

**November 4, 2022**

**Latest state updates highlighted in green**

## IDEA Priority States in Legislative Phase 2022

| State                                            | Current Status                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Key Dates                                                                                                                              | IDEA Engagement / Opportunities                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
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| <b>ILLINOIS</b><br>(iGaming + Sports Amendments) | <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"> <li>• IDEA's Senate passed bill related to correcting the supplier licensing fee could be considered during the veto session (November).</li> <li>• 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.</li> <li>• Continued outreach to IL stakeholders on iGaming. VGTs have said they will not support any iGaming legislation in 2023.</li> </ul> | November -- veto session.                                                                                                              | <p>This week we sent a letter to the Governor outlining why his office should support our legislation that fixes the sports wagering supplier license fee. A copy of the letter is on the <a href="#">Member Portal</a>.</p> <p>The legislature is expected to have a "veto session" after the elections. During this time, we will be pushing for the supplier fix bill to be passed out of the House (it has already passed the Senate) as a stand-alone bill or as part of a larger package of gaming related bills.</p>           |
| <b>INDIANA</b><br>(iGaming)                      | <p>Rep. Manning confirmed that Speaker Huston gave him "a green light" to work on iGaming and iLottery at the same time.</p> <p>The speaker has asked for a unified AGR tax rate instead of 3 different rates (i.e., one for casinos, one for sports wagering, one for iGaming).</p> <p>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><b>November 22 – Legislative organization day.</b></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>We have mapped out the likely committees of jurisdiction for an iGaming bill created a list of lawmakers wh will support/oppose.</p> <p>We are also speaking with Rep. Manning and Sen. Ford to press them to seek multiple co-sponsors of their bills.</p> <p>Arranging meeting with Manning/Ford to discuss RG/PG components of their bill to get ahead of expected opposition to expanded iGaming.</p> |

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| <b>NEW YORK</b><br><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> |
| <b>*NEW*</b><br><b>VERMONT</b><br><i>(sports)</i>                | <p>Earlier this year the Vermont legislature approved a sports wagering “study committee.”</p> <p>The Committee is currently meeting to discuss best practices for sports wagering. Legislation will be drafted based on these recommendations and then go through the legislative process in 2023.</p> <p>In the last few meetings, the Committee has leaned their recommendations toward a state-controlled competitive bid model, such as New Hampshire or New York.</p>                                                                                                                                                               | <p>Next Meeting: Nov 1</p> <p>Final Meeting: November 22</p>                                                         | <p>IDEA has been invited to provide testimony before Nov 22. We are working to put testimony together that will advocate for a open and competitive marketplace.</p>                                                                                     |
| <b>*NEW*</b><br><b>North Dakota</b><br><i>(iGaming + Sports)</i> | <p>As we shared last week, the ND Governor has been negotiating an updated gaming compact with the state’s tribes. On 10/31 iDEA sent a letter to the Governor expressing our concern with the proposed approach that would give tribes exclusive rights to online gaming via compact. The iDEA letter is on the <a href="#">Member Portal</a>.</p> <p>Our letter made an impression on the Governor and his staff. On 11/02 the Governor announced a new compact agreement that removes the online exclusivity for tribes and reaffirms his commitment to work towards a legislative solution that benefits all gaming stakeholders.</p> | <p>Oct 31 – Comment letter due</p>                                                                                   | <p>We will evaluate the opportunity to engage in North Dakota during 2023 to push for an iGaming bill.</p>                                                                                                                                               |

## Priority States in Regulatory Phase 2022

| State                       | Current Status                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | Key Dates                                                                                                                                                       | iDEA Opportunities                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
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| <b>OHIO</b><br>(Sports)     | <p><b>*REMINDER*</b> December 2 deadline for Type A and B licenses to meet the OCCC's "Equipment, Systems, and Facility Verification Readiness"</p> <p>All proprietors must have their already lab-tested and Commission-approved sports gaming systems and equipment installed and ready for Commission verification by December 2.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | <p>December 2 – Equipment verification deadline.</p> <p>Jan 1 – launch of mobile sports betting.</p>                                                            | <p>iDEA continues to engage with the OCCC on matters related to rulemaking and the launch of mobile sports betting.</p>                                                                                                                                                                                                                                                                                                                                                   |
| <b>MARYLAND</b><br>(Sports) | <p>On 10/27 the Maryland Lottery approved a total of 21 sports wagering applicants. 10 master licensees, 10 operators and one Class B retail.</p> <p>We understand that several mobile and Class B applications (outside of those approved on 10/27) are currently under consideration. Those will be approved on a rolling basis by the MD Lottery and then sent to SWARC for approvals.</p> <p>The approved master license entities will now be reviewed by the SWARC to ensure they meet additional requirements, notably those related ownership interest.</p> <p>SWARC will grant/deny applications before Thanksgiving. Then the MD Lottery will conduct a controlled demo of the approved applicant's platform to ensure the meet the technical/regulator standards. Once that is concluded, the operators will be issued their license and cleared to launch.</p> | <p>Nov 21 – SWARC will issue its approval/deny applicants.</p> <p>Late November – likely launch of mobile operations pending MD Lotto testing and approval.</p> | <p>iDEA continues to monitor activity of the SWARC and MD Lottery and communicates with these bodies as needed.</p>                                                                                                                                                                                                                                                                                                                                                       |
| <b>MASS</b><br>(Sports)     | <p>The Mass Gaming Commission (MGC) held a meeting on 10/27. Key take-aways include:</p> <ul style="list-style-type: none"> <li>The Commission approved the Sports Wagering License Evaluation regulation. Available on <a href="#">Web Portal</a>.</li> <li>The Commission discussed but did not vote on the Sports Wagering Operator Licensing Framework set of regulations. These draft regulations can also be found on the <a href="#">Web Portal</a>.</li> <li>The MGC will be sending all prospective operators an email with application instructions.</li> </ul>                                                                                                                                                                                                                                                                                                 | <p>Nov 21<sup>st</sup> – Operator applications due (subject to change)</p> <p>Launch Dates:<br/>Retail = Prior to Super Bowl<br/>Mobile = Mid-March</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: <a href="#">iDEA-Letter-to-Senator-Lesser 6.8.22.pdf (ideagrowth.org)</a></p> |

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|  | <ul style="list-style-type: none"><li>• MGC is requesting that operators share a list of vendors. MGC will then reach out to these vendors to begin and licensing process.</li><li>• Massachusetts staggered sports betting launch windows (for retail and mobile) will remain unchanged at this time.</li></ul> |  |  |
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