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WEEK 04

FRIDAY 25 JAN 2019

WIRE ACT REVERSAL: THE THINGS YOU NEED TO KNOW



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THIS WEEK

- **Votes are in for Global Gaming Awards London**
- **Itai Frieberger moves upstairs at 888**
- **Malaysian judge rules in favour of Wynn Macau**
- **NBA to use Premier League's betting example**
- **Extended ICE London 2019 preview**

GUEST COLUMNIST:

- **Staffan Cnattingius, CCO, QTech Games**

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WEEK 04

FRIDAY 25 JAN 2019

WIRE ACT REVERSAL: THE THINGS YOU NEED TO KNOW



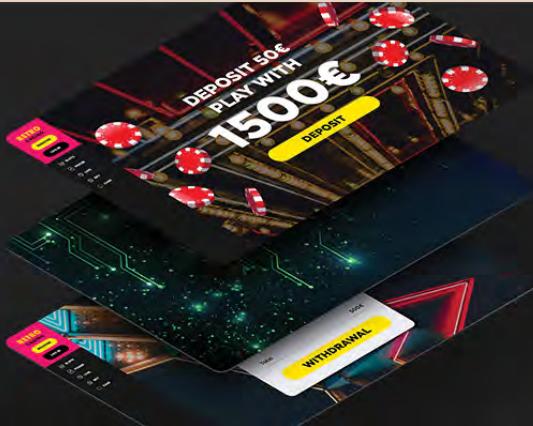
Plenty has been said about the Federal Wire Act over the last few days. Since the US Department of Justice (DoJ) reversed its opinion on the law last week, there's been an array of analysis, some overreaction and some sheer misreporting.

But there is no getting away from the biggest fact of all; that the DoJ's new interpretation of the Wire Act has caused a fresh wave of uncertainty within US gaming. In response, *Gambling Insider* decided to explore the law and what this latest development means for US betting going forward.

What is the Wire Act?

The Wire Act was formed in 1961 and outlawed all interstate wagers placed – or information passed on pertaining to wagers – via telephone or wired communication facility. It was aimed, first and foremost, to prevent match-fixing and collusion; an issue North America's major sports leagues are still nervous about in light of the repeal of the Professional and Amateur Sports Protection Act (PASPA).

In September 2011, the DoJ interpreted the Wire Act as legislation which only applies to sports betting. But in its new opinion, issued on 2 November 2018 and made public last week, the DoJ revised that outlook, judging the law as applicable to all forms of gambling – including online casino, poker and lottery. ▶



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THIS WEEK IN NUMBERS

612

The number of exhibiting brands at ICE London this year; 23 more than in 2018



Of MRG shareholders have accepted William Hill's £245m (\$315m) acquisition offer

\$4.5m

The fee Newgioco Group has agreed to acquire Virtual Generation Ltd



 **20**

Years since Intertops launched its affiliate programme; the anniversary of which will be celebrated at ICE London

How does this impact the PASPA repeal?

The first note to emphasise is that the Wire Act focuses on interstate communications. That means gaming conducted within individual states, in theory, remains unaffected – as does sports betting within individual states. The fact sports wagering was already covered by the Wire Act is the best example of this: states are free to legalise sports betting and will continue to be.

What is affected?

Where the DoJ's new interpretation of the Wire Act may take effect is when there are interstate compacts in place. In Nevada, one such agreement exists.

In the wake of the new opinion going public, Becky Harris, outgoing Chair of the Nevada Gaming Control Board, said: "There is an interstate compact between Nevada, Delaware and New Jersey, where Nevada participates with regard to poker only, and that's [now] in question."

Yet former Senator Ray Lesniak, a long-time advocate of legalised sports betting, believes there could be far-reaching implications for the New Jersey gambling industry.

He is quoted as saying by NJBIZ: "If I go online to gamble on my phone [and] my internet connection goes through a transmitter out of the state, that can be considered a violation of the Wire Act. Same thing with payment processes."

How can it be implemented?

Initially, the DoJ said it will wait 90 days to implement its new opinion. However, it is unclear whether this new opinion will eventually have any direct bearing on existing legislation. How exactly can and will it be implemented?

Legal experts say casino operators and online lotteries will contest the issue in court. Some analysts meanwhile, claim there is nothing more to the DoJ's new view, except a moral victory for casino owner Sheldon Adelson and the Coalition to Stop Internet Gambling.

How has the industry reacted?

Following the news, Reuters reported share prices of UK gambling companies had fallen, highlighting William Hill, Paddy Power Betfair and 888 Holdings as firms to have experienced falls in share value of between 1% and 7%. Considering the new changes' lack of impact on sports betting, it is difficult to understand why this would affect William Hill.

Plenty within gaming are continuing to go about their business as they would have done previously; a stance best embodied by the American Gaming Association (AGA).

Sara Slane, AGA Senior Vice President of Public Affairs, said: "It is unfortunate the Department of Justice departed from well-established practice in reversing its previous opinion without a compelling reason to do so."

"However, the 2018 OLC opinion does not impact the ability for states and tribes to legalise and regulate gaming on a state-by-state and tribal basis, or for companies to provide the exciting products and entertainment experiences our customers want."

But, in New Jersey, Lesniak believes the impact of the DoJ's new opinion could be "disastrous," as multiple online sportsbooks depend on payment methods which involve out-of-state transactions.

Where do we go from here?

As is so often the case with a contentious issue that sparks such polarising views, we can only wait and see which side of the argument takes centre stage in practice. If a player in New Jersey wagering through a New Jersey online operator still counts as a breach of the Wire Act, the implications may be far wider reaching than many originally feared.

Federal intervention though, is something yet to occur in US gaming since the repeal of PASPA. Does the Wire Act encompass the internet, rather than the Unlawful Internet Gambling Enforcement Act of 2006? Meanwhile, is the DoJ's new opinion simply an attempt to stay relevant without the authority to genuinely act?

At the heart of the issue, these are the questions gambling companies need to be asking.



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\$116.3m



Gross operator revenue for GAN in 2018, driven primarily by New Jersey sports betting

HK\$0.99



The interim dividend per share Sands China will pay out to shareholders in February (US\$0.13)

INDUSTRY SET FOR GLOBAL GAMING AWARDS LONDON 2019 AS VOTING CLOSES

Voting has officially closed for the Global Gaming Awards London 2019.

After a rigorous initial process, a stellar panel of judges boasting some of the industry's most influential executives have cast their votes, honouring the gaming industry's most successful performers from the past year.

The line-up of Awards judges includes: Kristian Nylén, CEO, Kambi, Antonios Kerastaris, CEO, Intralot, Walter Bugno, CEO, IGT International, Therese Hillman, CEO, NetEnt, Phil Horne, CEO, SG Gaming, Jesper Svensson, CEO, Betsson Operations and many more.

Judges chose between nominees in 16 diverse categories, which reflected the different verticals and sectors within the industry, deciding on first and second place for each Award.

The panel faced an unenviable task of choosing between a long list of reputable companies, with all Awards fiercely contested by worthy nominees.

Being nominated for an Award is a remarkable achievement, considering the level of operational excellence required to make the Shortlist.

The successful winners will be announced over an afternoon tea at the Hippodrome Casino on Monday 4 February, while the Global Gaming Awards London 2019 Shortlist magazine will break down the full list of all nominees in each category.

A digital version of the Shortlist magazine is now available on the *Gambling Insider* website and will also be distributed at ICE London.

The Global Gaming Awards are powered by *Gambling Insider* and the voting process is officially adjudicated by KPMG Isle of Man.

Category sponsors include some of the industry's biggest names, such as SG Digital, Inbet Games, Asia Live Tech, Betradar, Pragmatic Play and ActiveWin.

BetConstruct is the Lead Partner of this year's Awards.

CLICK HERE TO READ THE SHORTLIST IN FULL



The number of tennis players held in French custody last week, suspected of helping a gambling syndicate and fixing hundreds of professional tennis matches

\$86.9m



Delaware's
sports betting
handle for
2018

ITAI PAZNER APPOINTED 888 CEO AS FIREBERGER TAKES DIRECTOR ROLE

Operator 888 Holdings has announced Itai Frieberger is standing down as CEO and has been replaced by Itai Pazner, previously the group's COO. Frieberger has been with 888 since 2003 and has been CEO since 2016. He will remain with the company as a director for a period of up to 12 months.

In the last year, 888's stock price has faced a steady decline. On 21 May, share value was £3.24 (\$4.22), its highest point in the last 12 months, and dropped to £2.24 by 26 September.

After a quick fall to £1.90 on 27 September, the price fluctuated around the £1.70 mark at the end of 2018 and closed yesterday at £1.68. Frieberger said: "Being CEO of 888 and working with our team of highly skilled and committed colleagues has been a tremendous honour.

"This has not been an easy decision to make. However, I feel that, after

eight exciting and rewarding years as a senior executive in a dynamic global business, this is the right time for me to step back from the day-to-day running of 888."

A mid-December pre-close trading update from 888 said the operator was confident of meeting its adjusted EBITDA target for 2018, but did not provide specific figures.

In the half-year report it released in September, 888 was only able to report a 1% increase in group revenue to \$270.1m and a 2% increase in B2C revenue to \$246.7m.

Brian Mattingley, Non-Executive Chairman of 888, said: "Itai Frieberger has been instrumental in driving the transformation of 888 into one of the world's leading online gaming companies.

"The board understands and accepts Frieberger's decision to step back from the day-to-day running of a global business."

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THE WEEK IN QUOTES

"The exchange space is definitely up for grabs at present and, with our product, it can work alongside an exchange. We believe we have the ability to be the next Betfair."

Betconnect's Co-founder, Daniel Schreiber, discussing his company's growing ambitions to Gambling Insider

"We are pleased to invite Keith onto the board as our newest independent director. As a significant shareholder in our company, we have been engaged in constructive dialogue in the last several months and are aligned on our strategy to increase free cash flow, continue to pursue an asset light model, drive margin improvement and position the company for long-term future growth."

Chairman and CEO of MGM Resorts, Jim Murren, welcoming Keith Meister to its board of directors

MALAYSIAN COURT AWARDS WYNN MACAU \$4.2M IN UNPAID CREDIT

Ruling in favour of Wynn Macau, a Malaysian judge has decided a fund manager must pay the operator \$4.2m in unpaid credit.

This is the first time a casino has been allowed to recover payments in the country, according to a Reuters report.

Betting or gaming contracts are not recognised in Malaysia, preventing casinos from recuperating gambling dues owed to them by clients.

In this case however, Wynn's lawyers argued it was not seeking dues from a wagering contract, but instead from a credit agreement made between the casino and a client.

Wynn filed the lawsuit against Paul Poh Yang Hong in 2017 for HK\$33m (\$4.2m) after he failed to honour the agreement.

He took a line of credit worth HK\$40m from Wynn and had paid down to roughly HK\$33m before Wynn sued him.

In an earlier court hearing, Poh said he was unaware he had

signed a credit agreement and that he did not owe the casino HK\$40m. He declined to comment at the ruling.

Judge S Nantha Balan ruled Poh will have to pay the outstanding amount of HK\$33m plus interest to Wynn.

Speaking to Reuters, Wynn's lawyer, Vincent Law, said: "If there is no appeal, I believe this judgment today will be the law in Malaysia for the foreseeable future.

"It is a good sign for the whole gaming industry."

The country has only one land-based casino, Resorts World Genting, and illegal operations are often the target of the Malaysian government.

Local police reported in September more than 22,000 people had been arrested in connection with gambling raids in 2018, up to that point. Usual targets are gambling dens and unlicensed lottery centres.

"It turns out that not every sports bettor is willing to just roll over and accept being screwed out of a shot at \$1m."

A FanDuel website criticising the DraftKings Sports Betting National Championship. A lawsuit was filed against DraftKings after players were unable to bet on the start of a game

"Throughout his career, Peter has shown he can deliver highly user-centric products and is therefore a perfect match for Betsson. With fewer layers in the organisation, we know we can be more efficient, as we did with the successful merger of marketing and commercial, a while back."

Betsson Operations CEO Jesper Svensson, discussing the appointment of Peter Frey as its new CPO and CTO

NBA TO MIMIC PREMIER LEAGUE'S GAMBLING POLICIES

With the expansion of legalised sports gambling within the US, the NBA's COO and Deputy Commissioner Mark Tatum will look to reinforce gambling policies among its players, teams and staff.

Tatum announced the NBA has already started to make moves in getting people up to speed on opportunities which may arise, alongside the threats of sports betting.

The NBA's gaming rules prohibit betting, match-fixing or tipping from players, which also includes encouraging others to place bets or use improper influence or manipulation.

Extra resources will be made available to prevent any of the offences listed. Supplier Sportradar is employed by the league to track betting data and flag any suspicious activity, Tatum acknowledges a more deliberate

approach and greater investment will be needed to keep everything above board.

Tatum said: "A lot of it has to do with education with respect to our players, with respect to our teams.

"We're trying to educate our fans. We're educating our players and our teams. We're taking a little bit of a cautious approach here, but generally, we think it's a good thing for sports betting to be regulated, to be legalised, so there is better information being captured."

The English Premier League has been able to find a balance between revenue and responsibility, according to Tatum.

Tatum added: "That really helped inform some of our thoughts on how sports betting could work in the US. We're seeing a large shift now and a change in the landscape of sports betting in the US. We've gone to school on them."



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THIS WEEK'S WINNERS AND LOSERS

WINNERS

Kambi and its partner Greenwood Gaming and Entertainment, have opened their second land-based sportsbook, at the South Philadelphia Turf Club in Pennsylvania

Zeal Network's shareholders have voted to approve its takeover offer of rival Lotto24

Senate President Dominick Ruggerio has introduced a bill to allow mobile sports wagering in Rhode Island.

Vietnam's first casino for locals, the Corona Resort and Casino, is set to open on a three-year trial basis.

Uganda's President Yoweri Museveni has ordered his government not to issue or renew licences for sports betting firms.

LOSERS

PHILIPPINES REGULATOR EXPECTS RECORD REVENUE DESPITE INCREASED COMPETITION

Gross gaming revenue (GGR) in Philippine casinos is expected to grow 9% year-on-year to 217bn pesos (\$4.1bn) in 2019.

Andrea Domingo, Philippine Amusement and Gaming Corporation (PAGCOR) Chairperson, has informed Reuters of the projections and says "all integrated casino resorts are doing very well."

In 2018, GGR grew 13% to reach approximately 200bn pesos, marking the Philippines out as one of Asia's fastest-growing gaming countries.

Overlooking Manila Bay, most of the large casinos in Metro Manila are based in the Entertainment City complex. These include City of Dreams Manila, Okada Manila and Solaire Resort & Casino.

Another resort casino is planned for the area. Westside City is owned by Travellers International, operator of Resorts World Manila, and is expected to open in 2021.

Despite this development, Domingo has warned of increased competition from within the continent. Japan approved new laws on integrated

resorts last year, while Cambodia and Vietnam have also invested in gaming, and legislation is advancing in Myanmar.

In Macau meanwhile, casinos generated GGR of MOP302.85bn (\$37.85bn) in 2018; a 14% increase.

A further obstacle facing the Philippine gaming industry is President Rodrigo Duterte's opposition to gambling. Duterte stopped issuing new licenses and made sure to cancel Galaxy Entertainment Group's license, blocking the reopened Boracay Island from operating a casino.

Explaining his reasoning, the Philippine President said he did not want the industry to become overcrowded.

But Domingo plans to meet with the President, discussing the benefits of a successful gambling sector and the risk of losing revenue to neighbouring nations.

The Philippine gambling industry was scrutinised in 2016 after reports said at least \$81m was laundered through local casinos. Legislators were quick to amend the country's Anti-Money Laundering Act to include casinos in its coverage.

LA FALLS

Louisiana gaming revenue fell 1.2% in December, as Baton Rouge casinos continue to feel the burn from the city's smoking ban.

Baton Rouge casinos, which include Gaming and Leisure Properties' Hollywood, Eldorado Resorts' Belle and Penn National's L'Auberge, were down 11.35%.

Casinos outside Baton Rouge grew 0.09%.

Boyd Gaming led all operators, in terms of combined year-on-year growth, and benefitted from 18.08% growth from Amelia Belle.

MARKET/PROPERTY	REVENUE (M)	(%) CHANGE
SHREVEPORT/BOSSIER CITY		
Sam's Town (BYD)	\$6.878	+4.45
Boomtown (Penn)	\$4.795	+4.15
Louisiana Downs (CZR)	\$3.761	+2.20
El Dorado (ERI)	\$9.931	+0.53
Horseshoe (CZR)	\$17.686	-0.94
Margaritaville	\$13.437	-5.76
DiamondJacks (Legends)	\$2.909	-16.86
SP/BC Total	\$59.397	-1.59

MARKET/PROPERTY	REVENUE (M)	(%) CHANGE
LAKE CHARLES/VINTON		
Delta Downs (BYD)	\$16.061	+2.49
Golden Nugget	\$29.007	-1.41
L'Auberge (Penn)	\$27.697	-11.22
Isle of Capri (ERI)	\$8.745	-17.37
LC/Vinton Total	\$81.509	-6.17
NEW ORLEANS		
Harrah's (CZR)	\$27.389	+7.70
Boomtown (Penn)	\$10.176	+5.98
Fair Grounds (CHDN)	\$3.621	+5.20
Treasure Chest (BYD)	\$8.682	+4.85
NOLA Total	\$49.869	+6.66
BATON ROUGE/CENTRAL LA		
Evangeline Downs (BYD)	\$7.156	+2.10
Hollywood (GLPI)	\$4.590	-8.82
L'Auberge (Penn)	\$12.290	-10.91
Belle (ERI)	\$2.519	-38.82
BR/C.LA Total	\$26.556	-11.35
ELSEWHERE		
Amelia Belle (BYD)	\$3.936	+18.08
Routes, Truck Stops, OTBst	\$52.095	+5.46
State total	\$273.361	-1.20

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FROM THE HOST: ICE LONDON 2019 PREVIEW

Clarion Gaming talks us through what we can expect from this year's show

The 2019 edition of ICE London will be the biggest on record, with net floor space growing from the 2018 figure of 43,500m² to 45,500m², an increase of just under 5%.

The unique number of visitors attending ICE London 2018 was confirmed as a record 33,536, an 11% increase on 2017; a landmark which constituted the event's seventh consecutive year of growth. Despite occupying an additional hall at Excel London, density increased year-on-year, with the average number of visitors per stand up 17% and the number of visitors per metre squared up 12%.

Announcing the growth for this year's show, Kate Chambers, Managing Director of Clarion Gaming, said: "It's important to stress this isn't a one-off increase in demand for space, but part of



a trend which stretches back to 2012, when the show floor comprised 22,500m². Since then, ICE London has grown

year-on-year and is now more than twice its 2012 size; a remarkable feat when you consider the level of ►

merger and acquisition activity that's taken place in the industry over that period.

"While the 2017/18 growth was due to the demand for space from payment providers, the 2019 growth has, in part, been driven by sportsbook and online gaming companies, following the Supreme Court's repeal of the Professional and Amateur Sports Protection Act (PASPA)."

While the development of ICE London is positive news for all of the brand's stakeholders, Chambers is keen to underline the importance of following a managed growth strategy.

She said: "The relocation to Excel London gave us the opportunity to provide exhibitors with the stand options that simply weren't possible at Earls Court. Following that, we have been careful not to follow an aggressive growth strategy. Instead, we have worked hard to marry the growth

of the show floor with an increase in visitor numbers, and I'm pleased to say in 2018, we were successful in growing the average number of visitors per stand by 17% and the average number per metre squared by 12%."

ICE VOX UNVEILS FRESH APPROACH

ICE VOX 2019, the re-formatted conference series which takes place alongside ICE London, will feature more than 120 high-profile, tier-one thought leaders delivering over 40 hours of business-centric learning.

Made up of five separate learning experience hubs and a broad spectrum of speakers drawn from both within and outside the gaming space, the 2019 edition of ICE VOX is set to do things differently, while still delivering the most comprehensive learning programme in gaming, curated to provide delegates with the unique insight to shape and enhance their businesses.

Previewing the conference programme, which runs alongside what will be the biggest edition of ICE London so far, Clarion Gaming's Head of Production, Sadie Walters, said: "The ICE VOX format draws inspiration from this year's successful iGB Live, which developed the use of four branded areas offering distinct ways of learning.

"Counsel will feature Oxford Union style debates and motions all facilitated by a professional debate team, while Boardroom invites inspirational thought leaders from outside the gaming universe to provide their insight. Finally, the Speaker Clinic delivers a one-to-one feedback masterclass, as delegates can make presentations to our professional speakers and receive an exclusive critique and guidance. The updates we have introduced aim to deliver a new kind of immersive learning experience." ▶

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ACROSS EUROPE, ASIA, AND THE AMERICAS

The campaign developed by Clarion Gaming in support of the 2019 edition of ICE London celebrates the genius of the international gaming industry, which is widely recognised as one of the world economy's earliest adopters, and indeed developers, of new technology. The Clarion marketing team has represented a series of inventions that have changed the world, as illustrations of the scale of game-changing genius found on the 45,500m² of the show floor at ICE London shows. The series of #spiritofgenius adverts feature iconoclastic inventions, encompassing Braille to the bar code, abstract art to applied mathematics and the printing press to the contraceptive pill.

Chambers said: "We thought it was about time that someone started banging the drum on behalf of an industry that has consistently been among the very first to embrace new

technology and is among the most creative sectors anywhere in the world, employing the most talented individuals and the brightest minds."

CONSUMER PROTECTION ZONE RETURNS

The Consumer Protection Zone, which was launched to great interest at ICE London 2018, has been given a new high-profile home on the show floor. The Zone, which will be slightly bigger in 2019, has been relocated to the high footfall area adjacent to the Bingo Pavilion and the Totally Gaming Academy in the South Hall at Excel London. The move reflects the huge importance responsible gambling plays in the culture of all serious operators across all of the gaming verticals.

Meanwhile, the All-In Diversity Project, the recognised global resource for gender, diversity and inclusion for the betting and gaming sector, will be using ICE London 2019 to publish the

results of its All-Index, a ground-breaking body of research which represents the first initiative to benchmark levels of diversity across the global industry. The All-Index will signal the start of a busy 2019 for the organisation, which will see the launch of an industry-wide apprenticeship programme for sports traders, the launch of a corporate membership programme and the delivery of a number of case studies and white papers, with the first exploring the topic of how diverse workforces impact issues including social responsibility and customer care.

The All-In Diversity Project Co-founder Kelly Kehn said: "We are constantly growing our list of businesses who support us.

"As well as the good people at Paddy Power Betfair, our founding members in the US, such as IGT and Scientific Games, are keen to push the agenda, while Caesars is on target with its 50:50 by 2020 ambitions. In Europe, we've got the likes ►

of Kindred and GiG championing gender and LGBTQ parity and challenger brands like Addison Global committing to equality of opportunity from the outset."

BEST GAMBLING PITCH IN WITH SPONSORSHIP

Best Gambling, which has created a platform to operate on behalf of new entrants, has been named as the first sponsorship partner of Pitch ICE. The agreement will see Best Gambling support the 2019 edition of Pitch ICE London, where gaming start-ups will be given the opportunity to debut their companies on the show floor and present them to the wider gaming industry.

Heralding the sponsorship, Ian Beauchamp, CEO of Best Gambling, said: "This represents a very important industry-wide initiative that gives voice to new ideas and insight to some of the new technologies which

will become mainstream in the coming years.

"Being able to pitch ideas offers validation for start-ups and is a key opportunity to connect with others that can help,

mentor, invest and support going forwards. In our opinion, it is fundamental that the culture of entrepreneurship is supported and developed by both large and small organisations.



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FROM THE EXHIBITORS: SCIENTIFIC GAMES

Doug Albregts, Executive Vice President, Group Chief Executive – Gaming



Why should a delegate come and visit the Scientific Games booth?

In our industry, everyone talks of being a holistic, one-stop-shop for gaming, lottery and sports content. At ICE 2019, we're taking that idea to the next level. We're sharing how our global entertainment ecosystem delights players and brings value to our customers.

It's easy to list products and services, but this year we're pulling out all the stops to demonstrate how we help our customers win.

We develop games people love, provide a leading full-service sports betting solution

and bring cutting-edge innovation to meet player demands and enhance operations. Our unified product portfolio spans the entirety of the gaming industry. We have unmatched breadth in the land-based, sportsbook, lottery, and online arenas, and we're bringing it out in full force for ICE.

Delegates should come to our booth for an all-encompassing look at our current products with a healthy dose of sneak peeks, hinting at some of the major innovations we have on our roadmap for 2019 and beyond.

Can you tell us about your engaging game content and product solutions?

Connecting players to amazing content and betting opportunities is the heart of our business, so we're showcasing products that reflect that idea by building on our rich heritage and looking to future industry trends.

From our land-based gaming groups, we're showing a bevy of new, engaging game titles featuring popular licensed brands and proven proprietary

performers. With a sharp focus on the European market, we're highlighting in Ji Bao Xi, our new wildly successful Asian game, and debuting the Fusion Auto Roulette, which offers a smaller footprint, improved wheel viewing angles and the same speed and reliability players expect to carry on the legacy of some of our best performers.

In the online space, we have a full suite of sports betting solutions that comprises back-end technology, front-end user interfaces, managed trading and pricing services, day-to-day operations and more.

What is Scientific Games' vision for 2019 and beyond?

The gaming industry is more connected now than ever before, and we want our products to reflect this ongoing shift. The focus isn't on a singular experience involving one slot machine, one sports bet, or one lottery ticket. Instead, we're sharing how the casino of the future is connected, immersive and personalised.

FROM THE EXHIBITORS: COLOSSUS BETS

Charlotte Farr, Head of Business Development



What are you most looking forward to about this year's ICE London?

ICE is always an exciting time, as it enables the industry to see what innovations are emerging, as well as giving people the chance to build and develop new relationships. With the industry being so fast-paced, it's easy for business relationships to

become almost exclusively digital, rather than personal. Many of our business relationships at Colossus are with partners outside Europe, including new business coming in from the US, so it gives us the ability to meet with a significant number of our business partners in the flesh and add that personal touch to our relations.

Which products will you be launching at this year's show?

In July, we launched our new racing pools following the expiry of the UK Tote's monopoly. Our main focuses at ICE this year will be on demonstrating how we are planning to breathe life back into racing pools with our global liquidity, patented cash-out technology and syndicates feature; all as standard features. We also look forward to discussing our upcoming launches later this year, as we launch our new esports and fantasy products with our partners in the US.

What do you think will be the general theme of new sports betting products being launched at the show?

There has been a real buzz around esports in the last year, and I expect the noise to continue at ICE and to be a real theme in the sports betting section. There is a bandwagon effect, as suppliers and operators don't want to miss out on something which could become a juggernaut, in particular for tapping into a potentially huge new audience of gamers.

Which networking events particularly stand out to you this year?

There are always some fantastic events surrounding ICE, including Fire & Ice and London Baby. However, I am excited to say we are hosting our own Colossus networking event with around 150 industry contacts on the Wednesday evening. Hopefully our event will be a good warm-up act to any of our guests heading on to Fire & Ice!



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FROM THE EXHIBITORS: BETINVEST

Valentyn Kyrylenko, VP of Business Development

Which products will you be launching at ICE London?

We'll be presenting new ways for our clients to work with their customers as well as innovative products within our completely new online platform. The release of this new Betinvest product is dedicated to our company's 20th anniversary.

Designing this online platform has allowed us to bring all the latest technical achievements, innovations and knowledge from the online gaming industry into one place. We call it our one-stop platform.

We also added live casino to our product line. We have formed a strong partnership with one of the most unique live casino game providers, which meant our team could offer the most comprehensive and exclusive set of casino games. At ICE, we will be unveiling this for the very first time.

Also, we are going to London with the announcement esports have become an important new direction for Betinvest.

What will make the new platform stand out in the sports betting market?

Our new online platform is one of the few platforms in the industry that has been created from scratch by a company with such extensive operational experience, using in-depth market analysis.

Our sophisticated software has been developed and optimised to ensure fast and efficient business set-up, management and extension which enables a quick-start of your business.

This platform is flexible, scalable, fast and simple and offers new ways for our clients to work with their customers.

What do you think will be the general theme of sports betting products being launched at the show? What do you think will be the main innovations exhibitors will be showcasing?

I believe the main challenge for the industry is not to launch something new, but to figure out which products are most

profitable and to develop them further. I think 2019 will be the year the industry gains a clearer understanding of the most promising directions for development.

What are you most looking forward to about this year's show?

We are looking forward to seeing providers become closer to each other. I think the online gaming community can be even more open-minded. This will lead us to the implementation of common standards of work with customers.



FROM THE EXHIBITORS: COMTRADE GAMING

Ales Gornjec, General Manager

What are you most looking forward to about this year's ICE London?

ICE London is the event of the year for us, where we showcase our latest product innovations to the international audience. It is also the perfect opportunity to make new connections, reconnect with old ones and meet our partners and clients from around the world.

We are very much looking forward to the event, to learn about product feedback and to share our ideas and plans with the rest of the industry.

Which products will you be launching at this year's show?

We will be launching our latest business intelligence architecture that is integrated with both the iCore and sCore product families. This will show how value through a high degree of real-time retention strategies, enabled by predictive analytics, can be created.

There are further updates to the

sophisticated bonusing gamification feature - Award Games. Predictive analytics assist the operator to plan, launch and personalise individual promotions, communicate specific messages and award their players before, during and after gameplay. Anyone visiting our stand at N4-340 will be able to try out the Award Games feature and win a prize.

What will make these products stand out in the market?

What makes our product stand out in the market is the high degree of personalisation using business intelligence technology.

What do you think will be the general theme of new market products being launched at the show?

New games will usually take the spotlight, but we believe artificial intelligence is the topic everyone will talk about.

Which networking events particularly stand out to you this year?

We will organise networking events to meet our partners and clients and use the chance to have quality time with them in our own setting.





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FROM THE EXHIBITORS: GANPATI

Yutaka Iwakiri, CEO, Ganpati NEO



Which products will you be launching at this year's show?

This year, we will be showcasing our flagship game, Neo Tokyo, which is actually the inspiration behind our Ganpati stand. Neo Tokyo is a fast-paced slot with expanding reels and up to 12,348 ways to win. In true Ganpati style, the game has been created around

a detailed backstory – this time a cyberpunk love story. Neo Tokyo's graphics are what will really attract players – behind the reels is a futuristic Tokyo complete with skyscrapers, rain and neon lights. For the game's features, we've gone in a completely new direction and have incorporated brand new ideas.

We'll also be exhibiting other new games, such as Onmyoji and Samurai Girl. Onmyoji is a cascading slot with eye-catching animations, based on a legendary Japanese spiritual guide who banished evil from the world using her magic. Samurai Girl is a high-volatility slot about a girl's quest to rid Japan of a zombie samurai army. Look out for the fun Pandemic and Boss Battle features.

What will make these products stand out in the casino market?

First, these games are based on a Japanese theme, which stands out naturally in the online casino market. Last year, we focused on a more traditional and classic view of

Japan, but for these new games, we've put a more futuristic, sci-fi and anime flavour into them.

We have a great development team in Estonia, so the combination of the Japanese theme and our Estonian team's ideas makes our games very different and able to stand out in the market. We've included some really unique features in our upcoming games, which could be the prototype for our future roadmap.

What do you think will be the general theme of new casino products being launched at the show?

I think a general theme across new online casino products is the adaption of games to the habits of modern-day players, generally to maximise speed and ease of gameplay, such as mobile optimisation and portrait-oriented layouts for slots. As for the casino industry as a whole, VR and AR elements will most likely be appearing in new products.

FROM THE EXHIBITORS: BMM TESTLABS

Wendy Anderson, Chief of Staff

How important is it to be able to take part at ICE London each year?

As a go-to-market partner, it's extremely important for BMM to take part in the most significant show in Europe. ICE is a wonderful opportunity to consult with our current and prospective clients on new challenges and opportunities within the market, and is where we can highlight our new capabilities and expanding footprint in Europe.

What can you tell us about the services you're planning to discuss or launch at ICE London?

The news isn't just about what services we've launched, but where we're delivering those services and setting new standards for excellence in the industry. In addition to moving our European headquarters to our Barcelona office and expanding our regional executive and management team, BMM has achieved a dominant

market position in the Italian VLT market, with an estimated 75%+ market share.

This has been an amazing year for online gaming, as BMM continues to build dedicated online gaming sales and service delivery teams in Europe. In addition, after launching commercial operations in Romania in June 2018, BMM was named as the Best Lab in Romania by Casino Life and Business Magazine.

Which networking events are you looking forward to attending?

Networking events are clearly a great time to interact with clients and prospects, but BMM is most passionate about meeting one-on-one to provide expertise, consulting and advice. If you would like to meet with any of BMM's experts at ICE, please feel free to get in touch and schedule a meeting.



What strategic growth plans does BMM have for 2019?

Last year was one of significant success, activity and expansion for BMM around the globe, but was especially important for the development and growth of our European business.

It's vital that BMM go beyond simply being the best test lab in the world. We're constantly asking: What's next? BMM Testlabs will be building upon this momentum into 2019.

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FROM THE EXHIBITORS: CONNECTIVE GAMES

Serge Mukhanov, CEO

What can you tell us about the services you are planning to discuss or launch at ICE?

We will be showcasing our award-winning poker platform and services. Our state-of-the-art technology powers some of the largest poker networks in the world, including Pokerdom, Spartan and the Aconcagua Poker Network.

We have built a formidable reputation for giving operators the power to localise their poker offerings, from language and currency to payment providers and the different types of poker variants.

Delegates will also be able to demo our online casino platform and portfolio of proprietary games. In addition, we provide a bespoke game development service for those looking to engage players with unique content.

As always, we anticipate having a very busy stand.

How important is it to be able to take part at ICE?

ICE is a very important event, as it allows us to showcase our products and services to operators from all over the world. It really is an incredible event, with unrivalled networking opportunities.

We return year after year because it is the only place where we can meet current partners and greet those that would like to learn more about Connective Games and the fantastic products and services we offer.

Which networking events will Connective Games representatives attend?

The Connective Games team spends much of its time on the stand talking to delegates. We are a hospitable bunch so, make sure to drop by stand N1-351 at some point over the three days.



What can you tell us about your expansion plans for 2019?

We have big plans to expand our ground-breaking technology and world-class services worldwide.

We will also continue to fine-tune our innovative platform and technologies and launch new and exciting features in the coming future. It's already looking to be another successful year for us.

FROM THE EXHIBITORS: BETGENIUS

Sam Hill, Business Development Director

What services are you planning to discuss at ICE?

A huge focus this year will be the Betgenius sportsbook platform. It's an interesting proposition for operators, because it's been built as independent modules to meet the requirements of any strategy. Should their strategy involve retaining control of certain elements of the sportsbook operation, our product allows them to do that and change that configuration over time.

Another key component is supplying odds, trading, data and content to licensed bookmakers, and today, over 150 of them use some or all of these sportsbook management services. At ICE, we'll be showcasing enhancements in all these areas, including major growth in sports, events and in the number of markets that we offer.

The third part of what we do is our customer engagement platform. This is essentially a digital marketing agency specifically optimised for the sports betting

and online gaming sector. We supply customer acquisition, engagement and retention technology which automates media buying and the delivery of highly-personalised and targeted online ads.

How important is it to be able to take part at ICE?

When I first joined, ICE was the main conference, and the one everybody geared their year around. Now there's a lot more around the world as new territories regulate. While I don't want to upset the others, ICE remains the top conference and the one in which we invest the most. It still remains the one event in the calendar where all bookmakers, operators and suppliers generally attend and it is massively important for us.

What are your expansion plans for 2019?

There's a focus on growing our presence in newly-regulated markets like the US and Latin America. That's both from a talent and technology development



perspective, as we strive to localise our expertise and product. In Medellin, Colombia for example, across a two-year period we've gone from a standing-start to an operational centre that now has up to 300 employees.

Following our acquisition by private equity fund Apax Partners, there's significant investment that is allowing us to expedite what we do as a business, allowing us to build technology faster and at a far bigger scale. It's going to be a hugely exciting year for us.



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to set up a meeting.



FROM THE EXHIBITORS: KAMBI

Max Meltzer, Chief Commercial Officer

How important is it to take part at ICE?

ICE is the number one exhibition on the industry events calendar, attracting large attendances, as well as the key stakeholders in gaming businesses from all across the world. So bearing this size and appeal in mind, it's important Kambi continues to takes part in ICE and that we use the opportunity to showcase our sports betting solutions and managed services to the market.

What services are you planning to discuss at ICE?

In general, third-party suppliers have an outdated reputation of being inflexible and of stifling innovation. Suppliers today are far more sophisticated and, from our perspective, can provide operators with the tools to innovate and create exciting and bespoke sports betting experiences.

During ICE, we'll be showcasing how the Kambi sportsbook provides the freedom to differentiate and to grow. What I'd say to ICE attendees is to come and experience this freedom for yourself.

We'll have experts on stand S1-110 ready to take you through our range of products and tools and answer your questions.

Due to the conscious way our sportsbook has been engineered, this freedom extends to our retail product too. You may have seen Kambi in the news recently regarding our retail launches on both sides of the Atlantic, and at ICE, we'll be exhibiting the multi-channel solution that's powering the growth of these land-based partners.

Which networking events will Kambi attend?

ICE offers a raft of valuable networking opportunities and Kambi will have a large team on the ground, so we'll be able to have representation at a large number of these. New business opportunities often come from unplanned conversations, while it's also great to catch up with friends, acquaintances and business partners. If anyone would specifically like to set up a meeting with us at ICE, I encourage them to email us on sales@kambi.com.



Can you tell us about your 2019 expansion plans?

Coming off an extremely successful 2018, where we signed eight new customers, took the first legal online sports bet in the US post-PASPA, extended deals with current customers and moved into a number of new regulated territories, the plan is for more of the same in 2019. You can expect us to sign more new customers, move into more jurisdictions and continue to improve our sportsbook with performance upgrades and new products. Visit our stand to find out more.

FROM THE EXHIBITORS: PRAGMATIC SOLUTIONS

Valli Fragoso, Chief Product Officer

Pragmatic Solutions, a relatively new online gaming platform provider, owned by the same investment group as Pragmatic Play, will be exhibiting at one of the biggest shows in the gaming industry at ICE London 2019 at Stand N6-232. This is the biggest show Pragmatic Solutions will be attending after SiGMA 2018.

We are excited that at the biggest online gaming show, we'll be able to showcase our fully-API based, mobile-focused online gaming platform that was specifically built with third-party integrations and regulation in mind as cornerstone considerations. We are certified across multiple markets and pride ourselves in being agile, flexible, secure, scalable and competitive in pricing.

We look forward to meeting potential clients interested in a powerful platform to support their gaming business, either online or land-based. ICE London each year attracts a significant number

of online and land-based operators looking to grow their business, either in new markets or by expanding their business online. Pragmatic Solutions has extended its valuable know-how of the online world into land-based and we are eager to onboard and support the growing list of new clients.

Our experienced team is going to this show with extensive knowledge of markets and regulations – and are ready to support those who want to invest in new markets in any part of the world.

Our online gaming platform has been a proven success for clients who provide casino, sports, bingo, lottery and many more products to their customers. We have integrated the vast majority of popular third-party content, payment and service providers available in the industry. We are willing to commit to any additional required integrations in a timely manner.



We invite everyone at ICE to come by our stand N6-232 to learn more about our online gaming platform. Our sales team will be delighted to speak to you to analyse your needs and recommend a tailored solution and start strong working relations. We can also be reached at sales@pragmatic.solutions to book a meeting.

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FROM THE EXHIBITORS: PROMATIC

Pawel Paliwoda, CEO

How important is ICE to Promatic?

Promatic Group is heading to the world's biggest betting, casino and online gaming event in February with more products and services than ever before.

We're very excited to be back at ICE in 2019, this time with a few new brands and products in our portfolio. We have always stayed true to our core products and partners, while expanding our market opportunities globally. As our brand continues to grow, it is a natural process to expand to other regions and to develop new products. ICE is always a great place to show how we evolved over the last year.

What products will Promatic showcase at ICE?

This year at Promatic Group's stand, we are expanding our offer of cabinets, slot games, jackpot systems and system solutions. The company representatives will be featuring a brand new cabinet – Casino 24. Next, Promatic's popular multi-

game collections will be presented with some new titles, i.e. historical slot game Hussars. This game's scenery, graphics and great sound effects take players into the world of the most famous cavalry – the Winged Hussars of Poland.

But the biggest part of Promatic's new offer will be our new online games platform, www.promaticgames.com, providing a full range of superior online gaming solutions for operators, platforms and aggregators. Last but not least, Promatic's new branded game, "Pudzianator" by Mariusz Pudzianowski, will have its premiere at ICE 2019. The game features the five-time World's Strongest Man Champion, and current MMA Fighter, who will be Promatic's special guest at our stand.

What is Promatic looking forward to most at ICE?

ICE is always exciting for us, but this year has to be our most anticipated event ever.



With our expanded offer, fully focusing on providing a complete portfolio of products and system solutions as well as having Pudzianowski as a special guest, our stand is a must visit for everyone. We are really looking forward to this year's exhibition.

If you are interested in setting up a meeting at ICE, please contact us.

WHAT'S ON SHOW?

Supplier Greentube discusses the new slots and interactive solutions it will reveal at ICE London

On a dedicated area of the Novomatic stand at ICE London 2019, Greentube is excited to unveil new slot titles, including the highlight launch of The Great Gambini's Night Magic, which will amaze players with a spectacular array of magic and illusions.

Four magical features, stunning animations and excellent winning chances will see players jump into the spectacular world of a magician. Stop by Stand #S6-340 on Wednesday 6 February to check out some live tricks.

"We look forward to presenting a new selection of interactive content and solutions at ICE 2019 aimed at bolstering player and operator experiences, with the launch of standout games from our in-house and third-party studios, and games based on popular titles from the Novomatic library," said Thomas Graf, CEO, Greentube.

The first of two online slot titles based on the IP theme MacGyver will make its premiere – MacGyver: Duct Tape & Diamonds takes players on an action-

packed adventure with Richard Dean Anderson and lead cast, as this classic TV show of the '80s is relived in casinos. Another slot launch will see players journey to the depths of the ocean in Tidal Riches, where hidden treasures are waiting to be discovered.

Based on the Novomatic land-based link, the online version of Enchanted Fortunes Linked Jackpot also makes its debut appearance, launching with linked themes popular in the land-based sector such as Book of Ra, Mystic Fortunes, Pyramid Fortunes and Goddess Rising.

In addition, a full selection of classic, new and proven games from Novomatic, Greentube and third-party studios for the regulated markets will be presented to operators.

The innovative Greentube solution Plurius will present seamless gameplay and single wallet capabilities between land-based, online and mobile, demonstrating how players can switch

between devices on the fly. The system will present a wide selection of games, with titles like The Great Gambini's Night Magic and Apollo God of the Sun, on desktop and mobile, and leading Novomatic gaming terminals. Plurius will be connected to the Novomatic Biometrics System and showcase a new multi-level jackpot.

AbZorba Games will present a new roulette game for the VLT market, exclusively via Plurius, as well as Grand Blackjack, as part of the latest suite of casino games simulating a live-dealer game experience.

Eurocoin Interactive will release a wide selection of AWP, VLT, classic slots and bingo titles for interactive markets. The highlight launches will include Fluffy Bingo, a new addition to its Novo Bingo line of interactive bingo titles, Jackpot Dice that features three creative jackpots, and an online version of the best-selling Swiss AWP machine Admiral Quattro.

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FROM THE EXHIBITORS: SBTech

Richard Carter, CEO



How important is ICE to SBTech?

ICE is the premier gaming event in Europe and one where we set the tone for the rest of the year. It's also a celebration of the world-class technology, software and platform capabilities we have developed in the 10 years since we were founded, which we continue to deliver year after year.

What products will SBTech showcase at ICE?

Our presence this year (stand S3-110) is our biggest and most ambitious yet, showcasing our full product range, with our omni-channel platform capabilities at the heart of every element of the

stand, powering all our technology and innovation. Our regulation-ready omni-channel Chameleon 360 platform gives our customers full control of their operations no matter where they are, due to its flexibility, localisation capabilities, extensive responsible gaming tools and speed to market for new entrants.

Our platform, seamless sportsbook and on-property sportsbook, and managed services, are recognised as the leading offering with a global client base of more than 50 premier betting and gaming operators, state lotteries, land-based casinos, and horseracing companies now live with SBTech. We firmly believe we offer our customers the ultimate solution across more than 20 regulated markets and growing.

Delegates will also not want to miss our spectacular on-stand product reveal at 2.30pm on the opening day of the show, where a new SBTech innovation will be making an explosive entrance.

What is SBTech looking forward to most at ICE?

One of the highlights of the stand and the whole show will be our Masters series. We have built a dedicated area for delegates to meet the key people behind the SBTech brand and to listen to a series of 15-minute TED-talk style sessions from our management team and product experts discussing the hottest topics in the industry.

This marks the launch of our Masters customer learning and development solution. We will offer the solution when onboarding new clients, giving them access to a blended learning package of online and face-to-face materials, webinars and training sessions across all our product range, enabling them to maximise their usage across brand offerings.

Which conferences or networking events will you be attending?

Delegates should go no further than our Masters series, where we will have our in-house experts presenting sessions on areas such as building the features of the future, sustainable compliance, expansion and achieving our customers' goals. I will also be presenting a keynote opening session.

FROM THE EXHIBITORS: HABANERO

Arcangelo Lonoce, Head of Business Development



What are you launching in 2019?

We are always looking to add to our portfolio of slot and table game offerings. It's a great way of ensuring that we have something to suit every player and we will continue to guarantee we are releasing top quality offerings throughout the next 12 months. We've kicked off the new year with the release of Hot Hot Fruit, which combines neon lights and vibrant sounds to bring back memories of a time when games were simpler. Visitors to ICE 2019 can test out everything we have to offer on Stand N03-243.

Eleven new slot games are in the works for 2019, and all of them will be sure to excite players, with Mount Moolah, among others, due out soon.

Also, since we've noted poker to be quite well accepted in our client base, I'd say expect a few very interesting table poker game variants from Habanero in the next few months.

What makes your products different to competitors?

Finding that balance between the highest quality images and sounds, the maths model and the narrative is no easy feat. However, the Habanero team put a lot of effort into mixing all those vital ingredients together to create a completely enjoyable player experience. You have to remember no game is going to suit everybody. You also have to take into consideration that what works in Europe may not work in other cultures and vice versa. It's a delicate balance, but something we do well.

How are you looking to improve from 2018 in 2019?

As well as growing our portfolio, which now stands at just over 110 games, it's important that we continue to certify them in as many jurisdictions as possible. In 2018, we targeted Europe for the first time and already we certify games across 14 jurisdictions, including the UK, Italy, Romania, Bulgaria and Estonia. We are constantly working hard to add to our licensed offerings and are in the process of adding Portugal and Sweden into the mix, as we continue our growth. Over the next 12 months, we will continue to enhance the depth and breadth of our portfolio as we bid to improve and grow the Habanero brand.

What networking events will you be attending this year?

The networking events come thick and fast nowadays and we will also be at a range of expos around the world, including G2E Asia, SiGMA and iGB Live.



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FROM THE EXHIBITORS: IOVATION

Scott Olson, Vice President of Product



What makes Iovation different to its competitors?

One of the things which make Iovation very unique in this industry is our gaming expertise. We've been serving this industry for over 15 years, and we've built our platform to deliver custom solutions for not only general fraud, but for specific gaming fraud.

We've built a platform for the businesses that are in the gaming industry to collaborate and work together to fight fraud rings that are targeting that industry.

Another thing which makes us different is that we don't have customer support in the traditional sense. We don't have a call centre or people waiting to answer when customers have problems. We have much more to a consultant approach, where we call it customer success.

Our team had deep gaming expertise, they work with the same individual through the life of their contract and they have years of experience specifically in the gaming industry.

What is going to be new for Iovation in 2019?

With our recent acquisition of TransUnion, it brings to bear some very unique capabilities and technologies from TransUnion that were taking a look at how we can apply those in the gaming industry in the EU as well as in the US and especially in around establishing identity.

TransUnion is a leader in providing identity solutions and with the combination of our company, they have one place to go to, to get all of their requirements for meeting regulatory

environments, as well as fighting fraud and supporting their customers who might be problem gamblers.

We are also going to be launching something new in the first quarter of 2019 which will look at security and account takeover threats.

How does Iovation create the balance between fraud prevention and user experience?

Iovation has been focused on transparent mechanisms to fight fraud. To the customer, when we add new capabilities, it's really invisible to them, in terms of fighting fraud. We do fraud checks based on devices that are used and that is something which is strong in our history.

What is new is adding in that capability around the authentication and authorisation flow as well.

What we have is tools built directly into their app, so the customer isn't going out of the app and are having a better experience and then we can provide that authentication within the app through our launch key solution.

FROM THE EXHIBITORS: BETRADAR

Warren Murphy, Managing Director of Betting and Gaming



What are you launching in 2019?

Adding to our market-leading 360-degree betting offering, we have recently launched Ad:s, a new full service marketing offer for sports betting operators. It enables bookmakers to streamline their business with targeted spend on prospects that produce measurable results. With its ongoing popularity, we will also continue focusing on our Managed Trading Services (MTS) too, which is our full-service betting solution, providing the full suite of Betradar's unrivalled betting content plusfully customisable

trading and risk management.

Our products and services continue to evolve as we maintain our focus on partners and helping them stay ahead of the game, both from a technological and market perspective. Regulated sports-betting in the US will understandably still grab the headlines this year, but there are sure to be further developments in other new markets, such as Latin America, for which we are also perfectly positioned.

What makes your products different to competitors?

The Betradar difference lies in the comprehensiveness of our data and the quality of our offerings. Our modular product offering, from betting services, gaming solutions, live streaming, betting stimulation and MTS, brings to the table industry-leading depth and scale. Our range of relationships with industry stakeholders, from rights-holders to sports governance bodies, operators and gaming regulators, means we are central to the ongoing developments within the industry.

How are you looking to improve from 2018 in 2019?

Our suite of products is becoming ever more comprehensive. The technology behind offerings such as MTS is always improving and extending, offering us the opportunity to leverage technical and content advances for the benefit of our clients. Of course, with the opportunities now opening up in the regulated US sports betting market, we are hoping to bring our offering to even more clients in 2019. We are investing heavily in our US betting service and this will appeal to operators across the globe - not just the US.

What networking events will you be attending this year?

Betradar will be on the floor at ICE with a range of our representatives from across the world there talking to current and future clients at stand S1-150 and at the number of associated events and industry get-togethers throughout the week.

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Stand S4-120

GUEST COLUMNIST

STAFFAN CCHATTINGIUS

CHIEF COMMERCIAL OFFICER,
QTECH GAMES

*Cchattingius assesses
how best to capitalise on
opportunities in emerging
markets across Latin America*

The buzz surrounding Latin America has become unmistakable in online gaming circles over the past 12 months. Some of this anticipation can be attributed to the initial success of the Colombian market, which began issuing online licenses in 2017 and has since gone from strength to strength. Practical legislation, which protects consumers while also setting the stage for growth, worked the oracle in Colombia and the industry is now watching on as other markets look to repeat the feat.

Elsewhere, Peru has tracked some of Colombia's regulatory footsteps to establish a working market, even though it is neither regulated nor unregulated. Meanwhile, Brazil, for so long the game-changing contender in South America, has finally taken a major stride towards potential legalisation of online gambling with the government's recent passing of a sports betting bill. With casino soon to follow, times are a-changing.

The Remote Gambling Association estimates the Brazilian market could be worth almost \$2.1bn if correctly regulated. The potential is as palpable as it is enticing.

Argentina is opening up too, having granted online casino gaming licenses in a couple of regions, whereas Mexico's burgeoning populace should never be overlooked. With Brazil and Mexico's combined population accounting for roughly 75% of the LatAm market, you don't need to be an accountant to unpack the promise in those figures; especially with smartphone adoption rates escalating across the continent, thanks to progressive affordability and increasing 4G coverage.

As you'll have heard countless time before, the revolution will be mobile. Growth in Latin America's online sector has been powered by mobile from the outset, so operators who cannot provide an engaging mobile UI have been quickly left behind. Operators will need to adopt a local attitude though. Rolling out the same products and services that work in Asia, Africa or more mature European markets simply isn't good enough.

Being a successful games distributor in Asia, QTech Games knows a thing or two about succeeding in a fragmented domain. Operators need to customise the experience to earn the trust of both players and authorities. Varying cultural trends and sometimes conflicting legislation present both the challenge and the opportunity. If you can achieve the right flexibility of approach however, the rewards are clear.

I would venture that if one tie does unite the whole LatAm gaming community, it is player loyalty, once you've defined a familiar product line they recognise as a natural habitat. So, while you can dream internationally in Latin America, you have to act locally.

Without wishing to state the glaringly obvious, negotiating the demands of newly-regulating territories is always a potential headache. That said, it's one well worth getting your head around since the benefits far outweigh the obstacles across multiple emerging markets. Our mission statement at QTech Games has always been to recruit the best RNG games (predominantly on mobile) and distribute them to the best operators and suppliers. That remains true wherever you stick your pin on the map.

After all, there's no point chancing your arm when you already have a platform that delivers. On top of which, our industry-first cross-provider recommendation engine, QT Play, readily affords our platform the capacity to distil any prevalent gaming proclivities country-by-country (note Brazil's inherent passion for video bingo and slots). It then parcels them, according to end-user preference and respective market requirements. In turn, this allows our partners to target any region with precision and confidence, as we organically improve their efficiency along the way.

Despite the vestige of certain anti-gambling Catholic norms, gaming is enshrined in LatAm society. It's seldom wise to generalise, but what we do know is LatAm is only just showing its hand as a multi-billion-dollar industry; an industry which could deliver a dependable source of financial stability for generations to come in the region. From sleeping giants like Brazil to lesser lights such as Bolivia, all the ingredients are there.

So, while there will always be inconsistencies in tax rates, compliance, responsible gaming frameworks – even the permitted product verticals – the opportunity will invariably surpass the problem in this land of possibility. Accordingly, a modular and adaptable platform, which is agile enough to cater to differing needs, will grant operators the best path through the newly-regulating woods.

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