



MECN
Media & Entertainment Consulting Network

The Balkan Gambling Markets

Report on the gambling markets in Greece, Turkey, Croatia, Bulgaria, Romania, Slovenia, Serbia, and Montenegro

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Summary

After continental and southern Europe, the global gambling industry is now focusing on the Balkan states and Eastern Europe for its expansion. In the Balkan states most forms of gambling enjoy above-average popularity – foremost sports betting. These facts combined with the recent or impending EU-membership of many states and their growing individual wealth makes the Balkan one of the most relevant markets to be analysed.

MECN accordingly analysed the Balkan region (that is, Greece, Turkey, Croatia, Bulgaria, Romania, Slovenia, Serbia, and Montenegro) in unprecedented detail and depth. For this study MECN worked together with various local researchers, interviewed local operators and regulators, and surveyed a total of 90 operators and market experts regarding their thoughts and insights.

Gambling market of currently Euro 4.5 billion and 130 million people

- **Total gambling market (gross revenue) of Euro 4.5 billion** - In 2007 the total Balkan market had an estimated gross revenue (after payout of prizes) of ca. Euro 4.5 billion; the figure for turnover/wagers came to ca. Euro 25 billion.
- Most experts see **great growth potential in Balkan gambling markets** - More than 60% of the experts surveyed by MECN believe that the growth potential of the Balkan gambling market is great or even very great. Hardly any market insiders (only 3% all surveyed experts) believe the market has only a small growth potential.
- **Betting and interactive sector** drive the Balkan gambling markets.
- Most experts surveyed believe the **Balkan gambling markets will be liberalised in the near future**.
- The majority of the operators surveyed are currently **in the process of developing their Balkan market strategy** and evaluating whether/how to increase their investment and focus in the near future.
- **Some forerunners are paving the way** - Intralot is on the way to becoming a betting heavyweight in the region; Sportingbet is realising about 4% of its business in Bulgaria; Bwin and Bet-at-home just recently increased their focus and investments in the region.
- **130 million people and a total GDP of Euro 1,170 billion** - A total of 130 million people live in the countries selected for MECN's study. Together, the Balkan countries had a GDP of Euro 1,170 billion in 2007.

The report includes:

- **Analysis of all sectors** - The report analyses all key sectors of the gambling markets: lottery, casino, betting, gambling machines, and interactive gambling (Internet/mobile).
- **Current market figures** - Comprehensive market data, such as market size and development of sales/turnover as well as gross revenues, including 2007 and in some cases also 2008 figures.
- **Legal and tax information** - Detailed explanation of the current legislation and the taxes imposed.
- **Company profiles** - We prepared detailed company profiles of the key market players that include products, financial figures, and strategic approaches.
- **Insights from local expert** - The analyses of Balkan gambling markets need local expertise. Therefore, we gathered some of the most renowned local market insiders and authors including Rob van der Gaast (Turkey, www.GamblingAnalysts.eu), Georgios Toghias (Greece), and MECN's own local experts from Croatia, ...

In total, the report has 152 pages and 86 graphs/exhibits.

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Turkish gambling market

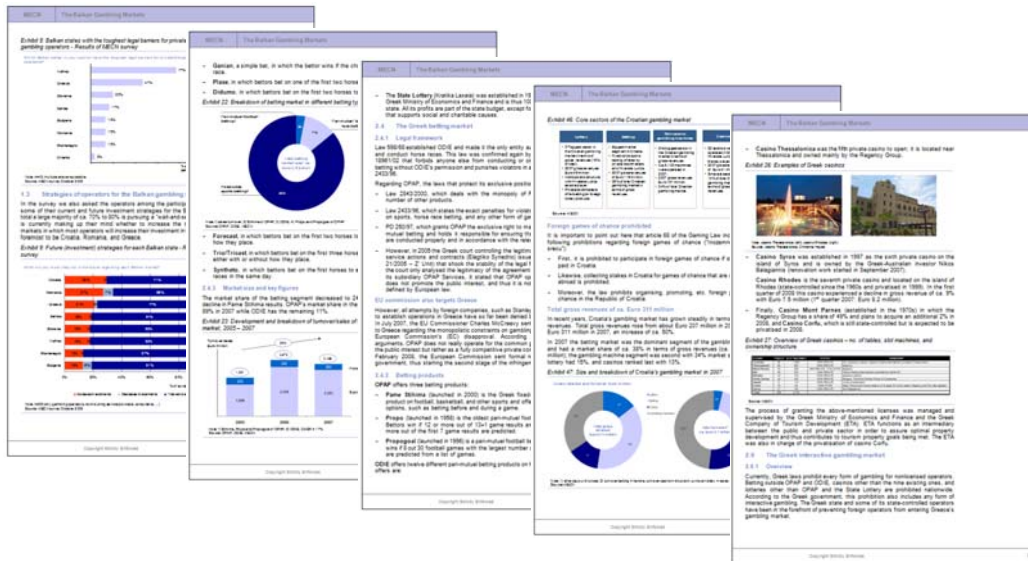
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3DVA	Germania	Oyak
7sport.net	GfK	Özkanlar Group
Admiral Casinos	Gioio	P&P Marketing
Admiral Sportwetten	Glas Slavonije	Pariori.ro
Aristos	Global Sport Bets	Partizan
Asociatia Organizatorilor Si Producatorilor (AOPJNR)	Globet	Partygaming
Astra Sport Bets	Globul	Paysafecard
Atlantik company	Glory Technology	PEPPS
Avea	GoalNews	Petrol AD
Balkan Innovative Technology	Grand Hotel Adriatic	Piraeus Bank
BC Partners	Grand Hotel Lav Casino	Pleasure Company
Beolot	Greek Football Confederacy	Postal Service of Slovenia
Bet365	Group Partouche	Pozitron
Bet-at-home	Grupo Orenes	Princess Casino Group
Betshop	Harrahs	Pro Monte
Betsson	Hattrick	Professional Football League of Bulgaria
BGRoom	Hellenic Federation of Professional PRO-PO Agents (POEPP)	Prognosi.bg
Bilyoner Interaktiv Hizmetler	Hipodrome Beograd	Prva Sportska Kladionica
Blitz Group	Hit Alpinea	Queen Montenegro Casino
Bolus	Hit Coliseum	Queenco Leisure
Boss Media	Hit Interactive	Queens Club
Bulgarian Football Union	Hit Montenegro	Regency Group
Bulgarian Olympic Committee	Hit Netherlands Antilles	Ritzio Entertainment Group
Bulgarian Sport Totalizator	Hotel Crna Gora	Romanian Football Federation
Bulgarian State Lottery	Hotel Resort Maestral	Romanian Olympic Committee
Bulgarian Telecommunication Company	HRT	Royal Casino d.d.
Bulgarian Trade Association of the Manufacturers and Operators	Hrvatska Lutrija	S.V.-RSA Bulgaria
Bwin	Hrvatski Telekom	Sabanci
Calcio	Igracnica Miro d.d.	Scientific Games
Camelot	Infoquest	Serbian Red Cross
Capital Group	Inteltek	Sisal
Carrefour Romania	Internacional Evona	Skupina Daimond Nova Gorica
Casino Bled	International Leisure Project	Slavija
Casino Finance Holding Liechtenstein	Intertop	Slovenian Olympic Committee
Casino Ljubljana	Intracom	Slovenian Post
Casino London	Intrakat	Slovenska odskodninska druzba (SOD)
Casino Maribor	Intralot	Spor Toto
Casino Parentium d.d.	Kapitalska druzba	Sport Five
Casino Portoroz	King & Co	Sport Tip
Casino Riviera	Kladionice Zderic	Sportal.hr
Casino Technology	Koc Holding	Sportime
Casino Umag d.d.	Kongo Hotel & Casino	Sporting Group
Casinos Austria International	Korner	Sportingbet
Centric Multimedia	Kratika Laxeia	Sportna Loterija
ClickandBuy	Ladbrokes	Sportske Novosti
Club Hotel Casino Loutraki	Lavovi	Srbijalot
Cosmo Bulgaria Mobile (Globus)	Libero Interakfit Hizmetler	Stanleybet
Croatian Red Cross	Lob Company	Steggos Group
Cubus Lux	Loteria Romana	Super Sport
Cukurova Holding	Loterija Slovenije	Tankercomerc
Demco Group	Lottomatica/Gtech	Tattersall
Derby	Lutrija Beograd	Tek Elektronik
Dobitnik	Lutrija Crne Gore	Tele 2
Dogan Group	Lutrija Srbije	Telecom Serbia
Dogus Holding	Marfin Investment Group	Telsim
Don Pepino	Markottel	Theros International Gaming
Drzavna Lutrija Srbije	Maslinica	To To
Dzek Pot	Master Media	Tobacna Ljubljana
Egasa	Maxima Invest	Trekom
Eldorado	Mega Game	Turkcell
Elektronik Şans Oyunları ve Yayıncılık	Mellon Systems	Turkish Jockey Club
Empire International Game World	Meridianbet	Turktell
Euro Games Technology	Merkur Casino	Ukash
Eurobank	Microgaming	Unibet
Eurobet	Milli Piyango	Unidesa
Eurochance	Mobiltel	Unisystems
Eurofootball	Mobtel Serbia	VBC
Expekt	Mocart	VIP
Favorit	Monet	Vipnet
Fidina	Moneybookers	Viva! Group
FIFA	Moneygram	Vivatel
Flyer	Motoroil	Vivere Entertainment
Fortuna	Narodna Lutrija	Western Union
Fos	Neteller	Wettpunkt
Foundation for Financing Sports Organisations	NFD Holding	WG investment
Foundation for the Finance of Invalid and Humanitarian Organisations (FIHO)	Nove Holding	William Hill
Free Bet Card	Novomatic	Worldbet
Gala Coral Group	ODIE	Yugobet
Gamebookers	Olympic Entertainment Group	Yugolot
Gauselmann	OMV	Zlata Moneta
Gazeta Sporturilor	OPAP	

Sample pages of report



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