



# Coming up

- Introduction to the RGA
- Overview of the EU
- State of the industry: headline developments & challenges.
- A view of the Spanish market
- Brexit.....
- Questions

# RGGA



- Trade Association formed in 2004
- 30 members (see [www.rga.eu.com](http://www.rga.eu.com))
- Online operators and software suppliers
- All licensed in Europe
- Based in London but active internationally

# Jurisdictions

- European Commission
- Poland
- Portugal
- Greece
- Czech Republic
- Romania
- Slovenia
- IoM, Malta, Gibraltar



# EU Harmonisation?

- What do we mean?
- What do we want?
- What will we get?
- The role of Directives.

# State of the industry (i)

- Revenues still growing (UK online is third of the market)
- Trading conditions becoming tougher (but it's all relative)
- More regulated markets = certainty + cost
- Cost + maturing markets = competition
- Scale more important = consolidation, M&A, fewer operators.

# State of the industry (ii)



- New products and innovation (esports, social gaming, virtual currencies, virtual casinos etc)
- Improving existing products and services
- Recruitment and retention of customers
- Money Laundering & sports integrity
- Social responsibility – improved KYC, additional safeguards, analytics, contracts & marketing.



# Spain?

- How comparatively attractive is the market
- What are the prospects for growth?
- Taxation?
- Regulation?
- Product types.
- Consumer protection.





# Brexit

- The great unknown!
- In what ways might it affect the industry?
- Access to markets; investment; travel?

# Questions

