Pollard in addition to our core instant-win scratch ticket operations. Continued innovation will be critical in expanding and growing lottery revenue through the use of efficient, eye-catching consumer and retailer friendly dispensing solutions, and the Schafer team will now be supported by the Pollard group of companies and resources to fuel their growth."

The management team of Schafer will be continuing in their roles after the transaction and will work closely with our lottery focused team in Pollard to ensure a smooth transition and integration to continue supporting the lottery industry.

The total Acquisition purchase price is \$23.5 million U.S. dollars plus standard working capital adjustments, with 100% all cash consideration being funded from existing Pollard Banknote cash resources and availability under our existing senior credit facility. Schafer has a long history of profitability and the Acquisition is expected to be accretive to Pollard Banknote's net income. Closing conditions include standard consents and approvals consistent with a transaction of this size and nature.

John Pollard, Co-Chief Executive Officer of Pollard Banknote concluded, "We are thrilled with the opportunity to join together with the Schafer team and are confident that with the closing of this transaction Pollard will add another industry leading solution dedicated to helping our lottery customers succeed. Assisting lotteries in maximizing their retail sales will also

benefit our core instant-win scratch ticket sales, highlighting the strategic and financial benefits of bringing together a variety of lottery solutions in one organization. Pollard Banknote's commitment to grow our organization both organically and through acquisitions will continue and we look forward to continued success with Schafer."

IGT Pioneers Tribal Gaming Sports Betting with Mississippi Band of Choctaw Indians

Under the agreement, IGT will provide its PlayDigital™ sports betting solution, PlayShot, at Pearl River Resorts' Golden Moon Hotel & Casino and Silver Star Hotel & Casino in Choctaw, MS., and at Bok Homa Casino in Sandersville, MS. By leveraging IGT sports betting technology, Golden Moon Hotel & Casino made gaming history last month when it became the first non-Nevada tribal casino to open a sports book post-PASPA repeal.

IGT technology and services will enable casino patrons to place pre-match and in-play wagers over-the-counter at the three Mississippi casinos. The casinos agreed to add IGT kiosks and other essential sports betting peripherals to their offerings in the future.

"IGT's leading entry into the tribal gaming sports betting space demonstrates how a wide variety of casino operators can benefit from our flexible, market-ready PlayShot sports betting solution, today," said Enrico Drago, IGT Senior Vice President PlayDigital. "With IGT PlayDigital's technology and expertise, the Mississippi Band of Choctaw Indians introduced sports betting to players with confidence, knowing that PlayShot is already the trusted sports betting platform provider at more than 15 U.S. casinos across multiple states."



American Gaming Association sent a letter to Senate Minority Leader Chuck Schumer (D-NY) reinforcing AGA's priorities for successful legal sports betting markets

The American Gaming Association letter further reinforced AGA's commitment to work with Senate Minority Leader Chuck Schumer (D-NY) and all stakeholders working to stamp out the vast illegal market. "AGA has long been a leading advocate for eliminating the vast illegal sports betting market in the U.S., which was largely enabled by the Professional and Amateur Sports Protection Act (PASPA),"

the letter stated. “We believe this can best be achieved through law enforcement oversight and robust state regulation. AGA firmly believes that additional federal engagement is not warranted at this time.”

IGT Delivers Online and Mobile Sports Betting Platform for FanDuel in New Jersey

IGT PlayShot sports betting platform now powers online and mobile sports betting in New Jersey via FanDuel Group’s consumer-facing wager website, sportsbook.fanduel.com.

FanDuel is leveraging PlayShot’s built-in content management system to deliver a bespoke mobile and desktop user experience. The system integration enables FanDuel to create betting promotions and dynamic content for retail, mobile and online all from a single source.

“Leveraging IGT’s PlayShot platform to power FanDuel’s online and mobile sports wagering in New Jersey was the natural extension of our technology partnership with IGT,” said Niall Connell, General Manager & SVP Sportsbook, FanDuel Group. “We are confident that IGT’s proven technology and quick delivery will enable FanDuel to continue offering unparalleled sports betting entertainment to our players with an intuitive and reliable user experience.”

“IGT’s online and mobile PlayShot platform deployment with FanDuel Group in New Jersey reinforces the omni-channel sports betting expertise of our PlayDigital organization, and continues the Company’s momentum in seizing and maximizing U.S. sports betting market opportunities,” said Enrico Drago, IGT Senior Vice President PlayDigital. “The integration of IGT’s PlayShot platform into FanDuel’s online and mobile sports betting site creates extraordinary user experiences for sports fans in New Jersey and builds on the momentum that we created with FanDuel at Meadowlands Racetrack.”

IGT integrated PlayShot into GAN’s player account management system utilized by FanDuel to complete the solution, and deployed a responsive HTML site for desktop and mobile designed by FanDuel. PlayShot’s end-to-end sports betting management tools and its modular HTML 5 framework enable operators to develop promotions, bet structures and offers that are unique to each channel, while delivering unique user experiences that meet individual operator requirements.

Szrek’s Trusted Draw Solution and Electronic Draw System Attested for Nonrepudiation and Conclusive Fault and Fraud Detection

Bulletproof, a GLI company, validated Szrek’s RNG Szrek2Solutions Electronic Draw System as meeting or exceeding the best practices by providing conclusive auditability and proof of integrity.



New Hampshire Lottery successfully launches iLottery

“We have long viewed ourselves as a player-centric lottery,” said Charlie McIntyre, Executive Director of the New Hampshire Lottery. “Our focus in everything we do is how best to make our products entertaining and accessible to our customers by creating a strong and positive play experience. Launching iLottery is the critical next wave component in enhancing our players direct interaction with our games. We wanted to get it right and believe our choice of NeoPollard Interactive would best ensure a successful rollout and early adoption of the online lottery experience. NPi’s domestic and international experience in this space has demonstrated critical best practice technology and created an enhanced player experience in that online space.”

Just launched recently, the New Hampshire Lottery’s iLottery program leverages NPi’s platforms and a full suite of NPi services including Customer Engagement Marketing, Player Support and NPi’s Games Studio which will give players throughout the state access to a full suite of engaging, interactive scratch games, as well as draw games such as Powerball® and Mega Millions. The launch of the iLottery program provides the Lottery with exciting new opportunities to enhance its product offering, increase player engagement, and maximize revenue for public education in the state. The New Hampshire Lottery will leverage NPi’s turnkey iLottery 360° Solution to enable players to conveniently access and play their favorite lottery games through web and mobile channels. The New Hampshire Lottery’s iLottery solution will also feature sophisticated CRM capabilities that support the cross-promotion of traditional lottery products with interactive games, enhancing and strengthening the Lottery’s retailer network.

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“We are thrilled to be working with the New Hampshire Lottery to deliver iLottery to its players,” said Liz Siver, General Manager, NeoPollard Interactive. “We are pleased to introduce iLottery strategies and products that will strengthen the Lottery’s portfolio and increase sales across all channels. With the launch of an iLottery platform, the robust interactive and mobile components of our solution will provide new insights into player preferences and behaviors, while our responsible gaming initiatives will support the New Hampshire Lottery’s mission of providing secure and entertaining gaming products.”



Michigan Lottery Awards NeoPollard Interactive iLottery Contract Extension

Under this agreement, Pollard Banknote and NeoGames will continue to serve as the providers of the Lottery’s iLottery platform, games, and managed services through their joint venture, NeoPollard Interactive, through July 2022.

Pollard Banknote and NeoGames first teamed up with the Michigan Lottery to launch their turnkey iLottery 360° Solution in 2014, providing the platform, managed services, and games required to deliver a comprehensive interactive solution to players throughout the state. Since then, NPi and the Lottery have worked collaboratively to establish the top-performing iLottery program in North America. ■



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Lotteries Reshape the Games-of-Chance Industry

Lotteries are building out the infrastructure, innovative game content, and strategies that connect the lottery operator to the consumer across an increasing variety of distribution channels and consumer touch-points.

And that is a good thing because now more than ever, Lottery must prepare for industry-wide disruption. What can Lottery do to be the ones who anticipate the future and lead the way?

PGRI Conferences are about pushing fearlessly into a future that is rich with opportunity. It's about keeping up with a consumer that expects more than ever, and with a competitive environment that is changing rapidly to meet those expectations. Team Lottery is already setting the highest standard for the entire games-of-chance industry and is bracing to raise the bar higher. It has all the tools to make it happen, and the courageous leadership to show us the way.

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I HAD FUN ONCE.

IT WAS AWFUL.

But These Games Will
Make Your Players Smile



Match any of the WINNING NUMBERS to any of the YOUR NUMBERS, instantly win 20 TIMES the PRIZE shown for that number. Get a "🐾" symbol, instantly win ALL 10 TIMES the PRIZE shown for that symbol.



Match any of YOUR NUMBERS to either of the WINNING NUMBERS, win PRIZE shown for that number. Get a "🐾" symbol, instantly win 10 TIMES the PRIZE shown for that symbol. Get a "🐾" symbol, instantly win \$0!



Get 3 like prizes, win that prize. Get 2 like prizes and a "🐾" symbol, win DOUBLE that prize!

