

PLAYING FAIR

SOCIAL RESPONSIBILITY IN GAMING: INDUSTRY COMMITMENTS AND BEST PRACTICE IN THE LAND-BASED GAMING SECTOR

The European Gaming and Amusement Federation, April 2015.

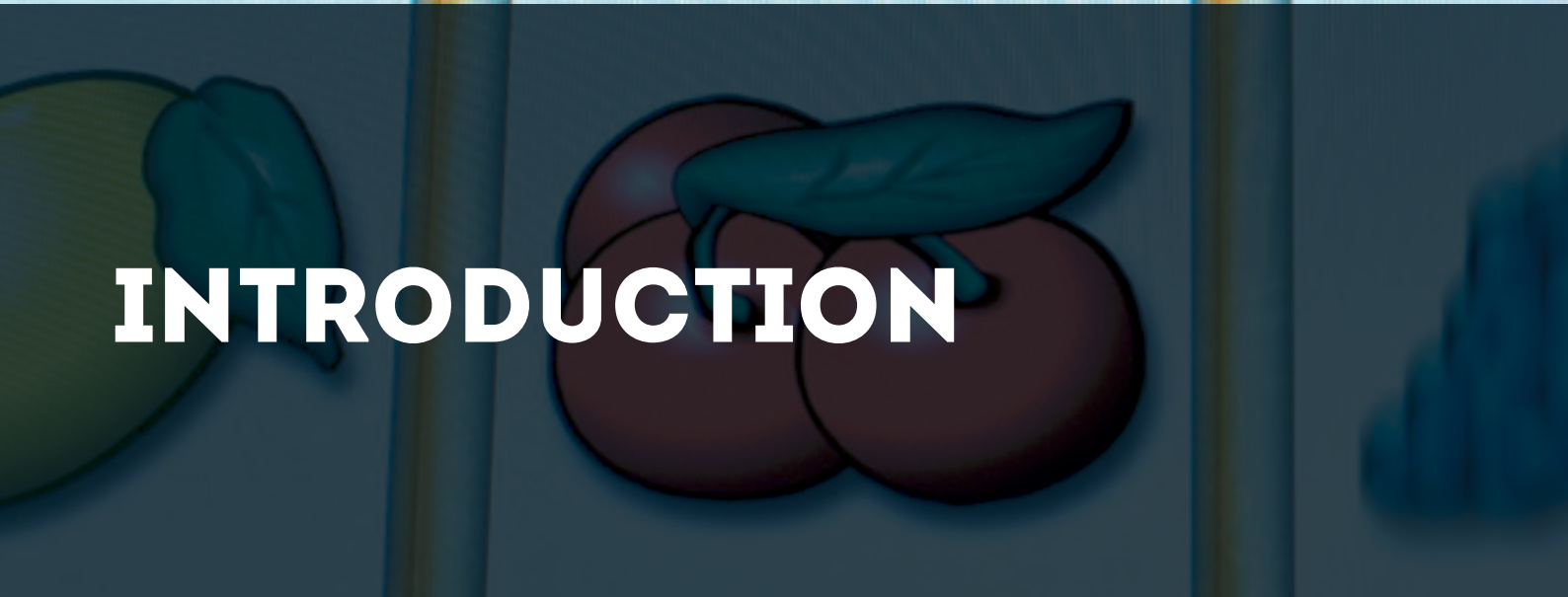


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INTRODUCTION



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INFO

EUROMAT, the European Gaming and Amusement Federation, represents Europe's private sector gaming and amusement machine industry. EUROMAT's members manufacture, distribute and operate gaming and amusement machines across Europe. Gaming and amusement machines provide customers with an enjoyable leisure and entertainment experience in a regulated and safe environment.

Gaming entertainment is an important component of Europe's leisure industry. EUROMAT's members represent the full supply chain of gaming entertainment (machine manufacturers as well as single site and arcade operators) to meet a consistent demand in Europe for a safe and highly regulated gaming experience.

Land-based gaming entertainment is a labour-intensive industry contributing to the European economy through direct employment and the indirect benefits that employment generates for the local communities in which our members operate, manufacture and procure.

This report sets out how - through compliance with regulation, industry initiatives and direct and indirect economic impact - gaming entertainment is making a positive contribution to Europe. The sector's priority is to maintain this positive contribution for the future. Achieving this is a collaborative effort between the industry, regulators and other stakeholders. This document is designed to act as the basis for an on-going dialogue between these groups.



While there is a diversity of regulatory practice across EU Member States in respect of gaming, this does not prevent the industry coming together at a European level to define common areas of best practice where businesses can work together to promote responsible gaming.

EUROMAT's members represent a sector that, through a combination of tight national regulation and industry corporate social responsibility, is low risk in terms of problem behavior; nonetheless EUROMAT recognises that it is in the interests of the future success of the sector that these high standards are maintained and, where possible, enhanced. This is why a statement of commitments is included in this document setting out what EUROMAT and its members are prepared to do in pursuit of this goal.

For further information on EUROMAT please visit www.euromat.org



THE ECONOMIC FOOTPRINT OF THE INDUSTRY IN EUROPE

The total number of gaming machines in Europe currently stands at 1,205,862. This represents a 1.5% increase from 2007 but a 6.8% decrease from 2010 when the installed base was at a high of 1, 291, 267.

Gross Gaming Revenue which is the amount played (stake) less the prizes paid out and represents the net amount spent by players was €19, 389,338,000 for 2013.

Direct employment - that is the people employed by operators, manufacturers and distributors of gaming machines, terminals or systems used by the industry - was 262, 851, a 2.7% decrease from 2007.

While the number of gaming machines and employment have declined, gaming taxes have been on a consistent upward trajectory. Gaming taxes are those that are specifically applied to gaming. These are calculated using a range of different formulas - on the "drop", on the GGR or a fixed lump sum per day, month, quarter or year. Gaming tax for 2013 stands at €4,353,749,000 which is an increase of 45 per cent from 2007.

EUROMAT's members are part of an EU gaming market which the European Commission estimates is worth €84.9 billion with annual growth rates of around 3%¹. The vast majority of this is land-based gaming; however, online distribution of gaming is the fastest growing service activity, with annual growth rates of almost 15%. Online distribution includes diverse channels like the internet, mobile phone technology or digital TV.



1 Green Paper on on-line gambling in the Internal Market, European Commission, 2011.



**THE IMPORTANCE
OF RESPONSIBILITY
FOR SUSTAINABLE
INDUSTRY GROWTH**

While the overwhelming majority of customers play responsibly, it is a fact that a very small minority are unable to do so. These customers are commonly referred to as problem or pathological gamblers, depending on their behaviour. These terms are defined by the World Health Organisation². As responsible operators, our industry wants to ensure that we have policies and processes in place to address this small but important group.

To support this objective, in 2007 EUROMAT adopted the Maastricht Declaration (see annex 1 of this document) which committed EUROMAT's members to participate in the "development of prevention programmes to avoid the risks associated with the abuse or misuse of gaming devices and facilities" and promote programmes which make it possible for players to identify gaming operations that comply with the principles and practices of responsible gaming.

SOCIAL RESPONSIBILITY IN GAMING: BENEFITING CUSTOMERS, COMMUNITIES AND EMPLOYEES

EUROMAT believes that Industry, government, and stakeholders must work together to ensure that social responsibility serves customers, communities, and employees. The way that responsibility applies to each of these groups is set out below.

CUSTOMERS

International studies show that the vast majority of the adult population enjoy gaming entertainment in a safe and responsible way as part of their leisure activities.³ Responsible gaming should target those who, due to a combination of different factors, cannot engage with gaming in a responsible way.

This is in part regulated by Member States, with a range of different rules applying to gaming and particularly to the land-based sector. However, in many cases the industry goes above and beyond regulation because responsibility is a necessary part of the business model. Businesses want to entertain the vast majority of players that are responsible, but do not benefit from capitalising on those few who exhibit compulsive or vulnerable behaviour. For this reason,

EUROMAT's members make players aware of the consequences of problem behaviour, promote the availability of resources to those who need assistance, and deter those who exhibit problem behaviour from playing.

It is often the case that best practice developed on a voluntary basis by the European gaming and amusement industry has been adopted by regulators and converted into legislation. Specific examples can be seen in the country chapters of this report. This underlines the seriousness with which the industry takes social responsibility.

COMMUNITIES

In partnership with governments, public health bodies, academics, social welfare groups and law enforcement agencies, EUROMAT and its members seek to enhance the understanding of responsible gaming, the promotion of evidence-based regulation, and the proper enforcement of existing laws protecting vulnerable people.

In addition, the daily business of the gaming machine sector helps to entertain people, enhancing the enjoyment of social life and adding positively to the experience provided by other leisure services. Through this activity the sector provides direct and indirect employment, skills training to staff, local community amenities and tax revenue that collectively helps to provide a better place to live for the communities in which the sector invests.

EMPLOYEES

The sector ensures that employees act in a socially responsible manner and interact with customers in a professional and supportive fashion. Corporate social responsibility programmes have become a common feature of every gaming operator's business. They ensure that employees share the goal of promoting socially responsible gaming and are trained and empowered to provide assistance to players.

Operators are focused on customer satisfaction which is defined by the quality of their staff. For this reason, they invest in people through training and professional skills to ensure that customers get the best possible service.

Manufacturers are investing in the next generation of machine engineers with established apprenticeship schemes which are helping to keep manufacturing expertise and jobs in Europe.

² Link to the WHO Classification of Mental and Behavioral Disorders ("pathological gambling" – p. 161)

³ As confirmed by the British Gambling Prevalence Survey 2010, the UK Gambling Commission's Report on Gambling Participation, as well as studies from the German Federal Centre for Health Education and the University of Tampere.





THE FOUR PILLARS OF RESPONSIBLE GAMING PUBLIC POLICY

EUROMAT and its members believe that the following elements are necessary for effective responsible gaming.

AVAILABILITY OF QUALITY RESEARCH TO ENABLE EVIDENCE-BASED POLICYMAKING

Credible studies should be the basis of any responsible gaming policy. It's the joint responsibility of government, industry and academia, supported by other stakeholders, to work together to assess the factors that trigger problem behaviour.

The gaming and amusement industry can contribute by making industry data available to public authorities and in many cases the industry also directly funds research into problem behaviour; however, as governments derive substantial tax revenues from the industry, and this trend is increasing, EUROMAT and its members believe that a greater proportion of this revenue should be used to directly fund the development of a body of credible evidence.

Examples of existing research which provide a good starting point include:

- German Federal Centre for Health Education's report on gambling behaviour and gambling addiction, "Glücksspielverhalten und Glücksspielsucht in Deutschland 2013"
- British Gambling Prevalence Survey 2010
- Dr Biljana Kilibarda "National Survey on life styles of citizens in Serbia 2014 - Key findings on substance use and gambling", Institute of Public Health of Serbia "Dr Milan Jovanovic Batut" 2014.
- Dr Ivica Mladenovic, Dr Goran Lazetic: "Dependence on gambling with therapeutic handbook", 2014, Serbia
- Research Dutch Scientific Research and Documentation Centre, part of the Ministry of Security and Justice, Dutch Government, "Gokken in kaart (gambling in card)", December 2011

Academic research should be based on clear and transparent methodology that helps to track and measure trends over time. With this in mind, EUROMAT is concerned that the latest edition of the Diagnostic and Statistic Manual for Mental Disorders (DSM-5), which is soon to be used as the basis to classify problem gaming, lowers the threshold for diagnosis. In our view this is likely to distort data and mislead policymakers as to the growth and prevalence of genuine problem behaviour. It will also make comparisons with historical data more complicated. Good evidence is based on clear and universally applied definitions and this development will in our view undermine this principle.

EFFECTIVE EDUCATION AND COMMUNICATION

Education includes the provision of information to customers to encourage them to play more responsibly and the training of personnel to enable them to provide better and more qualified assistance to customers.

In many countries, regulation requires information related to preventing problem behaviour to be displayed in gambling premises. For example, in Serbia gaming legislation states that leaflets, addressing issues of addiction including contact information for a certified treatment institution, must be available at each counter or window where games of chance are played. In addition, all personnel who are in direct contact with customers must be trained to deploy the right preventative measures to avoid problem behaviour.

German legislation includes further measures to prevent problem behaviour, such as a clause requiring both single site and arcade operators to submit a "social concept", which outlines how they plan to guarantee a high level of player

protection. In Spain, the regulator recently launched the Responsible Gambling Initiative, which brings together representatives from the public and private sectors in an effort to agree preventative measures to avoid problem behaviour.

In countries where measures to educate players are not included in legislation, many operators choose to implement them on a voluntary basis. For example, in Serbia companies belonging to EUROMAT's member JAKTA are involved in financing self-help groups and helplines as well as ensuring that there is no credit offered to customers and advertising is delivered responsibly.

REGULATION

Successful regulation has to strike an effective balance between allowing adult consumers the right to exercise their free will to spend their leisure time and money as they prefer and the need to limit an activity to protect a minority of citizens who experience difficulties. In addition, ensuring even regulatory treatment of online and offline channels is a new but increasing challenge.

Depending on the precise jurisdiction, there are a range of mandatory and voluntary options open to regulators to achieve these objectives. In many cases, voluntary initiatives by industry, such as codes of practice, have been integrated by national regulators into licence conditions. Some mechanisms, like age restrictions, are universal to all jurisdictions, whereas others vary based on the local social and cultural context.

Examples of different regulatory and self-regulatory measures used to protect customers in various jurisdictions include:

- The provision of helplines
- Licensing/ certification of gaming machine premises to permit the siting of certain machine types
- Age restrictions for the protection of minors
- Display of information on the risks of excessive gaming and how to obtain assistance if a customer needs help.
- No credit provision
- Regulation of promotions
- Introduction of advertising and marketing standards to protect people
- Provision of self-evaluation tools.

Access to information is a prominent feature of existing voluntary and mandatory requirements, examples include:

- Brochures, posters, and flyers in commercially operated gaming premises highlighting the potential

dangers of gaming activities for the vulnerable and signposting availability of advice and help.

- Information helpline numbers displayed on the screens of gaming and amusement machines installed in public places and licensed gaming premises. Through help lines customers can make contact with trained counsellors and receive advice on support available in their local area.

In addition to requirements surrounding the operation and promotion of machines, there are also a number of mandatory and self-regulatory technical requirements. Examples include:

- The regulation of stake and prize
- Limitation on the type and number of machines by premises
- Licensing of operators who can offer gaming and amusement machines
- Technical standards for gaming machines and machine testing
- Discretionary inspection of machines and authorisation for linking of games

Examples of regulatory and self-regulatory corporate practice include:

- Training of staff and personnel to identify pathological gambling indicators
- Responsible employment practices
- Audit and refresher training
- Health and safety compliance

This non-exhaustive list of examples shows the depth and breadth of practice to address problem behaviour.

THE TREATMENT OF PROBLEM BEHAVIOUR

Effective treatment is an essential element of ensuring responsible gaming. It's not the role of industry to define appropriate forms of treatment to address different forms of play-related difficulty. EUROMAT believes that industry should support the development of an appropriate evidence base on problem behaviour and ensure communication with consumers on this issue. Consumers should be directed to the right support services to address what are often complex conditions. National authorities, receiving tax revenue from the industry, should be responsible for the provision of required treatment to the small minority of the population which exhibit problem behaviour.



**PROTECTING
CONSUMERS IN
AN INTERNET AGE**

According to the European Commission, online gaming is growing at an annual rate of 15%, nearly double the land-based sector. Roughly 6.8 million consumers access these channels across Europe. The European Commission also points out that out of 14,823 active gaming sites in Europe more than 85% operate without any licence⁴. The specific challenges posed by online gaming were acknowledged by the European Parliament in its 2013 resolution on the subject as MEPs stated that “the online gambling sector differs from other markets on account of the risks involved in terms of consumer protection and the fight against organised crime, as repeatedly acknowledged by the Court of Justice of the European Union”⁵.

The growth of gaming through online channels – internet, mobile, social media and digital television– is a significant regulatory challenge for Member States, but must be regulated nonetheless. While Europe wide statistics on the impact of significant online growth are unavailable, the available data in Member States is of concern to any responsible operator. For example in Austria, while the growth rate of so-called pathological gamblers has increased by only 2 per cent between 2008 and 2013 in the gaming machine sector, the online sector has seen an increase of 118 per cent over the same period⁶. Medical experts in Serbia have raised concerns that the combination of a number of factors - isolation; availability in terms of access and choice for players; the disconnection between play and cash money; the anonymity that players have and the speed with which they can play – make internet gaming a serious risk worthy of further examination⁷.



> 'State examination passed. Gaming machines are government-certified for the players' protection. No gaming without rules.' An example of a responsible gaming poster used in Germany.

While there are studies which highlight the risks that the internet poses, there is a growing concern amongst some academics that this risk is yet to gain the required level of recognition. Today problem behaviour linked to the internet is not listed in the latest DSM manual (DSM-5, 2013), which is commonly used by psychiatrists. Internet gaming disorder is only listed in an appendix as a disorder requiring further study.⁸ It's clear that further work is necessary to ensure that there is a deeper understanding of the risks posed by online channels to vulnerable consumers.

In seeking to address these problems, regulators must avoid applying online solutions to offline businesses. The growth of the online sector and the risk this poses to consumers is creating momentum behind player-centred approaches to reducing harm. These range from Return to Player information messages, helpline information or sophisticated pre-commitment or self-exclusion facilities. Given the technological sophistication of these prevention measures they must be applied in a risk-based way. Low risk gaming machine operators should not be forced to adopt expensive technology without significant evidence that it is required. EUROMAT and its members will continue to work with regulators and academics to build an improved body of knowledge to inform effective policy-making to address the growth of online gaming and any harm associated with it.

4 Green Paper on on-line gambling in the Internal Market, European Commission, 2011.
 5 European Parliament Resolution of the 10th September 2013 on online gambling in the internal market: <http://www.europarl.europa.eu/sides/getDoc.do?pubRef=-//EP//TEXT+TA+P7-TA-2013-0348+0+DOC+XML+Vo//EN>
 6 Figures taken from Spielsuchthilfe Wien and the Amtliche Wiener Zeitung
 7 Dr Snezana Alcaz M.Sc, neuropsychiatrist, Head of daily hospital, Special hospital of Addiction Diseases, Belgrade
 8 American Psychiatric Association (2013). Diagnostic and Statistical Manual of Mental Disorders (Fifth ed.). Arlington, VA: American Psychiatric Publishing, pp. 797-798. ISBN 978-0-89042-555-8.



INDUSTRY PLEDGE

For the vast majority of people gaming is a normal leisure activity and an enjoyable form of entertainment which enhances social life. However, for a small minority gaming can and does create problems. We believe that industry can play a role in tackling this issue but only in partnership with regulators, public health bodies and NGOs.

With this in mind, EUROMAT and its members will continue to:

- Raise awareness amongst our member companies about the social impact of problem behaviour.
- Promote a combination of preventative measures including awareness, education, monitoring and control to tackle a complex problem.
- Disseminate best practice in responsible gaming.
- Encourage our members to inform consumers about the possible damage that problem gaming behaviour might cause.
- Consult with public health bodies, regulators and NGOs on the contents of this pledge and report at regular intervals on the progress towards meeting these commitments.





ACTING RESPONSIBLY: THE GAMING MACHINE SECTOR IN EUROPE



AUSTRIA

PROMOTION OF RESPONSIBLE GAMING

For more than 25 years, responsible gambling has been actively promoted by the industry in Austria, not only with limited stakes and prizes and minimum payouts, but also with strict age limits, restrictions on locations and appropriate stickers on machines with warnings and telephone numbers of different helplines. These helplines are sponsored by the operators and the industry.

AGENCIES PROVIDING ASSISTANCE

There are various counselling and therapy centres, groups, advisors and clinics for pathological gamblers in the nine Austrian counties, a number of which also care for persons indirectly affected by this issue. They are supported by the industry and operators, and some treatment centres are supported by the county governments and social services. Some of them offer online services. They are supported by the county governments and social services, if the diagnostic thresholds and criteria of ICD-10 of the WHO for pathological gamblers are fulfilled. Differential diagnosis excluding pathological gambling and comorbidities must be taken into consideration.

EUROMAT MEMBER ASSOCIATION

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BELGIUM

LEGISLATION APPLICABLE TO THE GAMING MACHINE SECTOR

In Belgium, legislation is designed to limit gaming opportunities and to protect the player.

It is prohibited for any operator to allow players any form of loan or credit. Operators of gaming establishments must inform their clients about this in a legible and conspicuous manner in all areas accessible to the public.

Leaflets containing information on gambling addiction must be made available to the public in a visible place (in casinos, gaming arcades and pubs).

Cash-dispensing machines are forbidden in casinos, gaming arcades and pubs. Every player can ask, on a voluntary basis, to be excluded from casinos and gaming arcades. The list of excluded persons has to be checked by the operator of casinos and gaming arcades at every visit.

For each game of chance operated in casinos, gaming arcades and pubs the law fixes the maximum amount of stake, loss and gain. A maximum average hourly loss per player is also fixed.

Access to the gaming halls of casinos and gaming arcades is prohibited to persons under 21 years of age. Betting shops are open to those who are over 18 years old.

The player has to present an identity card and provide his full name, date and place of birth, occupation and address and has to sign a register.

OTHER RESPONSIBLE GAMING MEASURES

Players can request to be excluded from gambling establishments through the Belgian Gambling Commission. As of 15 July 2011, exclusions at the request of a third party have been made available. Social workers and other interested parties can apply to the Gaming Commission to limit the access of a person believed to be a problem gambler.

BODIES PROVIDING ASSISTANCE

The Belgian Gaming Commission (www.gamingcommission.fgov.be) directs players to a number of different self-help groups that are privately funded. Amongst these are:

Houba

Houba de Strooperlaan 136

1020 Brussel

Phone: +32 4 789 090

Vereniging Voor Alcohol – En Andere Drugproblemen

Vanderlindenstraat 15

1030 Brussel

Phone: +32 4 230 333

E-mail: vad@vad.be

Website: www.vad.be



LEGISLATION APPLICABLE TO THE GAMING MACHINE SECTOR

The Ordinance on Physical and Technical Requirements for Organising Games of Chance in Casinos, on Slot Machines and in Betting Shops includes obligations for operators to provide notifications about social responsibility, the harmful effects associated with gambling and a telephone number to access professional help related to the prevention of addiction. On the premises of casinos, slot machine clubs or betting shops there should also be a notice banning the entry and participation of persons under the age of 18. Similar obligations have also been imposed on online casino and remote betting operators.

OTHER RESPONSIBLE GAMING MEASURES

The industry has increasingly been active in the promotion of responsible behaviour amongst customers. Private companies provide customers with information on how to prevent problem gambling and where to seek help if necessary.

AGENCIES PROVIDING ASSISTANCE

KLOK – Klub Ovisnika o Kocki, Zagreb

Doc. Zoran Zoričić

Doc. Robert Torre

Helpline: +385 800 7888

Centar za Prevenciju Ovisnosti

Nastavni Zavod Za Javno Zdravstvo

Kalvarija 8, Rijeka

Phone: +385 91 720 1053

Website: www.kockanje.info

EUROMAT MEMBER ASSOCIATIONS

Croatian Association of Automat Clubs (HUAK)

Vlaška g.

10 000 - Zagreb

Phone: +385 97 79 68 875

Email address: tajnik@huak.hr

Website: www.huak.hr/eng/about-us

Croatian Amusement & Music Operators Association (UPZI)

Ulica Janka Rakuše 10.

10 000 - Zagreb

Phone: +385 1 77 94 947

Fax: +385 1 37 05 097

Email address: upzi@upzi.hr

Website: www.upzi.hr

Clinique du Jeu Pathologique Dostoievski – CHU Brugmann

Service de Psychiatrie et de Psychologie Médicale /
Centre Hospitalier Universitaire Brugmann
Place Van Gehuchten 4

1020 Bruxelles

Phone: +32 4 772 777

E-mail: cliniquedujeu@chu-brugmann.be

Website: www.cliniquedujeu.be



LEGISLATION APPLICABLE TO THE GAMING MACHINE SECTOR

Gaming machines are only permitted in licensed restaurants and approved arcades and each single machine must be approved by an authorised test institution. All machines in operation must be linked to a central monitoring system controlled by the Gaming Board.

Tax must be paid by operators on a monthly basis on the following approach:

- In restaurants: 41% of Cash-box up to 30.000 DKr. (4.027 Euro) per month, plus 71% of Cash-box over 30.000 DKr. (4.027 Euro) per month.
- In arcades: 41% of Cash-box up to 250.000 DKr. (33.557 Euro) per month, plus 71% of Cash-box over 250.000 DKr. (33.557 Euro) per month.

Danish legislation used to require an industry levy of 1% of the profit (stake - cash out) for treatment and research into problem gaming. This law has changed in favour of a general tax from which resources for problem gaming are allocated.

OTHER RESPONSIBLE GAMING MEASURES

In a 5 year period, the Dansk Automat Branche forening (DAB) distributed 10.000 information pamphlets including contact information for addiction treatment centres. DAB members attached 25.000 stickers to machines warning about problematic gaming behaviour.

AGENCIES PROVIDING ASSISTANCE

There are 4-5 independent treatment centres in Denmark, to which the public health system refers patients for treatment. They are funded by an industry levy of 1% of turnover. The biggest treatment centre in Denmark is:

Centre for Ludomani
 Ostergade 42,
 5000 Odense C.
 Phone: +45 70 11 18 10
 Email address: info@ludomani.dk
 Website: www.ludomani.dk

EUROMAT MEMBER ASSOCIATION

Dansk Automat Branche forening (DAB)

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 Fax: +45 86 57 25 73
 Email address: kl@d-a-b.dk
 Website: www.d-a-b.dk



LEGISLATION APPLICABLE TO THE GAMING MACHINE SECTOR

The legal requirements governing the manufacturing and operation of gaming and amusement machines are contained in Article 33 c-i of the Trade, Commerce and Industry Regulation Act (GewO), in the Gaming Ordinance (SpielV 2014) and in the Interstate Treaty on Gambling 2012 together with the Amusement Arcades Acts of the 16 German Federal States. The legal requirements foresee stringent protection of minors and customers.

Several player protection measures are included in the Amusement Arcades Acts of the German Federal States, such as minimum distance between amusement arcades, prohibition of multiple arcades in one building and the social concept requirement. According to the social concept requirement, single site and amusement arcade operators must submit a "social concept", in which they outline how they will guarantee a high level of player protection, for example, by means of early diagnosis and prevention. They are also required to provide information and warnings on the risk of addiction and on the probability of possible wins and losses.

OTHER RESPONSIBLE GAMING MEASURES

The Amusement Arcades Act of Hesse provides a joint client exclusion system for all arcades in Hesse. Exclusion can take place either at the request of the player, at the initiative of operators, or at the request of third parties that are directly involved. Exclusion lasts at least one year. After this period the player can make a written request to lift the ban. Operators can be held liable for losses if they fail to prevent vulnerable players from playing.

AGENCIES PROVIDING ASSISTANCE

There are many authorities, organisations, associations, clubs and clinics in Germany devoted to dealing with pathological gambling. With few exceptions, all bodies involved in out-patient counselling and treatment, in-patient provision and self-help are represented by the Deutsche Hauptstelle für Suchtfragen e.V. (The German Centre for Addiction Issues). There are approximately 150 nationwide self-help organisations and consultations are available in over 900 out-patient advice and treatment centres.

The Federal Centre for Health Education (FCHE) is an authority within the sphere of responsibility of the Federal Ministry of Health. The task of the FCHE is to promote health at the national level, to which end it implements education campaigns on central health issues.

EUROMAT MEMBER ASSOCIATIONS

Bundesverband Automatenunternehmer E.V. (BA)
 Am Weidendamm 1A
 D -10117 Berlin
 Phone: +49 30 72 62 55 00
 Fax: +49 30 72 62 55 50
 Email address: ba@baberlin.de
 Website: www.baberlin.de

Deutscher Automaten-Grosshandels-Verband E.V. (DAGV)
 Höller Weg 2
 D - 56332 Oberfell (Koblenz)
 Phone: +49 26 05 96 08 55
 Fax: +49 26 05 96 08 58
 Email address: info@dagv.de
 Website: www.dagv.de

Verband der Deutschen Automatenindustrie E.V. (VDAI)
 Dircksenstrasse 49
 D - 10178 Berlin
 Phone: +49 30 28 407 0
 Fax: +49 30 28 407 2
 Email address: vdai@vdai.de
 Website: www.vdai.de



LEGISLATION APPLICABLE TO THE GAMING MACHINE SECTOR

The legislative Decree "Decreto Balduzzi" includes the regulation of gaming advertisements, recognition of gaming addiction as a real disease (that means that it will be treated as any other addiction by public health bodies), requirements to provide detailed information about the winning chance of any kind of game.

According to the decree, specific signs are to be displayed on any gaming machine indicating the risk of addiction and the winning percentage. This applied in Italy from the 1st of January 2013.

In addition, brochures including help numbers and medical information from the Public Health Department should be made available in all establishments.

The decree also limited the hours for advertising on TV and made it obligatory to mention the risk of addiction.

OTHER RESPONSIBLE GAMING MEASURES

The Department of the Italian Ministry of Finance that regulates wagering games in Italy has promoted an advertising campaign called Gioco Sicuro (Safe Gaming) following cooperation between the Government and EUROMAT's Italian member, SAPAR.



> 'Alcohol is forbidden in arcades. No gaming without rules.' An example of a responsible gaming poster used in Germany.



On February 5th 2013, the Italian Department of Anti-drug Policies presented a report concerning gaming, which recognizes the need for specific regulation and health and social protection, especially due to the strong evolution of online gambling, which is more difficult to control and monitor. The report identifies a series of strategies and lines of action directed towards the legal gambling sector in Italy and social institutions responsible for health care and recovery activities of people affected by pathological gambling addiction.

In 2011 Sapar launched its Campaign of Youth Protection "Affinchè il Gioco rimanga un Gioco" ("let game be only a game"). In 2012 Sapar initiated a project involving high school students that aims to educate young people about the risks associated with problem behaviour. This project was launched in cooperation with the Social Assistance Service sited in Cesena (Emilia-Romagna region) and was presented to the Italian Social Affairs Commission.

AGENCIES PROVIDING ASSISTANCE

La Società Italiana Di Intervento Sulle Patologie Compulsive

Via G. di Vittorio 1/B
 (Bolzano Sud, Zona Fiera)
 Bolzano 39100
 Phone: +39 (0) 471 300498
 Email address: info@siipac.it
 Website: www.siipac.it

A.G.I.T.A

Phone: +39 (0) 432 728639
 Email address: roldeluc@libero.it
 Website: www.sosazzardo.it

ALEA – Associazione Per Lo Studio Del Gioco d’Azzardo e Dei Comportamenti a Rischio

Phone: +39 (0) 423 732736
 Email address: info@gambling.it
 Website: www.gambling.it

Gamblers Anonymous Italy

Phone: +39 33 8127 1215
 Email address: gaitalia_1999@yahoo.it
 Website: www.gamblersanonymous.org

EUROMAT MEMBER ASSOCIATION

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THE NETHERLANDS

LEGISLATION APPLICABLE TO THE GAMING MACHINE SECTOR

Several responsible gaming requirements are in place, including:

- A maximum average loss per hour on gaming machines in arcades and on single sites of €40; automatic playing is not possible in single sites, players need to press a start button to start a new game each time. Wins up to a maximum of 200 times the stake (i.e. €40) are paid automatically from the machines followed by a waiting time of 15 seconds.
- Gaming arcade managers are obliged to monitor clients and recognise problem gamblers. Private gaming machines operators (in both arcades and single sites) co-operate with the Dutch Mental Health Care Association (GGZ Nederland) to deliver prevention programmes (training for employees, brochures, websites, no access for problem gamblers, etc.) while casinos have their own prevention programme in place. For machines located on single sites, there is also a legal obligation for the owner of that site to supervise the behaviour of the player. There is regular consultation with the Royal Horeca Netherlands on this issue.
- Entry into casinos and gaming arcades is not allowed for people younger than 18 years of age. Age verification is mandatory in all premises. In certain cases, arcades and casinos may decide to bar people younger than 21 years.
- Proposals are under consideration for a central register for all operators except the single sites.
- Holland Casino and entertainment centres have a general duty of care under Article 4a of the law on gambling. This will be replaced by specific government rules if a central register is accepted.

OTHER RESPONSIBLE GAMING MEASURES

Holland Casino and the (private owned) arcades have a protocol (each of their own) to deal with problem gaming. It provides for preventive actions like leaflets in several languages, a self-test tool, access prohibitions and referring to treatment organisations. The protocol also provides for instructions to floor managers on when and how to address (potential) problem gamblers.



The protocols are set up in cooperation with GGZ Nederland (see above). They are monitored and enforced by the industry itself and (arcades) by DEKRA which is a member of the international network for management system assessment and certification "IQNET".

Members of the VAN Kansspelen Branche-organisatie (until recently Speelautomaten Branche-organisatie) can only become a member if they sign the entrepreneurs code, which requires them to fulfil a strict ethical code.

In addition, the VAN recently launched a website www.gokwijzer.nl which provides information on all aspects of problem behaviour including a self-test and contact information for addiction care institutions.

As from the 1st of July 2015, all slot machines are required to bear a sticker with the responsibility slogan "Speelbewust" ("play conscious").

The VAN works in cooperation with other gaming providers such as lotteries and Holland Casino to exchange best practice and ensure that high standards of responsibility exist across the industry.

AGENCIES PROVIDING ASSISTANCE

The services exist, but they are all local or regional NGOs and are privately funded. They are under the umbrella of GGZ Nederland (Mental Health Care Netherlands).

GGZ Nederland

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Phone: +31 33 460 89 00
Fax: +31 33 460 89 99
Website: www.ggznederland.nl

EUROMAT MEMBER ASSOCIATION

VAN Kansspelen Branche-organisatie (VAN Speelautomaten Brancheorganisatie)

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LEGISLATION APPLICABLE TO THE GAMING MACHINE SECTOR

Legal restrictions aim to prohibit access to gaming machines for under 18s and also ensure no advertising on mainstream media, with the exception of the National Lottery. Until 2015 there were no specific legal regulations for preventing or combating harm, but some operators and gaming associations were increasingly advertising the risks and promoted self-control measures which players should take to ensure that their experience is an enjoyable one.



Moreover, according to the new Romanian gaming law, from 2015 a public interest foundation must be created. The foundation is dedicated to ensuring that responsibility measures adopted by the European Committee for Standardization are followed.

OTHER RESPONSIBLE GAMING MEASURES

EUROMAT's Romanian member, Romslot and the Romanian Bookmakers support the "Responsible Gambling" program, the only functional program of its type in the country, which offers gamblers and their families real help. Romslot and its members are the pioneers of problem gambling programs in Romania.

The Responsible Gambling program provides gamblers with self-testing methods, found on the program's website (www.jocresponsabil.ro) and access to a free of charge helpline (0800.800.099), through which they can contact a psychologist, receive free phone counselling and make an appointment for up to two free evaluations and counselling sessions. This service is available in the 3 most important cities in Romania (Bucharest, Cluj or Iasi).

Moreover, the project is coordinated by 2 psychologists renowned for their expertise in problem gambling therapy.

Romslot's work to promote responsibility started in 2012 when it took over the programme "Play Responsible". The program gave players the possibility to verify their degree of problem behaviour through questionnaires presented on the project's website and offered players free psychotherapy sessions through a helpline as well as free access to treatment in a specialised psychotherapy clinic.

EUROMAT MEMBERS ASSOCIATION:

ROMSLOT - Slot Organizers' Association

Ienachita Vacarescu St. 22B, District 4 - Bucharest, Romania
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Website: www.romslot.ro

AOPJNR - Romanian Association of Gaming Organisers and Producers

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SERBIA

LEGISLATION APPLICABLE TO THE GAMING MACHINE SECTOR

Social responsibility is prescribed in the Games of Chance Law from December 2011. According to this Act, organisation of games of chance must be socially responsible and oriented towards the protection of minors, prevention of addiction by participants in games of chance and the protection of the personal data of participants in games of chance.

Each organiser shall within the facility where games of chance are organized and in the immediate vicinity of the entrance, display a poster measuring 100x80 centimetres containing a text informing consumers about measures to avoid problem behaviour and contact information for support organisations, certified by the Ministry of Health. When games of chance are organised in kiosks, posters measuring 50x40 centimetres shall be displayed on the outer side of the kiosk.

A brochure-flyer must be placed on each desk or counter used for the registration of participants in games of chance.

Slot machine clubs must be located no less than 200 meters away from educational institutions (primary and secondary schools).

Before starting work, all employees that have direct contact with customers must be trained to use preventative measures to avoid problem behaviour.

OTHER RESPONSIBLE GAMING MEASURES

Private associations provide course of therapy to rehabilitate problem gamblers. These are usually small in scale and run at regional or local level. Funding is normally the direct payment by patients rather than public funding.

Some private companies also have own-initiative prevention programmes in place. These are usually delivered in cooperation with Serbia's two main national institutes which have the right experience, reputation and credibility.

NATIONAL INSTITUTIONS PROVIDING ASSISTANCE

The National Health System deals with the issue of problem gamblers as a regular disease in their psychiatric department and it is covered by health insurance. The Institute of Public Health of Serbia is an authority under the responsibility of the Ministry of Health. The task of the Institute is to promote health at the national level, to which end it implements education campaigns on central health issues.

There are two main specialised national institutions and one NGO Agency which have extensive experience in this field:

1. Special hospital of Addiction Diseases

Teodora Drajzera 44
11000 Belgrade
Director: Dr. Mira Kovacevic
Tel: +381 367 14 29
www.drajzerova.org.rs

This is a day hospital for rehabilitation treatment.

2. Institute of Mental Health

Palmosticeva 37.
11000 Belgrade, Serbia
Director: Prof. Dr. Dusica Lecic Tosevski
Tel: (+381) 11 3307 500
www.imh.org.rs

The Institute of Mental Health (IMH) is the most important Serbian institution in the field of prevention, treatment and research into psychiatric disorders. The Institute of Mental Health is classified as a collaborating center of the World Health Organization (WHO) for South-Eastern Europe, in the field of education. Within the Institute of Mental Health operate three clinics, and one of them is the Clinic for Addiction Diseases. IMH is a pioneer in the treatment of pathological behaviour with 15 years of experience in implementing programs in this field. The clinic has four organizational units, three day hospitals and a clinical department. for substance abuse, with more than 500 hospitalized patients per year.

3. Klub "SANSa", Citizens Association for the Fight against pathological gambling

President of association:

Dr. Ivica Mladenovic, psychiatrist - psychotherapist

Help Line: 0800 301 302

www.klubsansa.com

Klub "SANSa" was founded, by Dr Mladenovic, in 2009, as the first non-governmental Serbian association in the field. It provides of counselling and supports a project called Responsible Gambling which is financed by the gaming industry. The project's objectives are to: Increase research in the field of games of chance

- Provide education and adequate communication on the principles of responsibility
- Provide training to those who work in gaming establishments.
- Offer help line services for vulnerable people
- Improve the treatment of problem gamblers

In addition, Klub "SANSa" also runs its own programme for the education of employees in the gaming industry.

EUROMAT MEMBER ASSOCIATION

JAKTA - Association of Gaming Operators, Authorized Technicians and Producer of Slot Machines and Equipment for Games of Chance

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LEGISLATION APPLICABLE TO THE GAMING MACHINE SECTOR

Responsible gaming programmes are being progressively put in place by the 17 regional governments. The purpose of these programmes is to avoid problems, rather than limit gaming. Most private operations, especially casinos but also arcades and bingo halls, have their own prevention programmes in place, in addition to meeting legal requirements.

- The principles followed by regional governments when setting their gambling policy are: Limiting the gaming offer
- Information and training to players/operators
- Help lines for people in trouble. Casinos, bingo and adult gaming arcades have controlled access with proof of age and identity required. Self-exclusion programmes are also in place for a minimum of one year.

OTHER RESPONSIBLE GAMING MEASURES

In Spain, two regions have started educational programs to make teenagers aware of the risks associated with spending excessive time and money on playing Internet and mobile phone games, interactive video games, and, when they become adults, playing traditional arcade and AWP games. A pilot program was implemented in some public hospitals in Catalonia that asked patients to complete a quick survey on admission to assess their level of involvement in gaming (games played, frequency, expenditure, etc.). The aim of the program is to identify problems at an early stage.

AGENCIES PROVIDING ASSISTANCE

The National Health System deals with problem behaviour as a regular disease in their psychiatric department.

There are private associations for compulsive gamblers (mostly run by former gamblers) which aim to provide therapies and remedies, and rehabilitate patients. These are usually very small, run at regional or local level and require payments from compulsive gamblers.

Recently, the Spanish regulator, Dirección General de Ordenación del Juego (DGOJ), launched a Responsible Gambling Initiative. The project aims to prevent consumers from problem gambling, involving all stakeholders of the industry, both public and private. As part of the project, the Consejo Asesor de Juego Responsable (CAJR) has been established. The CAJR is an advisory board for responsible gaming, and includes both land-based and online operators, associations involved in problem gambling, and public institutions such as the Spanish Ministry of Health and regulators from the Autonomous Communities.

EUROMAT MEMBER ASSOCIATIONS

Asociación Española De Empresarios De Máquinas Recreativas (FACOMARE)

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Website: www.todoeljuego.com

Confederación De Asociaciones y Federaciones De Empresarios Del Recreativo (COFAR)

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Website: www.cofar.net



UK

LEGISLATION APPLICABLE TO THE GAMING MACHINE SECTOR

The industry is principally regulated under the Gambling Act 2005. It establishes a Gambling Commission to oversee the operation of the Act. The Commission is guided in its duties by the overriding objectives of the Act which is to permit gambling but to ensure that any gambling activity meets the three licensing objectives – to keep gambling crime free, to ensure it is fair, and to protect children and vulnerable people.



In practice the Commission does this by licensing gambling activities and the people who run gambling companies. Local Authorities also have a role. They grant premises licenses for the places in which gambling is to take place such as Adult Gaming Centres.

Gambling machines are specifically regulated. The Act defines a machine and then, through secondary legislation, categorizes them according to the size of the maximum permitted stake and prize. The higher the maximum stake and prize the more restricted the locations in which the machine can be located.

Similarly the UK industry and Gambling Commission agree a series of Technical Standards for each category of machine which sets out what features are permitted and the way in which those machine features are allowed to operate.

OTHER RESPONSIBLE GAMING MEASURES

The principal method for ensuring the three licensing objectives of the Act are met is through what is called in the UK "social responsibility". The Gambling Commission publishes from time to time guidance to Local Authorities on their responsibilities under the Act. The Commission also publishes the Licensing Conditions and Codes of Practice or LCCP.

The LCCP document sets out for companies the measures they must put in place in order to be granted a licence to provide gambling. This is known as the Social Responsibility or SR Code. It contains provisions for example on age verification procedures, self-exclusion of problem gamblers, and the documentation that a company must keep to record what it is doing to discharge the licensing objectives. In addition the LCCP contains Ordinary Code provisions which set out best practice guidance on social responsibility matters.

The UK gaming machine industry is seeking to broaden, strengthen and enhance its social responsibility measures. The UK trade association for the machine industry runs its own age verification scheme and self-exclusion scheme. It provides industry training and standard "tool kits" for members to enable them to comply with the LCCP. It is in the process of publishing a Social Responsibility Code with which its members will be expected to comply.



AGENCIES PROVIDING ASSISTANCE

The Responsible Gambling Trust, which is funded by voluntary industry donations, funds much of the research, education and treatment in the UK. It funds the national Gamcare helpline for problem gamblers for example. There is one National Health Service Clinic for problem gamblers as well as numerous charities such as the Gordon Mooney Association, that provide help, assistance and counseling for those with problems.

EUROMAT MEMBER ASSOCIATION

British Amusement Catering Trade Association (BACTA)
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 Website: www.bacta.org.uk

A slot machine in a casino at night. The machine is illuminated with blue and purple lights. The screen displays a Hawaiian-themed game with palm trees and the text 'The King' and 'Aloha Hawaii'. The background shows a city skyline at night with a large moon.

ANNEX 1

**THE MAASTRICHT DECLARATION
(SIGNED BY EUROMAT MEMBERS
ON THE 25TH OCTOBER 2007)**

The European Gaming and Amusement Industry, represented by EUROMAT, provides citizens with a service that society demands: regulated entertainment and gaming in public places with the appropriate controls.

It is our aim that all those involved in the provision of these services do so in the best possible way, respecting the legitimate interests of all parties involved - citizens, site owners, operators, administrations - while contributing to the prevention of any damaging consequences of our activity for more vulnerable individuals.

We wish and need to co-operate with those involved in the regulation of our sector to make "Amusement with Prizes" what it is meant to be: a safe, reasonably priced and properly regulated entertainment experience.

A person exercising a rational and sensible choice and acting upon that choice based on his/her individual circumstances and awareness of the intention of the entertainment experience and its limitations is what we understand to be a "Responsible Gambler".



With all the above in mind, EUROMAT urges its Member Associations, and through them, the entire gambling sector, to co-operate with national authorities, public and private institutions, user groups and organisations concerned with responsible gambling, in the development of prevention programmes to avoid the risks associated with the abuse or misuse of gaming devices and facilities.

EUROMAT understands the diversity of regulations and control practices existing in Europe, but considers that such diversity should not be an obstacle for a clear, honest and continued effort to promote responsible gambling within each jurisdiction.

To that end, EUROMAT encourages its Member Associations to promote or co-operate in specific programmes which make it possible for players to identify gambling operations that are run in agreement with the principles and practices of responsible gambling.

MEMBERS OF THE SOCIAL RESPONSIBILITY IN GAMING COMMITTEE

The EUROMAT Committee for Social Responsibility in Gaming helps to ensure that customers and users enjoy an entertaining experience in a regulated and safe environment. EUROMAT is committed to promoting responsible behaviour amongst its customers, industry stakeholders and employees.

The priority of the EUROMAT Committee for Social Responsibility in Gaming is to share best practice and promote initiatives that bring together all relevant stakeholders to promote responsible gaming. EUROMAT believes that industry, governments and stakeholders must work together to ensure that social responsibility serves customers, communities and employees.

EUROMAT's Committee for Social Responsibility in Gaming also shares amongst its members credible studies and available research. Industry has a role to play in supporting the development of an appropriate evidence base. In this regard, it is only through a strong partnership between regulators, public health bodies and dedicated NGOs that we will enhance knowledge about the gaming industry to ensure better responsible gaming policy in Member States.

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THE EUROPEAN GAMING AND AMUSEMENT FEDERATION

