

October 07, 2022

Latest state updates highlighted in green

IDEA Priority States in Legislative Phase 2022

State	Current Status	Key Dates	IDEA Engagement / Opportunities
ILLINOIS <i>(iGaming + Sports Amendments)</i>	<p>iDEA state lobbyist provided a comprehensive update on the 9/30 member call regarding the supplier licensing fix bill and the potential for iGaming in 2023. A recording of the call can be found on the Member Portal.</p> <p>In summary:</p> <ul style="list-style-type: none"> • iDEA’s Senate passed bill related to correcting the supplier licensing fee could be considered during the veto session (November). • Recent revenue reports from the state show strong tax dollars raised from sports wagering, this will help neutralize arguments that the high license fee is needed to meet budgetary estimates. • Continued outreach to IL stakeholders on iGaming. VGTs have said they will not support any iGaming legislation in 2023. 	<p>November -- veto session.</p>	<p>While at G2E, we met with Senate Executive Committee Chairwoman Cristina Castro (whose committee considers all gaming legislation) and State Representative Jonathan Carroll. Chairwoman Castro has been a proponent of iGaming expansion in Illinois and spearheaded the effort to have the state conduct a study on iGaming in 2021.</p> <p>Chairwoman Castro is still committed to pushing for iGaming legalization and intends to file legislation in 2023 to this effect. Castro asked for iDEA to aggressively educate lawmakers on the merits of iGaming. Rep. Carroll has also been a supporter of iGaming expansion and impressed upon us that it will be important for us to coordinate efforts with a colleague of his, Rep. Daniel Didech (with whom we’ve met before).</p> <p>Our letter to the Governor outlining support for the supplier license fix is being prepared to be sent in October.</p>
INDIANA <i>(iGaming)</i>	<p>Rep. Manning confirmed that Speaker Huston (last week) gave him “a green light” / desire to work on igaming and iLottery at the same time.</p> <p>The speaker also said he would prefer a unified AGR tax rate instead of 3 different rates (i.e., one for casinos, one for sports wagering, one for igaming); but he also didn't seem super committed to insisting that unified tax rate be a part of the bill.</p> <p>The Speaker asked Manning to confer with the House fiscal analyst (Ben Tooley) on the bill ASAP. The Speaker also expressed a preference that Manning work out a deal with the horsemen and maybe even local communities (on revenue sharing issues) ahead of filing the bill.</p>	<p>Week of November 20 – Legislative organization day.</p> <p>January 9 – start of session.</p> <p>End of April – Session adjourns.</p>	<p>Our team is actively using the interim session to meet with influential lawmakers and gather support for iGaming.</p> <p>Our lobbyist are arranging a strategy session with other stakeholders including the Casino Association for later this month.</p> <p>Please read latest update on the Member Portal.</p>

<p>MASS <i>(Sports)</i></p>	<p>*REMINDER: The scoping survey must be submitted as part of the application for a Category 1, 2, or 3 Sports Wagering License and must be submitted as a prerequisite to the submission of additional application forms. Failure to submit this survey by October 17, 2022 by 5pm shall result in the Commission deeming the application incomplete and administratively closed.</p> <p>This week the Commission held a meeting, key take-aways include:</p> <ul style="list-style-type: none"> • Vendors will eventually be required to fill this scoping survey out, but they aren't subject to this same submission deadline. • The Operator License Application has been released. The MGC is still taking public comment on the application until 5pm on October 17, 2022. It was noted that, to date, the Commission hasn't received any public comments on the application. • The MGC has entered into a contract with RSM to consult on the background reviews. The MGC has also entered into a contract with GLI to help with sports betting implementation. • Discussion on the licensing evaluation process. Please go to the Member Portal for a full update on the scoring criteria. 	<p>Oct. 17th-The Operator and Vendor Scope of Licensing Initial Scoping Survey is due.</p> <p>No firm dates announced for launch.</p>	<p>iDEA is closely monitoring developments in Massachusetts and will be providing input to the MGC as they develop rules and regulations.</p> <p>iDEA played a role in shaping the final policies in the bill. Many of the key items we advocated for were adopted by the legislature. You can read a sample of the letter that was sent to all 6 members of the conference committee here: iDEA-Letter-to-Senator-Lesser 6.8.22.pdf (ideagrowth.org)</p>
<p>MISSOURI <i>(Sports + iGaming)</i></p>	<p>The effort to revive sports wagering during the special session died this week as we had predicted. The primary reason for introducing the bill was to continue to raise awareness and highlight the fact that Kansas has launched legal sports betting and Missouri continues to be left behind.</p> <p>As we reported last week, the Missouri legislature started a “special session” this week. On Monday, a House Committee held a hearing to discuss the urgent need for Missouri to pass sports betting, especially in light of the recent launch of the Kansas market.</p> <p>Driving the discussion at the hearing, was data from iDEA member GeoComply showing that thousands of Missourians are attempting to access regulated OSBs in Kansas, and that thousands are traveling across the border to place bets.</p>		<p>iDEA shared information with Rep. Houx and other lawmakers in advance of the 09/19 hearing.</p> <p>We continue to communicate with lawmakers to provide data an information they can use to advance the legislation during the special session and beyond.</p>

	<p>Because the special session is limited on what types of bills can be passed by the legislature, there is a high hurdle for sports wagering to proceed beyond the committee stage.</p> <p>The attention the issue has gotten this past week, helps position it for the 2023 session. The Governor’s office stated they would support a bill next year.</p>		
NEW YORK <i>(iGaming)</i>	<p>Senator Addabbo is drafting his iGaming bill and is asking for stakeholders to provide input. He hopes that recent fiscal projections, showing a future \$10b deficit for the state, will provide ammunition to get his proposal included in the state budget.</p> <p>Senator has indicated that he will include VLT/Racino establishments in his bill and make them eligible to receive an iGaming license.</p>	<p>Fall – iGaming briefing with Sen. Addabbo and iDEA members.</p> <p>December – reintroduction of iGaming bill.</p>	<p>John Pappas met with Senator Addabbo this week to discuss the future prospects of iGaming.</p> <p>We are providing input on his legislation from earlier this year so it can be prepared for introduction before session which begins in January.</p>

Priority States in Regulatory Phase 2022

State	Current Status	Key Dates	iDEA Opportunities
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<p>OHIO (Sports)</p>	<p>Earlier this week, the OCCC sent out another reminder about key upcoming deadlines. You can read the reminder here: Sports-Gaming-Deadline-Reminders.pdf (ideagrowth.org)</p> <p>This week the OCCC approved several conditional licenses for Type A proprietors (master license holders) and select suppliers. A list of approvals can be accessed via the Commission’s licensing page.</p> <p>The OCCC has also sent reminders to all prospective operators about two upcoming deadlines. Key employee applications and holding forms are due October 5th. Compliance materials and standard employee applications are due by November 2nd.</p> <p>Included in the November 2nd deadline are complete, final, and Commission-approved versions of responsible gaming plans, required procedures, house rules, facility plans, geolocation procedures, and equipment test reports.</p>	<p>Oct 5-Deadline for key employees and corp forms.</p> <p>November 2 – Compliance materials must be approved by this date to launch by Jan 1.</p>	<p>iDEA continues to engage with the OCCC on matters related to rulemaking and the launch of mobile sports betting.</p>
<p>MARYLAND (Sports)</p>	<p>On 09/22 the MD SWARC and MD Lottery announced that it would approve mobile licenses on a “rolling basis” to accelerate the launch of the market. We reported on this possibility in an earlier update.</p> <p>The announced deadline to submit a SWARC application is Oct 21. While the SWARC has not committed to opening future application windows, information received from the MD Lottery and lawmakers suggests that additional opportunities to apply <i>should</i> become available, particularly, if few of the initial applicants demonstrate ownership diversity – beyond the required personal net worth ownership mandate.</p> <p>More info on the 09/22 SWARC meeting can be found on the Member Portal.</p> <p>Also we recommend anyone seeking an mobile license in Maryland to review the SWARC’s updated Application FAQs.</p>	<p>Oct 21 – Deadline to submit application for mobile license.</p> <p>Late 2022/Early 2023 – likely timeframe for approved operators to launch.</p>	<p>iDEA continues to monitor activity of the SWARC and MD Lottery and also communicates with these bodies as needed.</p>
<p>ONTARIO, CAN (iGaming)</p>	<p>The AGCO released proposed revisions to the Registrar’s Standards for Internet Gaming on August 29th for stakeholder input.</p>	<p>Sept 19th – Comments due on updated Registrar standards</p>	<p>iDEA has engaged with AGCO/iGO and government agencies throughout the process and continues to reach out on issues of shared industry concern.</p>

	<p>The Ontario gaming regulator is targeting October 31 deadline for grey market online gaming operators to complete their transition into the regulated market.</p> <p>The AGCO has also submitted new proposed requirements for live dealer games. They would add new technical requirements for the operation of the live-dealer games related to the security of the physical equipment used in the games.</p> <p>Comments must be submitted through the AGCO’s iGaming Engagement Portal by September 19th.</p> <p>iGaming Ontario also released revenue numbers for the first 3 months of launch. A full release of numbers can be found here.</p>	<p>Oct 31 – deadline for transition from gray market to legal market.</p>	<p>While the revenue numbers for Ontario are lower than what the industry/public may have expected, we are told that the government views them very favorably based on their expectations.</p> <p>Key factors include that several of the larger brands which had an existing Ontario customer data base did not launch until the latter part of first quarter.</p> <p>The belief is that channelization rates will grow significantly over Q2 and Q3 as the market matures and more companies become fully approved.</p>
<p>KANSAS <i>(Sports)</i></p>	<p>Kansas sports betting market launched on 09/01. Deemed a “soft launch” it is essentially a full launch with just 6 operators starting.</p> <p>Based on data from iDEA member GeoComply, more than 520,000 geolocation checks occurred within the first 8 hours of launch.</p>	<p>Sept1 – Soft launch Sept 8 – full launch.</p>	<p>iDEA is communicating state Lottery and the Racing and Gaming Commission who will have joint oversight over the rulemaking process and the regulation of sports wagering.</p>