



# ANNUAL MEETING 2016

September 28 – Las Vegas, NV



# PLATINUM MEMBERS



Adrian Marcu - Chairman

**WELCOME**

# AGENDA

- **FINANCIAL REPORT**
- **2016 IN REVIEW**
- **2017 PRIORITIES**
- **TECHNICAL UPDATES**
- **GUEST SPEAKER**

# NEW MEMBERS

**Amatic Industries GmbH, Austria**

**Ares Way, Italy**

**CasinoFlex Systems International Ltd, Bulgaria**

**Gaming Consultants International, Australia**

**Ganlot, Inc., Taiwan**

**Innovative Technology Limited, United Kingdom**

**Onetill Pty Ltd, Australia**

**Smartgames Software Hardware Systems Holdings, Cyprus**

**Techno-consult GmbH, Germany**

**Universal de Desarrollos Electronicos, S.A., Spain**

# BOARD OF DIRECTORS

**Adrian Marcu**

IGT

Chairman

**Mark Pace**

Scientific Games

Vice – Chair

**Byron Bridger**

Atlantic Lottery Corp

Secretary

**Keith Wood**

Aristocrat Technologies

Treasurer

Roman Czubak

Novomatic Gaming Industries

Syed Hussain

Oregon State Lottery

Mike Langedock

Manitoba Liquor & Lotteries

Jeanne-Marie Wilkins

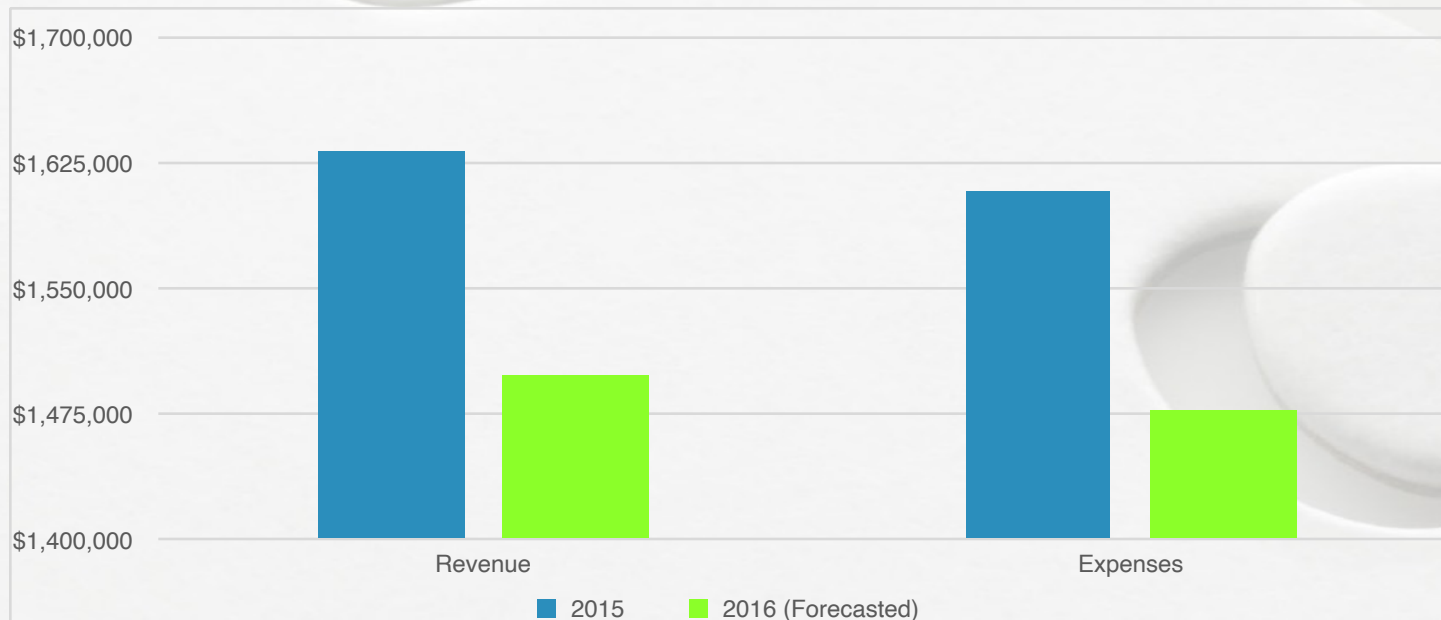
Isle of Capri Casinos

Keith Wood – Treasurer

# FINANCIAL REPORT

# Financials

2015 Vs 2016



Retained Earnings projected to be \$217,000 or 44% increase





Peter DeRaedt - President

# 2016 REVIEW

# 2016 IN REVIEW

## ■ STANDARDS DEVELOPMENT

- Updated 5 existing standards
- Released 6 new standards
- New standard development
  - Certification Database Interface for the exchange of product and approval information
  - Online Gaming Standards
    - Finalizing the industry's first online gaming standards (3<sup>rd</sup> Party Game IF)
    - Regulatory Reporting Interface

## ■ STANDARDS ADOPTION

- Completed CVT3.0 and CVT4.0 toolkits supporting G2S core classes
- Published the 2016 adoption survey

# 2016 IN REVIEW

## INDUSTRY RELEVANCE

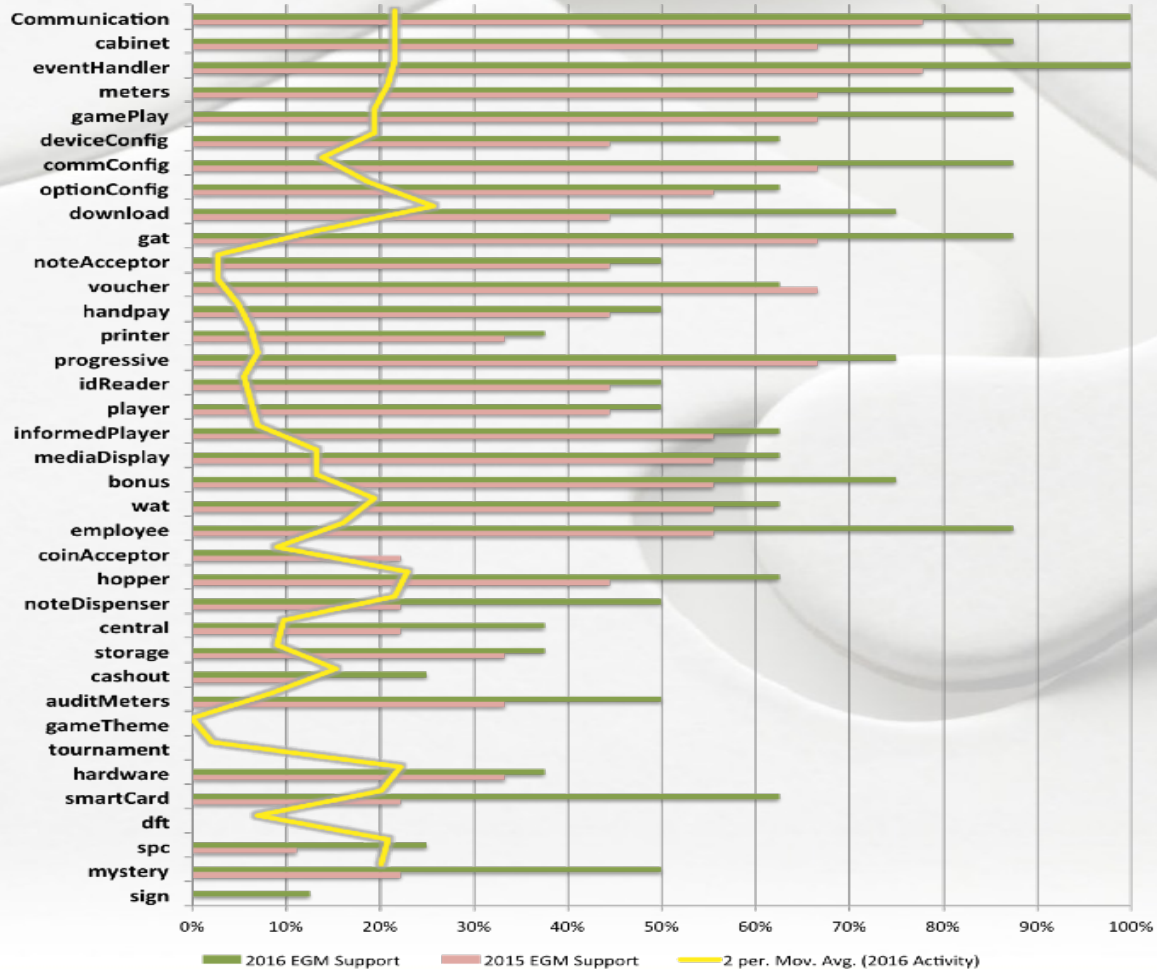
- **GSA in London**
  - ICE Seminar: Gaming Innovation in Regulated Markets
  - ICE Seminar: Online Gaming Regulations in Europe
- **GSA in Vienna**
  - European Interoperability Summit
- **GSA in Barcelona**
  - WGES operator presentation: The Strategic Benefit of Standardization
- **GSA in San Diego**
  - Addressed NIGA executive board
- **GSA in Macau**
  - GSA technical update program to MPI
- **GSA in Malta**
  - eLearning program to be launched in 2017
- **GSA in Niagara Falls**
  - National tribal gaming commissioners / regulators conference
- **Launched the GSA Regulatory Committee**

# 2016 ADOPTION SURVEY

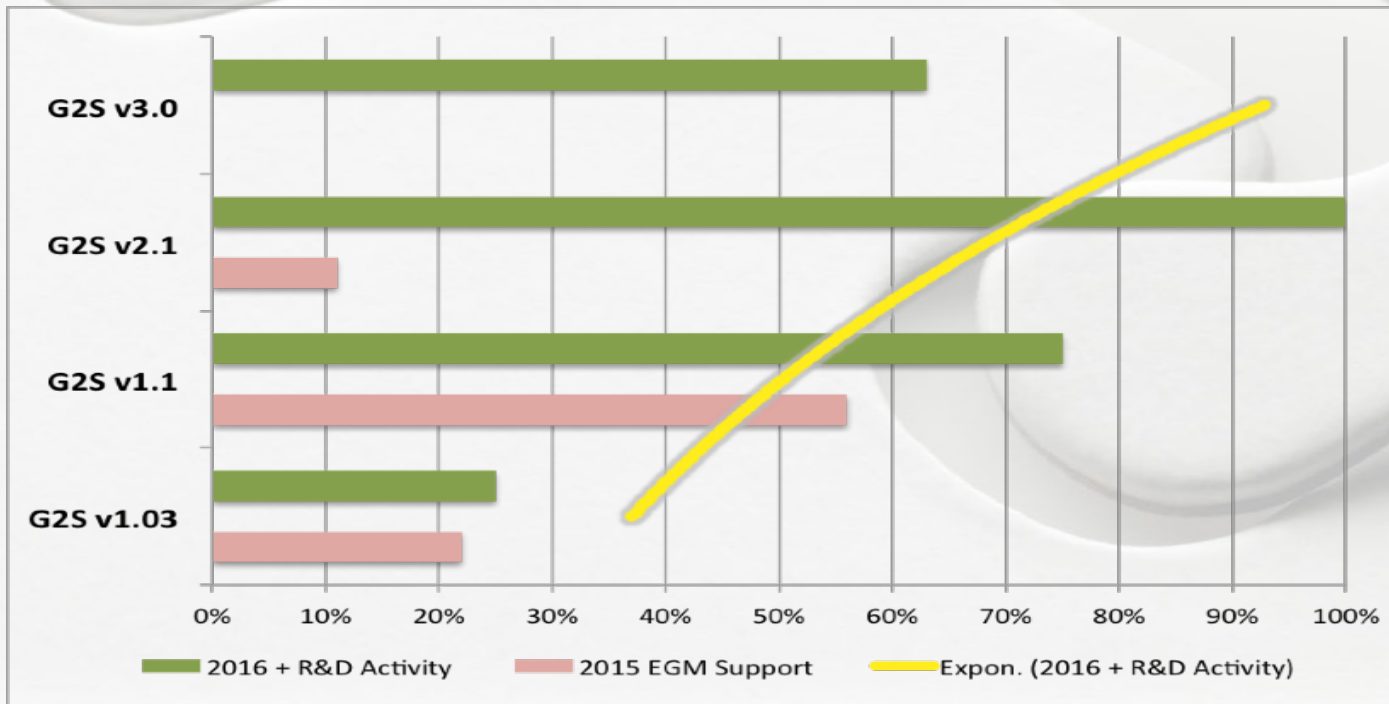
(details available for download from [www.gamingstandards.com](http://www.gamingstandards.com))

- **Adoption of GSA standards grew by 17% in 2016**
- **Companies participated: 21**
- **All EGM manufacturers have implemented 100% of the core classes!**
  - **63% support a player user interface (mediaDisplay class)**
    - **18% increase**
  - **88% support game authentication (gat class)**
    - **32% increase**
  - **75% support EGM Download (download class)**
    - **31% increase**
  - **50% support the mystery class (new in G2S v3.0)**
    - **28% increase**
- **G2S v3.0: In development by 63% of EGM manufacturers**

# GROWING G2S SUPPORT



# SPEED OF ADOPTION OF G2S



| 2013  | 2014  | 2015  | 2016  | 2017 |
|---|---|---|---|------|
| STANDARDS DEVELOPMENT                               |   |   |   |      |
| Implemented Life Cycle program                      | Identified PUI requirements                             |   | Released 6 new standards and updates to 5 existing standards                |      |
| Start working on Web socket transport layer         | Aligned S2S and G2S                                     |   | Consolidated committee work   |      |
|   | Enhanced GAT standard                                   | Started on the creation of the Certification Database Interface standard with input from Regulatory Committee | Started the creation of the Regulatory Reporting iGaming Interface standard |      |
| Identified standardization requirements for iGaming | Started the Third Party Game iGaming Interface standard | Initial draft of Third Party Game iGaming Interface standard completed  | Release Third Party Game iGaming Interface standard                         |      |
| STANDARDS ADOPTION                                  |   |   |   |      |
| Launched Industry Survey                            | Released initial adoption survey results                | Released updated adoption survey results  | Released updated adoption survey results                                    |      |
| CVT – achieved first 4 milestones                   | CVT – re-prioritized tool development                   | Released EGM/Host compliance tester (CVT1.0/2.0)  | Released EGM/Host compliance tester (CVT3.0/4.0)                            |      |
|   |   | Published G2S vs. SAS comparison  |   |      |
| Launched OGC  |   | INDUSTRY RELEVANCE  | Created new legal framework to support European outreach                    |      |
|   | Enhanced global visibility                              | Addressed NIGA executive board  |   |      |
| Created PUI committee & Identified PUI Requirements | Increased partnerships with regulatory community        | Launched the Regulatory Committee   | Established eLearning partnership to educate industry about G2S             |      |
| Initial European Commission Meetings                | GSA held European workshop                              |   |   |      |
|   | GSA held European workshop                              | Created new avenue for operator participation   |   |      |
| FINANCIAL SUSTAINABILITY                            |   |   |   |      |
| Created a BOD Funding Work Group                    | Create Value Proposition                                |   | Created new BOD workgroup and identified                                    |      |

# 2017 PRIORITIES

## IDENTIFIED

- Seek manufacturers support to create an **Interoperability Clearing House**. A place where members can interact, collaborate, and create a common understanding of all the interoperability requirements for System/EGM deployments.
- Progressively enhance the **CVT** to support specific deployments with CIC oversight
- Create industry supported **transition plan** from SAS to G2S
- Expand GSA's presence in **Europe**
- Enhance **global communication**
- Launch **GSA's e-learning portal** to provide online training to the global market
- Work towards closer collaboration between **GSA & AGEM**





Ethan Tower – Protocol Director

# 2016 REVIEW

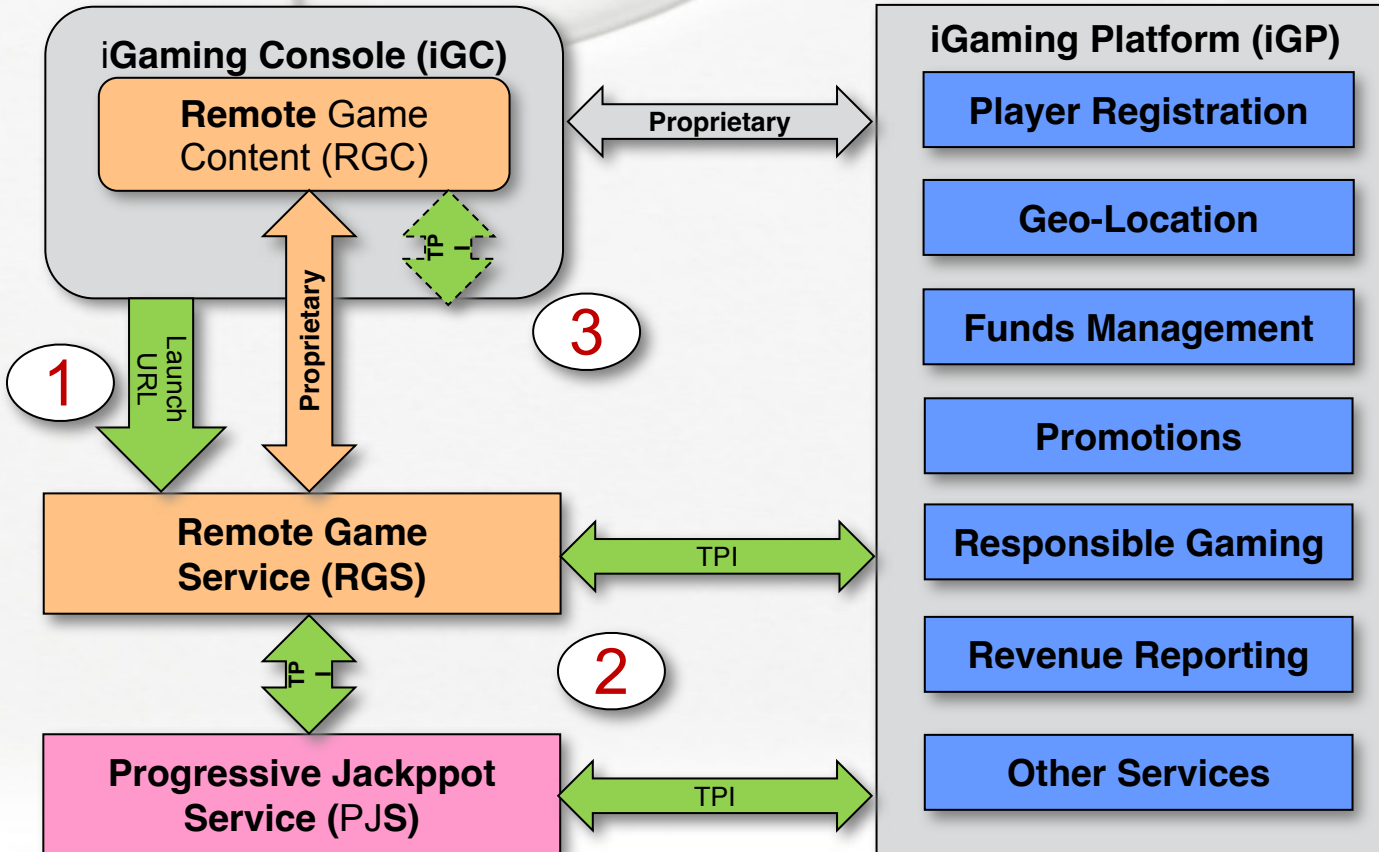
# NEW RELEASES – MARCH 2016

- **Game-to-System v3.0 (G2S)**
  - EGM Media Display Interface v3.0 (EMDI)
  - Player User Interface Standard v1.0 (PUI) – New!
  - Package Manifest File Format v1.0 (PKG) – New!
- **System-to-System v2.0 (S2S)**
  - Simple System Interface v1.0 (SSI) – New!
- **Transport v2.0 (XPT)**
  - Network & Security Specification
  - Point-to-Point SOAP/HTTP Specification
  - Multicast Specification
  - Point-to-Point WebSocket Specification – New!
  - Transport Negotiation Specification – New!

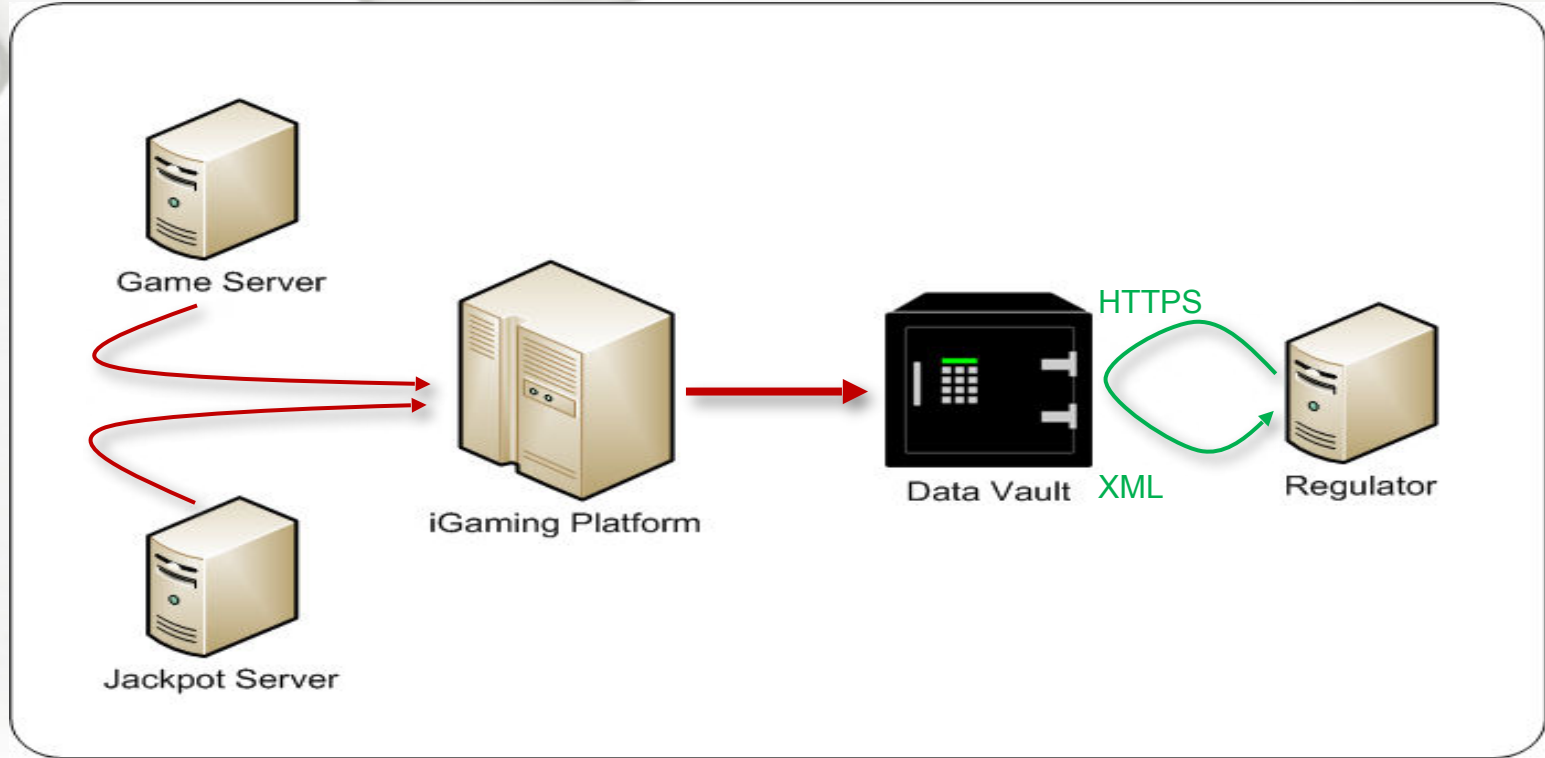
# NEW RELEASES – MARCH 2016

- **Game Authentication Terminal v4.1 (GAT)**
  - Network GAT Interface v1.0 (NGI) – New!
  - Trusted GAT Results File Format v1.0 (TGR) – New!
- **Gaming Device Standards v1.3 (GDS)**
  - Peripheral Manifest File Format v1.0 (PRF) – New!

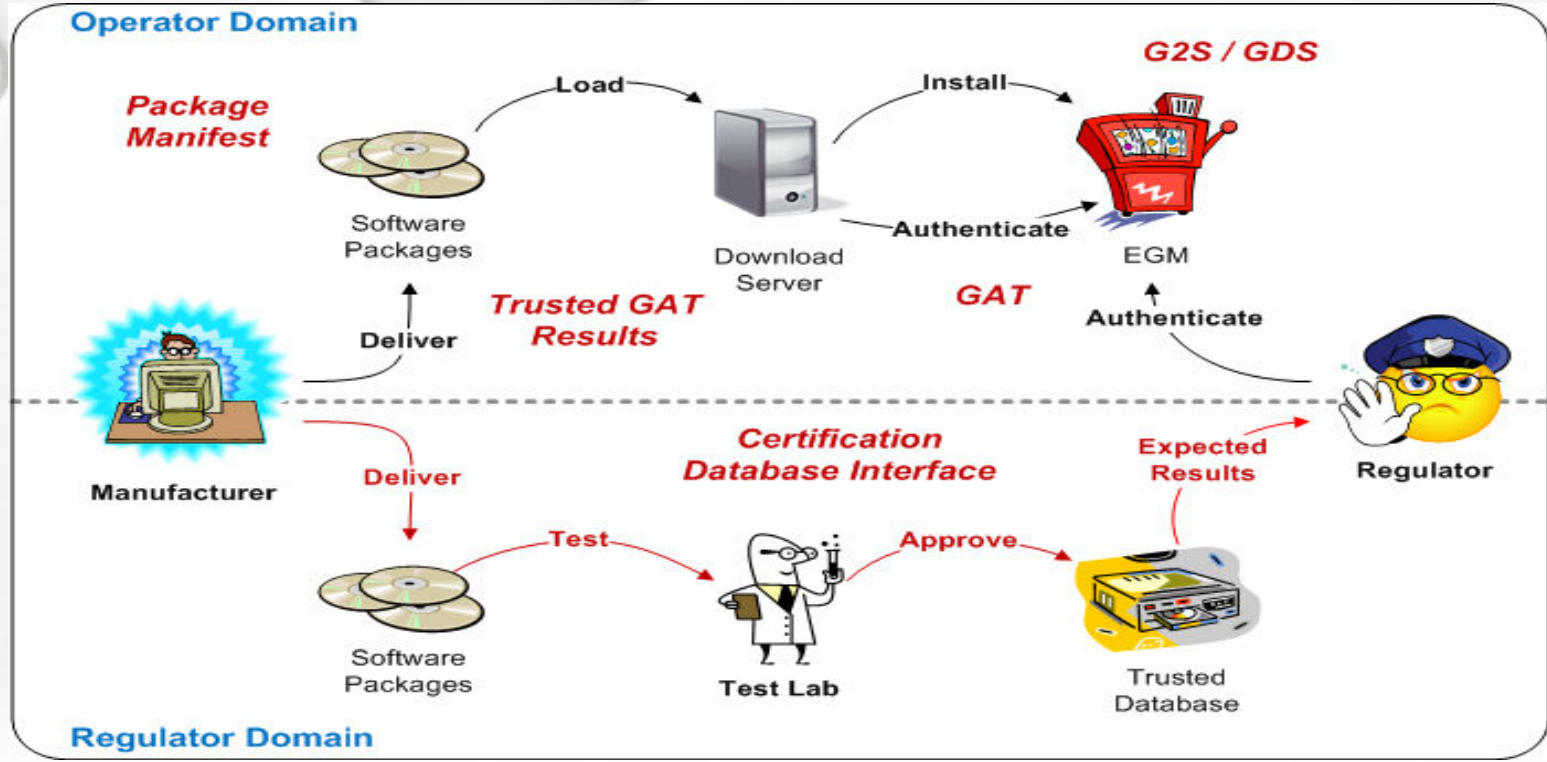
# THIRD-PARTY GAME INTERFACE



# REGULATORY REPORTING INTERFACE



# CERTIFICATION DATABASE INTERFACE



# THANK YOU

## 2016 COMMITTEE LEADERSHIP

| <b>Committee</b> | <b>Chair</b>      | <b>Vice Chair</b> |
|------------------|-------------------|-------------------|
| <b>GDS</b>       | Pat Gustafson     | Abdul Ali         |
| <b>G2S</b>       | Kevin Higgins     |                   |
| <b>S2S</b>       | Jeff Shepherd     |                   |
| <b>Transport</b> | Erik Petersen     |                   |
| <b>CIC</b>       | Ryan Popovich     | Cathy Matthews    |
| <b>OGC</b>       | Martin Snitkovsky |                   |
| <b>PUI</b>       | John Taylor       |                   |

**Byron Bridger – Director Marketing (ATLANTIC LOTTERY) & GSA  
Secretary**

**KEYNOTE SPEAKER**





A CANADIAN EXPERIENCE

# THE STRATEGIC BENEFIT OF STANDARDIZATION

# Atlantic Lottery



# A Story of Growth



# Legacy Environment

- **Technical Barriers**
  - Solutions were tied to vendor proprietary protocols
  - Integration capabilities were limited and complex
  - Long time to market for new features & games
  - Technology obsolescence

# System & Terminal Replacement



**IGT**™



**SCIENTIFIC GAMES**®



# G2S Implementation

- **Project execution 2.5 years from build to full deployment**
  - Many firsts within this process
  - VLT system w/ 7,000 devices across 1,000 locations
  - Conversion from dial-up to DSL fully online network
- **AL acting as primary integrator**
  - Working through an outsourced IT service provider
  - Test certification with system and VLTs via external lab
  - System integration testing conducted in-house

# G2S Implementation

- **First time through it was tedious BUT:**
  - Building out new system & GM OS for Wide Area operations
  - AL first jurisdiction to implement PUI
  - Actual GM vendor builds were much shorter, < 1 year
  - Given current state, with certification endorsed, implementing GSA standards would be 18 months or less

**WHY?**

**GAMING STANDARDS**



**A S S O C I A T I O N**



GAMING STANDARDS



A S S O C I A T I O N

# REGULATOR VALUE

# Regulatory Value Proposition

- **Visibility**

- GSA standards are open and non-proprietary
- Regulators understand and predict how gaming technology functions

- **Access & Influence**

- GSA participation provides full access to all standards
- Members of GSA have open forums to influence standards direction

# Regulatory Value Proposition

- **Standards-based approach**
  - Development, testing and integration of technologies are formatted
  - Operating environment is standardized with more technology
- **Open forum**
  - GSA is a forum for collaboration across regulators, vendors & operators

GAMING STANDARDS



A S S O C I A T I O N

# OPERATOR VALUE

# Enhanced Security

- **Host & EGM – Transport Related**
  - HTTP persistent connections required
  - Maximum specific message size
  - Data exchange requirements in protocol
    - GSA standards ensure comms are authenticated, secure and data has not been tampered with
- **G2S & EGM**
  - EGMs only communicate with configured hosts
  - Host configuration for specific rights to each device type

# Enhanced Security

- **Network Monitoring**
  - Fully online system enables active monitoring versus other protocols
  - Active event-based intrusion versus passive reactions after the fact
- **PUI & EGM**
  - Isolation of the browser environment
  - PUI content to EGM communications are restricted

# Download & Config

- **Remote management of OS, peripheral & game content**
  - Single source implementation – host driven w/ one operator
  - Scheduled or on demand changes
  - No active technician intervention
  - No physical media
  
- **Significant operator benefits:**
  - Operational staff savings, one FTE to manage all S/W
  - Faster time to market with new content
  - Operational fixes executed much more efficiently
  - Schedule basis enables ongoing optimization of content

# Download & Config

## EGM Upgrade Before

50 field staff  
8 weeks to visit all sites  
Distribution of Upgrade to field staff  
Player Impact  
Retailer Impact  
Extensive Travel  
Upgrade Focused vs Sales Focused



## EGM Upgrade Now

Upgrade can be done in 5 days by 1 staff  
Zero Player Impact  
Zero Retailer Impact  
Environmentally Friendly  
Increased focus on Value Add Functions



# EGM Certification

- **Historically, AL acted as the vendor's quality control program**
  - Protocol expert = testing expert
- **Standard protocol enabled outsourced test approach**
  - GSA standards, as well as GLI device standards, enable a transfer of testing to vendors
- **Adoption of industry standards for protocol, certification & interoperability**
  - Enabled move away from jurisdictional specific requirements
  - Vendor maturity, standards-based development = significant quality improvements
  - Standards enabled true certification by accredited test labs
- **Operator Benefit = reduced staff, faster time to market, higher quality**
  - No internal testing (6 FTEs to 1 FTE)
  - One submission release to field (versus 5/6+)
  - Higher quality, fewer in-field issues

# EGM Certification

## Testing Before

AL the VLT Product/Protocol Testing Experts  
Multiple Dedicated VLT Testing Staff  
Vendor Reliance on AL Performing Quality Control Testing  
AL Assumed Responsibility for Product Defects  
Customized External Testing Managed by AL  
Proprietary System Vendor Protocol  
AL Duplicating Efforts of Vendor and External Test Lab



## Testing Today

External Test Lab Provides Testing Experts  
Industry Standard Protocol Enables Transfer of Testing and Approval  
Certification & Interoperability Managed by Vendor and External Test Lab  
ALC Provides Oversight to Testing Process Approval Requirements  
Reduced Testing Timelines and AL Cost

# Incremental Features

- **Data & Analytics**
  - Fully online system enables capture of every transaction
  - S2S facilitates cross system integration = direct BI interface
  - Depth, breadth, accuracy and timeliness of data all improved drastically
- **Player User Interface**
  - New avenue for player services (RG, Loyalty, etc.)
  - Conduit for new forms of content (side games, iGames, etc.)
  - Potential to increase user appeal and revenue

# Incremental Features

- **Remote Terminal Management**
  - Command, control, configure remotely
  - Immediate/scheduled reaction to required change
  - Labor savings & operational efficiency
  
- **Single wire solution**
  - All services (games management, jackpot, player tracking, etc.) served via one EGM connection.
  - Simplified operations, enhanced program view

GAMING STANDARDS



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# VENDOR VALUE

# Standardized Integration

- **Theoretical plug & play**
  - Once certified, system & EGM integration is faster
- **Reduced development effort & cost**
  - Develop one core, sell to all customers
- **Reduced testing effort & cost**
  - Test the core once, sell to all customers
- **Faster time to market**
  - Transfer core code from customer to customer
- **Ability to sell new content**
  - Deeper integrations across more customers
  - New avenues (PUI) to extend content to players
- **What about SAS?**
  - Provides some of this today but is antiquated

GAMING STANDARDS



A S S O C I A T I O N

# INDUSTRY COLLABORATION

# GSA's Independence

- **Forum for collaboration**
  - Independent entity facilitating open communication
  - Established touch points for vendors, operators & regulators
- **Members influence industry direction**
  - Standards are built by members
  - Debates are encouraged
  - Operators & regulators can gain a larger, collected, voice
- **Opportunity to develop for the future**
  - New standards for new gaming avenues
- **Supporting industry adoption of standards**
  - Clarify the standards & how to adopt



GAMING STANDARDS



A S S O C I A T I O N

# THE AL EXPERIENCE - BENEFITS

# AL Ultimate Benefits

- **Efficiency in operations**
  - Remote device management
  - Download & config of games
  - Outsourced integration & certification
  - Ease of integration for new vendors
  - Ultimately saved 10 FTEs and SIGNIFICANT resource hours
- **Modernized gaming network**
  - Fully online network
  - Enhanced security & capabilities
  - Much deeper access to information
- **A new toolset to meet player needs (PUI)**
  - Responsible gambling service
  - Loyalty module
  - Delivering new content (new revenue streams)
- **More revenue**
  - Increased sales by 10%
  - New opportunities via new content

GAMING STANDARDS



A S S O C I A T I O N

# QUESTIONS?

Peter DeRaedt - President

# CLOSING COMMENTS

# THE GSA TEAM

- **Michelle Olesiejuk – Executive Director (13 years)**
- **Ethan Tower – Technical Director (9 years)**
- **Oscar Salgado – Documentation Manager (3 years)**
- **Lisa Rodriguez – Technical Project Manager (10 years)**



