

RADICAL CHANGES IN THE EUROPEAN INDUSTRY



Over the past 20 years, the map of Europe has undergone several big changes. "The Old Continent" has become a new continent, with many new Eastern European nations having obtained their independence, by whatever means. At the same time, the number of European Union member States has increased little by little, a tendency which will no doubt continue in coming years. This process has made the unification of the "two Europes" practically a reality, leaving out the specific case of Russia, seemingly immersed, for whatever reason, in resuscitating the Cold War.

This new geo-political situation in Europe also has its counterpart in the new situation being experienced by the gaming industry in Eastern European nations.

First of all, the new economic, social, political and cultural openness in these countries has also reached the gaming industry, with the number of Casinos growing mightily year after year.

New gaming establishments are constantly being opened in Bulgaria, Poland, Croatia, Romania, the Czech Republic, Serbia, Hungary, etc. Russia, once more, is a special case, with over 800 establishments in Moscow alone, all of which will have to adapt to the new Decree passed by President Putin regarding new Government standards applying to Casinos.

Neither are they all small gaming dens; in many cases they are large establishments located in city centre hotels and boasting the newest tendencies in design and architecture, along with state-of-the-art slots. These establishments are not aimed exclusively at the local population and the number of visiting tourists continues to increase, thanks precisely to this new openness.

Some of the countries from these new nations are among the biggest in Europe: Ritzio in Russia, Casinos Poland and Orbis Casino in Poland, Olympic Casino in Estonia, HIT Casino Group in Slovenia, to name just a few.

The enormous potential of these new markets has not gone unnoticed by Western European operators who, for some years now, have been opening new gaming establishments in many Baltic cities.

This growth in the number of Casinos has led the major international slots and gaming material manufacturers to open offices and branches in these new countries, in order to meet demand and deliver orders.

Most Eastern European governments understand that the gaming industry can be a good ally, through taxation and the creation of new jobs.

At the same time, we have also seen a rash of new slots manufacturers in many former iron curtain countries, such as Unicum Gaming in Russia, the result of the merger between Unicum and Smart Games; Fair Play, also in Russia; Belatra in Belarus; and EGT and Casino Technology in Bulgaria.

However, without a doubt, the biggest changes have occurred in the multi-player electronic roulette sector. Eastern Europe is the home of some of the most important manufacturers in the world, with an ever-increasing following in Casinos.

Alfastreet, Gold Club, Interblock, Carat and Slomaster in Slovenia; Evona in Slovakia; and Lucky Line in Serbia are just a few examples.

Accordingly, it should come as no surprise that roulettes from these manufacturers are increasingly to be seen in Casinos not just in Europe but in very distant parts of the world, such as Latin America, the Caribbean and Asia.

Executives from some of the major European and world Casinos agree that currently nobody manufactures these products better than the Eastern Europeans.

The gaming equipment sector is probably the area where there has been least progress, except maybe for GEM and Kare roulettes in Russia and CTC material from Lithuania.

Another consequence of the development of the sector in Eastern Europe can be seen in the increase in the number of gaming fairs. On the one hand, the number of companies from this part of the world showing their wares at the main international gaming fairs of Western Europe, the USA, Latin America and Asia is continuously increasing. On the other, so too has increased the number of fairs being held in Eastern Europe, even though many are still in the primary stages. Along with the big two held in Moscow, we have to add fairs in Belgrade, Hungary, Poland and Kiev.

The big differences that still exist in many areas between Eastern and Western Europe are disappearing in the gaming sector, and in some cases Western Europe could be said to be falling behind.

In short, the situation of the European gaming industry has changed radically.



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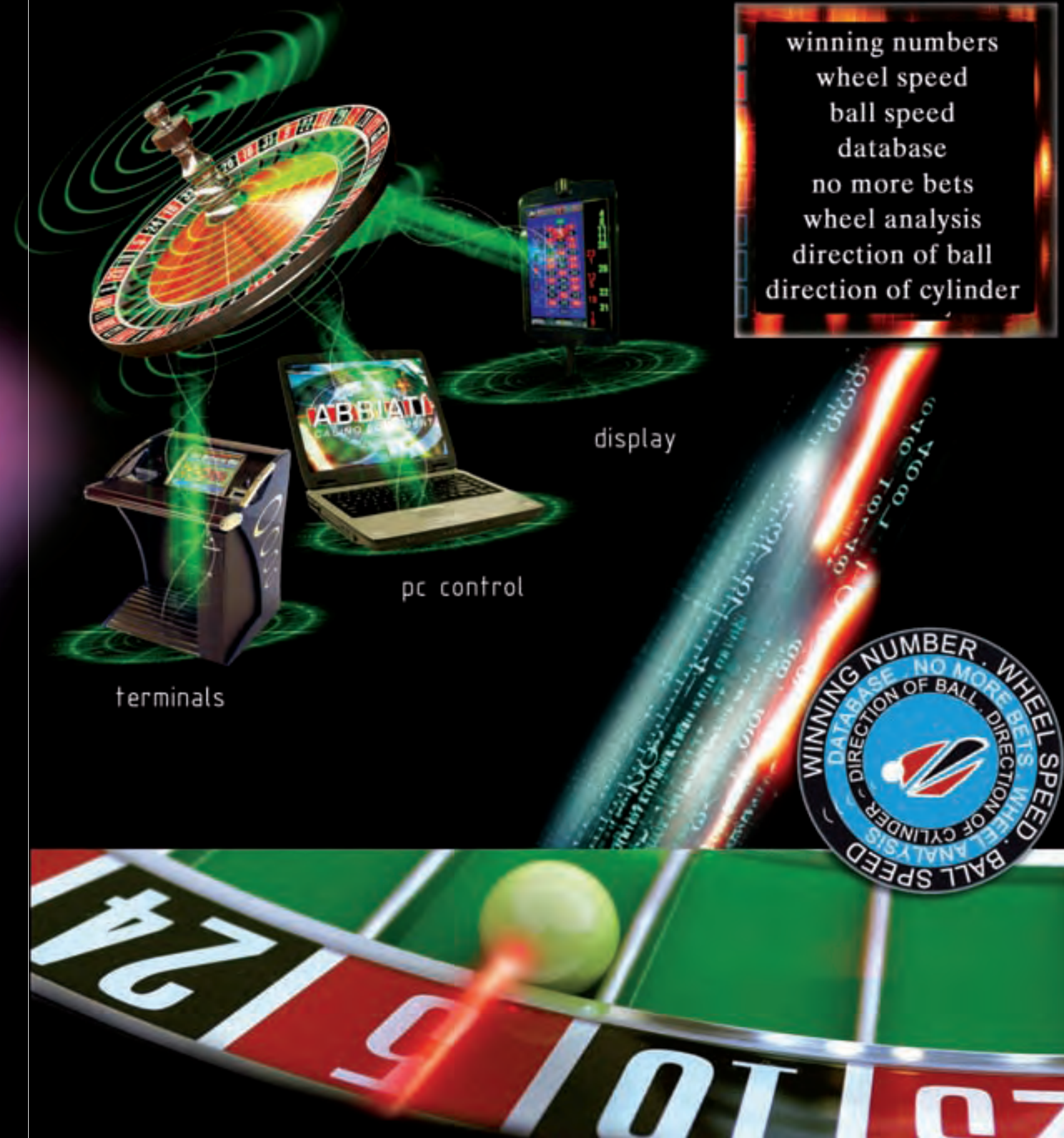


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