

To: Lottery CEO's, IALS Members, Marketing Directors, PR/Communications Directors

Public Gaming Research Institute Inc.'s

INTERNATIONAL

MORNING REPORT

Your weekly supplement to
Public Gaming International Magazine
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HOT OFF THE PRESSES. PGRI announces two industry conferences. Please mark your calendars now to attend and participate in the Institute's **SMART-Tech 2004** meeting at the Peabody Hotel, Memphis, Tennessee, Feb. 6-9; and our **combined ILAC Congress and Lottery Expo 2004**, June 28-July 2, Loews Miami Beach Hotel, Miami Beach, Florida.

TN AWARDS CONTRACTS. The Board of Directors of the Tennessee Education Lottery Corp. approved a recommendation to select GTECH and Scientific Games as the providers of online and instant ticket products and services. Both companies will be awarded seven-year contracts where compensation will be based on a percentage of lottery sales; GTECH will earn 1.24% of all sales and Scientific Games will earn 1.139% of instant sales. GTECH anticipates approximately \$120 to \$130 million in revenue over the life of the contract and Scientific Games estimates approximately \$80 million in revenue over the next seven years. Lottery sales are expected to begin on or before February 10.

ZAMARRIPA TO RETIRE, THORNBURG TO ACT IN HIS PLACE. Mark A. Zamarripa, Director of the Colorado Lottery, will announce that he is leaving the lottery at the end of this month. Mark will actually be out of the office early when he takes some leave time this month. Mark Zamarripa has a long history with the Colorado Lottery, holding the distinction of being the Lottery's first paid employee hired in August, 1982. He was named Director in May, 1994. Tom Thornburg, currently security director, will be the acting director.

MUSL MOVE. MUSL has moved its office. There is still some dust settling, but future mailings and deliveries should be sent to: Multi-State Lottery Association; 4400 NW Urbandale Drive; Urbandale, IA 50322-7919. The telephone numbers and email addresses remain the same.

MN LAUNCHES NHL GAME. The world's first licensed National Hockey League lottery game has been launched by the Minnesota State Lottery. The Lottery's \$3 "NHL All-Star Game" Scratch game offers players a chance to win



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cash prizes up to \$20,000, along with the chance to win official NHL merchandise and tickets to the 2004 NHL All-Star Game in St. Paul, Minnesota through second chance drawings. The Lottery will conduct four second chance drawings for the NHL prizes, which include 700 NHL merchandise prize packs featuring official NHL All-Star Game jerseys, jackets, long sleeve tee-shirts, caps and collectible pucks.

TELC PROGRESS UPDATE. As of last week, more than 1,600 retailers have applied with the Tennessee Education Lottery Corp. to sell lottery tickets. TELC has started the approval process and hopes to begin announcing retailers in December. Officials expect between 3,000 and 4,000 retailers to sign up.

THE LUCK OF THE HOOSIER? Indiana has had three Powerball winners in a row, and the lucky streak is causing Powerball sales to surge. The Lottery is selling nearly twice as many Powerball tickets right now than during the same time period last year. If a Hoosier wins this go-round, Indiana will be the first state to hit four jackpots in a row.

MD TO AIR "REALITY" COMMERCIAL. The Maryland Lottery's roving film production crew will be giving randomly selected Arundel Mills shoppers the opportunity to be cast in Scratch Cam, a series of "reality television" commercials that feature Lottery players as they scratch for prizes. The spots will be aired in the Maryland and Washington, D.C. area. The goal is show that players don't have to win big money to have fun playing Lottery games.

SCEL STAFF MEMBERS HAM IT UP FOR THE HOLIDAYS. South Carolina Education Lottery employees volunteered their talents in the latest holiday commercial. The idea behind this year's holiday spot is a professional dance gone awry. To accomplish the effect, the lottery hired several professional dancers to start the spot off, and then mixed in six-lottery staff members - who are definitely NOT professional dancers. Ultimately, this mixture of people produced a great commercial, which is slated to air from Mid-November through the end of the year.

QUEBEC LAUNCHES CELEBRATION. Loto-Quebec's popular Celebration lottery is back once again, marking its 15th edition with Celebration 2004. The \$20 Special Edition game officially went on sale at some 10,700 retailer locations. Celebration 2004 features a total of \$27 million in prizes, including a \$5 million grand prize, three prizes of \$500,000 each, 100 prizes of \$1,000, as well as 100 deluxe Volvo S40 vehicles and 100 trips. In addition, the daily pre-draws to be held between December 1st and 31st will be

offering 31 Land Rover Freelander SE vehicles, while the instant portion of each ticket will provide winners with a chance to become millionaires on live TV.

KS SUNFLOWER SALUTE & VETERAN'S CASH TO LEAVE MARKET. This past summer the Kansas Lottery launched two instant scratch games that were aimed at helping Kansas Veterans. Both the \$2 Sunflower Salute ticket and the \$1 Veteran's Cash ticket brought in sales totaling over \$2 million. Players will have the chance to purchase these tickets until Nov. 30, 2003, when the law requires them to be pulled from the market. All net profits received from the sale of these games will be deposited in the state treasury and credited to two special funds: 50% to the national guard assistance account of the state general fund of the state board of regents to be used for Kansas national guard educational assistance act scholarships; and 50% of net profits to the soldiers' home fee fund to be used for the Kansas soldiers' home and the state veterans cemetery system.

NY SHOWS UP FOR CRUNCH. The New York State Lottery was on hand for a Syracuse Crunch game on November 22, when the Crunch hosted the Binghamton Senators. The Lottery distributed lotto coupons to the first 500 people (of appropriate age) in attendance redeemable for \$1 off a Free Play game. Also, during the game, fans were selected at random to participate in the Lottery's intermission puck shoot-out. The two shoot-out winners received 25 "Money Tree" Instant Game Tickets, offering a chance to win a top prize of \$25,000.

MA PASSES ON \$7 MILLION. The Massachusetts Lottery was recently presented with an interesting dilemma. A man from Chicago asked the Lottery if he could buy seven million Mass Millions tickets. The purchase would have given the man a 50-50 chance of winning the game's \$38 million jackpot. While there would be no law against such a sale, the Lottery turned the man away – there's no indication where the \$7 million came from.

OH MULTI-STATE STANDS. The Ohio Supreme Court ended a lawsuit that challenged the constitutionality of Ohio's participation in a multi-state lottery. In a victory for the state, the court ruled 5-2 against hearing an appeal of a lower court decision that said the Mega Millions game was constitutional.

ME GOV PROPOSES GAMING COMMISSION. The Maine Harness Racing Commission could be put out to pasture under Gov. John Baldacci's proposal for creating a new state commission to regulate VLTs at the state's commercial racetracks. He's considering a gambling commission, a new agency that could eliminate the existing commission. Maine's racing commission was established in 1935, and became part of the Department of Agriculture in 1973.

UK TO PROMOTE HOW MONEY IS SPENT. U.K. Culture Secretary Tessa Jowell launched the first of thousands of National Lottery 'blue plaques' to

recognize how the lottery has transformed communities across the UK. The first 10,000 blue plaques will be sponsored by Camelot and distributed to lottery-funded venues by November 2004. Nearly every lottery beneficiary - from the major national projects to tiny community schemes - will eventually receive a plaque with the crossed fingers logo and the words "Awarded National Lottery Funding".

SAZKA TEAMS WITH CYBERVIEW FOR NEW VIDEO LOTTERY SYSTEM. SAZKA a.s. and Cyberview Technology confirmed that they have completed the pre-pilot stage of a new gaming system and that live operations have been successfully in place for over 1 month. The new Central Lottery System, which comprises a Central Server Based gaming platform with Interactive Video-lottery Terminals (IVT) and Storeowner's Terminals, has been licensed by the Ministry of Finance. This system has been achieved using Cyberview's server based downloadable gaming system adapted for the specific requirements of the Czech market. Approvals have been obtained for each element of the system including three different styles of terminals from Cyberview and each of the games. Cyberview's system is a server centric solution, with random number generation, transaction processing and authentication occurring in the patented central server.

EU RULES AGAINST FINNISH LOTTERY TAX. The European Union's Luxembourg-based European Court of Justice ruled Finland couldn't impose taxes on earnings from foreign lotteries while failing to tax earnings from its own lotteries.

LOTERIA MOLDOVEI SIGNS SMS AGREEMENT. Moldova's Loteria Moldovei has signed an agreement with mobile operator VOXTEL, subsidiary of France Telecom, for the supply of Lotto game via SMS. The contract has one-year duration with renewal option and allows subscribers of VOXTEL to participate in the Super Loto (5/35) draw by sending SMS from their mobile phones. VOXTEL currently possesses 64% of the local mobile telephony market. The new service will be launched by the end of the year.

LOTTERY JOBS

DESIGN/PROMOTION ADMINISTRATOR WANTED. The Kansas Lottery is seeking a creative, responsible, and disciplined individual who has a diverse background and experience in developing and creating advertising materials and productions. Must have exceptionally strong organizational communication, and time management skill, be able to meet tight deadlines and manage multiple projects. Must have Bachelor's degree in related field and 6 years experience in graphic design. Total proficiency with adobe Illustrator, Adobe Photoshop, Quark and the Macintosh platform are required. AA/EEO. **Send resumes to Kansas Lottery Personnel, 128 N. Kansas Ave, Topeka, KS 66603' 785-296-5724.** Visit www.kslottery.com

Submit material for next week's Morning Report by Wednesday of this week to Toddpgr2@aol.com