

ANNUAL PERFORMANCE PLAN

FOR THE FISCAL YEARS
2026/2027 – 2028/2029

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**Most efficient and empowering
gambling jurisdiction of choice**

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EASTERN CAPE GAMBLING BOARD STRATEGY MAP 2025 - 2030

THE STRATEGIC FOCUS OF THE ECGB OVER THE FIVE-YEAR PLANNING PERIOD INCLUDE THE FOLLOWING:

1. Collecting gambling taxes for the Provincial Fiscus.
2. Enhancing regulatory compliance and efficiency by providing comprehensive support to the industry to be Sustainable and Transformed.
3. Promote Responsible Gambling.
4. Empowering communities through the CSI/SED programmes.
5. Conducting empirical research and evaluations.
6. Promoting and implementing principles of corporate governance.
7. Position ECGB as an Employer of choice.
8. Displacement of illegal gambling activities.
9. Maximizing the benefit of AI and digitization benefits technology in the regulation processes.



VISION

- Most efficient and empowering gambling jurisdiction of choice.



MISSION

- We are committed to promoting a socially responsible industry through regulation, licensing and appropriate enforcement and education.
- We will ensure that the EC Gaming industry is conducted ethically and competitively.
- We will achieve this by providing excellent service to our internal and external stakeholders, through inclusive economic development and empowerment.
- We will achieve this by implementing technological innovations and Artificial Intelligence (AI).



VALUES

- Empowerment
- Ethical conduct
- Fairness
- Respect
- Collaboration
- Innovation
- Agility & Innovation
- Transparency

IMPACT STATEMENT

Gambling Regulation as a Catalyst for Socio-Economic Development and Empowerment in the Province.

STRATEGIC PILLARS AND IMPERITIVES



9 STRATEGIC OUTCOMES AND 5 YEAR TARGETS

No.	STRATEGIC OUTCOMES	OUTCOME / OUTPUT INDICATORS	BASELINE TARGET 2024/25	05-YEAR TARGETS BY 2029/30
1.	Transformed, Ethical and Sustainable Gambling Operations in the Province	Number of key gambling licenses issued Number of gambling economic opportunities awareness sessions conducted Revenue gambling taxes collected from online betting and land-based operators	23 Gambling Licenses issued 23 Gambling Economic Opportunities Awareness Sessions R850 Million Revenue Collected	36 Key Gambling Licenses Issued 30 Gambling Economic Opportunities Awareness Sessions R1.21 Billion Revenue Collected
2.	Compliant Gaming Industry to Thrive	Compliance maturity level Number of systems audits conducted	New Indicator New Indicator	Level 4 Compliance 75 Systems Audits
3.	Displaced Illegal Gambling in the Province	Number of sweeps conducted Number of community awareness campaigns on illegal gambling activities conducted	46 Sweeps Conducted New Indicator	50 Sweeps Conducted 20 Community Awareness Campaigns on Illegal Gambling
4.	Educated and Informed Public Regarding Responsible Gambling.	Number of responsible gambling awareness campaigns conducted	New Indicator	60 Responsible Gambling Awareness Campaigns
5.	Empowered Communities Located in the Province through SED/CSI Initiatives	Percentage of SED/CSI initiatives /programmes implemented	Number of SED/CSI Initiatives / Programmes Implemented	100% SED/CSI initiatives
6.	Implemented Research and Evaluation Outcomes and Findings	Number of empirical research projects commissioned Number of impact evaluation projects conducted	05 Research Outputs Commissioned New Indicator	05 Research Outputs Commissioned 05 Impact Evaluation Conducted
7.	Implemented Principles of Corporate Governance, Organisational Performance and Reporting	Organisational maturity Index Records and document management efficiency maturity level Enterprise Risk Management Maturity Level Board Governance Assessment Maturity Index Ethics Assessment Maturity Level Financial Management and Procurement Efficiency Maturity Level	Level 04 Organisational Maturity New Indicator New Indicator New Indicator New Indicator New Indicator	Level 05 Organisational Maturity Level 04 Records / Document Efficiency Maturity Level 05 Risk Maturity Level 05 Board Governance Assessment Maturity Index Level 04 Ethics Maturity Level 05 Financial Management and Procurement Efficiency Maturity
8.	Maximised Benefit of AI and Digitization Technology in the Regulation Processes	ICT Efficiency Maturity Level	New Indicator	Level 04 ICT Efficiency Maturity
9.	ECGB Positioned as an Employer of Choice	Human Resources Maturity Index	New Indicator	Level 04 Human Resources Maturity Index



R741 MILLION REVENUE BY 2029

A focused three-year strategy (2026–2029) enables the ECGB to strengthen regulatory compliance, exercise fiscal prudence, and deliver R741 million in revenue to the provincial fiscus by 2029.

FOREWORD BY THE CHAIRPERSON OF THE EASTERN CAPE GAMBLING BOARD

The Eastern Cape Gambling Board (ECGB) has the overriding responsibility to regulate all gambling activities, as well as to protect punters and to inform the public about legal and illegal gambling in terms of the Eastern Cape Gambling Act (Act 5 of 1997) (as amended).

We have developed a three-year (2026–2029) Annual Performance Plan (APP), and we believe that our clear and consistent strategy demonstrates the required combination of focus and flexibility to deliver results against limited budget allocation, as reflected in the planned targets of the APP.

The ECGB's three-year (2026–2029) APP is guided by the Medium-Term Strategic Framework (MTSF), which reflects specific outcomes contributing towards the achievement of the three major national priorities of government, aligned with Provincial Development Plan goals and the nine integration programmes which are, with the support of provincial clusters, consolidated into a Provincial Integration Programme Blueprint. As such, the Board has a responsibility to ensure that the work of the ECGB is aligned to achieve these priorities and goals, both provincially and nationally.

The development and implementation of the APP is taking place at a time when the country is facing significant fiscal pressures brought about

by a shrinking economy. All of us, including the management of the ECGB, are therefore called upon to ensure that financial prudence is exercised while also ensuring that policy priorities are implemented.

Over the Medium-Term Expenditure Framework (MTEF) period, we aim to achieve a revenue collection target of R741 million for the provincial fiscus by 2029 while also intensifying compliance in the gaming industry.

The Board of Directors, as the accounting authority, is therefore confident that management will implement this Annual Performance Plan, and management has the support and commitment of the Board to ensure that the priorities for the next three years are implemented.

Ms V. Vika
Chairperson of the Board
Accounting Authority



OFFICIAL SIGN-OFF

It is hereby certified that this Annual Performance Plan:

- ➔ Was developed by the management of the Eastern Cape Gambling Board under the guidance of the members of the Board and the Executive Authority of Finance, Economic Development, Environmental Affairs, and Tourism;
- ➔ Takes into account all the relevant policies, legislation, and other mandates for which the ECGB is responsible; and
- ➔ Accurately reflects the impact, outcomes, and outputs which the ECGB will endeavour to achieve over the 2026/27 – 2028/29 financial years.

Mr. S. Mhlauli
Acting Chief Financial Officer

Signature:



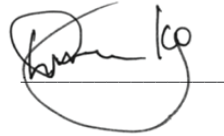
Ms Y. Roboji
Corporate Services Executive

Signature:



Mr L. Tshoko
Head Official Responsible for Planning

Signature:



Mr RM Zwane
Chief Executive Officer

Signature:



Approved by:

Ms V. Vika
Chairperson of the Board
Accounting Authority

Signature:



Endorsed by
Hon. N. Pieters, MPL
MEC for Economic Development,
Environmental Affairs and Tourism
Executive Authority

Signature:

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LIST OF ACRONYMS AND ABBREVIATIONS

AFS	Annual Financial Statements
AGSA	Auditor-General of South Africa
AO	Accounting Officer
APP	Annual Performance Plan
BBBEE	Broad-Based Black Economic Empowerment
BCMM	Buffalo City Metro Municipality
CAPEX	Capital Expenditure
CEO	Chief Executive Officer
CFO	Chief Financial Officer
CSI	Corporate Social Investment
DEDEAT	Department of Economic Development, Environmental Affairs and Tourism
DPSA	Department of Public Service Administration
DRDAR	Department of Rural Development and Agrarian Reform
DSRAC	Department of Sports, Recreation, Arts and Culture
EC	Eastern Cape
ECGA	Eastern Cape Gambling Act
ECGB	Eastern Cape Gambling Board
ECLB	Eastern Cape Liquor Board
FICA	Financial Intelligence Centre Act
GG	Government Gazette
GGR	Gross Gaming revenue
GRS	Gambling Regulation System
GRAF	Gambling Regulators Africa Forum
GTAC	Government Technical Advisory Centre
HDI	Historically Disadvantaged Individuals
HoD	Head of Department
HRM	Human Resource Management
HRD	Human Resource Development



HR	Human Resource
IA	Internal Audit
IDP	Integrated Development Plan
IGR	Inter-Governmental Relations
IPAP	Industrial Policy Action Plan
ICT	Information Communication Technology
ISO	Independent Site Operator
IT	Information Technology
IYM	In-Year-Monitoring
LPM	Limited Payout Machines
MEC	Member of the Executive Council
MPL	Member of Provincial Legislature
MTEF	Medium Term Expenditure Framework
MTDP	Medium Term Development Plan
MTSF	Medium Term Strategic Framework
NDP	National Development Plan
NGB	National Gambling Board
PAIA	Promotion of the Access to Information Act
PAJA	Promotion of the Administrative Justice Act
PDI	Previously Disadvantaged Individuals
POE	Portfolio of Evidence
PSACF	Public Sector Audit Committee Forum
REMCO	Remuneration Committee
SED	Socio-Economic Development
SMME	Small, Medium, Micro Enterprises
SP	Strategic Plan
SPV	Special Purpose Vehicle
Type A: LPM	3-5 Limited Payout Machines
Type B: LPM	20-40 Limited Payout Machines
Type C: LPM	6-19 Limited Payout Machines
Type D: LPM	21-40 Limited Payout Machines





“ FOCUSED DELIVERY UNDER FISCAL CONSTRAINTS.

Deliberate implementation measures ensure ECGB priorities are achieved within the MTEF despite tightening fiscal conditions.

OVERVIEW BY THE CEO OF THE EASTERN CAPE GAMBLING BOARD

The 2026–2029 Annual Performance Plan (APP) of the ECGB has been developed in line with provincial and national priorities to contribute to the desired growth of the economy of the Eastern Cape, thereby creating sustainable job opportunities for all, especially those in the Eastern Cape.

Conscious and deliberate efforts have been made to ensure that the work of the ECGB is geared towards achieving the national and provincial priorities, in line with the current electoral term.

Over the next three years, in line with the MTEF and bearing in mind the challenges of fiscal constraints, the ECGB will implement the following targets, seeking to achieve the identified strategic outcomes:

- Twenty-six (26) key gambling licenses awarded to suitably qualified applicants following adherence to the ECGB’s rigorous licensing process.
- R741 million gambling taxes collected from licensees and disbursed to the provincial fiscus, as required by the Eastern Cape Gambling Act (Act 5 of 1997), (as amended).
- Level 04 compliance maturity reached in 2029 by all new and existing operators to ensure that the gambling industry in the province is compliant with statutory requirements and license conditions.
- Forty-five (45) systems audits conducted to ensure provision of systems audits, penetration and vulnerability reviews, Information Security Management System (ISMS) reviews, as well as approving gaming and betting systems. These activities ensure compliance, revenue integrity, and security across all stages of system development, deployment, and enhancement, including responsible gambling compliance from a systems perspective, such as website reviews and features supporting player protection and exclusions.
- Thirty (30) sweeps conducted in the Eastern Cape to detect, investigate, and prevent illegal gambling operations.
- Nineteen (19) gambling economic opportunities awareness sessions conducted to attract new entrepreneurs into the gambling space and promote awareness about available economic opportunities associated with gambling. Furthermore, encourage as many people as possible to exploit economic opportunities relating to gambling business activities within the provincial gambling sector.
- Forty-five (45) Illegal and Responsible Gambling Awareness Campaigns conducted in all five zones based in all the Districts and Metro Municipalities in the province.
- 100% CSI projects implemented within the

APP STRATEGIC ALIGNMENT 2026–2029.

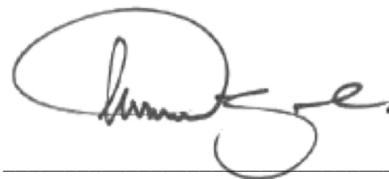
The 2026–2029 APP is aligned with national and provincial priorities to stimulate economic growth and create sustainable job opportunities across the Eastern Cape.

limited budget allocation, with priority given to the implementation of projects in communities located within the identified poorest wards in the province.

- Various maturity assessments of organisational performance, Records/Document management, Financial Management and Procurement, ICT and Human Resources Efficiency in the MTEF period administered to ensure that the effective functionality of all processes and components of the ECGB are pitched at a maximum level. The following maturity assessments will be achieved:
 - By 2026 Level 03 Board Governance assessment;
 - By 2028 Level 04 Organisational Maturity;
 - By 2029 Level 03 Records/Document Efficiency Maturity;
 - By 2029 Level 04 Risk Maturity;
 - By 2029 Level 04 Financial Management and Procurement Efficiency Maturity;
 - By 2029 Level 03 ICT Efficiency Maturity;
 - By 2029 Level 04 Human Resources Efficiency Maturity;
 - By 2029 Level 03 Ethics Assessment Maturity.
- Six (6) research and evaluation outputs commissioned in generating a reliable body of valid data, research information about gambling in the province and evaluations of programmes conducted that will ensure all decisions relating to gambling are evidence-based.

As the Accounting Officer, I wish to endorse this 2026–2029 Annual Performance Plan and further express my sincere appreciation to the Board of ECGB, the Chairperson of the Board and the Hon MEC and management of DEDEAT for their

continued guidance, support and commitment to the regulation of the gaming industry and the protection of the public in our province.



Mr Reuben Mabutho Zwane
CEO and Accounting Officer

PART A

OUR MANDATE



VISION

**Most efficient and empowering
gambling jurisdiction of choice**



PART A: OUR MANDATE

1. RELEVANT LEGISLATIVE AND POLICY MANDATES

Although there has been no update on relevant pieces of legislation and policy mandates during the development of the Five-Year Strategic Plan and Three-Year Annual Performance Plan, the ECGB is governed by the following pieces of legislation:

- ➔ Eastern Cape Gambling Act (Act 5 of 1997) (as amended)
- ➔ National Gambling Act (Act 7 of 2004) (as amended)
- ➔ Public Finance Management Act (Act 1 of 1999) (as amended)
- ➔ Promotion of Access to Information Act (Act 2 of 2000) (as amended)
- ➔ Promotion of Administrative Justice Act (Act 3 of 2000) (as amended)
- ➔ Protection of Personal Information Act (Act 4 of 2013)
- ➔ National Treasury Regulations (2005) (as amended)
- ➔ Labour Relations Act (Act 66 of 1995) (as amended)
- ➔ King IV Report
- ➔ Basic Conditions of Employment Act (Act 75 of 1997) (as amended)
- ➔ Companies Act (Act 71 of 2008), (as amended), and other pieces of legislation incidental thereto.

2. INSTITUTIONAL POLICIES AND STRATEGIES

Although there has been no update on institutional policies and strategies during the development of the Five-Year Strategic Plan and Three-Year Annual Performance Plan, the following internal policies, strategies, and frameworks guide the work of the ECGB:

- ➔ Eastern Cape Provincial Development Plan
- ➔ Eastern Cape Provincial Priorities
- ➔ Integrated Provincial Anti-Poverty Strategy
- ➔ ICT Policy
- ➔ Business Continuity Policy
- ➔ Safety, Health, Environment, Risk and Quality
- ➔ Occupational Health and Safety Policy
- ➔ Records Management Policy
- ➔ Training and Development Policy
- ➔ Health and Productivity Management Policy
- ➔ Human Resources Management Policy or Manual
- ➔ Disability Policy
- ➔ Special Leave Policy
- ➔ Death Grant Policy
- ➔ Overtime Policy
- ➔ Complaints Investigation Policy
- ➔ Performance Information Management Policy
- ➔ Intergovernmental Relations Policy
- ➔ Bursary Policy
- ➔ Wellness Management Policy (former Employee Assistance Policy)
- ➔ Funeral Policy
- ➔ Donations, Gifts and Sponsorships Policy
- ➔ Recruitment and Selection Policy
- ➔ Retention and Succession Policy
- ➔ Resettlement Policy
- ➔ Remunerative Work outside Employment
- ➔ Directive on Leave Policy
- ➔ Supply Chain Management Policy
- ➔ Petty Cash Management Policy
- ➔ Subsistence and Travel Policy
- ➔ Enterprise Risk Management Policy
- ➔ Code of Ethics and Business Conduct
- ➔ Whistle Blower Policy
- ➔ Communication Policy
- ➔ Social Media Policy
- ➔ Illegal Gambling Displacement Strategy
- ➔ Responsible Gambling Strategy

3. RELEVANT COURT RULINGS OR LITIGATION MATTERS

The ECGB operates in a highly litigious environment as its decisions may be challenged and/or reviewed by applicants and/or any interested persons. Listed below are relevant court rulings and litigation matters that may influence the mandate of the organisation in the form of precedent and litigation matters that are currently before the Board.

ONGOING COURT CASES

3.1. EMFULENI RESORTS (PTY) LTD v GALAXY BINGO PORT ELIZABETH (PTY) LTD t/a GALAXY BINGO AND OTHERS.

The review application was instituted by Emfuleni Resorts (Pty) Ltd (Emfuleni) under case number 2830/2016, against the ECGB and other parties. Emfuleni seeks an order declaring the definition of “Bingo” as defined in the ECGA as unconstitutional and invalid.

The matter has been dormant since October 2018. Since this matter remained in the ECGB register of litigation, management approached Emfuleni and requested it to withdraw and tender the wasted costs to date or proceed to set down the matter.

Emfuleni opted to withdraw the application and tender the cost. The ECGB requested Emfuleni to make a proposal on the withdrawal of the application and the payment of the wasted costs.

Emfuleni offered to pay the ECGB an amount of R800 000 which was rejected, with the ECGB prepared to accept nothing less than R1 800 000.00, taking into consideration that the legal fees paid are approximately R2 200 000.00.

The parties are still negotiating, the ECGB is considering setting the matter for taxation with a view to pushing Emfuleni to revert with an acceptable settlement amount.

3.2. LOTTOSTAR (PTY) LTD & OTHERS v ITHUBA HOLDINGS (PTY) LTD & OTHERS

The matter concerns the lawfulness of the practice by bookmakers of offering fixed odds bets on the outcome of the national lottery.

On 3 October 2023, the ECGB brought the above proceedings to the attention of licensed bookmakers in the province as directed by the SCA.

The ECGB contends that provisions of the Eastern Cape Gambling Act, 1997 (as amended) (“the EC Act”) permit betting on the outcome of the lottery and, accordingly, allows bookmakers to offer such bets in the province.

Ithuba Holdings (Pty) Ltd (“Ithuba”) launched an application in the Mpumalanga High Court to interdict Lottostar (Pty) Ltd (“Lottostar”) from offering such bets and to declare the practice unlawful in terms of section 57(2)(g) of the Lotteries Act, 1997. The Mpumalanga Gambling Board (“MGB”), Betting World (Pty) Ltd, and the National Lotteries Commission (“NLC”) were cited as respondents. The High Court dismissed the application on a point *in limine*.

Ithuba successfully appealed to the full Court, which on 31 August 2021 found that betting on the outcome of the lottery is unlawful, and Lottostar was interdicted. The full Court dismissed a further point *in limine* regarding the joinder of provincial licensing authorities (“PLAs”), provincial MECs, and licensed bookmakers.

The ECGB sought legal advice on whether to be bound by the appeal’s outcome or to participate. The advice was to intervene in order to protect the ECGB’s legislative and regulatory mandate. Key points included:

- ➔ Hollywood’s intervention application demonstrated the impact of the matter on all PLAs.
- ➔ The NLC contends that betting on lottery outcomes is prohibited, and the National Gambling Board (“NGB”) argues that provincial legislation permitting such betting is unconstitutional.
- ➔ A ruling in favour of the NLC/NGB may prohibit bookmakers in the province from offering such bets, with potential consequences for the validity of the EC Act.
- ➔ The SCA has recognised that the matter implicates concurrent national and provincial legislative competence, warranting ECGB’s participation.

The advice was accepted, and a notice to intervene was filed. On 4 August 2025, directives were issued by the Chief Registrar of the SCA.



The applications for leave to intervene and to adduce further evidence will be determined at the hearing of the appeal.

Sizekhaya Holdings (RF) (Pty) Ltd, the new National Lottery and Sports Pool license holder, has also indicated its intention to intervene.

The ECGB has filed and served its founding affidavit in support of its intervention and the introduction of new evidence.

3.3. MBIZANA DEVELOPMENT TRUST VS THE MASTER OF THE HIGH COURT (PMB) & OTHERS

On 4 October 2024, the Master of the High Court convened a virtual meeting to address governance issues within the Mbizana Development Trust (“MDT”). The ECGB and the Trustees were invited; the ECGB attended, but the Trustees did not.

On 10 October 2024, the Master issued directives by email, including the removal of the current Trustees from office.

On 1 November 2024, the Trustees instituted urgent proceedings against the Master of the High Court and cited the ECGB as the fifth respondent. The Trustees sought, among other things, an order reviewing and setting aside the Master’s decision to remove them.

The ECGB’s position is that, as regulator, it does not ordinarily involve itself in disputes between private parties unless they directly affect license conditions. The ECGB’s role is to monitor compliance and assist in resolving issues that may impact licensing.

In this case, the dispute concerns the appointment and removal of Trustees, which ordinarily falls outside the ECGB’s remit, particularly because:

The Master of the High Court, the competent authority in such matters, is cited and has filed the relevant records. No relief has been sought against the ECGB.

On 14 January 2025, the ECGB wrote to the Chairperson of the MDT, raising concerns about possible non-compliance with license conditions, particularly failure to implement the 2020 Amended Trust Deed.

On 29 January 2025, the MDT disputed non-compliance, stating that COVID-19 had delayed the lodging of the 2020 Amended Trust Deed.

The Trustees further contended that they remained bound by the 2019 Trust Deed, as the 2020 Amended Trust Deed had not yet been approved by the Master.

The ECGB noted that, despite this contention, the license conditions expressly incorporate the February 2020 Amended Trust Deed.

On 18 February 2025, the ECGB wrote to the Master’s Office seeking clarification regarding the Trust Deed and the Trustees in office.

On 20 February 2025, the Master replied, confirming that the 2019 Trust Deed had been lodged and that no subsequent amendments were filed — contradicting the MDT’s earlier representations.

The ECGB accordingly proposed a meeting with the Zone 5 licensee, the Master’s Office, and the MDT to clarify matters.

On 18 June 2025, the Master’s Office advised that it could not meet with the Trustees due to the pending litigation, and that separate engagements should be arranged.

On 11 July 2025, ECGB officials met with the Master, who confirmed that the 2020 Amended Trust Deed had been lodged but was defective as it lacked the required signatures. The Trustees had been informed accordingly.

On 29 July 2025, the ECGB met with Transun and the MDT. The Trustees requested time to respond to ECGB’s concerns by 18 August 2025.

The Trustees’ response of 18 August 2025 failed to resolve the issues, instead citing the pending court matter as justification for non-compliance.

On 25 August 2025, the ECGB again wrote to the licensee raising concerns about non-compliance with the license conditions, in particular the implementation of the 2020 Amended Trust Deed.

On 3 September 2025, the MDT replied that the 2019 Trust Deed remained operative, as the Donor had not consented to the 2020 amendments.

On 4 September 2025, the MDT forwarded correspondence from Transun, the Donor, expressly stating that it had not consented to the 2020 amendments. Clause 26.1 of the 2019 Trust Deed requires written Donor consent for any amendments.

The ECGB expressed concern at this position, given that the 2020 Amended Trust Deed is expressly incorporated into the license conditions, which Transun accepted in writing on 30 August 2021.

Importantly, the 2019 Trust Deed did not satisfy BEE requirements. The 2020 amendments were specifically introduced to align with the BEE Codes (Series 100) and to increase beneficiary participation in Trustee elections. The license was granted, inter alia, on the strength of the 2020 Amended Trust Deed.

In September 2025, the ECGB joined the proceedings as *amicus curiae* (“friend of the court”) to mitigate against the reputational risk.

3.4. EASTERN CAPE GAMBLING BOARD AND OTHERS v VUKANI GAMING EASTERN CAPE (PTY) LTD – APPEAL

The Supreme Court of Appeal handed down judgment in 2023 in favour of the ECGB, with costs. Tshangana Le Roux Inc was instructed to recover the costs.

The bill of costs was prepared and submitted. Objections were raised, and the matter was enrolled for taxation before the Taxing Master on 30 November 2025 at the Supreme Court of Appeal.

The high court main application and appeal will be taxed at the Makhanda High Court in due course.

3.5. TAXATION: FREEPLAY – EMFULENI RESORTS (PTY) LTD t/a THE BOARDWALK CASINO & ENTERTAINMENT WORLD & TRANSKEI SUN INTERNATIONAL LIMITED

The application for a declaratory order was instituted by the above-named Sun International casino licensees against the ECGB and Eastern Cape Member of the Executive Council responsible for finance (“the MEC”).

The matter was heard on 6 October 2022, and judgment was handed down on 24 January 2023 in favour of the ECGB.

On 18 October 2023, the Applicants filed and served the application for leave to appeal to the Constitutional Court. The matter was heard, and in August 2025 judgment handed down in favour of the ECGB with costs.

Subsequent to the aforesaid, Tshangana Le Roux Inc was instructed to recover the costs.



PART B

OUR STRATEGIC FOCUS



VISION

**Most efficient and empowering
gambling jurisdiction of choice**



PART B: OUR STRATEGIC FOCUS

4. SITUATIONAL ANALYSIS

The situational analysis provides the context for implementing the planned initiatives over the medium-term period and must be reviewed regularly. During the first year of the five-year planning cycle, the situational analysis in the Annual Performance Plan (APP) must be the same as that in the Strategic Plan (SP).

From the second year of the planning cycle onwards, the information in the SP at the beginning of the planning cycle should be updated annually in the APP, with changes in the institution's internal and external environment guiding the development of the APP. Reviewing of the situational analysis has taken into account evaluation reports and performance information from the previous financial year, relevant research into emerging trends, and the status of women, youth, and people with disabilities (where applicable); and decisions were taken with the use of planning tools such as SWOT analysis, PESTEL analysis, and McKinsey's 7S model.

The key areas below are reflected in the three-year Annual Performance Plan of the ECGB:

4.1. Strategic Focus of the Institution over the Three-Year Planning Period

The strategic focus of the institution over the three-year planning period and beyond includes the following:

- 4.1.1. Collecting gambling taxes for the Provincial Fiscus
- 4.1.2. Enhancing regulatory compliance and efficiency by providing comprehensive support to the industry to be sustainable and transformed
- 4.1.3. Promoting responsible gambling
- 4.1.4. Empowering communities through the CSI/SED programmes
- 4.1.5. Conducting empirical research and evaluations
- 4.1.6. Promoting and implementing principles of corporate governance
- 4.1.7. Positioning ECGB as an employer of choice
- 4.1.8. Displacement of illegal gambling activities
- 4.1.9. Maximising the benefit of AI and digitization technology in the regulation processes

4.2. Recent Statistics Relevant to the Institution and Sector

In developing the Three-Year Annual Performance Plan, the following statistics have been considered:

4.2.1. Revenue Contribution to the Provincial Fiscus

The ECGB is the second largest contributor to the provincial fiscus' own revenue: only revenue emanating from motor vehicle licensing accounts for more own revenue in the Eastern Cape. The ECGB's total contribution to the provincial fiscus in the last five years (2020/21 – 2024/25) from gambling and betting taxes was R822 million. Table 1 below indicates the sources of revenue collected over the past five years.

Table 1: Revenue collected for the Eastern Cape fiscus over the past five years

Revenue to the fiscus	2020/21	2021/22	2022/23	2023/24	2024/25
	R'000	R'000	R'000	R'000	R'000
Casinos	43 863	73 230	89 205	91 720	92 654
Bookmakers and totalisator	7 757	8 865	8 955	7 032	13 045
Bingo	25 424	38 971	47 673	44 103	41 851
Limited Payout Machines	25 093	39 221	43 111	41 217	39 764
Total taxes	102 137	160 287	188 944	184 071	187 314
Growth rate	-(46.2%)	56.9%	18%	(3%)	1.76%

Source: ECGB Annual Report (2024/2025)

In the previous strategic cycle, the ECGB stimulated gambling tax revenue growth primarily through the licensing and rollout of Bingo and Limited Payout Machines (LPMs). This resulted in significant growth in tax revenues paid to the fiscus at rates higher than national averages.

4.2.2. Decent Employment Opportunities through Inclusive Growth

Employment in the gambling industry requires high levels of integrity, honesty, and morality. The Board is responsible for receiving applications and approving key persons' and gambling employees.

The gambling industry continues to create sustainable job opportunities, promote tourism, and facilitate and contribute to significant infrastructural development and investments, even in non-metropolitan areas, which stimulate the local economy through procurement of goods and services within the province.

Table 2 on the following page reflects the number of sustainable job opportunities created by the provincial gambling sector in the Eastern Cape as at 31 December 2024.

Table 2: Gambling industry facilitated sustainable job opportunities

Casinos	Bizana Wild Coast Sun Casino	Gqeberha Boardwalk Casino	East London Hemingways Casino	Komani Queens Casino	Mthatha Mayfair Casino	Total Employment
Total Employees for Casinos	175	190	156	44	15	580
RO and LPMs	Vukani Gaming Eastern Cape (Pty) Ltd			Pioneer Slots (Pty) Ltd		813
Total Employees for RO and LPMs	513			300		
Independent Site Operators						75
Total Employees for ISOs						
Bookmakers (Total of 15 licensed bookmakers)						173
Total Employees for Bookmakers						
Totalisator and Racecourse						11
Total Employees for Totalisator and Racecourse						
Bingo Halls (Total of 15 licensed Bingo halls)						434
Total Employees for Bingo Halls						
Holders of Certificates of Suitability						58
Total Employees for Certificates of Suitability						
Manufacturers						15
Total Employees for Manufacturers						
Grand Total						2159

Source: ECGB Gambling Regulation System (GRS) (Year: 2025)

4.2.3. Contributions Towards Infrastructure Development in the Eastern Cape¹

As a result of the conditions imposed on gambling licensees, casino investments reached beyond the development of the immediate gambling premises and resulted in the establishment of new hotels or upgrades thereto, shopping malls, entertainment centres, and convention centres.

Table 3 on the following page depicts the casino profile on infrastructure development in the Eastern Cape.

Table 3: Functional and operating Eastern Cape casino profile on infrastructure development

Description	Bizana: Wild Coast Sun Casino	Gqeberha: Boardwalk Casino	East London: Hemingways Casino	Komani: Queens Casino	Mthatha: Mayfair Casino
Date Opened	2021	2010	2011	2017	2018
Total Capital Investment (Rm)	R2.6 Billion	R2 Billion*	R400 Million*	R151 Million	R141 Million

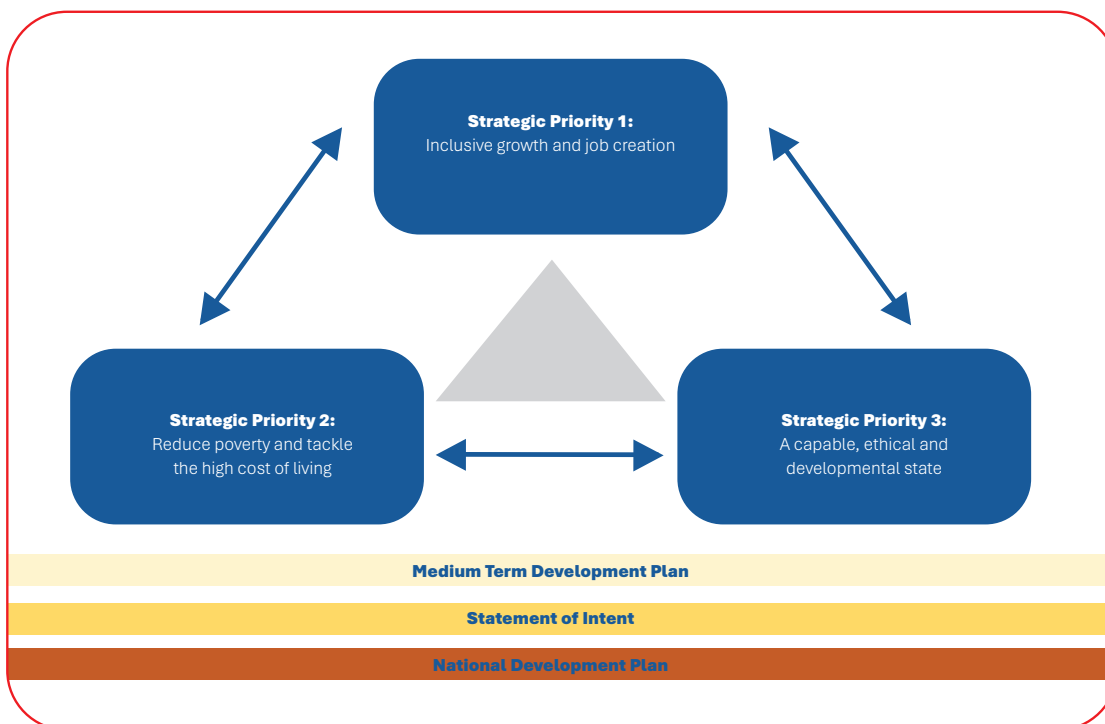
Source: ECGB Gambling Regulation System (GRS) (Year: 2025)

*These are reinvestments and do not represent the market value or original investment on the first award of licenses.

1 Contributions towards infrastructure development in the Eastern Cape province address National Outcome 06: "An efficient, competitive and responsive economic infrastructure network."

4.3. Reference to the Medium and Long-Term Policy Environment

The Cabinet adopted three major policy priorities to inform and guide all public sector organisations and entities to align their five-year strategies for the next five years, and the ECGB is also obliged to ensure that its targets are aimed at enhancing the implementation of these policy priorities as depicted in the figure below.



4.4. Provincial Policy Priorities

In determining emerging priorities for the 7th Administration for the province, provincial management, with the support of provincial clusters, embarked on a process of determining the provincial priorities and the institutional arrangements to drive such priorities.

The emerging priorities are anchored on the Provincial Development Plan goals and the nine integration programmes, and are consolidated into a Provincial Integration Programme Blueprint with the support of provincial clusters.

The ECGB’s three-year Annual Performance Plan is anchored on these nine integration programmes, and on an annual basis, a report will be developed indicating how the ECGB is performing and implementing some of the relevant areas. Below is a figure reflecting the Provincial Policy Priorities for 2025-2030.



4.5. Evidence-Based Analysis of the Strategic Context and Priorities Relating to Women, Children, Youth and People with Disabilities

Table 4 below indicates various types of licensees and the total number of persons employed as a result of licenses issued in terms of the designated groups. The table thus depicts the total number of 3 673 sustainable job opportunities created cumulatively as at 31 March 2025.

Table 4: Profile of gambling industry sustainable job opportunities created and maintained

TYPE OF LICENSEES	GAMBLING TOTAL	NON-GAMBLING TOTAL	FEMALES		YOUTH		DISABLED		PDI		NON-PDI	
			Non-Gambling	Gambling	Non-Gambling	Gambling	Non-Gambling	Gambling	Non-Gambling	Gambling	Non-Gambling	Gambling
Casinos	580	575	325	310	242	254	3	2	547	526	28	54
Bookmakers	173	80	55	169	49	138	1	0	75	167	5	6
Route and Site Operators	794	465	192	309	83	303	5	0	245	726	220	68
Bingos	434	290	184	174	179	115	2	0	282	425	8	9
Totalisator	11	0	0	9	0	0	0	0	0	11	0	0
Certificate of Suitability	58	50	18	7	0	0	0	2	50	55	0	3
Manufacturers	15	8	5	4	2	2	0	0	7	15	1	0
ISO	75	65	43	48	19	37	0	0	59	64	6	11
TOTAL	2140	1533	822	1030	574	849	11	4	1265	1989	268	151

Source: ECGB Gambling Regulation System (GRS) (Year: 2024/2025)

4.6. Profile and Landscape of Gambling Licenses Awarded to Qualified Applicants

4.6.1. Casino License Operations

The Eastern Cape has been allocated five casino licenses out of a total of 41 such licenses allocated throughout the country. The ECGB allocated the provincial licenses to five zones in an endeavour to ensure that a measure of geographic spread was applied to the distribution of casino gambling activities.

Table 5 below depicts the five casino licenses awarded in the province, including their expiry dates.

Table 5: Eastern Cape casinos per zone or municipal boundaries

District Municipality	Zone	Casino	Location	Expiry Date	Term of License
Nelson Mandela Bay Metropolitan Municipality	Zone 1	Emfuleni Resorts (Pty) Ltd t/a The Boardwalk Casino and Entertainment World	Gqeberha	2026	15 Years
Buffalo City Metropolitan Municipality	Zone 2	Tsogo Sun Emonti (Pty) Ltd t/a Hemingways Casino	East London	2026	15 Years
Chris Hani District Municipality	Zone 3	Queens Casino (Pty) Ltd t/a Queens Casino and Hotel	Komani	2037	20 Years
OR Tambo District Municipality	Zone 4	Mayfair Casino (Pty) Ltd (2014/147296/07) t/a Mayfair Casino	Mthatha	2038	20 Years
Alfred Nzo District Municipality	Zone 5	Transkei Sun International Ltd t/a Wild Coast Sun Casino	Mbizana	2041	20 Years

Source: ECGB Gambling Regulation System (GRS) (Year: 2025)

Casino operations generated gross gaming revenues of R1 101.4 million and contributed R91.72 million to the Provincial Revenue Fund during 2024/25. Table 6 on the following page depicts an overall profile of operational Eastern Cape casinos.

Table 6: Profile of operating Eastern Cape casinos

Description	Bizana: Wild Coast Sun Casino	Gqeberha: Boardwalk Casino	East London: Hemingways Casino	Komani: Queens Casino	Mthatha: Mayfair Casino
Date Opened	September 2021	October 2010	September 2011	December 2017	December 2018
Operator	Wild Coast Sun International Ltd	Emfuleni Resorts (Pty) Ltd	Tsogo Sun Emonti (Pty) Ltd	Queens Casino and Hotel (Pty) Ltd t/a Queens Casino	Mthatha Casino (Pty) Ltd
Management Company	Sun International Management Ltd	Sun International Management Ltd	Tsogo Sun Casino Management Company	African Pioneer Gaming (Pty) Ltd	No management company
Total Capital Investment (Rm)	R2.6 Billion	R2 Billion	R400 Million	R151 Million	R141 Million
Total Employees	175	190	156	44	15
Slot Machines	552	708	405	181	81
Tables	31	36	24	15	10
Electronic Player Terminals	8	8	-	8	8

Source: Source ECGB Gambling Regulation System (GRS) (Year: 2025)

It is evident that the casino component of the Eastern Cape gambling industry is significant and contributes to sustainable job creation in the province. As of 31 March 2025, the casino component employed about 580 people in permanent and temporary jobs. More than R5.3 billion has been invested by the casino industry in the province. The advent of online betting and gambling, a sluggish economy, and a lack of disposable income among punters are affecting the growth of gross gaming revenue from the casino sector in the province.

Challenges faced by the Casino Sector

The casinos in the province currently are experiencing challenges of decline in punters as punters are beginning to utilise online betting and gambling platforms.

- ➔ The industry has seen a significant shift, particularly post-2010 and after the COVID-19 pandemic. Digital betting is on the rise, while traditional modes like casinos face stagnation.
- ➔ The footprint of the Eastern Cape casinos has declined drastically because of the lack of disposable income of punters and the emergence of online sports betting.
- ➔ The future of land-based casinos, including Bingo halls and LPMs, is becoming unsustainable because of the emerging online betting and gambling. The National Gambling Act does not allow for online gambling, and until this is addressed, the land-based operations are limited in how they can innovate to take advantage of emerging technologies.
- ➔ The environment in which some of the Eastern Cape casinos operate is not conducive to business, with concerns over environmental disasters, social unrest, ageing municipal infrastructure, and sluggish economy.

4.6.2. Route and Site License Operations

Apart from casino license operations, the provincial gambling industry also consists of route and site license operations. These operations are located at recreational and leisure amenities such as taverns, clubs and pubs. To date, the ECGB has awarded two route operator licenses in terms of Section 49 of the Eastern Cape Gambling Act.

Vukani Gaming Eastern Cape (Pty) Ltd, trading as V-Slots, has established a number of site license operations distributed widely across the province. In this regard, the Limited Payout Machine (LPM) industry clearly fulfils a demand for entertainment facilities different from those provided by casino-type operations. V- Slots is currently operating 945 LPMs from 92 operational sites.

A second route operator, Pioneer Slots (Pty) Ltd, has been licensed to operate 1000 LPMs and is currently operating 861 LPMs from 59 operational sites. Each of these route operator licenses is valid for a period of 15 years.

Site operations are made up of Type A (3-5 LPMs), Type B (20-40 LPMs), and Type C (6-19 LPMs) site licenses. The route

and site operations generated gross gaming revenues of R397.7 million and contributed R39.8 million in gambling tax to the Provincial Revenue Fund for 2024/25.

Table 7 below depicts an overall profile of licensed Eastern Cape route operators.

Table 7: Profile of Eastern Cape route operators and Limited Payout Machines

Description	Vukani Gaming Eastern Cape (Pty) Ltd	Pioneer Slots (Pty) Ltd
Date License Issued	29/03/2012	01/03/2013
Date License Expires	31/03/2027	29/02/2028
Number of Sites Licensed	92	59
Registered Employees	513	300
Total Slot Machines	945	861

Source: ECGB Gambling Regulation System (GRS) (Year: 2025)

In line with legislative amendments to the regulations on LPMs, the Board has also created a fourth category of site license, namely Independent Site Owners (ISO), referred to as Type D, with 40 LPMs.

The ISO will be independently owned by the site owners with no link or profit-sharing with the route operator. Table 8 below depicts operational Independent Site Owners (ISO) (Type D) licenses.

Table 8: Independent Site Owners (ISOs) (Type D)

District Municipality or Metro	Licensed ISO	Location of ISO in the province	Date License Issued	Date License Expiry	Employment Created	No. of LPMs	Investment Value
Nelson Mandela Bay Metro	Spin & Win Uitenhage	Kariega	29/03/2018	28/03/2038	0	-2	No new investment ³
	Royale Aces	Bay West, Gqeberha	27/09/2019	26/09/2039	5	27	R5.6 Million
Alfred Nzo District	Spin & Win Mbizana	Bizana	29/03/2018	28/03/2038	13	40	No new investment ⁴
	Spinners Mount Frere	Mount Frere	01/11/2019	31/10/2039	9	335	R2.3 Million
Joe Gqabi District	Golden Palace Sterkspruit	Sterkspruit	07/11/2019	06/11/2039	11	38	R0.9 Million
KSD	Spinners Mthatha	Mthatha	14/07/2023	13/07/2043	16	40	R1.6 Million
Buffalo City Metro	Golden Palace Mdantsane	East London	24/07/2023	23/07/2043	15	36	R2.3 Million
OR Tambo District	Golden Palace Port St Johns	Port St Johns	16/10/2024	15/10/2044	6	21	R4.8 Million
Total					75	262	R17.5 Million

Source: ECGB Gambling Regulation System (GRS) (Year: 2025)

Challenges faced by the LPM Sector

- ➔ The LPM industry is maturing, making it increasingly difficult to find new profitable locations.
- ➔ The lack of profitable sites hinders revenue expansion, making it difficult for operators to sustain profitability over time.
- ➔ Electricity shortages, caused by South Africa's ongoing loadshedding, are one of the most pressing challenges for LPM operators. Power outages reduce foot traffic, shorten operating hours, and, in some cases, have led to permanent closures of businesses that house LPMs.
- ➔ The LPM sector is losing market share to other forms of gambling. The rise of online betting, particularly online slots licensed in mid-2022, has had a noticeable effect on LPM revenues.
- ➔ Rising operating costs, increased rental demands from landlords, and economic pressures are leading to unplanned closures of LPM sites. Consumer spending is also under pressure due to economic conditions, further affecting the industry.
- ➔ The combined effects of the above challenges - maturing sites, competition from online gambling, economic pressures, and operational inefficiencies - have resulted in a decline in overall revenue across the LPM sector.

2 The site is no longer operational, business was sold.

3 This was a conversion of an existing Type B to a Type D

4 This was a conversion of an existing Type B to a Type D

5 The site is no longer operational pending removal of business to other premises.

Proposed Solutions to Inform the New Strategy

- ➔ Increase maximum bet and win limits: Adjusting the maximum bet and win limits for LPMs can provide a means of boosting revenue. By allowing higher stakes, operators can attract a broader customer base and generate higher revenues from existing machines, potentially offsetting some of the costs associated with rising input expenses and competitive pressures.
- ➔ Re-evaluation of license fee structures: The cost of license fees needs to be reassessed in light of the industry's current economic challenges. Lowering or restructuring these fees could ease the financial burden on operators, enabling them to remain competitive and keep more locations viable in an increasingly competitive gambling landscape.
- ➔ Embrace technological solutions: Integrating technology solutions such as digital wallets, remote LPM gambling, and player tracking can provide a competitive edge. Digital wallets offer greater convenience for players, enhancing the user experience and potentially increasing play frequency. Remote gambling capabilities for LPMs would allow operators to tap into the growing demand for online gambling, while player tracking can help operators personalise the gaming experience and drive customer loyalty.
- ➔ Adopt server-based gaming: The adoption of server-based gaming offers a way to reduce machine costs by centralising the management and operation of games. With server-based gaming, multiple games can be hosted and updated from a central server, allowing for greater flexibility and reducing the need for costly physical upgrades or replacements of individual machines.

4.6.3. Bookmaking Operations

Betting activities related to horse racing are conducted by fifteen registered bookmakers in the province who have 34 licensed branches. The bookmaking industry has shown a steady decline in terms of retail outlets recently, whilst several new bookmakers with a national footprint have applied, with existing bookmakers also applying for additional premises.

The horseracing industry remains a significant source of employment and provides access to a wide range of specialised job opportunities, supported by comprehensive training and skills development programmes conducted by the racecourse operators, which extend to jockeys, trainers, and breeders.

Sports betting and horse racing operations generated gross gaming revenues of R189.1 million and contributed R13 million to the Provincial Revenue Fund for the 2024/25 year. Table 9 below reflects an overall profile of licensed Eastern Cape bookmakers.

Table 9: Profile of the Eastern Cape bookmaker industry

Licensed Bookmakers	Date License Issued	Date License Expires	No. of Branches	Employees
Hollywood Sportsbook Eastern Cape (Pty) Ltd t/a Hollywood Bets	23/06/2021	22/06/2026	10	110
WH van der Vyver (Pty) Ltd t/a Marshalls World of Sport	01/01/2023	31/12/2027	3	20
Lucky Bet (Pty) Ltd t/a Soccer Shop	14/12/2022	13/12/2027	1	10
BetXchange Eastern Cape (Pty) Ltd t/a BetXchange	18/12/2020	17/12/2025	2	14
World Sports Betting EC (Pty) Ltd t/a World Sports Betting EC	23/07/2020	22/07/2025	2	1
Vula Gaming (Pty) Ltd t/a Vula Gaming	30/09/2021	29/09/2026	1	3
Ukhozi Gaming (Pty) Ltd t/a Ukhozi Gaming	13/12/2021	12/12/2026	6	5
Alfa Bets (Pty) Ltd t/a Alfa Bets	29/09/2022	30/09/2027	1	0*
Wanejo Technologies (Pty) Ltd t/a Wanejo Bets	30/09/2022	29/09/2027	1	5
Nevzoclox (Pty) Ltd t/a Bahumi Bets (Port Alfred)	23/02/2024	22/02/2029	1	0*
Damich Betting (Pty) Ltd t/a Sports Pro Bets	12/04/2024	11/04/2029	1	0*
Score-a-lot (Pty) Ltd t/a Score-a-lot	27/03/2024	26/03/2029	2	5
Swanjohn Technologies (Pty) Ltd t/a Lucky Lotto	04/12/2024	03/12/2029	1	0*
Misty Mountain Wholesalers (Pty) Ltd t/a Dodge City	04/12/2024	03/12/2029	1	0*
Digibot (Pty) Ltd t/a Jackpot Fortune	04/12/2024	03/12/2029	1	0*
Totals			34	173

Source: ECGB Gambling Regulation System (GRS) (Year: 2025)

*These are bookmakers issued with a gambling license but who have not commenced with operations and as such, no employment has taken place yet.

Observations of the Bookmaking Sector

- ➔ Online betting has experienced exponential growth in recent years. As internet connectivity and access to smartphones increase across the country, more people are turning to online platforms to place their bets, creating vast opportunities for bookmakers.
- ➔ The shift towards digital has transformed the industry, making it more accessible and convenient for customers, while also broadening the range of betting options available. With online betting, bettors are no longer limited to traditional sports betting but can engage in various forms of gambling, from esports to casino-style games.
- ➔ This digital transition presents significant growth potential for the industry, particularly as the customer base diversifies and expands.
- ➔ As the sector grows, there is a need for more robust and agile regulatory frameworks to ensure fairness, security, and consumer protection in the online space.

4.6.4. Recent Developments on Online Betting Platform

A renewed interest in bookmaker licenses has been observed following the implementation of zero-rating on sports betting and other lawful contingencies in the province.

As at 31 November 2025, twenty-two (22) bookmaker operators have been licensed to offer online betting operations. It is anticipated that more applications for bookmaker licenses will be received in the last quarter of the 2025 FY, as well as applications for totalisator licenses and manufacturer registrations, which are linked to online betting. The Board further approved 14 licenses for online bookmakers in December 2025. These bookmakers are not yet operational. Other license applications that were received include 8 bookmakers, and these applications will be tabled before the Board in March 2026 for consideration and approval.

With the launch of various online platforms in the province since October 2024, there has been a surge in Turnover, GGR, and Taxes from online betting.

4.6.5. Totalisator and Racecourse Operations

The ECGB re-licensed Phumelela Gaming and Leisure Ltd (totalisator) with a new totalisator and racecourse license valid for five years. The licenses were transferred to 4Racing (Pty) Ltd in August 2021.

Operations extend to 21 totalisator branches and agencies. 4Racing (Pty) Ltd currently operates the only racecourse in the province – Fairview Racecourse in Gqeberha – which is approximately 2,700m² in circumference and has an 800m run-in.

Table 10 below depicts an overall profile of the licensed Eastern Cape totalisator and racecourse.

Table 10: Profile of the Eastern Cape totalisator and racecourse

Licensed Totalisator and Racecourse	4 Racing (Pty) Ltd - Totalisator	Fairview - Racecourse
Date License Issued	20/12/2021	20/12/2021
Date License Expiry	19/12/2026	19/12/2026
Registered Employees	11*	

Source: ECGB Gambling Information Management System (GIMS) (Year: 2025)

*Includes Employees working at Fairview racecourse registered in terms of the Act and excludes those performing non-gambling related functions or activities.

Observations by the Totalisator and Racecourse Sector

Despite the growth in betting, the sector is not without its challenges. Key headwinds that could impact future operations include:

- ➔ Industry realignment: The ongoing merger between Gold Circle and Cape Racing under Hollywoodbets will reshape the competitive landscape. Operators will need to navigate the balance between collaboration and competition once the merger is completed.
- ➔ Product offering expansion: The betting industry is expanding into new product offerings, such as fixed-odds betting and the introduction of Historical Horse Racing (HHR), which is being licensed and rolled out across the province and other jurisdictions.

4.6.6. Bingo License Operations

A market feasibility study was commissioned in 2010 to ascertain the introduction of Bingo as a new form of gambling in the Eastern Cape. The outcome of the study influenced the development of a policy framework that culminated in the awarding and issuing of 15 Bingo licenses in the Eastern Cape.

The Bingo sector generated gross gaming revenues of R418.5 million and contributed R41.9 million to the Provincial Revenue Fund for the 2024/25 year. Table 11 below depicts an overall profile of Eastern Cape operational Bingo halls.

Table 11: Profile of Eastern Cape operational Bingo halls

District Municipality or Metro	Licensed Bingo Halls	Location of Bingo Halls in the Province	Date License Issued	Date License Expires	Employment Created	No. of Electronic Bingo Terminals	Investment Value
Nelson Mandela Bay Metropolitan Municipality (Cacadu District)	Galaxy Bingo Port Elizabeth (Pty) Ltd (2012/136896/07) t/a Galaxy Bingo & Entertainment	Gqebera	19/03/2014	18/03/2029	33	292	R11 Million
	EC Gaming Uitenhage (Pty) Ltd (2012/136900/07) t/a Galaxy Bingo & Entertainment	Kariega	31/08/2017	31/08/2032	23	255	R17 Million
	Bingo Royale Cleary Park (Pty) Ltd (2012/18692/07) t/a Bingo Royale Port Elizabeth	Gqebera	05/09/2014	04/09/2029	47	181	R11 Million
Amathole District Municipality	Galaxy Bingo Butterworth (Pty) Ltd (2012/136895/07) t/a Galaxy Bingo	Butterworth	04/09/2015	03/09/2030	15	123	R5 Million
Buffalo City Metropolitan Municipality (Amathole District)	Galaxy Bingo East London (Pty) Ltd (2012/136888/07) t/a Galaxy Bingo Gaming & Entertainment	East London	07/03/2014	06/03/2029	23	177	R5 Million
	Galaxy Bingo King William's Town (Pty) Ltd (1997/005815/07) t/a Galaxy Bingo and Entertainment King William's Town	King William's Town	02/02/2017	01/02/2032	23	138	R8 Million
	Bingo Royale Buffalo City CBD (Pty) Ltd (2012/112914/07) t/a Bingo Royale East London	East London	19/09/2014	18/09/2029	45	150	R5 Million
Sarah Baartman District Municipality	Goldrush Bingo EC No.5 (Pty) Ltd (2014/0352210/07) t/a The Goldrush Bingo Grahamstown	Makhanda	12/06/2015	11/06/2028	25	55	R10.8 Million
	Goldrush Bingo Eastern Cape No.3 (Pty) Ltd t/a Goldrush Bingo Graaff Reinet	Graaff-Reinet	23/09/2015	22/09/2030	29	89	R6 Million
	Bingo Royale JBay (Pty) Ltd t/a Bingo Royale JBay	Jeffreys Bay	16/03/2015	15/03/2030	44	126	R5 Million
Chris Hani District Municipality	Goldrush Bingo Eastern Cape No.4 (Pty) Ltd t/a Goldrush Bingo Cradock	Cradock	29/01/2016	28/01/2031	23	60	R7 Million
	Palacio Bingo Ngcobo (Pty) Ltd Zone 4 (Pty) Ltd (2006/02153/07) t/a Palacio Bingo	Ngcobo	27/10/2016	26/10/2031	4	486	R5 Million
OR Tambo District Municipality	K2014016993 (Pty) Ltd (2014/016993/07) t/a Bingo Royale Lusikisiki	Lusikisiki	19/02/2016	18/02/2031	25	121	R 5.3 Million
	Arvodex (Pty) Ltd (2012/112949/07) t/a Bingo Royale Mthatha	Mthatha	06/12/2013	05/12/2028	45	165	R5 Million
Alfred Nzo District Municipality	Bingo Royale Matatiele (Pty) Ltd (2014/0169944/07) t/a RITZ Bingo Matatiele	Matatiele	21/11/2015	20/11/2030	30	81	R3.5 Million
Total					434	2061	R110 Million

Source: ECGB Gambling Regulation System (GRS) (Year: 2025)

Challenges faced by the Bingo Sector

- The industry has not yet returned to pre-COVID revenue levels. Several Bingo halls have faced restructuring or have been forced to reduce the number of EBTs due to reduced patronage and changing consumer behaviours.
- The rise of online gambling post-COVID has further exacerbated the issue, as consumers increasingly opt for more convenient digital platforms, often turning to illegal gambling sites, which present an additional challenge to regulated operators.
- Need to examine whether tangible empowerment, particularly through Broad-Based Black Economic Empowerment (B-BBEE), has been achieved, and to address critical areas where progress has been limited.
- Attitude of the Board towards regulating the Bingo industry has been criticised for its inflexibility and lack of adaptability to current challenges. Rules that prevent licensees from relocating their operations, even under severe economic circumstances, highlight the rigidity of the regulatory framework. Despite these shortcomings, some operators have managed to pay dividends, although not all have been equally successful, especially smaller establishments in less lucrative areas like Cradock.
- Despite changing market conditions, regulators have maintained rigid rules that restrict licensees from relocating to more profitable areas or adjusting their business models. This inflexibility stifles the growth and sustainability of operators, especially those located in regions where Bingo is no longer profitable.
- Vanity litigation, legal disputes driven by ego rather than substance, has become a costly issue in the sector. Rather than resolving disputes through negotiation or mediation, stakeholders often resort to the courts, leading to financial losses for both operators and regulators. A mature, cooperative approach to resolving conflicts must be encouraged to prevent further economic harm.
- The Smoking Bill is expected to reduce footfall in bingo halls and casinos, as smoking patrons may stay away due to restrictions. This will severely affect revenue streams already struggling to recover post-COVID. The bill disproportionately impacts Bingo and casino venues, which rely heavily on smoking areas to attract players.

Proposed Solutions to Inform the New Strategy

- Developing online Bingo regulations: With online gambling becoming more popular and statistics showing that more money is spent online, it is crucial for the Bingo industry to follow suit. The development of a regulatory framework that supports online Bingo could provide an opportunity for the sector to adapt and thrive in the digital age.
- The transition to online platforms must be supported by political will and regulatory action, including policies that safeguard consumers and ensure compliance by operators.
- Addressing the older generation's preferences: Bingo and casinos predominantly attract an older demographic. To ensure the sustainability of the sector, it is vital to rethink strategies for engaging younger generations. Without innovation, the Bingo sector risks alienating future players and hastening its decline.
- Flexible and adaptive regulation: The regulatory board must become more flexible to accommodate the evolving nature of the gambling industry. This includes revisiting rules around relocation and adapting to new business realities. More frequent and constructive communication between the board and operators is essential for addressing the issues faced by licensees. Engaging in real discussions based on the current context, rather than relying on outdated research, will help foster a more responsive and adaptive regulatory environment.
- Forums for collective engagement: The industry requires regular forums where all stakeholders can discuss critical issues such as illegal gambling, online expansion, and regulatory challenges. The recent closure of illegal gambling operations is a step in the right direction, but further efforts are needed to tackle the growing threat of illegal online gambling platforms. A collective approach will ensure that the legitimate industry is protected, and its employees' livelihoods are safeguarded.
- Protecting employment and revenues: Given the serious threat to livelihoods across the province, especially in Bingo halls and casinos, measures must be taken to protect existing jobs. One avenue is to embrace the digital transition, which could open new opportunities in the online gambling sector while ensuring that traditional establishments are supported through flexible regulations and innovative solutions.

4.7. Spatial Information Guiding Planning

Spatial planning is a strategic process that seeks to organise how the economy, society, and the built environment operate in space, whilst also seeking to ensure the protection, restoration, and management of the natural environment, underpinned by evidence-based and normative town and regional planning approaches.

In rolling out gambling licenses, the ECGB has been guided by the ECGA and its regulations, including various policy imperatives that determine the location of regulated gambling operations.

4.8. Emerging priorities and opportunities that will be implemented during the planning period

Following consultation and strategic conversations with the stakeholders of the ECGB, and considering the challenges highlighted above, the opportunities indicated below will be explored for implementation and aligned to strategic outcomes and targets planned for the five years continuing in the MTEF period 2025/26–2027/28:

Table 12: Emerging priorities and opportunities

NO.	EMERGING PRIORITIES AND OPPORTUNITIES	PROGRESS IN IMPLEMENTING THESE PRIORITIES AND OPPORTUNITIES EXPLOITED	DRIVING / RESPONSIBLE DIVISION
1.	Exploration of other revenue generation options	A study on the revenue generation options was conducted pre-COVID, and implementation of certain recommendations was delayed as a result of the pandemic; however, monitoring in this regard is ongoing.	Financial Management Services AND Audit, Gaming Control, Regulatory Affairs, and Systems
2	Attract more gaming companies to invest in online betting platforms to be licensed in the province	Progress has been made where six private companies have been licensed to offer online sports betting.	Gaming Control, Regulatory Affairs, and Systems
3	Enhance the legislative programme to address matters requiring new amendments and new regulations with regard to the licensing regime of the ECGB	Communication to the Hon. MEC to engage the National Minister of DTIC regarding the hosting of the National Gambling Policy Council has been submitted accordingly.	Office of the CEO AND Legal Division
4.	Conducting a study on possible new markets regarding propensity to gamble, and this will be aligned with the current Research Agenda of the ECGB, including a proposed study to evaluate the saturation of gambling within the province	The Budget Sub-Programme has reviewed its Research Strategy and Agenda, and determined possible areas for conducting research, especially in the emerging markets.	Empirical Research and Information Management
5.	New digital platforms to reach the young market, and in particular above 18 years of age	Research on new digital platforms attracts the younger markets, above 18 years of age, which will be explored in collaboration with the industry for the next five-year strategic planning cycle.	Gaming Control, Regulatory Affairs, and Systems AND Empirical Research and Information Management
6.	Establishing a “Gaming College /Academy” in partnership with licensees and a local university in preparation for the next growth node of the industry.	The Office of the Premier, the Department of Higher Education, and relevant statutory organisations within the higher education sector, as well as the gaming industry, will be engaged in the 2025/26 financial year to explore the possibility of establishing a Gaming College in the province.	Corporate Services Executive Manager AND Compliance and Licensing Executive Manager
7.	Advances in technology (GRS, cell-phone technology for effective regulatory service and reporting purposes)	The Gambling Regulation system has been developed in phases, which has enabled and streamlined processes such as correspondence, which is now done via a web portal. Inspectors will soon be able to perform some tasks via a mobile App on their smartphones, and ICT is currently pursuing this matter to be implemented in the next planning cycle.	Information and Communication Technology AND Empirical Research and Information Management AND Gaming Control, Regulatory Affairs, and Systems
8.	Consolidate all CSI contributions of the industry into a special purpose vehicle to drive the implementation of CSI activities in the province to make a visible impact	Amendments to all license conditions to reflect an intention to centralise CSI conditions into one special purpose vehicle; Or amend the current legislation to reflect this intention.	Gambling Regulation and Consumer Protection AND Corporate Services AND Legal Services
9.	Development of clear mechanisms for monitoring and reporting on trusts and foundations that are established through license conditions to disburse proceeds of gambling	Compliance mechanisms have been and will be intensified and enhanced from the 2025-2030 planning cycle to incorporate monitoring and reporting about trusts and foundations that are established through license conditions.	Investigation and Licensing Administration AND Audit and Compliance Divisions
10.	The organisation needs to embrace the 4IR and its impact on regulatory processes and on skills development for employees, including a paperless environment	The ECGB is currently in the process of developing an electronic document management system with digitized workflow. The ICT strategy and Enterprise Architecture Framework will be reviewed. This will look inter alia at additional automation and digitisation strategies.	Information and Communication Technology AND Human Resources AND Gaming Control, Regulatory Affairs, and Systems
11.	Innovation in terms of Internet interventions for problem gambling in the province, ease of access, and reduction of costs during this new five-year period should also be priorities during the seventh administration	Inspectors have been on a first responder course on how to handle ICT evidence.	Information and Communication Technology AND Inspections, Law Enforcement, Responsible Gambling, and Public Education.
12.	Regulated online gambling is an opportunity to be explored	Amendments to be made in the National and Provincial Gambling Act or to be reflected in a new Interim Legislation as a result of the merger of the ECGB and ECLB.	Legal Services AND Gaming Control, Regulatory Affairs, and Systems

4.9. Information on the Capacity of the Institution to Deliver on Its Mandate

The ECGB can implement its mandate and fulfil its responsibilities with its current limited available capacity. Additional responsibilities and functions have emerged, and several officials have been requested to manage these functions and implement the responsibilities.

The current organisational structure has been reviewed and approved in order to be fit for purpose. The structure is designed to adhere to the key strategic focus areas of the ECGB and its strategic pillars, aiming at achieving its strategic outcomes in an effort to achieve the desired impact.

For the organisation to deliver on its mandate, the strategy and the structure must be woven together seamlessly. With a clear focus on what the organisation wants to achieve, it will proceed to align its structure in such a manner to best deliver on its mandate.

4.10. Relevant Stakeholders that Contribute to the Institution’s Achievement of Outcomes

The ECGB has an approved Stakeholder Management Strategy which includes, among other things, a list of key stakeholders who have an influence on the regulatory work of the ECGB and those on whom the ECGB relies to implement its various activities. A copy of the approved Stakeholder Management Strategy with the list of all identified stakeholders is available on the ECGB website.

The ECGB has started engaging gambling industry role players and will engage others, including social partners that work in collaboration with the ECGB.

4.11. Challenges Identified to be Addressed and Proposed Interventions

The table below captures significant challenges and proposed interventions that have a direct impact on the implementation of the planned targets for the MTEF period and beyond.

Table 13: Identified challenges and proposed interventions

NO.	CHALLENGES THAT HAVE EMERGED	PROPOSED INTERVENTIONS	PROGRESS IN ADDRESSING THESE CHALLENGES	DRIVING/RESPONSIBLE DIVISION
1.	Unregulated Internet gambling and the potential loss of revenue for the fiscus	Exploration of possible regulation mechanisms and/or legislation or policy reform. Benchmark with other international jurisdictions where Internet gambling is regulated.	The National Gambling Board (“NGB”) has reopened the debate on the legislation of online gambling. The ECGB submitted representations to the NGB on the process to enable the legislation of online gambling and revival of the National Gambling Amendment Act, 2008, and the draft regulations on interactive gambling that were published in 2009 but were never approved by the relevant Portfolio Committee. Further to the above, a White Paper has been presented to the MEC on the Amendment of the Act in order to accommodate the indefinite licensing regime. This is a work in progress.	Legal Services and Investigation and Licensing Administration
2.	The need to embrace the 4th Industrial Revolution in gambling regulation, risk mitigation, and in the overall ICT strategy	Engagement, benchmarking and intensive seminars and learning regarding the identification and implementation of core activities of the 4th Industrial Revolution within the gambling sector.	The ECGB will start engaging private companies working in the space to empower and provide appropriate information regarding the pillars of the 4IR. Implementing the pillars progressively with current budget availability remains a priority issue in the MTEF period.	Information and Communication Technology
3.	Data protection and Compliance with the POPI Act	Comprehensive engagements with the industry regarding compliance requirements with the POPI Act. Virtual engagements with regard to the POPI Act will be implemented to include members of the Board, the industry and staff of the ECGB.	A POPIA Committee has been established and will now be requested to engage with industry, members of the Board and staff of the ECGB about the significance and compliance requirements of the POPI Act. This remains a priority issue in the MTEF period.	Legal Services

NO.	CHALLENGES THAT HAVE EMERGED	PROPOSED INTERVENTIONS	PROGRESS IN ADDRESSING THESE CHALLENGES	DRIVING/RESPONSIBLE DIVISION
4.	Proposed merger between the Eastern Cape Liquor Board and ECGB with no feasibility study performed	Engage the Department of Economic Development, Environmental Affairs and Tourism to facilitate the process as instructed by the MEC. Two Board members have been assigned to be part of the Joint Board Task Team (JBTT) as required by GTAC and Provincial Treasury.	The matter of the merger of ECGB and ECLB is handled by the Department of Economic Development and Environmental Affairs and Tourism wherein a service provider (GTAC) has been contracted to facilitate the merger process; work streams have since been developed and respective entities have nominated officials to serve in the work streams. A project plan with timelines has been developed by the service provider and presented to the respective parties. To propel the merger forward, a steering committee made up of two CEO's, ECSECC and the HOD of DEDEAT has also been established to take over from GTAC. This remains a priority issue in the MTEF period.	Office of the CEO
5.	A need for effective management of information generated within the organisation	The development of the Information and Knowledge Management Strategy that will outline the effective management processes of information generated within the organisation.	Development of the Information and Knowledge Management Strategy to guide the effective management of information generated within the organisation. This is a work in progress throughout the MTEF period.	Empirical Research and Information Management
6.	Perceived lack of preventive measures regarding self and third-party exclusion lists	Development of clear performance indicators and measures regarding self and third-party exclusion in terms of the Performance Information Management Policy of the ECGB.	Prioritising updating of the Exclusions and Upliftment Registers; this remains a priority issue in the MTEF period. Thereafter, focus will be on the development of clear performance indicators and measures regarding self and third-party exclusion.	Gambling Regulation and Consumer Protection
7.	Benchmarking and monitoring of turnaround times for employee registration certificates	A newly developed Gambling Regulation System (GRS) will be enhanced to improve the turnaround time.	A Gambling Regulation System (GRS) has been developed, with phase one completed; this is a work in progress to ensure continuous improvement of process flows.	Investigation and Licensing Administration

4.12. External Environmental Analysis

In conducting an external environmental analysis, a PESTEL analysis combined with the opportunities and threats elements of the SWOT analysis for scanning the external environment was utilised. Planning tools have been utilised as depicted in the table below.

PESTEL – EXTERNAL ENVIRONMENT	SWOT ANALYSIS – EXTERNAL ENVIRONMENT	
External Analysis	Opportunities	Threats
Political factors	<ul style="list-style-type: none"> ➤ An accountable Board through the MEC of the DEDEAT Legislature. ➤ Collaboration with municipal and provincial entities – entities generate revenue, e.g., alignment in policies such as the EC Liquor Board and those of municipalities. ➤ Indefinite licensing regime – legislation review by the legislature. ➤ Exploiting online gambling (interactive gambling) and online betting – political consideration on legislation amendment. 	<ul style="list-style-type: none"> ➤ Political unrest, if not managed, leads to investment reduction – no service delivery – social unrest – lack of trust in all government spheres. ➤ Bureaucratic bottlenecks in the legislative review process. ➤ Delay in the debate of the private member's bill in the National Parliament for online gambling (interactive gambling) and online betting. ➤ Delays in reconstituting the National Gambling Policy Council.

PESTEL – EXTERNAL ENVIRONMENT	SWOT ANALYSIS – EXTERNAL ENVIRONMENT	
External Analysis	Opportunities	Threats
Economic factors	<ul style="list-style-type: none"> ➤ Maximising revenue for the province. ➤ Enabling employment creation and retention. ➤ Empowerment of PDIs improves participation in the industry. ➤ Increasing gambling taxes, which will enable the government to create opportunities in other sectors. ➤ Zone 1 and 2 RFP, dealing with opportunities on the licensing requirements, EMRs. ➤ Changes in the BBBEE Act – sectoral transformation requirements. ➤ LED procurement framework. ➤ Technology Innovation Agency is open to collaborating with the public sector. ➤ National Treasury and World Bank potential support for industry development support (value chain development mainstreaming in government departments’ programmes. ➤ Leveraging the resources of other stakeholders. ➤ Partnerships with communities. ➤ Strong national focus on infrastructure-led economic recovery. ➤ Licensing and fee amendments on licensing. 	<ul style="list-style-type: none"> ➤ Unemployment and poor economic conditions reduce disposable income. ➤ Lack of economic growth, unemployment. ➤ Unreliable electricity supply. ➤ Economic consequences of COVID-19 pandemic. ➤ Government funding is decreasing. ➤ Labour-intensive sectors are declining and shedding jobs. ➤ Access to finance is limited. ➤ Delays in payment of suppliers/SMMEs. ➤ Poor implementation of economic policy. ➤ Limited access to technology. ➤ Lack of coordination of economic activities. ➤ The economy is concentrated in the Metros. ➤ Ease of doing business is poor. ➤ Limited transformation. ➤ Informal sector support – difficult, if they are not registered; they must be tracked. ➤ Invest in enterprises that are not compliant.
Social factors	<ul style="list-style-type: none"> ➤ Responsible public education on gambling. ➤ Consolidating CSI contributions for impactful initiatives. ➤ Turnaround times for approvals, stakeholder relations with licensees, and communities. ➤ Beneficiation through CSI projects as a result of licensing and strengthening socio-economic development enterprises. 	<ul style="list-style-type: none"> ➤ Youth are mostly impacted by unemployment. ➤ High crime rate, especially in townships. ➤ Abuse of substances by young people. ➤ Absence of safety and security. ➤ Lack of collaboration and partnerships with strategic stakeholders/other departments. ➤ Career paths in higher education are not aligned to industry needs. ➤ Job losses – high unemployment. ➤ Social uprising (unguided revolution). ➤ Skills shortage – capacity building. ➤ Skills migration – to entice those leaving the province. ➤ Potential harm from gambling. ➤ Lack of gender balance in the management level in the industry – male-dominated.
Technological factors	<ul style="list-style-type: none"> ➤ Creation of new jobs, software manufacturers, and call centres in the online betting space. ➤ Access to markets in other provinces through online betting. Reduce reliance on the local market (social grants). ➤ Research and development, access to existing resources on the best use of technology. ➤ Automation and digitization of processes to improve efficiencies. ➤ Partnerships with international jurisdictions that are advanced in the digital space, existing partners (e.g., China). ➤ Cryptocurrencies improve access to global markets. ➤ High penetration rate of cell phones. ➤ Self-regulation of the industry on ICT to save costs. ➤ Business intelligence – to minimise illegal gambling. ➤ Localisation of suppliers, repairers, or maintenance of gambling devices and equipment. ➤ Utilisation of Artificial Intelligence (AI) to ensure effective regulation of the Industry. 	<ul style="list-style-type: none"> ➤ Cyber security increase with digitization. ➤ Emergence of the online gambling sector. ➤ Internet gambling. ➤ Rate of technology (4IR) impacting employment and others. ➤ Emergence of e-commerce impact on brick-and-mortar businesses, e.g., banks closing down branches. ➤ Less use of technology when transacting. ➤ E-learning is not yet embraced. ➤ Limited innovation centres in the province. ➤ Limited R&D funding on ICT. ➤ Loadshedding. ➤ Cyber security/threats.

PESTEL – EXTERNAL ENVIRONMENT	SWOT ANALYSIS – EXTERNAL ENVIRONMENT	
External Analysis	Opportunities	Threats
Environmental factors	<ul style="list-style-type: none"> ➤ Unfavourable operating environments and dilapidated enabling infrastructure in municipalities. ➤ High attention paid to environmental management. ➤ Consistent application of environmental laws. ➤ Technology – virtual working – paperless, good for the environment. 	<ul style="list-style-type: none"> ➤ Climate change is impacting the province, e.g., less water in dams, and crops failing. ➤ Deteriorating environmental quality. ➤ Weak enforcement of environmental laws at the local level.
Legal factors	<ul style="list-style-type: none"> ➤ Legislative reform, indefinite licensing to sustain the industry. ➤ License conditions requirements, more favourable than other provinces. ➤ The remote gambling bill, if enacted, will contribute to the sustainability of existing operators who currently rely on physical footfall. ➤ Legislation reviewed to enhance operations and governance – Internet gambling. ➤ Competition laws: consideration of new entrants in the gambling space. ➤ Good environmental legislation. ➤ Merger of ECGB and ECLB. 	<ul style="list-style-type: none"> ➤ Bureaucratic bottlenecks in the legislative review process. ➤ Legislation: remote gambling is illegal, restricting access to global markets. ➤ Unfavourable license conditions. ➤ More favourable legislation and license terms, indefinite licenses are offered by other provinces. ➤ Legislation reviews and amendments, less favourable than the other provinces. ➤ Increased litigious environment. ➤ Licensing delays. ➤ High compliance requirements with the legal and regulatory environment. ➤ Consumer protection laws.

4.12.1. Background Information on the Demand for Services and other Factors Informing the Development of the Annual Performance Plan and Strategic Plan

Herewith, significant background information on the demand for services rendered by the ECGB:

4.12.1.1. Licensing and Regulatory Services of the ECGB

The ECGB creates opportunities for industry role players to apply for different types of gambling licenses in terms of the Eastern Cape Gambling Act (ECGA). A Request for Proposal (RFP) is published, inviting individual business organisations or entrepreneurs to apply for available types of licenses.

The following services and activities are therefore implemented by the ECGB:

- ➔ Gathering of information with respect to the applicant’s business activities and those of related parties to ensure that gambling is conducted in a manner that promotes the integrity of the gaming industry and does not cause harm to the public interest;
- ➔ Reviewing the applicant’s supporting documentation (and assertions made therein) included in their application for such licenses, to establish if the information truly reflects the integrity and sound financial position of the applicant and its shareholders;
- ➔ Ensuring that the applicant and related parties comply with the respective laws, viz. the ECGA, the NGA, FICA, and other statutory and ethical codes of conduct;
- ➔ Gathering and assessing relevant information about the applicant to make recommendations to the Board in respect of the suitability of the applicant with reference to criteria spelled out in the applicable gambling legislation and/or RFP; and
- ➔ Facilitating the registration of all applicants and awarding of licenses and registration certificates to suitably qualified applicants.

4.12.1.2. Audit and Compliance Services - Gambling Industry Regulatory Oversight Post-licensing

Following the allocation of temporary and permanent licenses to qualified gambling operators, and the signing of license conditions, the Audit and Compliance Division plays a critical role in ensuring that licensed gambling establishments operate within the bounds of applicable legislation and regulatory instruments. This Division, utilising the ECGB’s Combined Assurance, coordinates oversight, risk-based interventions, and systems integrity reviews. This Division contributes to the ECGB’s strategic goals by enhancing regulatory trust and transparency, promoting ethical and compliant gambling operations, and strengthening internal controls and risk mitigation across the industry. This oversight ensures a fair, secure, and ethically governed gambling industry aligned with public interest.

Gambling Industry Maturity Index

Purpose - to provide a structured framework for measuring and improving the compliance maturity of licensed gambling operators in the Eastern Cape. The index sets clear benchmarks that the ECGB aims to achieve and maintain over successive financial years.

Strategic Objective - Promote a culture of sustained regulatory compliance and ethical conduct across the gambling industry through measurable indicators and targeted interventions.

The Industry Maturity Index comprises four levels of compliance maturity:

Level	Description	Compliance Score	
Level 4	Fully Compliant	≥90%	Strong Green
Level 3	Compliant	≥80%	Green
Level 2	Partially Compliant	≥70%	Amber/Dark Yellow
Level 1	Non-Compliant	<70%	Strong Red

Figure 1: Compliance Level of Licensees Maturity

This framework enables the ECGB to assess the overall maturity of the industry and identify areas requiring regulatory attention.

Compliance Barometer

The Compliance Barometer is a high-level dashboard tool that supports the Maturity Index by:

- ➔ Tracking licensee compliance against: License conditions | Bid commitments | ECGA provisions | Rules and Regulations | Other applicable laws;
- ➔ Monitoring the frequency and severity of transgressions; and
- ➔ Providing visual insights into industry-wide compliance trends.

Implementation and Engagement

The Index and Barometer have been introduced by ECGB and widely welcomed by licensees.

Regular engagement sessions are held with each category of licensee:

- ➔ To review compliance performance;
- ➔ To develop tailored Compliance Action Plans;
- ➔ To implement remedial actions; and
- ➔ To track progress using the Barometer as an audit and inspection tool.

Benefits derived from utilising the compliance barometer

Year-on-Year Benchmarking - Enables licensees to measure improvements or regressions in compliance levels.

Early Detection of Non-Adherence - Identifies licensees failing to implement audit recommendations or showing poor commitment to compliance.

Visual Monitoring Dashboard - Provides ECGB and licensees with a snapshot of compliance status at a glance.

Incentivisation Mechanism - Supports reward mechanisms for consistently compliant licensees (e.g., reduced guarantee costs).

Knowledge and Awareness Building - Promotes understanding of regulatory obligations and fosters proactive compliance behaviour.

Summary of Comparative Analysis over Five Years - Per License Category

A summary of the comparative analysis of the industry compliance over the past five years is depicted below, with colour coding referenced from the dashboard above.

DETAILS	2020-21	2021-22	2022-23	2023-24	2024-25
Casino	83,5%	93,2%	88,3%	93,5%	91,5%
Bingo	81,7%	96,2%	95,0%	92,3%	99,6%
Route operator	93,2%	92,0%	91,6%	94,9%	99,3%
Tote ⁷	-	80,0%	73,2%	88,0%	94,2%
Bookmakers	79,5%	80,4%	83,0%	76,0%	91,6%
Type B	81,9%	87,3%	80,1%	83,8%	95,7%
Type C	93,1%	84,5%	82,3%	80,1%	95%
Type A ⁸	-	81,6%	-	-	100%
ISO (Type D)	72,7%	73,0%	78,4%	62,4%	84,1%
Overall	83,6%	85,3%	84,0%	83,9%	91%

Once operations commence, the Division enforces compliance through:

4.12.1.3. Audit and Compliance Services: Compliant and Ethical Gambling Industry with Revenue Integrity

Conduct revenue audits, compliance audits, and reviews of annual financial statements to ensure financial integrity and transparency.

The following services are demanded by the industry and provided by the ECGB:

Service Area	Description
1. Revenue and Compliance Audits	Conduct audits to verify accuracy of reported revenue, taxes, and fees, and assess compliance with license conditions.
2. Financial Statement Reviews	Review annual financial statements submitted by licensees to ensure transparency and financial soundness.
3. Financial Guarantee Reviews	Perform annual assessments of financial guarantees to ensure adequate coverage and compliance.
4. License Condition Monitoring	Monitor adherence to license conditions, bid commitments, FICA requirements, and ECGB legislation.
5. Compliance Barometer	Maintain and update a compliance barometer to guide risk-based audit scheduling and prioritisation.
6. Inter-Board Liaison	Collaborate with other provincial gambling boards to share insights and harmonise audit practices.
7. Hybrid Audit Implementation	Roll out hybrid virtual audits and deploy the ECGB Regulatory Audit Tool to enhance efficiency and coverage.

⁷ The Tote in 2020/21 financial year was not operational following the business rescue process and acquisition by new owners.

⁸ The Type As in the financial years 2020/21 and 2022/23 and 2023/24 were not conducted hence no comparative information in those years.

Risk-Based Regulatory Services (Audits)

- ➔ Since the introduction of the **Compliance Barometer**, the Audit and Compliance Unit has adopted a **risk-based audit methodology**. This approach assesses the compliance history of each licensee within a specific license category over a one-year period and informs audit frequency.
- ➔ **Key Adjustments Based on Risk Ratings:**
 - **Casinos, route operators, bookmakers⁹, totalisator and Bingo halls:** Revenue Audit frequency reduced from quarterly to biannually due to high compliance maturity.
 - **Reliance on internal audit reports:** Where applicable, ECGB reviews quarterly reports submitted by licensees' internal audit departments.
 - **External auditor oversight:** Regulations require external auditors to evaluate and report on licensees' internal control systems. These reports must accompany annual financial statements or be submitted biannually.

Regulatory Reinforcement

- ➔ The ECGB will reinforce compliance with external audit reporting requirements, particularly among smaller licensees, to ensure consistent adherence to internal control systems and financial transparency. This includes:
 - Monitoring submission of external audit reports in line with regulatory obligations;
 - Engaging with all licensees to clarify expectations and support compliance; and
 - Implementing follow-up mechanisms for non-compliant or late submissions.
- ➔ In addition, the ECGB will continuously monitor the compliance maturity or regression of the industry using the Compliance Barometer and other risk indicators. Based on these assessments, the ECGB may impose stricter regulatory measures where necessary, including:
 - Increasing the frequency of revenue and compliance audits for licensees showing signs of regression or elevated risk;
 - Requiring additional documentation or assurance reports from licensees with poor compliance history; and
 - Conducting targeted inspections or forensic audits where financial irregularities or systemic weaknesses are suspected.
- ➔ This dynamic and risk-responsive approach ensures that regulatory oversight remains proportionate, effective, and aligned with the evolving risk landscape of the provincial gambling industry.

4.12.1.4. **Inspections, Law Enforcement, Responsible Gambling and Public Education Services: Compliant, Ethical, Protected and Responsible Gambling Industry**

Conduct inspections to verify adherence to license conditions. Investigates illegal gambling and resolves complaints and disputes. Monitors responsible gambling practices and runs public education campaigns.

Inspections and Law Enforcement: Compliant, Ethical and Protected Gambling Industry

The following services are demanded by the industry and provided by the ECGB:

Service Area	Description
1. Regulatory Inspections	Conduct scheduled and risk-based inspections of licensed gambling establishments to verify compliance with license conditions and regulatory standards.
2. Operational Change Processing	Review and approve changes to gambling operations, including equipment upgrades, floor plan modifications, and surveillance system updates.
3. Device Reconciliation	Perform monthly reconciliations of gambling devices to ensure accurate reporting and integrity of operations.
4. Illegal Gambling Investigations	Investigate and close illegal gambling operations, including coordination with law enforcement agencies.
5. Equipment Oversight	Supervise the destruction of illegal or dysfunctional gambling equipment in accordance with regulatory protocols.
6. Technology Exploration	Explore and pilot ICT technologies to enhance detection and monitoring of illegal gambling activities.
7. Complaints and Dispute Resolution	Resolve complaints and disputes lodged by patrons, licensees, or stakeholders through structured investigation and mediation processes.
8. Responsible Gambling monitoring	Monitor licensee adherence to responsible gambling practices and support implementation of harm minimisation measures.
9. Public Education Campaigns	Design and implement targeted campaigns to raise awareness of gambling-related harms and promote responsible gambling behaviour.
10. Compliance Barometer	Maintain and utilise a compliance barometer to guide prioritisation of inspections and enforcement actions based on risk levels.

⁹ Unless this is a newly licensed bookmaker, where the audit is conducted quarterly until the licensee has attained and maintained a Level 3 or 4 in terms of the ECGB's Compliance Industry Maturity Index Framework.

4.12.1.5. Responsible Gambling and Public Education

- ➔ **Context** - Gambling has become increasingly accessible through both physical venues and digital platforms, heightening the risk of problem gambling. Research commissioned by the ECGB revealed concerning trends among vulnerable groups, including public servants and social grant recipients. Problem gambling often coexists with other addictions such as substance abuse, which compounds its social impact.
- ➔ **Strategic Response** - The ECGB is busy implementing the Board’s approved **Responsible Gambling Strategy** aimed at:
 - Promoting recreational and social gambling behaviour;
 - Minimising the harm of excessive and irresponsible gambling;
 - Ensuring that the licensees proactively support responsible gambling without coercion; and
 - Implementing a comprehensive communication, media and outreach programme.
- ➔ **Key Activities**
 - Dissemination of research findings to inform targeted interventions.
 - Collaboration with community organisations, government departments, and licensees.
 - Development of educational materials and support tools.
 - Roll-out of multi-platform campaigns (radio, social media, print, mobile outreach).
 - Monitoring and evaluation of campaign effectiveness and licensee practices.
 - Exploration of cost-effective digital tool for responsible gambling management.

The ECGB won four awards from the various organisations as depicted in the table below:

No.	AWARDING ORGANISATION	AWARDS CATEGORY WON
1.	Gambling Indaba (Africa’s Premium Gambling Conference and Expo) on 4 September 2018.	“Best Responsible Gambling Programme in South Africa”
		“Best Efficient Gambling Regulator in South Africa”.
2.	South African Responsible Gambling Foundation (SARGF) on 1 November 2024.	“Gold for Best Emerging Responsible Gambling Programme”
		“Silver for Best Responsible Gambling Messaging and Marketing Campaigns”

The table on the following page outlines services rendered by the ECGB to minimise harmful effects of excessive and irresponsible gambling.

NO.	SERVICES	TYPE OF PROJECTS	BENEFICIARIES
1	Inform, empower, communicate, and enhance understanding of problem gambling and excessive gambling and how to deal with this phenomenon and maintain the productivity and healthy functioning of an individual, potential punter, punter or community of persons or citizens of the province.	<p>Schools as gambling, alcohol and drug free zones - Taking Risks Wisely - school programme.</p> <p>Workshop sessions to minimise harmful effects of excessive and irresponsible gambling – Gracious Ageing.</p> <p>Minimisation of the harmful effects of excessive and irresponsible gambling in the workplace – Private and Public Servants Empowerment.</p> <p>Project targeting institutions of higher learning in the province to create awareness on excessive and irresponsible gambling.</p>	<p>Young people in and out of school.</p> <p>Old-age pensioners and senior citizens of the province.</p> <p>Directors, senior, general, and executive managers. Policy Reform and Development.</p> <p>Employees across occupational levels in the private and public service.</p> <p>Students, lecturers, and administrators of institutions of higher learning.</p>
2	Provision of referral and support services that are available when problem gambling is identified, including resolving personal concerns, health, family, financial, alcohol, drug, emotional, stress or other personal issues that may affect individual behaviour.	Enhancement and provision of self and third-party exclusion programme and the management of data regarding self and third-party-exclusions.	Punter at high risk of addictive gambling.
3	Utilisation of different platforms to profile messages of responsible gambling and mitigation of excessive and irresponsible gambling.	<p>Various community platforms to communicate messages of responsible gambling – community advocacy.</p> <p>Integrated communication, media and public outreach programmes and utilisation of outside broadcasts, billboards, industrial theatre, various events.</p>	Provincial citizenry and/or communities, ward councillors and their communities; traditional leaders and their communities; different community formations.
4	Advocating the formulation or amendment of policies and procedures to include responsible gambling and minimisation of harmful and excessive effects of irresponsible gambling in employee wellness programmes, policies and strategies, ICT governance and risk management policies of different public and private sector organisations.	Public and private sector organisations, including non- governmental organisations.	Employees and managers of different public and private sector organisations, including NGOs.

NO.	SERVICES	TYPE OF PROJECTS	BENEFICIARIES
5	Facilitating and ensuring that gambling environments, processes and sites are safer and more supportive of gambling consumers or punters.	<p>All players across all gambling codes to be registered with smart cards which will allow the coordination of the self-exclusion process. Smart cards will allow the regulator to monitor the player's habits regarding excessive gambling.</p> <p>Implementation of pop-up messages to warn against overspend or to initiate breaks where machines cease to play if the player has exceeded his/her time.</p> <p>Player workshops, briefings before participating in social and recreational gambling, and encouraging players to attend short, focused briefing sessions which outline statistical probabilities in decision-making, dangers of excessive gambling, and symptoms of problem gambling.</p>	Punters and gambling operators in the province.

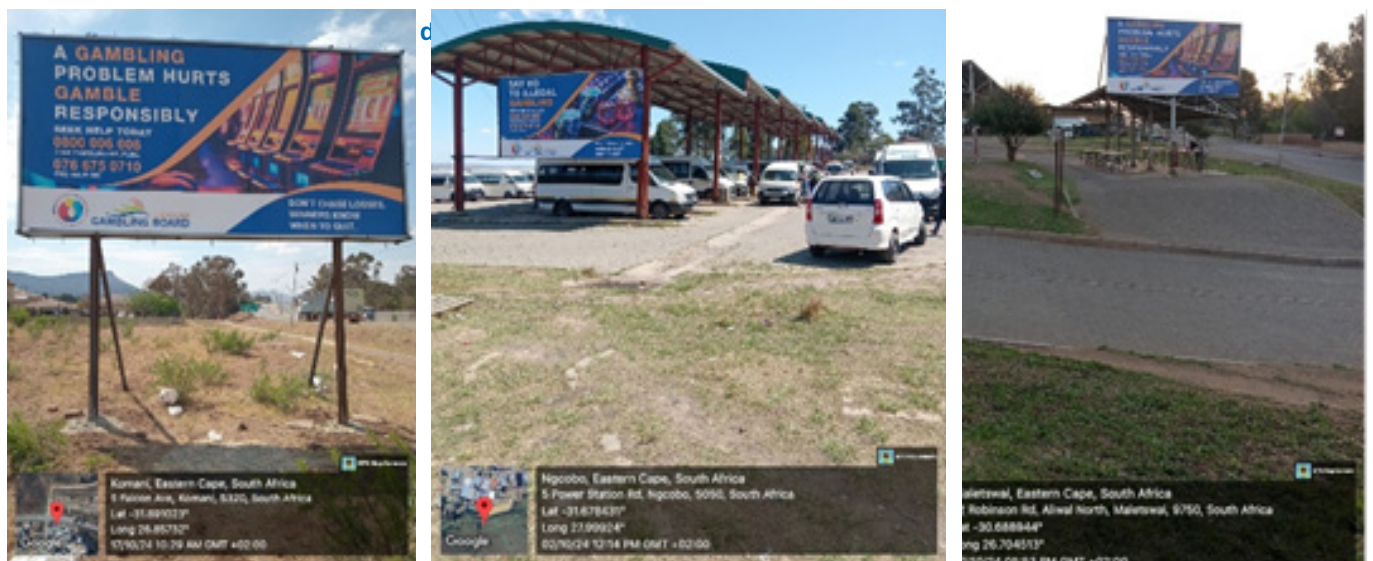
One of the pillars of the ECGB's Responsible Gambling Strategy is the utilisation of different platforms to profile messages of responsible gambling and mitigation of excessive and irresponsible gambling in illegal sites. Outside billboards are utilised as one of the platforms to communicate messages of responsible gambling and mitigation against the use of illegal gambling sites.

Approved artwork for 2024-25 for illegal gambling and responsible gambling messaging



Importantly, as the figure above illustrates, responsible gambling is incomplete without the displacement of illegal gambling, as unregulated environments expose punters to harm without any consumer protection measures. Addressing illegal gambling is therefore integral to ECGB's mandate of promoting responsible gambling and safeguarding public well-being.

The following towns were targeted in the 2024/25 financial year: Komani, Aliwal North and Ngcobo, while also utilising the Mayibuye buses for wide reach.



Mayibuye buses' branding with messaging about both illegal and responsible gambling:



During the MTEF period, the ECGB, aided by new technologies, will enhance all efforts to minimise harmful effects as a result of online betting and new forms of gambling in brick-and-mortar sites, especially by the younger population or punters. ECGB is steadfast in its mandate to protect communities, enforce compliance, and promote responsible gambling. However, the growing prevalence of illegal gambling operations poses a severe threat to our province, economically, socially and morally, as the sign below illustrates.

A SILENT GENOCIDE

ECONOMICALLY, SOCIALLY, MORALLY - ILLEGAL GAMBLING OPERATIONS

ECONOMIC IMPACT

- revenue leakage
- job displacement
- unfair competition

SOCIAL IMPACT

- community harm
- youth exposure
- normalization of illegality

MORAL IMPACT

- exploitation of desperation
- lack of accountability
- corruption risks

MORAL IMPACT

- exploitation of desperation
- lack of accountability
- corruption risks

PROTECT OUR COMMUNITIES.
ENFORCE. EDUCATE. REFORM.

4.12.1.6. **Gaming Control, Regulatory Affairs and Systems: Compliant, Ethical, Protected and Responsible Gambling Industry**

Reviews and approves gambling systems, websites and contingency setups. Ensures cybersecurity and regulatory compliance of all operational systems.

The following services are demanded by the industry and provided by the ECGB:

Service Area	Description
1. Systems Review and Approval	Evaluate and approve gambling systems, websites, and contingency setups prior to deployment.
2. Internal Control Evaluation	Assess licensees' internal control systems and procedure manuals for adequacy and regulatory alignment.
3. Systems Integrity and Cybersecurity Monitoring	Monitor operational systems for integrity, reliability and cybersecurity threats.
4. Change and Certification Processing	Process requests for system changes, certifications and advertising approvals.
5. Inter-Board Liaison	Collaborate with other provincial boards on testing labs, manufacturers, and licensee oversight.
6. Hybrid Virtual Systems Audits	Implement hybrid virtual audits, including ISMS reviews and Penetration and Vulnerability assessments.
7. Regulatory Audit System Development	Explore and develop a virtual regulatory audit system, supported by a revised audit methodology and standard operating procedures.
8. Software Oversight	Oversee installation, configuration, and functionality of gaming software.
9. Risk-Based Regulatory Interventions	Use the compliance barometer to guide targeted regulatory actions and audit prioritisation.
10. Compliance Barometer Maintenance	Update and maintain the compliance barometer quarterly to reflect system-related risks and maturity levels.

Digital Transformation and Regulatory Innovation

- ➔ Expand the use of hybrid virtual audits to include systems audits, ISMS reviews, and penetration and vulnerability testing.
- ➔ Implement the Virtual Regulatory Audit System, supported by:
 - ➔ Recently reviewed and approved regulatory audit methodology; and
 - ➔ Specific standard operating procedures (SOPs) for reviews.
- ➔ Enhance cybersecurity oversight across all licensee systems, ensuring resilience against emerging threats.

4.12.1.7. **Socio-Economic Development and Empowering Services**

In addition to the awarding of different types of licenses and the collection of revenue for the provincial fiscus, the ECGB has the corporate responsibility of identifying and supporting socio-economic development initiatives to empower impoverished communities, in terms of the Provincial Anti-Poverty Strategy, which includes designated and vulnerable groups of youth, the elderly, disabled persons, and women.

In terms of license conditions, licensees are expected to contribute a certain percentage of their gross gaming revenue (GGR) by implementing sustainable CSI projects in the areas within which they operate.

The ECGB developed and approved a CSI framework in March 2016 to guide the implementation of sustainable CSI projects by licensees, either as individual companies or in collaboration with each other.

Figure 2 below depicts the basic underpinning principles that must be followed to guide the implementation of this framework by all licensees, stakeholders, and partners.

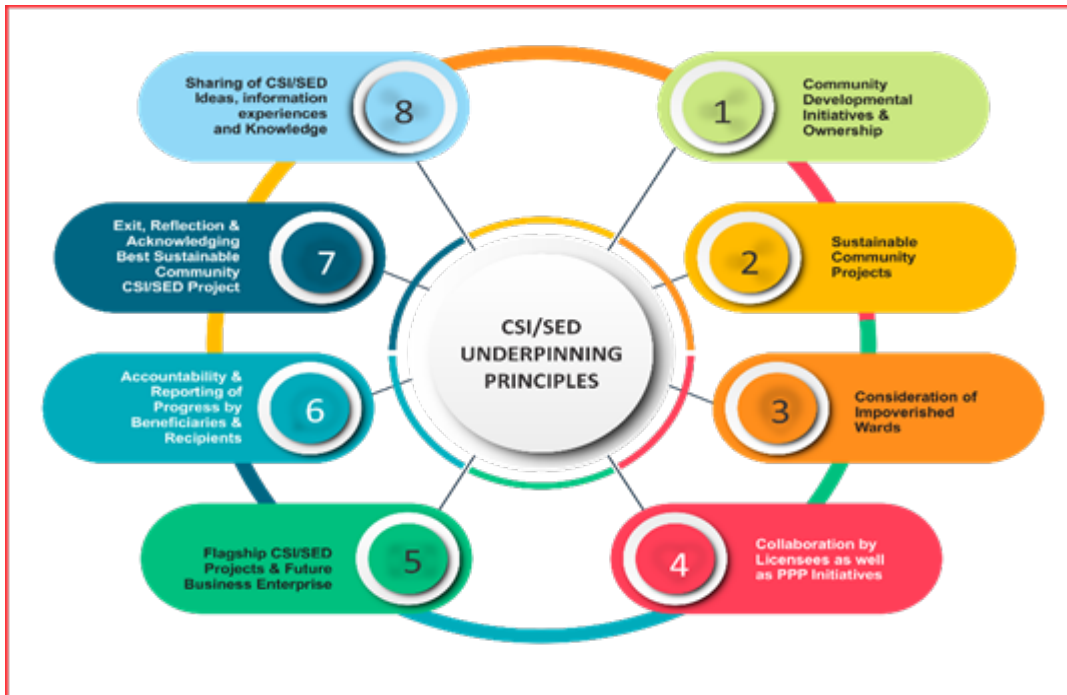


Figure 2: CSI Framework underpinning principles

The CSI framework has identified focus areas or baskets for implementation on sustainable CSI projects by the licensees.

Furthermore, the CSI framework provides guidance on areas or municipal wards where sustainable CSI projects can be implemented. This is meant to assist in realising the implementation of the Provincial Policy and Strategy to reduce levels of poverty, especially in the municipal wards identified as the most impoverished areas in the province (“anti-poverty wards”). Provincial gambling licensees are beginning to invest their CSI projects in these poorest wards.

Figure 3 below depicts the identified focus areas or baskets for implementing sustainable CSI projects by licensees.

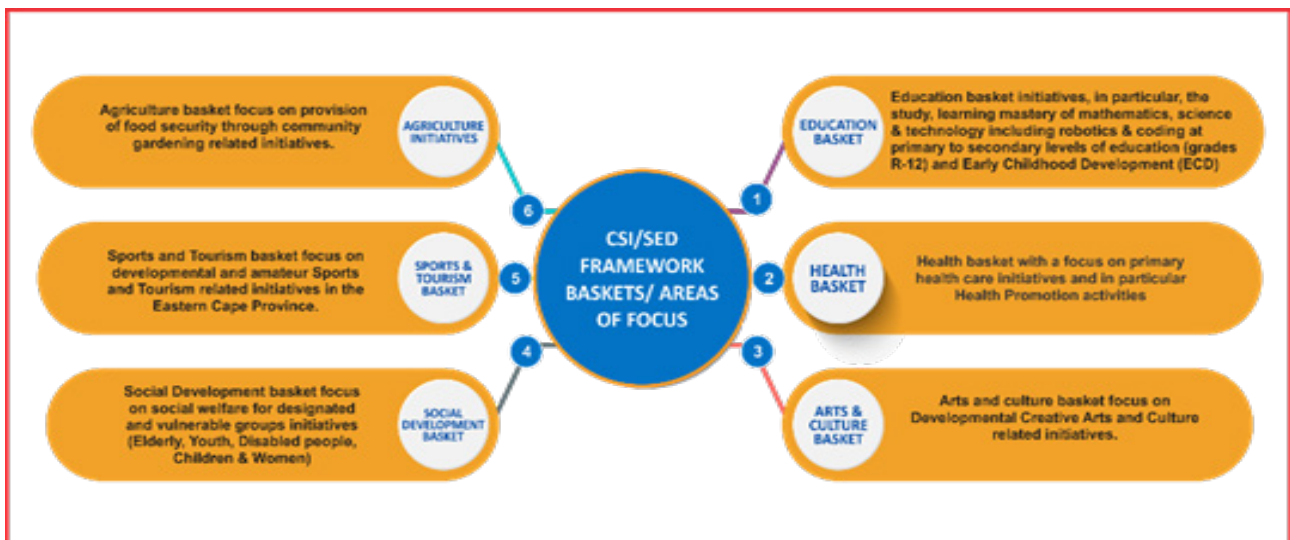


Figure 3: CSI Framework focus areas/baskets

During this period, a strategic decision has been made by the ECGB to consolidate all CSI contributions of the industry into a special purpose vehicle to drive the implementation of CSI activities in the province in order to make a visible impact.

4.12.1.8. Research and Development and Programme Evaluations

The ECGB is committed to generating a reliable body of valid data and research information about gambling in the province that will ensure that all decisions relating to gambling are evidence-based. As a regulated industry, the gambling industry requires rigorous and continuous research due to various factors such as technological advances on gaming, which require the regulator to be well informed about such developments to regulate effectively.

Furthermore, there is an acknowledgement that the more the regulator issues licenses and creates unlimited access to gaming opportunities within the province, the greater the need to investigate, evaluate and conduct research to determine the extent of unintended outcomes and possible consequences of creating a culture of irresponsible and excessive gambling.

Finally, the ECGB as a gambling regulator is also expected to promote the use of research and generation of knowledge to make decisions and direct actions to improve research outcomes which are grounded on evidence from research. Following a strategic review, the Board resolved that research and development must be enhanced, and an appropriate budget must be allocated accordingly.

The following services are therefore implemented to realise the significance of research, learning and knowledge management:

- ⇒ Conduct high-quality research that enables the evidence-based advancement of responsible gaming programmes, and the prevention and treatment of problem gambling.
- ⇒ Review the Research and Development Strategy of the ECGB.
- ⇒ Develop and implement a Knowledge and Management strategy for the ECGB.
- ⇒ Conduct an evaluation of the various activities and functions of the ECGB pertaining to its regulatory functions in terms of the Research and Development Strategy and instructions of the Board.
- ⇒ Develop and inculcate a culture of conducting and using research findings for evidence-based decision-making and planning, especially by relevant budget programmes of the ECGB.
- ⇒ Create a platform for effective involvement of the research community, government, strategic partners, and other relevant stakeholders.
- ⇒ Publicise research findings, using relevant platforms, to communicate the findings and recommendations of research conducted.
- ⇒ Mobilise research resources by co-partnering with different state agencies and organisations in conducting specific and related research in a joint and collaborative manner.

Programme Evaluations

Programme evaluation is a systematic method for collecting, analysing and using information to answer questions about projects, policies and programmes, particularly about their effectiveness and efficiency.

In both the public and private sectors, stakeholders often want to know whether the programmes they are funding are being implemented, voted for, being received or being objecting to, and whether they are producing the intended effects. While programme evaluation first focuses on this definition, important considerations often include:

- ⇒ how much the programme costs per participant;
- ⇒ how the programme could be improved;
- ⇒ whether the programme is worthwhile;
- ⇒ whether there are better alternatives;
- ⇒ if there are unintended outcomes; and
- ⇒ whether the programme goals are appropriate and useful.

Evaluators help to answer these questions, but the best way to derive answers is for the evaluation to be a joint project between evaluators and stakeholders.

In the last five years, the ECGB has not conducted programme evaluations to understand whether the current programmes are effective and efficient for policy, strategy, and process decisions. This function will be a priority as we approach the coming decade.

4.13. Trend Analysis that Inform the Strategy Going Forward

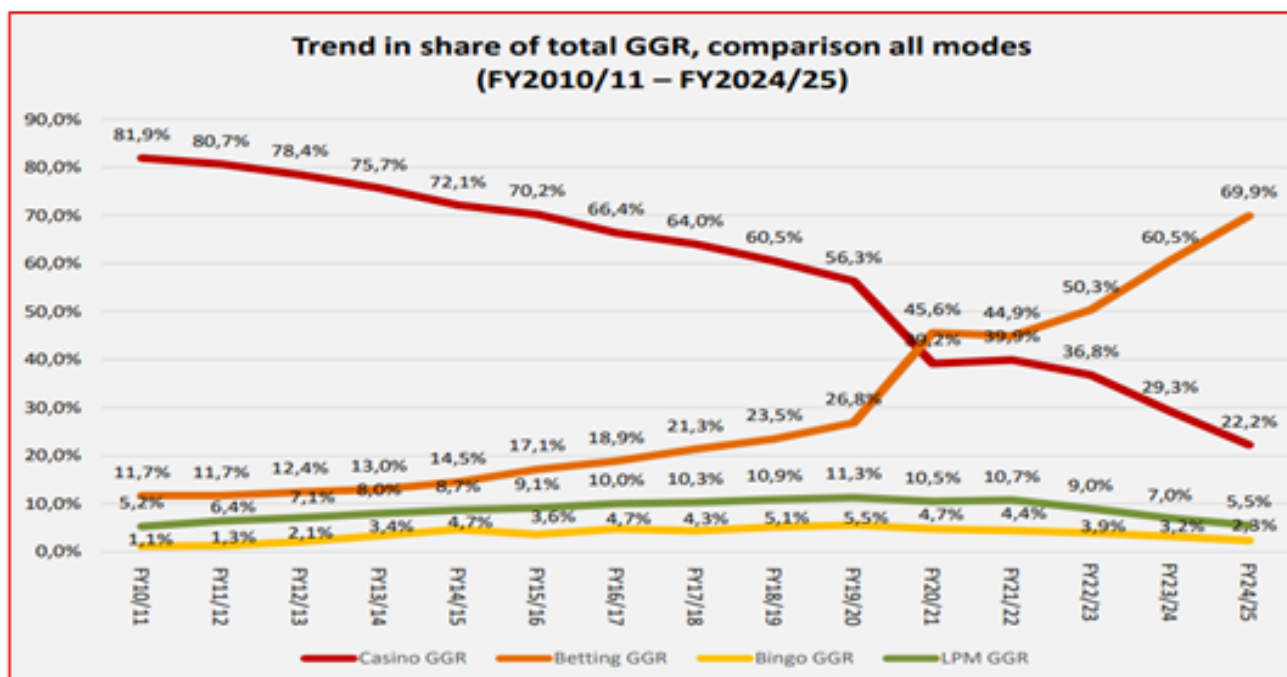
4.13.1. The National Gambling Board (NGB) statistics and previous five-year annual reports were also utilised to track significant matters to be addressed and considered in developing an Annual Performance Plan of the ECGB.

4.13.2. Since the gazetting of zero-rating from 1 April 2024, the entity has dedicated its efforts to attracting the largest operators to establish their online platforms in the province.

4.13.3. The EC legislation allows an operator to apply for an online bookmaker license without requiring a physical retail site where punters can place bets, but rather to have an administration office that can be located in the province.

4.13.4. A comparable tax regime (with other provinces) allows for ease of doing business and has allowed the entity to attract online bookmakers in the province.

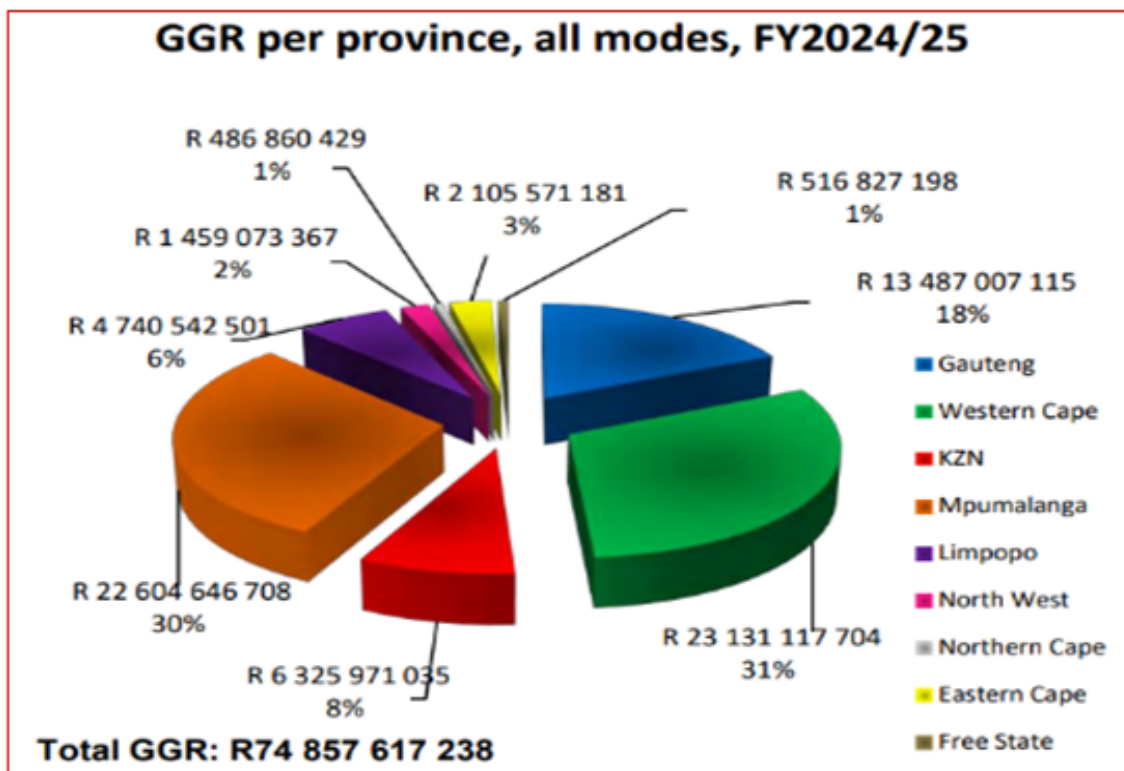
- 4.13.5. While the Board licensed new online bookmakers in 2024, these small operators have not had a significant impact in moving the needle on taxes collected.
- 4.13.6. Nationally, the sector is currently dominated by at least ten companies through online betting, advertising, and sponsorships. This makes it increasingly difficult for a relatively unknown and new entrant to thrive and generate revenues at the same scale as the top ten companies.
- 4.13.7. The same phenomenon is observed in casinos, for example, where the sector is dominated by the likes of Sun International, Peermont Global, and Tsogo Sun. New entrants often struggle to penetrate and capture a share of the market.
- 4.13.8. Except for HollywoodBets, all of the top ten (bookmaker) companies are licensed in other provinces and have been operating for at least five years.
- 4.13.9. This presented a challenge to the ECGB in attracting these companies to the province, especially amid unfavourable legislation, e.g., the finite license term allowable for bookmakers.
- 4.13.10. In this current five-year planning cycle, the ECGB will drive the diversification of the betting sector and tax revenue sources through the licensing of online bookmakers. The growth is largely dependent on attracting a national or international operator to the province.
- 4.13.11. In addition, smaller operators will also be licensed. It must be noted that smaller operators in the industry thrive better when they are linked with an experienced operator. Market penetration improves with linkages to an existing operator.
- 4.13.12. The growth in the sector must also factor in the time it takes for an operator to launch their platforms after a license is awarded. At the very least, it will take six months for a new operator to launch.
- 4.13.13. Retail betting is projected to decline by at least 5% annually as more products are rolled out online. Year on year, the land-based operations are projected to decline by at least 5% over the current planning cycle.
- 4.13.14. Figure 4 below depicts the trend in share of Gross Gaming Revenue (GGR) for all gambling modes at national with a focus on the betting sector.



Source: NGB National Gambling Statistics 2025
 Figure 4: Gross Gaming Revenue (GGR) for all gambling modes at the national level



- 4.13.15. The targets are based on booming games that maintain their current performance for the foreseeable future (12 months). Moreover, the introduction of at least one online national/international bookmaker is launched every two years, with the same level of performance as online HollywoodBets.
- 4.13.16. The Board ratified management’s decision to establish a special projects unit to respond to the emerging demand for online bookmakers. The establishment of this unit has now been formalised as a separate budget sub-program under Programme 2 with the 2025-30 strategy and will now be referred to as Gaming Control, Regulatory Affairs and Systems.
- 4.13.17. Figure 5 below depicts Gross Gaming Revenue (GGR) per province, all modes, wherein the Eastern Cape accounted for 3% of the national market share, being number six in provinces.



Source: NGB National Gambling Statistics 2025
 Figure 5: Gross Gaming Revenue (GGR) per province, all modes - Eastern Cape market share

- 4.13.17.1. GGR generated in the gambling industry during FY2024/25 amounted to R74.8 billion. This represents a 26.1% increase from the 2023/24 previous year’s GGR of R59.3 billion.
- 4.13.17.2. Gauteng has been overtaken by the Western Cape and Mpumalanga as the largest gambling markets, with the Western Cape and Mpumalanga sitting at 31% and 30% of market share respectively at the end of FY2024/25. Gauteng held roughly 18% of the market share.
- 4.13.17.3. The betting industry’s market shares continued to expand from 60.5% in FY2023/24 to 69.9% in FY2024/25.

4.14. Findings of Internal or External Research used to Inform the Strategy of the Organisation

There was no internal and or external research conducted to inform the development of a new five-year strategy. However, the ECGB has a research agenda, and several research outputs are commissioned during the year.

Findings and recommendations of some of these research reports were utilised to guide the development of this new five-year strategy.

4.15. Findings of Internal or External Evaluations used to Inform the Strategy of the

Organisation

The ECGB has not yet conducted programme evaluations, either internally or externally. This matter has been prioritised for the next five-year period.

4.16. Political Environment, which may impact the Implementation of the Strategic Plan

The following key political issues emerged when a PESTEL analysis methodology was utilised, and these have informed the development of this new five-year Strategic Plan of the ECGB.

PESTLE ANALYSIS MODEL	GUIDING FACTORS	DISCUSSIONS AND EMERGING ISSUES
Political factors	Government changes Shareholders and their demands Funding Government leadership Lobbying Foreign pressures Conflicts in the political arena	Change of leadership impact: Delay in review or amendment of the legislation. Change of direction/focus. New policies. Lack of appetite. New focus by leadership. Policy Council between the National Minister and the MEC of Economic Development is not being scheduled as expected. Merger between the ECGB and ECLB.

4.17. Internal Environment Analysis

The ECGB has a responsibility to conduct an internal environmental analysis, which should provide a summary of the internal institutional situation. This may impact the achievement of the institution's outcomes. The areas that emerged when conducting an internal environmental analysis utilising the McKinsey 7Smodel, combined with the strengths and weaknesses elements of SWOT analysis for scanning the internal environment, are reflected in the table below:

McKINSEY 7S – INTERNAL ENVIRONMENT	SWOT ANALYSIS – INTERNAL ENVIRONMENT	
Internal Analysis	Strengths	Weaknesses
STRATEGY	High-performing organisation. Clean audit and continuous improvement. Strategy in place, fit for purpose and delivering on the economic trajectory of the province. Clear targets for the planning cycle towards mandate implementation.	Inadequate resourcing despite the rise in online betting space calling for extensive and sophisticated responsible mechanisms and/or strategies. Small presence on online betting platforms. Inadequate brand visibility to promote ethical gambling and betting as online betting grows with related unintended consequences. Organogram/structure was not reviewed following the development of the strategy. Under-reporting and a lack of information provision on the opportunities provided by the strategy.
STRUCTURE	The organogram for the previous five-year cycle was reviewed, approved, and is now being implemented.	Slow review processes of the organogram /structure. The organogram and structure are not aligned with the new strategy, or structure is not fit for the purpose. Lack of diversity and inclusivity in the gender balance at the management levels.
SYSTEMS	Maturing organisation with stable corporate governance systems. Clean audit outcomes. A few functional systems, e.g., VIP, NAVISION. ICT uptime averages above 98%. Governance structures are in place. Functional board. Cloud computing services. Assist the entities in delivering more by sharing the electronic platforms. Develop an electronic reporting system that will consolidate reports for the organisation. Embracing technology. An IT system that will bridge a gap in rural places as a community centre. Integrated process to enhance holistic governance. Monitoring and porting. Zero-based budgeting. Collaboration with public entities on planning. Reduction in the use of consultants. Improved sourcing of goods and services. Fair financial management.	Lack of data/failure to collect data associated with fraudulent/criminal activities. Absence of business intelligence. Lack of automated/limited integrated ICT systems. (Lack of an automated IPA system.) No information management performance system. Limited and fragmented knowledge management. Cyber threats. No focus on prioritising technology, access to resources, training, or sharing resources. Slow pace of procurement before tenders are awarded. Increased regulatory costs. Budget cuts. Unfunded projects/mandate, e.g., merger. Artificial intelligence has not been embraced. No Regulatory Audit Systems or computer assisted tools. No computer assisted systems for Responsible Gambling, i.e., Exclusions register remains manual and fragmented (ECGB maintains one, while licensees have their own, therefore, no central real-time data management). No computer assisted systems for illegal gambling, i.e., illegal site operation, websites, or machine detection. No computer assisted systems or tools for review, approval, and monitoring of adverts and promotions. Lack of a document management system.



McKINSEY 7S – INTERNAL ENVIRONMENT	SWOT ANALYSIS – INTERNAL ENVIRONMENT	
Internal Analysis	Strengths	Weaknesses
SKILLS	Skills sets of the organisation, the willingness of staff to learn, and the industry knowledge. Skilled workforce. General capability is satisfactory. Good technical capacity of staff in various portfolios. Bursaries offered are linked to the skills matrix of the organisation.	Succession plan not yet implemented (lack of internal mentor/coach for succession purposes). Lack of upskilling workforce on technological aspects to match the industry demands. (Conduct gap analysis report in line with the skills matrix.)
STAFF	High staff retention. Staffing level at +98%. A majority young workforce.	Lack of capacity to handle, manage, respond quickly as a result of potential betting revenue (Approve, Monitor, Implement and Report). Recruitment is slow and impacts work implementation negatively. Increasing CoE costs. Lack of diversity and inclusivity in the gender balance in the senior/executive management. Lack of specialisation due to budget limitations, i.e., GCRAS requiring specialised personnel.
STYLE	Robust board members. Communication systems are in place. Strong governance and managerial leadership. High accountability of the leadership team. Ability to engage independently on issues.	Resistance to change and new ideas. Lack of gender balance/equity profile. Challenges emerged from a current employee satisfaction survey regarding organisational culture and style of management.
SHARED VALUES	Established experience in the industry. Great reputation with regard to compliance. Socio-economic impact in the province (visible footprint). The organisation embraces the values as enshrined in the strategy. A vast number of stakeholders in both the public and private sectors. Range of services provided and wider reach of implementing agents on programmes. High-quality service support. New services with partners and departments.	Limited effective collaborations. Limited effective coordination, e.g., SMMEs. Assessment of the functionality of stakeholder management. The capacity to take up services in local areas is limited. Not all Indicators are pitched at the impact level. Lack of collaboration by the DEDEAT group.

4.17.1. Human Resources and Capacity

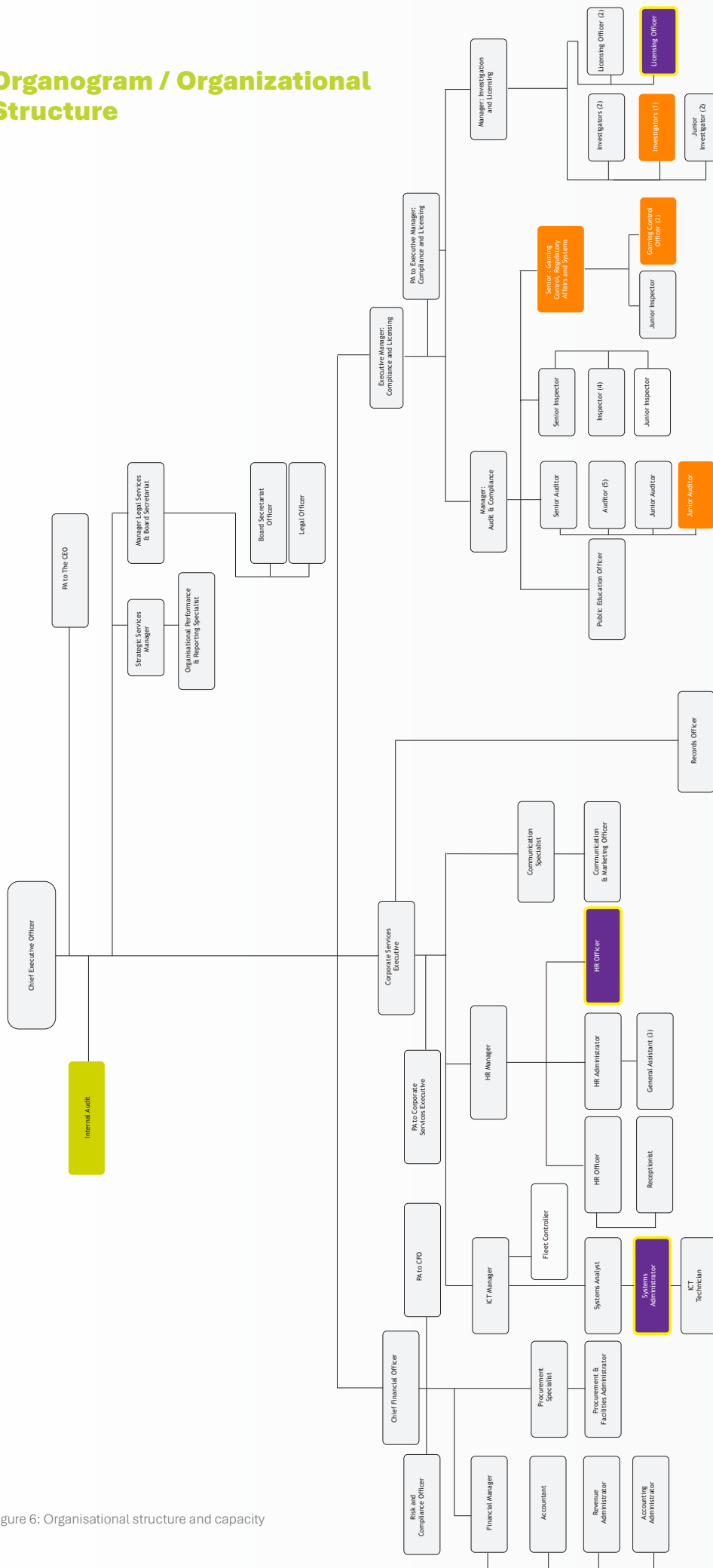
For the organisation to deliver on its mandate, the strategy and the structure must be woven together seamlessly. With a clear focus on what the organisation wants to achieve, it will proceed to align its structure in such a manner to best achieve this. The ECGB reviewed its organisational structure in response to the human resource needs required to support the implementation of the existing strategy.

The review was conducted to align with the new strategy, to determine the required human resources and capacity to execute the organisational strategy.

In doing this, people, positions, policies, procedures, processes, technology and other related elements that comprise the organisation were considered and reviewed where necessary. Appropriate technologies required to improve efficiencies and support the strategy will also be considered. It is expected that the introduction of new technologies may face some resistance.

For 2025-2030, there is going to be a need to review the current organisational structure to reflect the new strategy, especially the focus on maximising the benefit of automation technology in the regulation processes. Figure 6 below depicts the existing organogram/current organisational structure of the ECGB.

Organogram / Organizational Structure



LEGEND	
Vacant	5
Filled	58
Outsourced	1
New role Frozen	3
Total Permanent Positions	64
Total Outsourced Positions	1

Figure 6: Organisational structure and capacity

4.17.2. Information, Communication, and Technology Resources

The Eastern Cape Gambling Board (ECGB) has developed a Master System Plan/IT Strategy, which details the organisational status quo and provides a way forward for the organisation to address the ICT challenges it faces.

The strategic imperatives that have been identified will guide and form the basis of the implementation of the ECGB's ICT strategy and its drive towards embracing the 4th Industrial Revolution. The POPIA compliance is an ongoing process that the ECGB continues to monitor and enhance. In addition, the ECGB will continue benchmarking against the Corporate Governance of ICT Policy Framework. Other strategic imperatives that will be dealt with over the next three years include the following:

Review, communicate, and monitor all relevant IT governance, policies and guidelines to enhance the IT capability of the ECGB.

Enhance the ECGB's IT infrastructure and systems capability (hardware).

Synchronisation and client data backups.

Continuously communicate and monitor IT norms and standards to support the divisions of the ECGB.

Video conferencing and field connectivity.

IT and administration systems.

Automation of systems to support the core business of licensing and compliance, as well as the support functions of the organisation.

Provision of IT support in developing a paperless environment.

Development of a digital transformation strategy, a concept that encapsulates digitization, digitalization, and automation, but goes even further. It refers to the profound and accelerating transformation of business activities, processes, competencies, and models to fully leverage the changes and opportunities of digital technologies. Digital transformation is not just about adopting new technologies; it is about a fundamental change in how an organisation thinks, operates and engages with its customers.

4.17.3. Compliance with the B-BBEE Act

The ECGB upholds and promotes the principles enshrined in legislation about black economic empowerment. As such, the entity seeks to ensure commitment, adherence and compliance with B-BBEE legislative provisions.

The latest B-BBEE scorecard for 2024/25 is still underway. The ECGB was previously rated Level Seven in the 2023-24 financial year.

The entity has assessed the achievement of level one as uneconomical, as the level of investment required in the enterprise development and skills development cannot be accommodated within the existing budget structure of the entity.

A more conservative level should be targeted, and the entity will review and enhance the effectiveness of existing skills development initiatives to target the designated groups more effectively.

4.17.4. The Status of Women, Youth, and People with Disabilities

In terms of the current workforce profile, there is a commendable achievement in the representation of women in top management, which is currently at 50/50, while an under-representation (20%) of women in senior and middle management positions is acknowledged; however there is no representation of people with disabilities within the entire organisation.

The ECGB adopted an Employment Equity Plan to eliminate the imbalances of the past and ensure the employment of people from designated groups.

In line with the current EE plan, the current vacancies will be filled, taking into consideration those gaps to ensure fair and reasonable representation of women in middle management and people with disabilities.

The ECGB is committed to youth empowerment and has a 24-month internship programme in place. This programme offers internship opportunities to young people within the Eastern Cape (straight from tertiary institutions) to assist them in gaining the necessary experience and competencies that will enable them to enter the job market.

Currently, there are twenty-two (22) interns on the internship programme gaining exposure in the following areas: Finance, Communication and Marketing, Human Resource Management, Public Education, Investigation and Licensing, Audit and Compliance, Strategic Management Services, Procurement, Legal Services, and ICT. Table 14 on the following page depicts the current workforce profile of the ECGB.

Table 14: ECGB workforce profile

EMPLOYMENT EQUITY PROFILE AND OTHER HUMAN RESOURCES INFORMATION													
DESCRIPTION		MALES					FEMALES					FOREIGN NATIONALS	
		A	C	I	W	TOTAL	A	C	I	W	TOTAL	MALES	FEMALES
EQUITY PROFILE	Provincial Economically Active Population Percentages	43.3%	5.7%	0.8%	2.8%	52.6%	39,8%	4,9%	0,3%	2.4%	47.4%	0%	0%
	Actual Employee numbers	22	0	1	2	25	31	1	0	0	32	0	0
	Disabled Employees	0	0	0	0	0	0	0	0	0	0	0	0
	ECGB Workforce Percentages	3,85%	0%	1,75%	3,50%	43,85%	54,38%	1,75%	0%	0%	56,14%	0%	0%
TOTAL PERMANENT STAFF	57	22	0	1	2	25	31	1	0	0	32	0	0
TEMPORARY EMPLOYEES / INTERNS / LEARNERS	6	0	0	0	6	17	0	0	0	17	0	0	

4.17.5. Budget Programme Structure of the ECGB

- 4.17.5.1. A The budget programme is a main division within the ECGB's budget that clearly defines a set of outcomes based on the services or functions within the ECGB's legislative and other mandates.
- 4.17.5.2. A sub-programme is a constituent part of a budget programme that defines the services or activities which contribute to the achievement of the outcomes of the programme. Some of the defined services or activities could include key projects identified by the ECGB.
- 4.17.5.3. A Sub-sub-programme is a constituent part of a budget sub-programme that defines the services or activities which contribute to the achievement of the outcomes of the programme and sub-programme.
- 4.17.5.4. The SMS, Legal Services, and Board Secretariat functions are Sub-sub programmes that are consolidated in the Office of the CEO. The Risk Management function is consolidated in the Financial Management division as a sub-sub programme. The Document and Records Management function is consolidated in the Human Resources Management division as a sub-sub programme.
- 4.17.5.5. The focus on ICT and Systems Application and utilisation of Artificial Intelligence, Internet of Things, Focus on Cybersecurity, Virtual Audits, and detection of illegal gambling activities warrants the establishment of a new budget sub-programme.
- 4.17.5.6. Figure 7 below indicates the three Budget Programmes and Budget Sub-programmes of the ECGB:

PROGRAMME ONE		PROGRAMME TWO		PROGRAMME THREE	
CORPORATE SERVICES MANAGEMENT AND ADMINISTRATION		GAMBLING REGULATIONS AND CONSUMER PROTECTION		KNOWLEDGE AND INFORMATION MANAGEMENT	
SUB-PROGRAMMES	1.1 Office of the CEO	SUB-PROGRAMMES	2.1 Licensing and Investigation Administration	SUB-PROGRAMMES	3.1 Empirical Research
	2.2 Financial Management		2.2 Inspections, Law Enforcement, Responsible Gambling and Public Education		3.2 Monitoring and Evaluation
	3.3 Human Resources Management and Development		2.3 Audit and Compliance Services		
	4.4 Information Communications and Technology		2.4 Gaming Control, Regulatory Affairs and Systems		
	5.5 Communications Services				

Figure 7: Budget Programme structure

4.17.5.7. The above Budget Programme structure has been re-engineered and merged with a sub-programme “Gaming Control, Regulatory Affairs and Systems” that will focus on issues of, among other things, ICT and Systems Application and utilisation of Artificial Intelligence, Internet of Things, Focus on Cybersecurity, Virtual Audits, and detection of illegal gambling activities.

The Law Enforcement and Gaming Control sub-programme has been consolidated with Responsible Gambling and Public Education and renamed as “Inspections, Law Enforcement, Responsible Gambling and Public Education”.

4.17.6. Overview of the Budget and MTEF Estimates

Table 15: Budget estimates by economic classification

Economic Classification	Audited Outcomes/Actuals			Main Appropriation	Medium-Term Expenditure Estimate		
	2022/23 R'000	2023/24 R'000	2024/25 R'000	2025/26 R'000	2026/27 R'000	2027/28 R'000	2028/29 R'000
REVENUE							
Equitable Share Allocation	70 043	70 725	70 382	68 952	68 143	71 209	74 413
Own Revenue	15 277	17 580	17 278	19 496	20 385	21 400	22 363
TOTAL REVENUE	85 320	88 305	87 660	88 448	88 527	92 609	96 776
EXPENDITURE							
Compensation of Employees	51 948	59 303	62 916	64 774	67 644	70 669	70 669
Goods and Services	26 296	27 019	35 393	26 504	24 370	25 601	29 933
Administrative Expenses	10 126	10 147	14 780	11 140	8 813	9 314	12 751
Corporate Social Investment	677	512	391	548	574	574	599
Consumer Protection and Public Education	2856	2000	895	777	1 000	1 577	1 648
Depreciation and Amortisation	2 704	3 029	4 388	3 330	3 487	3 661	3 826
Legal Costs	1 912	2 580	4 092	1 999	2 709	2 500	2 613
Marketing and Research Costs	782	1 106	1 879	1 249	857	876	915
Monitoring and Evaluation Costs		141	0	154	131	130	136
Other Operating Expenses	5 616	6 644	8 079	6 457	5 909	6 040	6 474
Statutory Audit Fees	782	860	889	850	890	930	972
TOTAL EXPENDITURE	78 244	86 322	98 308	91 278	92 014	96 270	100 602
TOTAL CAPEX	7 420	14 584	8 584	500	0	0	0

Trend Analysis of Expenditure

- ➔ The Equitable Share grant funding of the institution has decreased by 1% on average over the past five years. A slight increase of 4% is projected for the first two years in the MTEF period, and this will increase in the third year. Own revenue has declined in the past three years and has not met projection. A gradual improvement in revenue from fees is projected over the MTEF period due to new licenses that the entity expects to issue.
- ➔ The Treasury guidelines on budgeting for Compensation of Employees have been applied over the MTEF period. In 2025/26, positions and salaries that were previously frozen have since been unfrozen, advertised and filled. Strict cost containment measures have been applied to COE and have been kept constant through the 4 past years. COE is projected to increase by 4,5% year on year over the MTEF period . This is in line with CPI projections and National Treasury guidelines.
- ➔ Goods and Services decreased by 8% from the previous year as a result of implementing cost containment measures and applying austerity measures as far as possible. On average, Goods and Services has remained at 0.1% increase over the past 5 years. Strict cost containment measures continue to be in place over the MTEF period.
- ➔ There is no Capital Expenditure (Capex) budgeted for 2026/27 and the MTEF period due to the shrinking budget and also to take into consideration and delay any further acquisitions due to the proposed merger project which is underway.

4.18. ECGB'S ALIGNMENT WITH THE MTD P STRATEGIC PRIORITIES AND PROVINCIAL POLICY PRIORITIES

NO.	NATIONAL MTD P STRATEGIC PRIORITIES	APPLICABILITY TO THE ECGB	SIX EASTERN CAPE PROVINCIAL DEVELOPMENT PLAN GOALS (PDP)	APPLICABILITY TO THE ECGB	EASTERN CAPE NINE-INTEGRATION PROGRAMMES	APPLICABILITY TO THE ECGB
1	STRATEGIC PRIORITY 1: Inclusive Growth and Job Creation.	Applicable to ECGB. See Budget Sub-Programme Investigation and Licensing Administration, through issuing of gambling licenses to qualified applicants.	GOAL 1: Innovative and inclusive growth of economy.	Applicable to ECGB. See Budget Sub-Programme Investigation and Licensing Administration, through issuing of gambling licenses to qualified applicants.	PROVINCIAL INTEGRATION PROGRAMME 1: Early Childhood Development and Learner Attainment.	Applicable to ECGB. See Budget Sub-Programme Audit and Compliance, respectively, through imposing license conditions for SED/CSI initiatives.
2	STRATEGIC PRIORITY 2: Reduce Poverty and Tackle the high Cost of Living.	Applicable to ECGB. See Budget Sub-Programme Communication Services, through corporate social investment for Maths, Science, and Technology projects.	GOAL 2: An enabling Infrastructure network.	Applicable to ECGB. See Budget Sub-Programme Investigation and Licensing Administration, through issuing of gambling licenses to qualified applicants.	PROVINCIAL INTEGRATION PROGRAMME 2: Transformation and Municipal Support (by all organs of State).	Applicable to ECGB. See Budget Sub-Programme Investigation and Licensing Administration, through minimum licenses held by PDIs in the Gambling Sector.
3	STRATEGIC PRIORITY 3: A Capable, Ethical and Developmental State.	Applicable to ECGB. See Budget Sub-Programme Investigation and Licensing Administration, through issuing of gambling licenses to qualified applicants.	GOAL 3: Rural development and an innovative and high-value agriculture sector.	Applicable to ECGB. See Budget Sub-Programme Audit and Compliance, respectively, through imposing License Conditions for SED/CSI initiatives.	PROVINCIAL INTEGRATION PROGRAMME 3: Social Cohesion, Moral Regeneration, Community Safety and GBVF.	Applicable to ECGB. See Budget Sub-Programme Human Resources Management and Inspections, and Law Enforcement respectively, through the assessment of Human Resources Management Efficiency Maturity and impose through sweeps conducted on illegal gambling.
4			GOAL 4: Human Development.	Applicable to ECGB. See Budget Sub-programme Human Resources management and Development.	PROVINCIAL INTEGRATION PROGRAMME 4: Anti-poverty and Sustainable Development.	Applicable to ECGB. See Budget Sub-Programme Audit and Compliance respectively, through imposing license conditions for SED/CSI initiatives.
5			GOAL 5: Environmental sustainability.	Not applicable to the ECGB.	PROVINCIAL INTEGRATION PROGRAMME 5: Infrastructure, Human Settlement and Broadband.	Applicable to ECGB. See Budget Sub-Programme Investigation and Licensing Administration through issuing of gambling licenses to qualified applicants.
6			GOAL 6: Capable Democratic institutions.	Not applicable to the ECGB.	PROVINCIAL INTEGRATION PROGRAMME 6: Food Security, Land Reform, and Agriculture Commercialisation	Applicable to ECGB. See Budget Sub-Programme Audit and Compliance, respectively, through imposing license conditions for SED/CSI initiatives.
7				PROVINCIAL INTEGRATION PROGRAMME 7: Inclusive Economic Growth.	Applicable to ECGB. See Budget Sub-Programme Investigation and Licensing Administration through issuing of gambling licenses to qualified applicants.	
8				PROVINCIAL INTEGRATION PROGRAMME 8: Non-communicable Diseases, Mental Health, and Social Determinants of health	Applicable to ECGB. See Budget Sub-Programme Audit and Compliance, respectively, through imposing license conditions for SED/CSI initiatives.	
9				PROVINCIAL INTEGRATION PROGRAMME 9: Youth Development, Skills Development, and Training for the Economy.	Applicable to ECGB. See Budget Sub-Programme Human Resources Management and Audit and Compliance, respectively, through the assessment of Human Resources Management Efficiency Maturity, impose through license conditions, and assess compliance.	

4.19.PROCESS FOLLOWED IN DEVELOPING THE 2026/27 – 2028/29 ANNUAL PERFORMANCE PLAN AND REVIEW OF THE 2025/26 – 2029/30 FIVE-YEAR STRATEGIC PLAN OF THE ECGB

- 4.19.1. The development of the 2026/27 – 2028/29 Annual Performance Plan and Review of the 2025/26 – 2029/30 five-year Strategic Plan of the ECGB was informed by processes which are meant to see the Annual Performance Plan and reviewed 5-year statutory plan documents, with clear strategic outcomes, performance indicators, targets and priorities for the five years and three years of the MTEF.
- 4.19.2. Engagement sessions for review and development of the 2026/27 – 2028/29 Annual Performance Plan and review of the 2025/26 – 2029/30 five-year Strategic Plan were organised and facilitated with ECGB Executive Management and entire Management Team wherein key strategic imperatives, priorities and key strategies were agreed for implementation over the three years of the MTEF and beyond.
- 4.19.3. All the recommended changes have found expression in the first draft of the 2026/27 – 2028/29 Annual Performance Plan and reviewed the 2025/26 – 2029/30 five-year Strategic Plan.
- 4.19.4. The following stakeholders have been consulted in the development of the 2026/27 – 2028/29 Annual Performance Plan and review of the 2025/26 – 2029/30 five-year Strategic Plan:
 - 4.19.4.1. *The ECGB Executive Management Team.*
 - 4.19.4.2. *The entire ECGB Management Team.*
 - 4.19.4.3. *Department of Economic Development, Environmental Affairs and Tourism, the Shareholder Department.*
- 4.19.5. From these engagements and consultations, the following issues emerged:
 - 4.19.5.1. *A robust discussion on strategic imperatives to reflect the new strategic thrusts of the ECGB.*
 - 4.19.5.2. *Agreement to maintain the three Budget Programmes with 11 Budget Sub-Programmes .*
 - 4.19.5.3. *The alignment of the five-year Strategic Plan of the ECGB with the 2026/27 – 2028/29 APP, especially with the Strategic Outcomes and other imperatives that were proposed, and to ensure compliance with the statutory requirements governing the development of the Strategic Plan and Annual Performance Plan.*
 - 4.19.5.4. *The alignment of the National Medium Term Development Plan (MTDP) strategic priorities, Mandate Paper and provincial policy priorities was also addressed with a view to these finding expression in the Statutory Planning Documents of the ECGB, to ensure the achievability of national and provincial imperatives.*

PART C

MEASURING OUR PERFORMANCE



VISION

**Most efficient and empowering
gambling jurisdiction of choice**



PART C: MEASURING OUR PERFORMANCE

5. INSTITUTIONAL PERFORMANCE INFORMATION

6. BUDGET PROGRAMME ONE: CORPORATE SERVICES MANAGEMENT AND ADMINISTRATION

6.1. PURPOSE OF THE BUDGET PROGRAMME

The purpose of this programme is:

- ➔ To provide corporate administrative and management support services to the organisation and the budget programme, including the Board;
- ➔ To ensure that the ECGB mandate is executed, achieved, and reported upon accordingly;
- ➔ To utilise different platforms to ensure the communication, marketing, and profiling of the ECGB as an efficient and effective gaming regulator.

A theory of change for Programme One to align with the impact and outcomes is provided as Annexure B.

6.2. PRIORITIES FOR PROGRAMME ONE

- ➔ Automation of systems and processes to support the core business of licensing and compliance, as well as the support functions of the organisation.
- ➔ Development of a digital transformation strategy, a concept that encapsulates digitization, digitalization, and automation, but goes even further. It refers to the profound and accelerating transformation of business activities, processes, competencies, and models to fully leverage the changes and opportunities of digital technologies. Digital transformation is not just about adopting new technologies; it is about a fundamental change in how an organisation thinks, operates, and engages with its customers.

7. BUDGET SUB-PROGRAMME: FINANCIAL MANAGEMENT SERVICES

7.1. PURPOSE OF THE BUDGET SUB-PROGRAMME

To administer the ECGB's revenue and expenditure to conduct all financial dealings efficiently and effectively.

7.2. BUDGET SUB-PROGRAMME: OUTCOMES, OUTPUTS, SELECTED KPIS AND ANNUAL TARGETS

NO.	OUTCOME	OUTPUTS	OUTCOME INDICATOR	STRATEGIC PLAN TARGET 2029/30	AUDITED/ACTUAL PERFORMANCE			ESTIMATED PERFORMANCE	MEDIUM-TERM TARGETS		
					2022/23	2023/24	2024/25	2025/26	2026/27 Budget Year	2027/28	2028/29
7.2.1	Transformed, Ethical and Sustainable Gambling Operations in the Province	Taxes and Fees Collected from Licensed Operators; License Certificates Issued to Operate.	Revenue gambling taxes collected from online betting and land-based operators	R1.21 Billion Revenue Collected	R189.50 Million Revenue Collected	R184.0 Million Revenue Collected	R187.0 Million Revenue Collected	R209 Million Revenue Collected	R242 Million Revenue Collected	R240 Million Revenue Collected	R259 Million Revenue Collected
7.2.2	Implemented Principles of Corporate Governance, Organisational Performance, and Reporting	Financial Management and Procurement Maturity Framework; Report on Assessment of the Financial Management and Procurement Maturity.	Financial Management and Procurement Efficiency Maturity Level	Level 05 Financial Management and Procurement Maturity	New Indicator	New Indicator	New Indicator	N/A	Level 02 Financial Management and Procurement Maturity	Level 03 Financial Management and Procurement Maturity	Level 04 Financial Management and Procurement Maturity
7.2.3		Risk Management Maturity Framework; Report on Assessment of the Risk Management Maturity.	Enterprise Risk Management Maturity Level	Level 05 Risk Maturity	New Indicator	New Indicator	New Indicator	Level 03 Risk Maturity	Level 03 Risk Maturity	Level 03 Risk Maturity	Level 04 Risk Maturity

8. BUDGET SUB-PROGRAMME: OFFICE OF THE CEO

8.1. PURPOSE OF THE BUDGET SUB-PROGRAMME

The purpose of this programme is to provide strategic management, corporate administrative, and management support services to the organisation and the budget programme, including the Board, to ensure that the ECGB mandate is executed, achieved, and reported upon accordingly. Utilisation of different platforms to ensure the communication, marketing, and profiling of the ECGB as an efficient and effective gaming regulator is prioritised. Furthermore, legal and secretariat support to the Board are ensured and sound legal support and advice to ECGB personnel are provided.

8.2. BUDGET SUB-PROGRAMME: OUTCOMES, OUTPUTS, SELECTED KPIS AND ANNUAL TARGETS

NO	OUTCOME	OUTPUTS	OUTCOME INDICATOR	STRATEGIC PLAN TARGET 2029/30	AUDITED / ACTUAL PERFORMANCE			ESTIMATED PERFORMANCE	MEDIUM-TERM TARGETS			
					2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	
8.2.1	Implemented Principles of Corporate Governance, Organisational Performance and Reporting.	Organisational Maturity Index Framework; Report on Assessment of the Organisation's Maturity.	Organisational Maturity Index	Level 5 Organisational Maturity	Level 3 Organisational Maturity	Level 4 Organisational Maturity	Level 4 Organisational Maturity	N/A	N/A10	Level 4 Organisational Maturity	N/A	
		SUB-SUB-PROGRAMME: LEGAL AND BOARD SECRETARIAT SERVICES										
8.2.2		Board Charter and Board committee charters. Report on Independent Assessment of Board Governance.	Board Governance Assessment maturity index	Level 05 Board Governance Assessment Maturity Index	New Indicator	New Indicator	New Indicator	N/A11	Level 3 Board Governance Assessment Maturity Index	N/A	N/A	
8.2.3	Ethics Maturity Framework; Report on Assessment of the Ethic's Maturity Framework.	Ethics Assessment Maturity Level	Level 04 Ethics Assessment Maturity	New Indicator	New Indicator	New Indicator	N/A12	Level 02 Ethics Assessment Maturity	Level 03 Ethics Assessment Maturity	Level 03 Ethics Assessment Maturity		

10 The Organisational Assessment Maturity will be conducted twice in the five-year planning cycle, commencing in 2027/28 and fifth year in 2029/30.

11 The Board Governance Assessment Maturity will be conducted every two years commencing in 2026/27 and fifth year in 2029/30.

12 The Ethics Assessment Maturity will be conducted every two years commencing in 2026/27 and fifth year in 2029/30.

9. BUDGET SUB-PROGRAMME: HUMAN RESOURCES MANAGEMENT AND DEVELOPMENT

9.1. PURPOSE OF THE BUDGET SUB-PROGRAMME

To ensure that all matters relating to human capital management and development are implemented effectively and efficiently. In addition, to ensure that the ECGB becomes an employer of choice.

9.2. BUDGET SUB-PROGRAMME: OUTCOMES, OUTPUTS, SELECTED KPIs AND ANNUAL TARGETS

NO	OUTCOME	OUTPUTS	OUTCOME INDICATOR	STRATEGIC PLAN TARGET 2029/30	AUDITED / ACTUAL PERFORMANCE			ESTIMATED PERFORMANCE	MEDIUM-TERM TARGETS		
					2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29
9.2.1	ECGB Positioned as an Employer of Choice.	Human Resources Maturity Index Framework. Report on Independent Assessment of Human Resources Functionality.	Human Resources Maturity Index	Level 4 Human Resources Maturity Index	New Indicator	New Indicator	New Indicator	Level 3 Human Resources Maturity Index	Level 3 Human Resources Maturity Index	Level 4 Human Resources Maturity Index	Level 4 Human Resources Maturity Index
SUB-SUB-PROGRAMME: RECORDS AND DOCUMENT MANAGEMENT											
9.2.2	Implemented Principles of Corporate Governance, Organisational Performance, and Reporting.	Records/ Document Management Maturity Framework. Report on Assessment of Records/ Document Management Functionality.	Records/ Document Management Efficiency Maturity Level	Level 4 Records/ Document Efficiency Maturity	New Indicator	New Indicator	New Indicator	Level 2 Records/ Document Efficiency Maturity	Level 2 Records/ Document Efficiency Maturity	Level 3 Records/ Document Efficiency Maturity	Level 3 Records/ Document Efficiency Maturity

10. BUDGET SUB-PROGRAMME: INFORMATION COMMUNICATION AND TECHNOLOGY

10.1.PURPOSE OF THE BUDGET SUB-PROGRAMME

To provide end-user and internal and external system support and ensure the effective running of all IT-related matters within ECGB and the stakeholders.

10.2.BUDGET SUB-PROGRAMME: OUTCOMES, OUTPUTS, SELECTED KPIS, AND ANNUAL TARGETS

NO	OUTCOME	OUTPUTS	OUTCOME INDICATOR	STRATEGIC PLAN TARGET 2029/30	AUDITED / ACTUAL PERFORMANCE			ESTIMATED PERFORMANCE	MEDIUM-TERM TARGETS		
					2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29
10.2.1	Maximised Benefit of AI and Digitization Technology in the Regulation Processes.	ICT Maturity Index Framework Report on Independent Assessment of ICT Functionality; Digital Transformation Strategy Document.	ICT Efficiency Maturity Level	Level 04 ICT Efficiency Maturity	New Indicator	New Indicator	New Indicator	N/A ¹³	Level 02 ICT Efficiency Maturity	Level 03 ICT Efficiency Maturity	Level 03 ICT Efficiency Maturity

¹³ The assessment of the maturity will be conducted annually commence in 2026/27 going forward.

11. BUDGET SUB-PROGRAMME: COMMUNICATION SERVICES

11.1.PURPOSE OF THE BUDGET SUB-SUB-PROGRAMME: SED/CSI

- ➔ To market and profile the ECGB as an efficient and effective gaming regulator and development entity.
- ➔ To facilitate the empowerment of local communities and contribute to the Eastern Cape government’s Poverty Eradication Programme and Anti-Poverty Strategy.
- ➔ To mainstream vulnerable and designated groups, which are the youth, the disabled, women, and the elderly within the province, including other emerging vulnerable groups identified by the Department of Planning, Monitoring and Evaluation (DPME).
- ➔ To strengthen and support the socio-economic development projects of the Board and those established in terms of license conditions, so that they are sustainable and add value to the lives of the people of the Eastern Cape.

11.2.BUDGET SUB-PROGRAMME: OUTCOMES, OUTPUTS, SELECTED KPIs AND ANNUAL TARGETS

NO	OUTCOME	OUTPUTS	OUTPUT / OUTCOME INDICATOR	STRATEGIC PLAN TARGET 2029/30	AUDITED / ACTUAL PERFORMANCE			ESTIMATED PERFORMANCE	MEDIUM-TERM TARGETS		
					2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29
11.2.1	Empowered Communities Located in the Province through SED/CSI Initiatives.	CSI/SED Project reports; CSI Committee Report: Reports on the implementation of projects supporting vulnerable groups.	Percentage of SED/CSI initiatives / programmes implemented	100% SED/CSI initiatives / programmes implemented ¹⁴	20	20	04	100% Planned SED/CSI initiatives implemented	100% Planned SED/CSI initiatives implemented	100% Planned SED/CSI initiatives implemented	100% Planned SED/CSI initiatives implemented

¹⁴ A target measuring unit was changed from number to percentage because setting of the target cannot not be predetermined for the planning cycle hence the change to percentage measuring unit.

12. BUDGET SUB-PROGRAMMES: SELECTED KEY PERFORMANCE INDICATORS, ANNUAL AND QUARTERLY TARGETS

12.1. BUDGET SUB-PROGRAMME: FINANCIAL MANAGEMENT SERVICES

NO.	OUTCOME INDICATOR	REPORTING PERIOD	ANNUAL TARGET 2026/27	QUARTER TARGETS			
				Q1	Q2	Q3	Q4
12.1.1	Revenue gambling taxes collected from online betting and land-based operators	Quarterly	R242 million Revenue Collected	R57.9 Million	R57.9 Million	R65 Million	R60.3 Million
12.1.2	Financial Management and Procurement Efficiency Maturity Level	Annually	Level 02 Financial Management and Procurement Efficiency Maturity	-	-	Level 02	-
SUB-SUB-PROGRAMME: RISK MANAGEMENT							
12.1.3	Enterprise Risk Management Maturity Level	Annually	Level 03 Risk Management Maturity	-	-	Level 03	-

12.2. BUDGET SUB-PROGRAMME: OFFICE OF THE CEO

NO.	OUTCOME INDICATOR	REPORTING PERIOD	ANNUAL TARGET 2026/27	QUARTER TARGETS			
				Q1	Q2	Q3	Q4
12.2.1	Organisational Maturity Level	Annually	Level 04 Maturity ¹⁵	-	-	-	-
SUB-SUB-PROGRAMME: BOARD SECRETARIAT SERVICES							
12.2.2	Board Governance Assessment Maturity Index	Annually	Level 03 Board Governance Assessment Maturity Index	-	-	-	Level 03
12.2.3	Ethics Assessment Maturity Level	Annually	Level 02 Ethics Assessment Maturity	-	-	-	Level 02

12.3. BUDGET SUB-PROGRAMME: HUMAN RESOURCES MANAGEMENT AND DEVELOPMENT

NO.	OUTCOME INDICATOR	REPORTING PERIOD	ANNUAL TARGET 2026/27	QUARTER TARGETS			
				Q1	Q2	Q3	Q4
12.3.1	Human Resources Maturity Index	Annually	Level 03 Human Resources Maturity Index	-	-	-	Level 03
SUB-SUB-PROGRAMME: RECORDS AND DOCUMENT MANAGEMENT							
12.3.2	Records and Document Management Efficiency Maturity Level	Annually	Level 02 Records and Document Management Efficiency Maturity	-	-	-	Level 02

12.4.BUDGET SUB-PROGRAMME: INFORMATION, COMMUNICATION AND TECHNOLOGY

NO.	OUTCOME INDICATOR	REPORTING PERIOD	ANNUAL TARGET 2026/27	QUARTER TARGETS			
				Q1	Q2	Q3	Q4
12.4.1	ICT Efficiency Maturity Level	Annually	Level 02 ICT Efficiency Maturity	-	-	-	Level 02

12.5.BUDGET SUB-PROGRAMME: COMMUNICATION SERVICES

NO.	OUTCOME INDICATOR	REPORTING PERIOD	ANNUAL TARGET 2026/27	QUARTER TARGETS			
				Q1	Q2	Q3	Q4
12.5.1	Percentage of SED/CSI initiatives /programmes implemented	Annually	100% SED/CSI initiatives	-	-	-	100%

13. EXPLANATION OF PROGRAMME ONE PLANNED PERFORMANCE AND RISKPETITE OVER THE MEDIUM-TERM PERIOD

Over and above the awarding of different types of licenses and the collection of revenue for the provincial fiscus, the ECGB has a corporate responsibility to identify and support socio-economic development initiatives to empower communities in areas compounded by poverty. In addition, the ECGB supports impoverished communities in terms of the Provincial Anti-Poverty Strategy, including designated and vulnerable groups which are youth, elderly, disabled persons, children, and women.

In terms of license conditions, licensees are expected to contribute a certain percentage of their GGR by implementing sustainable SED/CSI projects where they operate in the province. An SED framework is being developed to guide the implementation of sustainable CSI projects by provincial licensees, either as individual companies or in collaboration with each other.

Human Resources are important enablers towards the implementation of the Organisational Strategy. Having a well-informed structure will contribute to the sustainability and success of the organisation, especially in meeting organisationally planned targets and objectives.

Targeting R740.5 million in revenue collection for the provincial fiscus is one of the ECGB's key mandates. Although expectations are high in this regard, these have been tempered against the current economic conditions and specifically the negative growth in gaming revenues as a result of the sluggish economy.

The Maturity Index is an assessment tool used to assess an organisation's performance, governance and accountability as perceived by selected employees of the ECGB. Outcomes of such assessments then inform appropriate strategies to be utilised to strengthen performance, governance functionality and effectiveness in the organisation.

Various Maturity assessments of organisational performance, i.e., Records/Document management, Financial Management and Procurement, ICT and Human Resources Efficiency, will be administered to ensure that the effective functionality of all processes and components of the ECGB are pitched at maximum level. The following Maturity assessments will be conducted:

- ➔ Level 04 Organisational Maturity;
- ➔ Level 03 Records/Document Efficiency Maturity;
- ➔ Level 04 Risk Maturity;
- ➔ Level 03 Financial Management and Procurement Efficiency Maturity;
- ➔ Level 03 ICT Efficiency Maturity;
- ➔ Level 04 Human Resources Efficiency Maturity; and
- ➔ Level 02 Ethics Assessment Maturity.

Programme One has been informed by current baseline performance and the strategic plan expectations together with available budget, for realistic forecasts on the targets set.

14. PROGRAMME ONE RESOURCES CONSIDERATION: BUDGET ALLOCATION

BUDGET PROGRAMME ONE	Audited Outcomes/Actuals			Main Appropriation	Medium-Term Expenditure Estimate		
	2022/23 R'000	2023/24 R'000	2024/25 R'000		2025/26 R'000	2026/27 R'000	2027/28 R'000
1. Corporate Services Management and Administration							
1.1 Office of the CEO	9 631	10 258	13 812	23 348	24 636	25 533	26 659
1.1 Strategic Management Services	6 468	6 838	5 831	0			
1.1 Legal Services and Board Secretariat	6 512	6 949	9 870	0			
1.2 Financial Management	12 360	14 279	15 692	15 404	16 030	16 750	17 227
1.3 Human Resource Management and Development	7 667	8 802	10 024	10 379	10 611	11 033	11 529
1.4 Information Communications and Technology	5 474	7 656	7 803	6 063	5 582	5 759	6 018
1.5 Communication Services	0	2057	3094	3 129	3 370	3 480	3 637
TOTAL PROGRAMME EXPENDITURE	48 112	56 839	66 125	58 324	60 228	62 555	65 069

14.1. CONTRIBUTION OF RESOURCES TOWARDS ACHIEVEMENT OF OUTPUTS

PROGRAMME ONE: ECONOMIC CLASSIFICATION	Audited Outcomes/Actuals Appropriation			Main	Medium-Term Expenditure Estimate		
	2022/23 R'000	2023/24 R'000	2024/25 R'000		2025/26 R'000	2026/27 R'000	2027/28 R'000
Compensation of Employees	28 292	33 823	38 470	38 477	40 164	41 952	41 952
Goods And Services	19 820	23 016	27 655	19 847	20 064	20 603	23 117
Administrative Expenses	7 997	9 357	10 381	7 254	7 001	7 403	9 162
Corporate Social Investment	677	699	391	548	574	574	599
Depreciation and Amortisation of Assets	3 545	3 637	4 388	3 330	3 487	3 661	3 826
Legal Costs	1 912	1 559	4 092	1 999	2 709	2 500	2 613
Marketing and Research Costs	200	456	467	226	334	349	365
Other Operating Expenses	4 707	6 457	7 057	5 640	5 070	5 185	5 581
Statutory Audit Fees	782	849	881	850	890	930	972
PROGRAMME EXPENDITURE	48 112	56 839	66 126	58 324	60 228	62 555	65 069

Trend Analysis of Expenditure

14.1.1. Programme One Compensation of Employees' expenditure is budgeted to increase in line with cost-of-living adjustments and the Treasury guidelines at 4,5%.

14.1.2. In 2026/27, goods and services expenditure is budgeted to decrease overall due to the tight fiscal landscape and budget cuts, and the application of strict cost containment measures. This decrease will, however stabilise in the MTEF and will be maintained. There will be a slight increase in the outer-most year of the MTEF due to the



anticipated increase in software licensing fees.

15. KEY RISKS IDENTIFIED

NO.	OUTCOME	KEY RISKS DESCRIPTION	CONSEQUENCES	RISK MITIGATION PLANS
1.	ECGB positioned as an employer of choice	Inability to retain and attract appropriate skills impacting on a capable and motivated workforce.	Highly specialised industry. Ineffective implementation of retention, succession and other relevant policies. Workplace not conducive to positive employee morale. Planned merger between Eastern Cape Liquor Board and ECGB without appropriate consultations.	Implementation of the organisational culture improvement plan. HR maturity index action plan. Awarding bursaries to eligible staff. Implementation of the training plan to upskill employees. Performance review process and appraisal. Exit Interviews.
2.	Maximise benefit of AI and digitalization technology in the regulation process	Possible information security breach.	Lack of adequate cyber security measures. Lack of disaster recovery.	Digitalization strategy.
		Lack of integration of AI and digitization process within the regulation process.	Lack of resources i.e., capital, people and skills. Technology implementation failure.	Upskilling. Stakeholder engagement. Change management. Regular audit monitoring.
3.	Implemented principles of corporate governance, organisational performance and reporting	Business continuity disruptions and loss of information.	Lack of document management system for archiving information. Lack of a disaster recovery strategy/framework. Inadequate ICT access controls. Lack of User awareness. Inadequate integration of controls systems.	Folder structures setup on file server. Bi-annual testing of disaster recovery plan. Daily and weekly offsite backups. Quarterly awareness sessions held. Periodic monitoring of incident reports. ICT Steering Committee in place and functional. Cyber Security Monitoring System.
		Inadequate stakeholder buy-in to the planned merger between Eastern Cape Liquor Board and ECGB.	Process underway to merge without a comprehensive feasibility study. Inadequate stakeholder engagement and consultation.	Work streams have been established. Work streams consisting of management from both ECGB and ECLB, are facilitated by GTAC/Provincial Treasury.
4.	Empowered communities located in the province through CSI/SED initiatives	Failure to achieve the desired CSI impact on indigent communities.	Non-adherence to the CSI policy and framework. Lack of evaluation of outcomes of CSI Projects. Ineffective empowerment Initiatives in targeted communities. Lack of integrated CSI impact monitoring and reporting tool.	CSI implementation plan in place and executed. CSI industry forum. CSI committee in place and functional. CSI awards.

16. BUDGET PROGRAMME TWO: GAMBLING REGULATION AND CONSUMER PROTECTION

16.1. PURPOSE OF THE BUDGET PROGRAMME

The purpose of this programme is to implement the ECGA and other statutory mandates through conducting investigations, licensing, compliance, revenue, gaming control, law enforcement, and protecting consumers, including public interest activities such as educating consumers and the public about illegal and responsible gambling and mitigation of excessive and uncontrolled gambling.

A theory of change for Programme Two to align with the impact and outcomes is provided as Annexure B.

16.2. PRIORITIES FOR PROGRAMME TWO EMERGING FROM ENVIRONMENTAL SCANNING USING PESTEL AND SWOT ANALYSIS

- 16.2.1. Regulatory Reform and Benchmarking - Explore mechanisms for regulating land-based/brick-and-mortar gambling operations through new technologies within the legislative provisions. Benchmark against international jurisdictions with established remote gambling within licensed establishment.
- 16.2.2. Technology-Driven Enforcement - Implement ICT technologies to detect and disrupt illegal gambling operations within the province.
- 16.2.3. Early Harm Minimisation - Proactively address risks associated with online gambling, including problem gambling, financial harm, cybersecurity threats, and fraud.
- 16.2.4. Virtual Audit Implementation:
 - Develop and deploy virtual revenue audits.
 - Establish a virtual audit system with supporting standard operating procedures.
- 16.2.5. Provincial conference focussing on the profiling of mechanisms of fighting and curbing of illegal gambling in the province.

17. BUDGET SUB-PROGRAMME: INVESTIGATION AND LICENSING ADMINISTRATION

17.1. PURPOSE OF THE BUDGET SUB-PROGRAMME

To implement the Eastern Cape Gambling Act (ECGA) and other statutory mandates through conducting investigations in order to award licenses to suitably qualified applicants by the Board of the ECGB. Furthermore, to provide information on economic opportunities associated with the gambling industry, including types of licenses to be rolled out by the ECGB, to potential entrepreneurs and investors, business organisations and local economic development agencies within the province.

17.2. BUDGET SUB-PROGRAMME: OUTCOMES, OUTPUTS, SELECTED KPIs AND ANNUAL TARGETS

NO.	OUTCOME	OUTPUTS	OUTCOME/ OUTPUT INDICATOR	STRATEGIC PLAN TARGET 2029/30	AUDITED/ACTUAL PERFORMANCE			ESTIMATED PERFORMANCE	MEDIUM-TERM TARGETS		
					2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29
17.2.1		License Certificates Issued to Operate Gambling Site	Number of Key Gambling Licenses Issued	36 Key Gambling Licenses	7	2	5	04 Key Gambling Licenses	12 Key Gambling Licenses	08 Key Gambling Licenses	06 Key Gambling Licenses
17.2.2	Transformed, Ethical and Sustainable Gambling Operations in the Province.	Reports on the Awareness Sessions Conducted Number of Persons Who Attended Economic Opportunities Session	Number of Gambling Economic Opportunities Awareness Sessions Conducted	30 Economic Opportunities Awareness Sessions	5	5	7	07 Economic Opportunities Sessions	07 Economic Opportunities Sessions	06 Economic Opportunities Sessions	06 Economic Opportunities Sessions

18. BUDGET SUB-PROGRAMME: INSPECTIONS, LAW ENFORCEMENT, RESPONSIBLE GAMBLING AND PUBLIC EDUCATION

18.1. PURPOSE OF THE BUDGET SUB-PROGRAMME

To enforce the **ECGA** and related legislation by conducting compliance inspections, applying regulatory law enforcement, and processing patron complaints and disputes to eliminate non-compliance and protect consumers. Furthermore, to lead investigations and prevent illegal gambling in collaboration with provincial law enforcement agencies and other relevant stakeholders, including implementing **responsible gambling initiatives, exclusions and related measures**, as well as **public education campaigns** to curb excessive gambling, while profiling the ECGB as an efficient and effective regulator.

18.2. BUDGET SUB-PROGRAMME: OUTCOMES, OUTPUTS, SELECTED KPIS AND ANNUAL TARGETS

NO.	OUTCOME	OUTPUTS	OUTCOME INDICATOR	STRATEGIC PLAN TARGET 2029/30	AUDITED/ACTUAL PERFORMANCE			ESTIMATED PERFORMANCE	MEDIUM-TERM TARGETS		
					2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29
18.2.1	Displaced Illegal Gambling in the Province	Reports on Illegal Operations	Number of 16 Sweeps Conducted	50 Sweeps Conducted	10	15	15	10 Sweeps Conducted	10 Sweeps Conducted	10 Sweeps Conducted	10 Sweeps Conducted
		Identified Reports on the Closure of Illegal Gambling Sites									
		Number of Confiscated Illegal Gambling Devices and Equipment									
18.2.2		Reports on Community Awareness Campaigns Conducted	Number Of Community Awareness Campaigns on Illegal Gambling Activities Conducted	20 Community Awareness Campaigns on illegal gambling	New Indicator	New Indicator	New Indicator	08 Community Awareness Campaigns on illegal gambling	03 Community Awareness Campaigns on illegal gambling	03 Community Awareness Campaigns on illegal gambling	03 Community Awareness Campaigns on illegal gambling
18.2.3	Educated and Informed Public Regarding Responsible Gambling.	Confirmation Reports Regarding Messages of Responsible Gambling	Number Of Responsible Gambling Awareness Campaigns Conducted	60 Responsible gambling awareness campaigns conducted	New Indicator	New Indicator	New Indicator	12 Responsible Gambling Awareness Campaigns	12 Responsible Gambling Awareness Campaigns	12 Responsible Gambling Awareness Campaigns	12 Responsible Gambling Awareness Campaigns

19. BUDGET SUB-PROGRAMME: GAMING CONTROL, REGULATORY AFFAIRS AND SYSTEMS

19.1.PURPOSE OF THE BUDGET SUB-PROGRAMME

To enforce the ECGA and related legislation by conducting systems audits, penetration and vulnerability reviews, and Information Security Management System (ISMS) reviews, as well as approving gaming and betting systems. These activities ensure compliance, revenue integrity, and security across all stages of system development, deployment, and enhancement, and also include responsible gambling compliance from a systems perspective, such as website reviews and features supporting player protection and exclusions.

19.2.BUDGET SUB-PROGRAMME: OUTCOMES, OUTPUTS, SELECTED KPIs AND ANNUAL TARGETS

NO.	OUTCOME	OUTPUTS	OUTPUT/ OUTCOME INDICATOR	STRATEGIC PLAN TARGET 2029/30	AUDITED/ACTUAL PERFORMANCE			ESTIMATED PERFORMANCE	MEDIUM-TERM TARGETS		
					2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29
19.2.1	Compliant Gaming Industry to Thrive	Compliance Barometer Dashboard Reports on systems audits for any potential vulnerabilities or penetration	Number of Systems Audits Conducted	75 Systems Audits	New Indicator	New Indicator	New Indicator	15 Systems Audits	15 Systems Audits	15 Systems Audits	15 Systems Audits

20. BUDGET SUB-PROGRAMME: AUDIT AND COMPLIANCE SERVICES

20.1.PURPOSE OF THE BUDGET SUB-PROGRAMME

To enforce the ECGA and related legislation by conducting **regulatory compliance audits**, comprising **traditional compliance assessments** and **revenue integrity verification**. This includes **responsible gambling compliance**, in line with the ECGB's Responsible Gambling Strategy.

20.2.BUDGET SUB-PROGRAMME: OUTCOMES, OUTPUTS, SELECTED KPIs and ANNUAL TARGETS

NO.	OUTCOME	OUTPUTS	OUTCOME/ OUTPUT INDICATOR	STRATEGIC PLAN TARGET 2029/30	AUDITED/ACTUAL PERFORMANCE			ESTIMATED PERFORMANCE	MEDIUM-TERM TARGETS		
					2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29
19.2.1	Compliant Gaming Industry to Thrive	Compliance Barometer Dashboard on Maturity Reports on compliance and Revenue audits conducted.	Compliance Maturity Level	Level 4 Compliance Maturity	New Indicator	New Indicator	New Indicator	74 Revenue audits	Level 3 Compliance Maturity ¹⁷	Level 4 Compliance Maturity	Level 4 Compliance Maturity

17 New indicator "Compliance Maturity Level" has been re-introduced to replace indicators "Number of Revenue Audits Conducted; Number of Compliance Audits conducted and Number of Inspections Conducted" wherein these indicators have since been relocated from APP to Operational Plan and replaced by this outcome based KPIs. Therefore, the target is no longer measured in numbers as shown under year 2025/26, the new KPI is measured in Level of Maturity to align with the new KPI description "Compliance Maturity Level".

21. BUDGET SUB-PROGRAMMES: SELECTED KEY PERFORMANCE INDICATORS, ANNUAL AND QUARTERLY TARGETS

21.1. BUDGET SUB-PROGRAMME: INVESTIGATION AND LICENSING ADMINISTRATION

NO.	OUTPUT / OUTCOME INDICATOR	REPORTING PERIOD	ANNUAL TARGET 2026/27	QUARTER TARGETS			
				Q1	Q2	Q3	Q4
21.1.1	Number of Key Gambling Licenses Issued	Quarterly	12 Key Gambling Licenses	2	4	4	2
21.1.2	Number of Gambling Economic Opportunities Awareness Sessions Conducted	Quarterly	07 Economic Opportunities Sessions	1	2	2	2

21.2. BUDGET SUB-PROGRAMME: INSPECTIONS, LAW ENFORCEMENT, RESPONSIBLE GAMBLING AND PUBLIC EDUCATION

NO.	OUTPUT INDICATOR	REPORTING PERIOD	ANNUAL TARGET 2026/27	QUARTER TARGETS			
				Q1	Q2	Q3	Q4
21.2.1	Number of Sweeps Conducted	Quarterly	10 Sweeps Conducted	01 Sweep	02 Sweeps	05 Sweeps	02 Sweeps
21.2.2	Number of Community Awareness Campaigns on Illegal Gambling Activities Conducted	Quarterly	03 Community Awareness Campaigns on Illegal Gambling Activities Conducted	01	01	-	01
21.2.3	Number of responsible gambling awareness campaigns conducted	Quarterly	12 Responsible Gambling Awareness Campaigns Conducted	03	03	03	03

21.3. BUDGET SUB-PROGRAMME: GAMING CONTROL, REGULATORY AFFAIRS AND SYSTEMS

NO.	OUTPUT INDICATOR	REPORTING PERIOD	ANNUAL TARGET 2026/27	QUARTER TARGETS			
				Q1	Q2	Q3	Q4
21.3.1	Number of Systems Audits Conducted	Quarterly	15 Systems audits	3 Systems audits	5 Systems audits	3 Systems audits	4 Systems audits

21.4. BUDGET SUB-PROGRAMME: AUDIT AND COMPLIANCE SERVICES

NO.	OUTPUT INDICATOR	REPORTING PERIOD	ANNUAL TARGET 2026/27	QUARTER TARGETS			
				Q1	Q2	Q3	Q4
24.4.1	Compliance Maturity Level	Quarterly	Level 3 Compliance Maturity	-	-	-	Level 3 Compliance Maturity

22. EXPLANATION OF PROGRAMME TWO PLANNED PERFORMANCE AND RISK APPETITE OVER THE MEDIUM-TERM PERIOD

The ECGB remains committed to fostering a compliant, ethical and people-centric gambling environment while driving economic transformation and safeguarding public interest. Over the medium-term, Programme Two will focus on licensing, compliance oversight, technological adaptation, and responsible gambling initiatives to ensure sustainable industry growth aligned with regulatory integrity.

Licensing and Transformation

ECGB will continue to create opportunities for industry role players through Requests for Proposals, enabling entrepreneurs and business entities to apply for available licenses. The awarding of new licenses is a key driver of economic growth and transformation, promoting increased black ownership, particularly among local PDIs and women. Previous strategic cycles successfully rolled out Bingo, casino, and Limited Payout Machine route operators, as well as Independent Site Operators, and future licensing targets will align with remaining modes and locations.

Compliance Oversight and Risk-Based Regulation

Following license allocation and operational commencement, the Audit and Compliance Division will ensure adherence to legislation, license conditions, and ethical standards. The Compliance Barometer will continue to guide a risk-based approach, reducing audit frequency for mature licensees while intensifying oversight where compliance risks persist. This approach ensures efficient resource allocation and strengthens regulatory trust and operational resilience.

Technology-Driven Regulation

The evolution of gambling technologies necessitates enhanced systems audits, ISMS reviews, and virtual/remote audits to maintain revenue integrity and operational security. The ECGB will enforce SANS1718-4 technical as well as related and applicable standards (i.e., SANS27000 series), requiring annual penetration and vulnerability testing by SANAS-accredited testing laboratories, to protect information confidentiality, integrity, and availability across betting ecosystems (wagering and integrated systems).

Responsible Gambling and Ethical Practices

As a responsible regulator, the ECGB acknowledges the social harms associated with gambling, including addiction and related issues such as substance abuse. Programme Two will intensify responsible gambling initiatives, incorporating self-exclusions, monitoring unlawful winnings from excluded patrons, and embedding player protection features in licensed systems and websites, including procuring Regulatory Systems to assist with real-time data management. These measures reinforce ECGB's commitment to ethical regulation and consumer protection.

The ECGB has made significant strides in combating illegal gambling and advancing responsible gambling education, reaching communities, stakeholders, and vulnerable groups through targeted campaigns, workshops, and enforcement actions. These efforts have not only minimised harm but also strengthened the integrity of the regulated industry. However, the fight against illegal gambling and the institutionalisation of responsible gambling is far from complete. Responsible gambling is incomplete without the displacement of illegal gambling, and this requires intensified enforcement, technology-driven audits, and expanded public education.

The ECGB has laid the foundation and now requires resources to scale. By making available and securing additional resources and support, the ECGB will be further empowered to protect communities, uphold ethical standards, and deliver a safe, transparent, and people-centric gambling environment for the Eastern Cape.

Public Education and Community Awareness

To mitigate gambling-related harms, the ECGB will expand public education campaigns on responsible gambling and illegal gambling risks. The previous year's new performance indicator will continue to be utilised to track community awareness initiatives, ensuring messaging reaches vulnerable groups and promoting informed decision-making.

Collaborative Enforcement

The ECGB will strengthen partnerships with law enforcement and industry stakeholders to detect and dismantle illegal gambling operations, while educating communities on the dangers of unregulated gambling. The ECGB will also explore partnering with banks, financial institutions and landlord associations where these illegal operations take place or host their banking accounts. These collaborative efforts will enhance compliance and uphold the integrity of the regulated industry.



23. PROGRAMME TWO RESOURCES CONSIDERATION: BUDGET ALLOCATION

BUDGET PROGRAMME TWO: SUB-PROGRAMMES	Audited Outcomes/Actuals			Main Appropriation	Medium-Term Expenditure Estimate		
	2022/23 R'000	2023/24 R'000	2024/25 R'000	2025/26 R'000	2026/27 R'000	2027/28 R'000	2028/29 R'000
2. Gambling and Regulation							
2.1 Licensing and Investigation Administration	11 594	11 562	12 965	14 838	13 632	14 237	14 877
2.2 Law Enforcement and Gaming Control	6 742	6 249	6 942	0			
2.2 Inspections, Law Enforcement, Responsible Gambling, and Public Education				7 956	8 400	9 304	9 722
2.3 Audit and Compliance Services	6 594	7 923	8 274	7 867	7 934	8 299	8 672
2.4 Responsible Gambling and Public Education	0	2267	3049	0	0	0	0
2.4 Gaming Control, regulatory affairs and systems				1 164	1 216	1 271	1 631
PROGRAMME EXPENDITURE	24 930	28 001	31 229	31 824	31 182	33 111	34 902

23.1. CONTRIBUTION OF RESOURCES TOWARDS ACHIEVEMENT OF OUTPUTS

PROGRAMME 2: ECONOMIC CLASSIFICATION	Audited Outcomes/Actuals			Main Appropriation	Medium-Term Expenditure Estimate		
	2022/23 R'000	2023/24 R'000	2024/25 R'000	2025/26 R'000	2026/27 R'000	2027/28 R'000	2028/29 R'000
Compensation of Employees	22 082	23 070	24 456	26 297	27 480	28 717	28 717
Goods and Services	2 848	4 931	6 774	5 527	3 701	4 394	6 185
Administrative Expenses	1 898	2 594	4 400	3 864	1 789	1 886	3 564
Consumer Protection and Public Education	0	1257	895	777	1 000	1 577	1 648
Marketing And Research Costs	66	316	460	70	73	76	80
Other Operating Expenses	884	764	1 019	817	839	855	893
PROGRAMME EXPENDITURE	24 930	28 001	31 229	31 824	31 182	33 111	34 902

Trend Analysis of Expenditure

Programme Two Compensation of Employees expenditure increased by CPI index of 4.5%, as per the Treasury budget guidelines.

In 2025/26, goods and services expenditure is budgeted to decrease due to ongoing cost-effective contracts, tight fiscal constraints, and intensive use of ICT capabilities. However, in the outer year, there will be a slight increase as we expect to carry out more responsible gambling campaigns in line with the newly awarded licenses.

24. KEY RISKS IDENTIFIED

NO.	OUTCOME	KEY RISKS DESCRIPTION	CONSEQUENCES	RISK MITIGATION PLANS
1.	Transformed ethical and sustainable gambling operations in the province	Litigation against licensing, transformation, and other regulatory decisions of the Board.	<ul style="list-style-type: none"> ⇒ Litigation costs. ⇒ Delays in licensing processes and rollout. ⇒ Reputational damage. 	<ul style="list-style-type: none"> ⇒ Investigation and Licensing Manual. ⇒ Legal Services Policy. ⇒ Legal support available to advise the Board on the decision-making process. ⇒ Adherence to requirements of the Request for Proposal (RFP) and refinement thereof.
		Over-concentration of licenses in a geographic area.	<ul style="list-style-type: none"> ⇒ Unsustainable licensees. ⇒ Non-adherence to bid commitments. ⇒ Proliferation of gambling. 	<ul style="list-style-type: none"> ⇒ Reliance on research and five-zoned approach. ⇒ Board directives.
		Lack of interest or reduced investment in the province as a result of fixed term license regime and the lack of zero-rated sports betting.	<ul style="list-style-type: none"> ⇒ Discourages investment. ⇒ Not awarding licenses. ⇒ Lack of revenue generation prevents business imperatives from driving investment decisions. 	<ul style="list-style-type: none"> ⇒ Executive Authority approval for indefinite licensing.
2.	Compliant gambling industry to thrive in the province	Failure to prevent and detect non-compliance by licensees and registrants.	<ul style="list-style-type: none"> ⇒ Revenue under-collection. ⇒ Reputational damage. ⇒ Increased non-compliance. ⇒ Player exploitation and harm. 	<ul style="list-style-type: none"> ⇒ Audit and compliance methodology (used to perform regulatory compliance audits). ⇒ Penalties Framework. ⇒ Audit Procedure Manual. ⇒ Regulatory Law Enforcement Framework. ⇒ Inspectorate Procedure Manual. ⇒ Responsible Gambling and Public Education Implementation Framework ⇒ Gaming Control and Regulatory Affairs Methodology. ⇒ Gaming Control Regulatory Affairs Manual. ⇒ Interest and penalties imposed for non-compliance. ⇒ Review (increase/decrease) of guarantee(s).
3.	Displace illegal gambling in the province	Proliferation of illegal gambling.	<ul style="list-style-type: none"> ⇒ Loss of tax revenue. ⇒ Reputational damage. ⇒ Unfair competition. ⇒ Excessive gambling. ⇒ Tax evasion and money laundering. ⇒ Increased exposure of vulnerable populations. 	<ul style="list-style-type: none"> ⇒ Regulatory Law Enforcement Framework. ⇒ Inspectorate Procedure Manual. ⇒ Regular sweeps and closure of illegal sites. ⇒ Stakeholder sessions on illegal gambling. ⇒ Fraud hotline. ⇒ Effective implementation of FICA to mitigate challenges of illegal gambling. ⇒ Public education on risks of illegal gambling.
4.	Educated and informed public regarding responsible gambling	Prevalence of irresponsible gambling.	<ul style="list-style-type: none"> ⇒ Increased levels of gambling addiction. ⇒ Negative social impact. ⇒ Family and community breakdown. ⇒ Regulatory trust deficit. 	<ul style="list-style-type: none"> ⇒ Responsible Gambling and Public Education Strategy. ⇒ Responsible Gambling and Public Education Implementation Framework ⇒ Responsible Gambling programmes and awareness sessions held. ⇒ Multi-media campaigns to disseminate responsible gambling messages. ⇒ Collaboration with health and social services. ⇒ Integration with school, TVET, University and Community Outreach. ⇒ Use of behavioural insights to tailor messaging.

25. BUDGET PROGRAMME THREE: KNOWLEDGE AND INFORMATION MANAGEMENT

25.1.PURPOSE OF THE BUDGET PROGRAMME

The purpose of this programme is to build a strong foundation of valid and reliable empirical research and programme evaluations to inform operational and policy advisory decision-making. A theory of change for Programme Three to align with the impact and outcomes is provided as Annexure B.

25.2.PRIORITIES FOR PROGRAMME THREE EMERGING FROM ENVIRONMENTAL SCANNING USING PLANNING TOOLS

Review and/or updating the research agenda to specify the topics for prioritisation for implementation aligned with the organisational strategy on the research to be commissioned as planned.

26. BUDGET SUB-PROGRAMME: EMPIRICAL RESEARCH

26.1.PURPOSE OF THE BUDGET SUB-PROGRAMME

To build a strong foundation of valid and reliable empirical research to inform operational, policy advisory, and public interest activities, as well as to conduct *ad hoc* surveys to examine levels of information, attitudes, behaviour, and social changes within the gaming industry in the Eastern Cape and the ECGB itself.

26.2. BUDGET SUB-PROGRAMME: OUTCOMES, OUTPUTS, SELECTED KPIs AND ANNUAL TARGETS

NO.	OUTCOME	OUTPUTS	OUTPUT INDICATOR	STRATEGIC PLAN TARGET 2029/30	AUDITED/ACTUAL PERFORMANCE			ESTIMATED PERFORMANCE	MEDIUM-TERM TARGETS		
					2022/ 23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29
26.2.1	Implemented Research and Evaluation Outcomes and Findings	Bid specification. Bid evaluation report – tender issued. SLA Board’s resolutions on findings and recommendations. Checklist on the implementation of research findings and recommendations.	18Empirical research studies commissioned.	05 Empirical Research Study	2	1	2	01 Empirical Research Study	01 Empirical Research Study	01 Empirical Research Study	01 Empirical Research Study

¹⁸ Research work which will be conducted and achieved by March during a financial year is to ensure that research is conducted to assist the ECGB in making informed decisions on gambling industry developments.

27. BUDGET SUB-PROGRAMME: MONITORING AND EVALUATION

27.1.PURPOSE OF THE BUDGET SUB-PROGRAMME

To assess, evaluate and verify the impact of the socio-economic development initiatives and/or any other implemented programmes/projects to inform policy, decision making and direction of the organisation. Monitoring and evaluation processes assist the organisation to identify what is working and what is not, and to make informed decisions on how to improve the implemented programmes and/or projects.

27.2.BUDGET SUB-PROGRAMME: OUTCOMES, OUTPUTS, SELECTED KPIs AND ANNUAL TARGETS

NO.	OUTCOME	OUTPUTS	OUTPUT INDICATOR	STRATEGIC PLAN TARGET 2029/30	AUDITED/ACTUAL PERFORMANCE			ESTIMATED PERFORMANCE	MEDIUM-TERM TARGETS		
					2022/ 23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29
27.2.1	Implemented Research and Evaluation Outcomes and Findings	Bid specification. Bid evaluation report – tender issued. SLA Board’s resolutions on findings and recommendations. Checklist on the implementation of impact evaluation findings and recommendations.	Number of impact evaluation projects conducted	05 Impact Evaluation Projects Conducted	New Indicator	New Indicator	New Indicator	01 Impact Evaluation Project Conducted	01 Impact Evaluation Project Conducted	01 Impact Evaluation Project Conducted	01 Impact Evaluation Project Conducted

BUDGET SUB-PROGRAMMES: SELECTED KEY PERFORMANCE INDICATORS, ANNUAL AND QUARTERLY TARGETS

27.3.BUDGET SUB-PROGRAMME: EMPIRICAL RESEARCH

NO.	OUTPUT INDICATOR	REPORTING PERIOD	ANNUAL TARGET 2026/27	QUARTER TARGETS			
				Q1	Q2	Q3	Q4
27.3.1	Empirical research study commissioned	Annually	01 Empirical Research Study	-	-	-	01

27.4.BUDGET SUB-PROGRAMME: MONITORING AND EVALUATION

NO.	OUTPUT INDICATOR	REPORTING PERIOD	ANNUAL TARGET 2026/27	QUARTER TARGETS			
				Q1	Q2	Q3	Q4
27.4.1	Impact evaluation project conducted	Annually	01 Impact Evaluation Project Conducted	-	-	-	01

28. EXPLANATION OF PROGRAMME THREE: PLANNED PERFORMANCE AND RISK APPETITE OVER THE MEDIUM-TERM PERIOD

The ECGB, as a gambling regulator, is expected to promote the use of research and the generation of knowledge to make decisions and direct actions to improve research outcomes, which are grounded in evidence from research. The ECGB is committed to generating a reliable body of valid data and research information about gambling in the province that will ensure that all decisions relating to gambling are evidence-based.

As a regulated industry, the gambling industry requires rigorous and continuous research due to various factors, such as technological advances in gaming, which require the regulator to be well-informed about such developments to regulate effectively.

The targets in Programme 3 have been informed of the intent to enhance activities in the budget programme within budget constraints, including a limited workforce.

29. PROGRAMME THREE RESOURCES CONSIDERATION: BUDGET ALLOCATION

BUDGET PROGRAMME THREE:	Audited Outcomes/Actuals			Adjusted Appropriation	Medium-Term Expenditure Estimate		
	2022/23 R'000	2023/24 R'000	2024/25 R'000	2025/26 R'000	2026/27 R'000	2027/28 R'000	2028/29 R'000
3. Research and Development							
3.1 Empirical Research	346	387	926	975	473	474	496
3.2 Responsible Gambling and Public Education	2596	4814			-		
3.3 Monitoring and evaluation		-	0	154	131	130	136
PROGRAMME EXPENDITURE	2 942	5 201	926	1 129	604	604	631

29.1. CONTRIBUTION OF RESOURCES TOWARDS ACHIEVEMENT OF OUTPUTS

BUDGET PROGRAMME THREE	Audited Outcomes/Actuals			Adjusted Appropriation	Medium-Term Expenditure Estimate		
	2022/23 R'000	2023/24 R'000	2024/25 R'000	2025/26 R'000	2026/27 R'000	2027/28 R'000	2028/29 R'000
Compensation of Employees	2 191	1 573	0	0	0	0	0
Goods and Services	751	3628	926	1129	604	604	631
Administrative Expenses	141	232		22	23	24	25
Consumer Protection and Public Education	245	2856	0	0	0	0	0
Monitoring and Evaluation Costs		0	0	154	131	130	136
Other Operating Expenses	21	25	0	0	0	0	0
Research and Seminar Costs	344	515	926	953	450	450	470
PROGRAMME EXPENDITURE	2 942	5 201	926	1 129	604	604	631

Trend Analysis of Expenditure

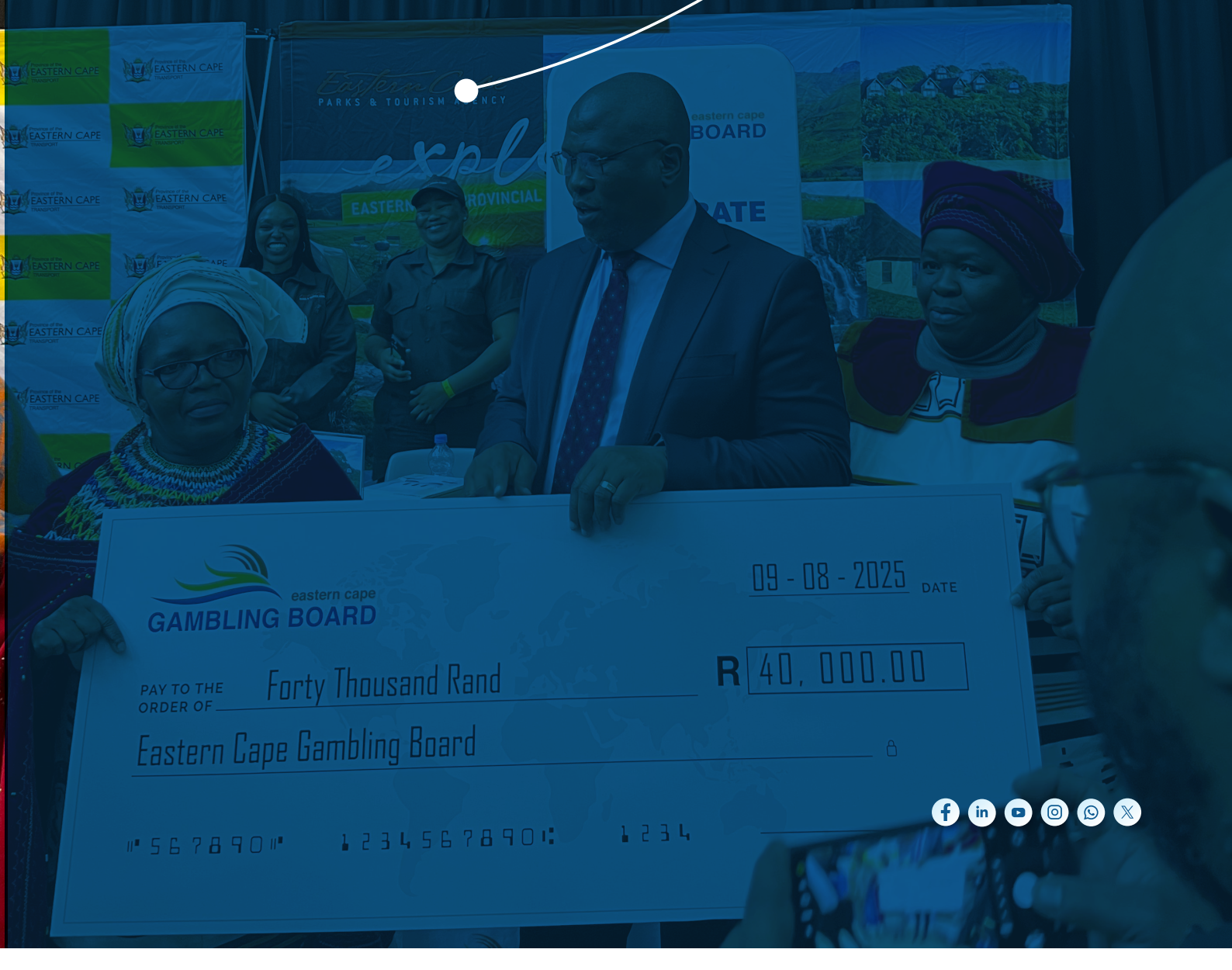
- ➔ There is no Compensation of Employees in Programme Three, as this is managed by personnel in Programme Two.
- ➔ The Goods and Services budget in 2026/27 shows a 47% decrease. This is due to the number of research assignments planned for 2026/7 and the MTECF.

30. KEY RISKS IDENTIFIED

NO.	OUTCOME	KEY RISKS DESCRIPTION	CONSEQUENCES	RISK MITIGATION PLANS
1.	Implemented research and evaluation outcomes and findings	Incorrect board decisions based on lack of or incorrect research studies.	Litigations Financial loss Reputational damage	Research and development strategy and the research agenda. Management review of research outcomes. Formal processes in place for conducting empirical research to inform policy decisions. Research seminars held. Communication of research findings to relevant stakeholders. Checklist for the implementation of research findings and recommendations.

PART D

AMENDMENTS AND DISCLOSURE TO THE EXISTING STRATEGIC PLAN



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PART D: AMENDMENTS AND DISCLOSURE TO THE EXISTING STRATEGIC PLAN

Following the development of the 2026/27 – 2028/29 APP of the ECGB, there were issues that emerged during the planning and review process. Although there are no significant policy shifts that have to be considered by the ECGB, there are however some service delivery matters that the ECGB had to amend or update the current 2025/26 – 2029/30 Strategic Plan of the ECGB.

The updating of those matters are therefore disclosed here in the 2026/27 – 2028/29 APP in terms of issuing this amendment as required by Treasury’s Framework for Strategic Plans and APP.

Due to capacity, operational re-alignment and budget challenges, the 5-year targets in the Strategic Plan have been revised and the table below demonstrates the issues that would have appeared in the Strategic Plan of the ECGB are considered and reflected in this 2026/27 – 2028/29 APP and are disclosed in the table below.

NO.	OUTCOME	OUTCOME / OUTPUT INDICATOR	5-YEAR STRATEGIC PLAN TARGETS 2029/30		COMMENTS ON THE AMENDMENTS AND DISCLOSURES
			INITIAL TARGET	REVISED TARGET	
1.	Transformed, Ethical and Sustainable Gambling Operations in the Province	Number of licenses issued for manufacturers of gambling devices, software and contingencies	03 Licenses issued for manufacturers of gambling devices, software and contingencies	Nil	<ul style="list-style-type: none"> ⇒ The indicator “Number of licenses issued for manufacturers of gambling devices, software and contingencies” has been relegated from the APP to Operational Plan until the completion of the Transformation policy wherein the ECGB is currently developing a Transformation Policy that seeks to address, among other things, the meaningful participation of PDIs through different structured mechanisms. ⇒ After the Board has approved the Policy for publication and solicited comments from industry stakeholders, and after considering the comments received from the industry stakeholders, only then will the final Policy be published and implemented to ensure, in line with the Conditions of License by the industry, empowerment of potential emerging PDI Entrepreneurs issued with licenses for manufacturers of gambling devices, software and contingencies and patents thereof.
2.	Compliant Gaming Industry to Thrive	Number of inspections conducted	550 Inspections conducted	Level 4 Compliance Maturity	<ul style="list-style-type: none"> ⇒ New indicator “Compliance Maturity Level” has been introduced to replace indicators “Number of Revenue Audits Conducted, Number of Compliance Audits conducted and Number of Inspections Conducted”. ⇒ These indicators have since been relocated from the APP to the Operational Plan and replaced by an outcome-based KPI, which is Compliance Maturity Level. ⇒ Therefore, the target of the new KPI is measured in Level of Maturity to align with the new KPI description “Compliance Maturity Level”.
3.		Number of revenue audits conducted	394 Revenue audits		
4.		Number of compliance audits conducted	400 Compliance audits		
5.	Displaced Illegal Gambling in the Province	Number of community awareness campaigns on illegal gambling activities conducted	40 Community awareness campaigns on illegal gambling	20 Community awareness campaigns on illegal gambling	<ul style="list-style-type: none"> ⇒ Due to resource constraints and tapping from other activities being pursued, such as heightened brand visibility with platforms on awareness campaigns, the performance indicator “Number of community awareness campaigns on illegal gambling activities conducted” target was reduced from 40 to 20 awareness campaigns in the 5-year planning cycle. ⇒ The target may again be reviewed in the next planning cycle, guided by the recommendations that will emerge from the evaluation study, which is currently being undertaken on the evaluation of the effectiveness and efficiency of strategies, methods, and approaches implemented by the Eastern Cape Gambling Board to mitigate/curb illegal gambling.

PART E: TECHNICAL INDICATOR DESCRIPTIONS

31. BUDGET PROGRAMME ONE: CORPORATE SERVICES MANAGEMENT AND ADMINISTRATION

31.1. BUDGET SUB-PROGRAMME – FINANCIAL MANAGEMENT SERVICES

TABLE 16

Indicator Title	Revenue gambling taxes collected from online betting and land-based operators
Definition	Total tax collected monthly during a financial year and disbursed to the provincial Treasury through DEDEAT.
Sources of Data	Tax returns from all operators licensed are submitted monthly (weekly for bookmakers). Bank statements showing taxes received from operators.
Method of Calculation /Assessment	Simple count of rands collected.
Means of Verification	Licensees' tax returns Monthly ECGB global gambling tax reconciliation Proof of payment to DEDEAT
Assumptions	All operators will submit tax returns in the prescribed format as required by the ECGA. All operators will pay gambling taxes as prescribed by the ECGA.
Disaggregation of Beneficiaries	Targets for Women: N/A Targets for Youth: N/A Targets for People with Disabilities: N/A
Spatial Transformation	Not applicable
Calculation Type	Non-cumulative
Reporting Cycle	Quarterly
Desired Performance	Improved tax revenue collection by diversifying the sources of tax revenue.
Indicator Responsibility	Budget Sub-programme Manager: Financial Management

TABLE 17

Indicator Title	Financial Management and Procurement Efficiency Maturity Level
Definition	The assessment of Financial Management and Procurement Maturity will be administered as perceived by the ECGB's relevant internal and/or external stakeholders once a year in March. Financial management and procurement practices are assessed through the Financial Management and Procurement Maturity Framework and Assessment Tool to be developed for the ECGB against the attributes and domains that will be developed. Each attribute/domain is further disaggregated into performance areas. Together, the attributes/domains and performance areas with specific inputs and activities result in a set of targeted outputs.
Sources of Data	National Treasury Framework; best practice; benchmarking and ECGB Strategic Plan.
Method of Calculation /Assessment	The ECGB Financial Management and Procurement Maturity Framework, as approved by the Board; however, the method of calculation is specified therein and updated in the Annual Performance Plan accordingly. The framework consists of five levels of maturity, representing Level 1 to Level 5. The administration and assessment of the tool as per the ECGB framework will be conducted based on the average score calculated using a weighted scoring formula.
Means of Verification	Financial Management and Procurement Efficiency Report on the Maturity Level.
Assumptions	Clean audit outcomes are strengthened and enhanced, and business processes, financial management and procurement practices are institutionalised in the organisation.
Disaggregation of Beneficiaries	Targets for Women: N/A Targets for Youth: N/A Targets for People with Disabilities: N/A
Spatial Transformation	Not applicable
Calculation Type	Non-cumulative
Reporting Cycle	Annually
Desired Performance	Effective, institutionalised and efficient financial management and procurement function is desirable.
Indicator Responsibility	Budget Sub-programme Manager: Financial Management

31.1.1. BUDGET SUB-PROGRAMME – FINANCIAL MANAGEMENT SERVICES (SUB-SUB-PROGRAMME: RISK MANAGEMENT)

TABLE 18

Indicator Title	Enterprise Risk Management (ERM) Maturity Level
Definition	The assessment of Risk Management Maturity will be administered as perceived by the ECGB's relevant internal and/or external stakeholders once a year in March. Risk management practices are assessed through the developed Risk Management Maturity Framework and Assessment Tool of the ECGB against the attributes/domains: 1. Risk governance 2. ERM process management 3. Root cause discipline 4. Risk monitoring report 5. Risk and optimisation Each attribute/domain is further disaggregated into performance areas. Together, the attributes/domains and performance areas with specific inputs and activities result in a set of targeted outputs.
Sources of Data	Best Practice, Risk Management Maturity Framework and ECGB Strategic Plan.
Method of Calculation / Assessment	The ECGB Risk Management Maturity Framework as approved by the Board; however the method of calculation is specified therein and updated in the Annual Performance Plan accordingly. The framework consists of five levels of maturity representing the following: Level 1: Risk naive Level 2: Risk aware Level 3: Risk defined Level 4: Risk managed Level 5: Risk enabled The administration and assessment of the tool as per the ECGB framework will be conducted based on the average score calculated using a weighted scoring formula.
Means of Verification	Enterprise Risk Management Report on the Maturity Level.
Assumptions	ERM is pitched at the appropriate level, with appropriate support and commitment from management and governance structures. ERM is integrated into the corporate structure and business processes, and that risk management practice is institutionalised in the organisation.
Disaggregation of Beneficiaries	Targets for Women: N/A Targets for Youth: N/A Targets for People with Disabilities: N/A
Spatial Transformation	Not applicable
Calculation Type	Non-cumulative
Reporting Cycle	Annually
Desired Performance	Effective, institutionalised and efficient risk management function is desirable.
Indicator Responsibility	Budget Sub-Programme Manager: Financial Management (Risk Management)

31.2. BUDGET SUB-PROGRAMME – OFFICE OF THE CEO

TABLE 19

Indicator Title	Organisational Maturity Level
Definition	The assessment of organisational performance maturity will be administered every two years from 2026/27 and 2029/30 to ensure that the effective functionality of all governance processes and components of the ECGB are pitched at a maximum level. Management practices are assessed through the developed Organisational Maturity Framework and Assessment Tool of the ECGB against the seven domains: Independence and Legal Framework Corporate Governance Processes and Procedures/Systems (incl. IT) Human Resources/Skills/Staffing Communication and Stakeholder Management Organisation and Management/Integrated Management System Performance Management/Performance Management architecture Each domain is further disaggregated into performance areas. Together, the domains and performance areas with specific inputs and activities result in a set of targeted outputs.
Sources of Data	ECGB Organisational Maturity Index Framework
Method of Calculation/ Assessment	The ECGB Organisational Maturity Index Framework as approved by the Board; however, the method of calculation is specified therein and updated in the Annual Performance Plan accordingly. The framework consists of five levels of maturity representing the following: Level 1: Initial/Chaos - Everything is very rudimentary. Level 2: Repeatable/Start process and Control/Emergent – plans developed, but very little is implemented. Level 3: Established/Structured/Defined – plans prepared or under development at level 2 are implemented. Level 4: Integrated/Adapted/Managed – the ECGB is managing its core business in the most cost efficient and cost-effective way. Level 5: Optimised/Innovation/Applied – focus is on continually improving processes/performance. The administration and assessment of the tool as per the ECGB framework will be conducted based on the average score calculated using a weighted scoring formula.
Means of Verification	Organisational Maturity Report of independent validator/assessor and ECGB approved Framework.
Assumptions	Governance processes and achievement of clean audit outcomes are strengthened and enhanced.
Disaggregation of Beneficiaries	Targets for Women: N/A Targets for Youth: N/A Targets for People with Disabilities: N/A

Indicator Title	Organisational Maturity Level
Spatial Transformation	Not applicable
Calculation Type	Non-cumulative
Reporting Cycle	Annually
Desired Performance	Maximum Maturity Level 5 is desired to be achieved with regard to the ideal matured organisation.
Indicator Responsibility	Budget Sub-Programme Manager: Strategic Management Services.

31.2.1. BUDGET SUB-PROGRAMME – OFFICE OF THE CEO (SUB-SUB-PROGRAMME: LEGAL AND BOARD SECRETARIAT)

TABLE 20

Indicator Title	Board Governance Assessment maturity index
Definition	Board governance practices and performance are assessed through the developed Maturity Framework and Assessment Tool of the ECGB against the attributes/domains. This evaluation of maturity aims to assess the effectiveness of the board in overseeing the company's strategic direction, governance practices, and overall performance.
Sources of Data	Board Charter; best practice; King IV code of good practice; National Treasury guidelines, minutes of the Board.
Method of Calculation / Assessment	Self-assessment supported by relevant PoE; A pre-determined questionnaire completed by Board members, administered by an independent person.
Means of Verification	Board Governance Assessment Report on the Maturity Assessment conducted by independent person.
Assumptions	Board members are available, aware of the process and there is willingness to undertake the assessment as required.
Disaggregation of Beneficiaries	Targets for Women: N/A Targets for Youth: N/A Targets for People with Disabilities: N/A
Spatial Transformation	Not applicable
Calculation Type	Non-cumulative
Reporting Cycle	In best practice, assessment is conducted biennially; ECGB will conduct the assessment biennially and ensure implementation of the findings.
Desired Performance	Ensured effective and efficient oversight and governance on Board's commitment to maintaining a results-oriented approach.
Indicator Responsibility	Budget Sub-Programme Manager: Office of the CEO (Board Secretariat)

TABLE 21

Indicator Title	Ethics Assessment Maturity Level
Definition	Industry ethical compliance and performance are assessed through the developed Maturity Framework and Assessment Tool of the ECGB against the attributes/domains. This evaluation of maturity aims to assess the adherence of the industry to norms and standards and ethical practices guided by various pieces of legislation and related policies.
Sources of Data	Compliance Barometer outcomes; best practice; King IV code of good practice; National Treasury guidelines.
Method of Calculation / Assessment	A pre-determined questionnaire completed by licensees, administered by ECGB.
Means of Verification	Ethics Assessment Report on the Ethics Maturity Assessment conducted.
Assumptions	Industry is operating ethically by adhering to the King IV code of good practice, various pieces of legislation, and related policies.
Disaggregation of Beneficiaries	Targets for Women: N/A Targets for Youth: N/A Targets for People with Disabilities: N/A
Spatial Transformation	Not applicable
Calculation Type	Non-cumulative
Reporting Cycle	ECGB will conduct the assessment annually.
Desired Performance	Higher ethical gambling regulation is desirable.
Indicator Responsibility	Budget Sub-Programme Manager: Office of the CEO (Legal Services)

31.3. BUDGET SUB-PROGRAMME – HUMAN RESOURCES MANAGEMENT AND DEVELOPMENT

TABLE 22

Indicator Title	Human Resources Maturity Index
Definition	<p>The assessment of Human Resources Management Efficiency Maturity will be administered as perceived by the ECGB's relevant internal and/or external stakeholders once a year in March. Human resources management practices are assessed through the developed Human Resources Management Maturity Framework and Assessment Tool of the ECGB against the attributes/domains:</p> <ol style="list-style-type: none"> 1. Strategic Partner role 2. Change Agent role 3. Employee Champion role 4. Organisational Development and Design 5. Recruitment and Employee Life Cycle Development 6. Human Resource Utilisation and Development 7. Quality of Life and Environment Management 8. Employee Relations <p>Each attribute/domain is further disaggregated into performance areas. Together, the attributes/domains and performance areas with specific inputs and activities result in a set of targeted outputs.</p>
Sources of Data	HR Assessment Framework, HR Strategy, HR policies, ECGB Strategic Plan, and Human Resources Manual.
Method of Calculation / Assessment	<p>The ECGB Human Resources Management Efficiency Maturity Framework, as approved by the Board; however the method of calculation is specified therein and updated in the Annual Performance Plan accordingly. The framework consists of five levels of maturity representing the following:</p> <p>Level 1: <25% Level 2: 25%-49.9% Level 3: 50%-74.9% Level 4: 75%-89.9% Level 5: 90%-100%</p> <p>The administration and assessment of the tool as per the ECGB framework will be conducted based on the average score calculated using a weighted scoring formula.</p>
Means of Verification	Human Resources Maturity Report of an independent validator/assessor and ECGB-approved Framework.
Assumptions	HR plans, policies, strategies, manuals, processes and frameworks are in place and understood by all ECGB stakeholders.
Disaggregation of Beneficiaries	<p>Targets for Women: N/A Targets for Youth: N/A Targets for People with Disabilities: N/A</p>
Spatial Transformation	Not applicable
Calculation Type	Non-cumulative
Reporting Cycle	Annually
New Indicator	No
Desired Performance	Higher performance is desirable.
Indicator Responsibility	Budget Sub-Programme Manager: Human Resources Management and Development

31.3.1. BUDGET SUB-PROGRAMME – HUMAN RESOURCES MANAGEMENT AND DEVELOPMENT (SUB-SUB-PROGRAMME: RECORDS AND DOCUMENT MANAGEMENT)

TABLE 23

Indicator Title	Records and Document Management Maturity Level
Definition	<p>The assessment of Records and Document Management Maturity will be administered as perceived by the ECGB's relevant internal and/or external stakeholders once a year in March. Records and document management practices are assessed through the developed Records and Document Management Maturity Framework and Assessment Tool of the ECGB against the attributes/domains.</p> <p>Each attribute/domain is further disaggregated into performance areas. Together, the attributes/domains and performance areas with specific inputs and activities result in a set of targeted outputs.</p>
Sources of Data	Best practice: Records and Document Management Policy and ECGB Strategic Plan.
Method of Calculation / Assessment	<p>The ECGB Records and Document Management Maturity Framework, as approved by the Board; however, the method of calculation is specified therein and updated in the Annual Performance Plan accordingly. The framework consists of five levels of maturity, representing Level 1 to Level 5.</p> <p>The administration and assessment of the tool as per the ECGB framework will be conducted based on the average score calculated using a weighted scoring formula.</p>
Means of Verification	Records and Document Management Summative Report of the Maturity Level.
Assumptions	ECGB Management will assess the maturity of records management.
Disaggregation of Beneficiaries	<p>Targets for Women: N/A Targets for Youth: N/A Targets for People with Disabilities: N/A</p>
Spatial Transformation	Not applicable

Calculation Type	Non-cumulative
Reporting Cycle	Annually
Desired Performance	Improved records management function leading to a paperless environment.
Indicator Responsibility	Budget Sub-Programme Manager: Human Resource Management and Development (Document Management)

31.4. BUDGET SUB-PROGRAMME – COMMUNICATIONS

TABLE 24

Indicator Title	Percentage of SED/CSI initiatives /programmes implemented
Definition	Social responsibility projects are conducted, implemented and reported on, on an annual basis by March during a financial year to provide support to all the anti-poverty sites, in line with the Provincial Anti-Poverty Strategy and the ECGB SED policy, and to further ensure that projects that are supported are functional and sustainable. Key CSI projects are those four recommended and approved upfront by the ECGB CSI Committee in line with the ECGB CSI Policy.
Sources of Data	CSI Framework; CSI/SED Policy; Anti-Poverty Strategy; Summative CSI/SED Report
Method of Calculation /Assessment	Simple count of projects conducted/implemented.
Means of Verification	SED/CSI initiatives/programmes implemented report, beneficiaries appreciation/confirmation letter; minutes of CSI committee.
Assumptions	Budget allocation is made available to support projects that are identified in areas that are impoverished in terms of the Anti-Poverty Strategy of the province.
Disaggregation of Beneficiaries	Targets for Women: N/A Targets for Youth: N/A Targets for People with Disabilities: N/A
Spatial Transformation	Not applicable
Calculation Type	Non-cumulative
Reporting Cycle	Annually
Desired Performance	It is desirable to implement more social responsibility projects in the province, especially in areas that are impoverished in terms of the Anti-Poverty Strategy of the province.
Indicator Responsibility	Budget Sub-programme Manager: Communications, CSI, Designated and Vulnerable Groups

31.5. BUDGET SUB-PROGRAMME – INFORMATION COMMUNICATION TECHNOLOGY

TABLE 25

Indicator Title	ICT Efficiency Index
Definition	The assessment of ICT performance/efficiency will be administered as perceived by the ECGB's relevant internal and/or external stakeholders once a year in March. ICT practices are assessed through the developed ICT Maturity Framework and Assessment Tool of the ECGB against the attributes/domains. Each attribute/domain is further disaggregated into performance areas. Together, the attributes/domains and performance areas with specific inputs and activities result in a set of targeted outputs.
Sources of Data	ICT Strategy, ECGB Strategic Plan and ICT Framework.
Method of Calculation /Assessment	The ECGB ICT efficiency Maturity Framework as approved by the Board; however the method of calculation is specified therein and updated in the Annual Performance Plan accordingly. The framework consists of five levels of maturity from Level 1 to Level 5. The administration and assessment of the tool as per the ECGB framework will be conducted based on the average score calculated using a weighted scoring formula.
Means of Verification	ICT Efficiency Report on the Assessment conducted by independent person.
Assumptions	ICT business processes are strengthened, enhanced, and institutionalised in the organisation and that there is stakeholder buy-in and ownership on the ICT systems.
Disaggregation of Beneficiaries	Targets for Women: N/A Targets for Youth: N/A Targets for People with Disabilities: N/A
Spatial Transformation	Not applicable
Calculation Type	Non-cumulative
Reporting Cycle	Annually
Desired Performance	Increased utilisation of ICT platforms to achieve higher efficient performance.
Indicator Responsibility	Budget Sub-Programme Manager: Information Communications Technology (ICT)

BUDGET PROGRAMME TWO: GAMBLING REGULATION AND CONSUMER PROTECTION BUDGET

31.6.SUB-PROGRAMME – INVESTIGATION AND LICENSING ADMINISTRATION

TABLE 26

Indicator Title	Number of Key Gambling Licenses Issued
Definition	Key gambling licenses are issued to qualified applicants to operate gambling and betting business activities. The purpose of the sub-programme is to maintain a record of permissible gambling and betting business activities within the province at any given point. It also provides knowledge about revenue sources. Licenses are issued annually by March during a financial year. Key Licenses refers to casinos, bookmakers, totalisators, racecourses, Independent Site Operators (ISOs), Bingo halls, and LPM Type B sites.
Sources of Data	The ECGA, Rules and Regulations; Bid Commitments; NGBA and Regulations; the ECGB Investigators Manual; Register of Licenses Issued; License Certificates and Summative Investigation Report.
Method of Calculation / Assessment	Simple count of licenses issued.
Means of Verification	Board minutes: copy of licenses issued.
Assumptions	Applications for gambling licenses will be received and issued to qualified applicants to operate gambling and betting business activities in the province. Public hearings are arranged, and Board meetings take place to award licenses to qualifying applicants.
Disaggregation of Beneficiaries	Target for local PDIs (inclusive of women, youth and people living with disabilities) – 26-51%.
Spatial Transformation	Not applicable
Calculation Type	Non-cumulative
Reporting Cycle	Annually
Desired Performance	More entrepreneurs in the province should apply for gambling licenses that are available at a particular time so that economic opportunities, job creation, and infrastructure development are enhanced. More importantly, when more licenses are issued to qualified applicants, more gambling tax will be collected and disbursed to the provincial fiscus.
Indicator Responsibility	Budget Sub-Programme Manager: Investigation and Licensing Administration.

TABLE 27

Indicator Title	Number of Gambling Economic Opportunities Awareness Sessions Conducted
Definition	Gambling economic opportunities awareness sessions are initiatives undertaken to attract new entrepreneurs into the gambling space and to promote awareness about available economic opportunities associated with gambling; also to encourage as many people as possible to exploit economic opportunities relating to the gambling business activities. Awareness sessions are conducted on a quarterly basis during a financial year.
Sources of Data	The ECGA, Rules and Regulations; NGB Act and Regulations; Requests for Proposals; Summative Report.
Method of Calculation/Assessment	Simple count of the gambling economic opportunities awareness sessions conducted.
Means of Verification	Gambling economic opportunities awareness sessions reports, attendance register, and invitation letters.
Assumptions	Economic opportunities within the gaming sector have not yet been made more available and accessible to potential entrepreneurs in the province.
Disaggregation of Beneficiaries	Targets for Women: N/A Targets for Youth: N/A Targets for People with Disabilities: N/A
Spatial Transformation	Not applicable
Calculation Type	Non-cumulative
Reporting Cycle	Quarterly
Desired Performance	More sessions are desirable to increase knowledge and prospects for participation in gambling-related economic opportunities by local entrepreneurs in the province.
Indicator Responsibility	Budget Sub-Programme Manager: Investigations and Licensing Administration.

31.6.1. BUDGET SUB-PROGRAMME – INSPECTIONS, LAW ENFORCEMENT, RESPONSIBLE GAMBLING AND PUBLIC EDUCATION

TABLE 28

Indicator Title	Number of Sweeps Conducted
Definition	Sweeps refer to operations conducted by ECGB inspectors in collaboration with other law enforcement agencies. These operations are sometimes clandestine in nature and intended to combat all illegal gambling activities in the province. Sweeps for illegal operations are conducted with an annual target of 10 sweeps, achieved through conducting two planned sweeps per zone during the financial year. Furthermore, to implement proactive action to combat and displace all illegal operations in the province with the aim of shutting them down.
Sources of Data	The ECGA, Rules and Regulations; Bid Commitments; NGB Act and Regulations; ECGB Illegal Gambling Procedure Manual and Summative Report.
Method of Calculation / Assessment	Simple count of sweeps conducted.

Indicator Title	Number of Sweeps Conducted
Means of Verification	Sweeps reports, SAPS confirmation sheet, and planning memorandum
Assumptions	Collaborations with law enforcement agencies have been established, with MOUs signed.
Disaggregation of Beneficiaries	Targets for Women: N/A Targets for Youth: N/A Targets for the People with Disabilities: N/A
Spatial Transformation	Not applicable
Calculation Type	Non-cumulative
Reporting Cycle	Quarterly
Desired Performance	Displacing, curbing and mitigating illegal gambling operations within the province.
Indicator Responsibility	Budget Sub-Programme Manager: Law Enforcement and Gaming Control.

TABLE 29

Indicator Title	Number of Community Awareness Campaigns on Illegal Gambling Activities Conducted
Definition	Community awareness campaigns on illegal gambling activities are marketing initiatives to build public recognition of a problem through media, messaging, and an organised set of communication tactics. These campaigns target a large number of people over a specific period of time to try and generate specific outcomes or achieve pre-determined goals.
Sources of Data	The ECG Act, Rules and Regulations; Bid Commitments; NG Act and Regulations; Illegal Gambling Displacement Strategy, Law Enforcement Procedure Manual, and Summative Report.
Method of Calculation /Assessment	Simple count of awareness campaigns on illegal gambling conducted.
Means of Verification	Awareness campaigns on illegal gambling reports, Planning Memorandum; Attendance Registers.
Assumptions	Level of awareness and information gap about regulation of gambling, including what constitutes a legal gambling establishment, is a challenge faced in the Province, hence the need for the community outreach to bridge that gap.
Disaggregation of Beneficiaries	Targets for Women: N/A Targets for Youth: N/A Targets for People with Disabilities: N/A
Spatial Transformation	Not applicable
Calculation Type	Non-cumulative
Reporting Cycle	Quarterly
Desired Performance	More awareness campaigns are desirable to increase the knowledge of general citizenry about dangers of illegal gambling while also promoting protection of licensed establishments from unfair competition.
Indicator Responsibility	Budget Sub-Programme Manager: Law Enforcement and Gaming Control.

TABLE 30

Indicator Title	Number of Responsible Gambling Awareness Campaigns Conducted
Definition	Responsible gambling awareness campaigns are measures undertaken by ECGB to raise awareness about responsible gambling and dangers associated with excessive and irresponsible gambling. These are done using various communication platforms, including general events, roadshows, print and electronic platforms, social media, bus messaging etc.
Sources of Data	ECGB Act, Rules and Regulations; Bid Commitments; NGB Act and Regulations; Responsible Gambling Strategy; Responsible Gambling Handbook.
Method of Calculation /Assessment	Simple count of responsible gambling awareness campaigns conducted.
Means of Verification	Quarterly reports of the awareness campaigns conducted, attendance registers of those workshops.
Assumptions	Problem gambling has been identified as a challenge as there seems to be an increase in excessive and irresponsible gambling cases.
Disaggregation of Beneficiaries	Targets for Women: N/A Targets for Youth: N/A Targets for People with Disabilities: N/A
Spatial Transformation	Not applicable
Calculation Type	Non-cumulative
Reporting Cycle	Quarterly
Desired Performance	It is desirable to have a general citizenry that is aware of dangers associated with excessive and irresponsible gambling within the province, including strategies to mitigate irresponsible gambling. In addition, for social change behaviour by those who may be experiencing problems, including instilling the mentality that gambling is only for entertainment. To build relationships with other external stakeholders through collaboration to improve our branding/ profiling, etc.
Indicator Responsibility	Budget Sub-Programme Manager: Responsible Gambling and Public Education

31.7. BUDGET SUB-PROGRAMME – AUDIT AND COMPLIANCE SERVICES

TABLE 31

Indicator Title	Compliance Maturity Level
Definition	A measure to determine the level of compliance by the industry, identify specific non-compliance areas and risk-profile the licensees (type, individually, as well as specific areas).
Sources of Data	Compliance Barometer based on Compliance and Revenue Audit Outcomes.
Method of Calculation / Assessment	Overall industry average of compliance level for each operator sector i.e., casino, LPM, bingo and bookmaker sectors. Compliance Barometer mechanics (<60% = non-compliant (Level 1); 70% - 79% = partially compliant (level 2); 80% - 89% = compliant (Level 3) and 90% - 100% = fully compliant (Level 4). The Compliance Barometer is utilised to gauge the compliance level of the licensees and to incentivise them by reducing their submitted Financial Guarantee according to their compliance level.
Means of Verification	Compliance Audit reports; Compliance Barometer.
Assumptions	Licensees comply with Act, Rules and Regulations, Bid Commitments and B- BBEE Codes.
Disaggregation of Beneficiaries	Not applicable
Spatial Transformation	Not applicable
Calculation Type	Cumulative
Reporting Cycle	Annually
Desired Performance	It is desirable that licensees as gaming operators are more compliant with license bid commitments, conditions of license and legislation at all material times.
Indicator Responsibility	Budget Sub-Programme Manager: Audit and Compliance Services.

31.8. BUDGET SUB-PROGRAMME – GAMING CONTROL, REGULATORY AFFAIRS AND SYSTEMS

TABLE 32

Indicator Title	Number of Systems Audits Conducted
Definition	This indicator is about testing licensees' (casinos, bookmakers, totalisators, Bingo and route operators) control environment in line with the ECGB legislation and other applicable components of the RSA regulatory framework (i.e., SANS1718 and SANS27000 series of standards) and other best and emerging international practices and/ or standards. This is to ensure that the revenue data generated, processed, transmitted and stored is protected and confidential, and its availability and integrity are not threatened; thus, to ensure that gambling fees and levies paid by the operators are accurate, valid and complete at all material times. Systems audits are conducted on a quarterly basis by June, September, December and March during a financial year.
Sources of Data	Licensee and manufacturers and GSPs (gaming service providers) monitoring systems; Wagering and Recordkeeping system; websites, Mobi applications, USSDs, RNGs (random number generators), and RGSs (remote gaming servers); ERPs (enterprise resource planning/assessment system) and database management.
Method of Calculation/assessment	Simple count of systems audits conducted.
Means of Verification	Audit planning memorandum; Systems audit reports; engagement letters.
Assumptions	Licensees maintain general ICT internal control systems as well as information security management systems at all material times.
Disaggregation of Beneficiaries	Targets for Women: N/A Targets for Youth: N/A Targets for People with Disabilities: N/A
Spatial Transformation	Not applicable
Calculation Type	Non-cumulative
Reporting Cycle	Quarterly
Desired Performance	It is desirable to have more system audits conducted. Furthermore, performance should show an improvement in the validity, accuracy and completeness of gambling levies paid by operators (casinos, bookmakers, totalisators and Bingo and route operators).
Indicator Responsibility	Budget Sub-Programme Manager: Gaming Control, Regulatory Affairs, and Systems.

BUDGET PROGRAMME THREE: KNOWLEDGE AND INFORMATION MANAGEMENT

31.9. BUDGET SUB-PROGRAMME – EMPIRICAL RESEARCH

TABLE 33

Indicator Title	Number of Empirical Research Commissions
Definition	Research work is being conducted and achieved by March during a financial year, to ensure that research is conducted to assist the ECGB in making informed decisions on gambling industry developments.
Sources of Data	Research Strategy and Agenda of the ECGB.
Method of Calculation / Assessment	Simple count of research reports approved by the Board.
Means of Verification	Report: SLA, bid committee's report.
Assumptions	Research to be commissioned is informed by the research strategy of the ECGB on emerging issues to be researched.
Disaggregation of Beneficiaries	Research will be informed by different demographics as beneficiaries at the time, including the research strategy of the department.
Spatial Transformation	Targets for Women: N/A Targets for Youth: N/A Targets for People with Disabilities: N/A
Calculation Type	Non-cumulative
Reporting Cycle	Annually
Desired Performance	It is desirable to have increased evidence-based knowledge that will be utilised to inform appropriate policy, strategy, and regulatory decisions regarding gambling and other related gambling activities in the province.
Indicator Responsibility	Budget Sub-Programme Manager: Research and Development.

31.10. BUDGET SUB-PROGRAMME – MONITORING AND EVALUATION

TABLE 34

Indicator Title	Number of Impact Evaluation Projects Conducted
Definition	Impact evaluation work is conducted and achieved by March during a financial year, to ensure that evaluation is conducted to assist the ECGB in making informed decisions on projects/programmes implemented.
Sources of Data	Research strategy and evaluation agenda of the ECGB.
Method of Calculation / Assessment	Simple count of evaluation reports approved by the management or the Board.
Means of Verification	Report: SLA, bid committee's report.
Assumptions	The evaluation to be commissioned is informed by the evaluation agenda of the ECGB of emerging issues to be evaluated.
Disaggregation of Beneficiaries	Evaluation will be informed by different demographics as beneficiaries at the time, including the evaluation agenda of the ECGB.
Spatial Transformation	Targets for Women: N/A Targets for Youth: N/A Targets for People with Disabilities: N/A
Calculation Type	Non-cumulative
Reporting Cycle	Annually
Desired Performance	It is desirable to have increased evidence-based knowledge that will be utilised to inform appropriate policy, strategy, and regulatory decisions regarding projects/programmes implemented and other related gambling activities in the province.
Indicator Responsibility	Budget Sub-Programme Manager: Research and Development.

PART F: ANNEXURES

32. ANNEXURE: A - BREAKDOWN OF THE FIVE-YEAR STRATEGIC PLAN TARGETS

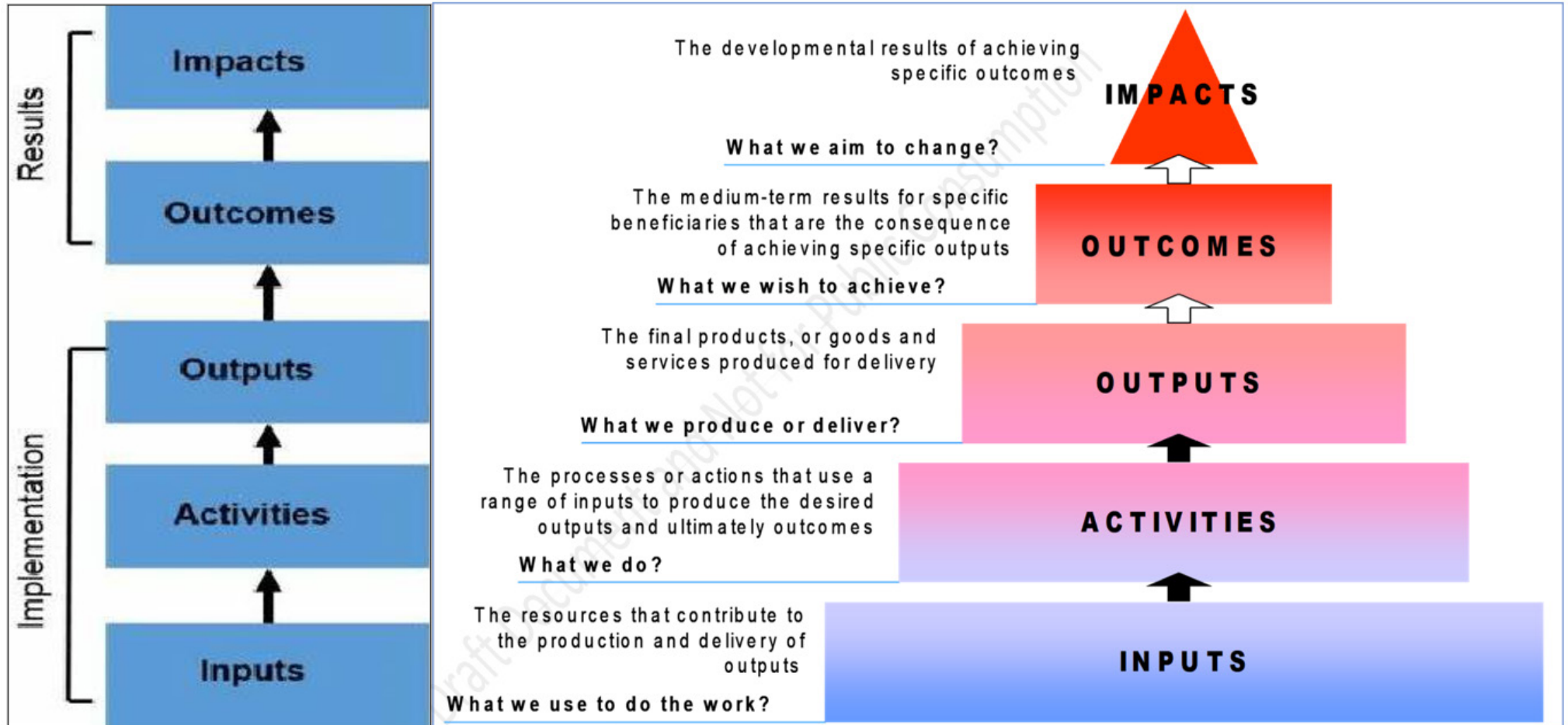
NO	STRATEGIC OUTCOMES	OUTCOME / OUTPUT INDICATOR	BASELINE OF PREVIOUS FIVE-YEAR TARGETS BY END OF 2024/25	FIVE-YEAR TARGETS BY END OF 2029/30	MTEF (THREE-YEAR TARGETS)		
					2026/27	2027/28	2028/29
1.	Transformed, Ethical and Sustainable Gambling Operations in the Province	Number of key gambling licenses issued	23 Gambling Licenses issued	36 Key Gambling Licenses Issued	12 Gambling Licenses Issued	8 Gambling Licenses Issued	6 Gambling Licenses Issued
		Number of gambling economic opportunities awareness sessions conducted	23 Gambling Economic Opportunities Awareness Sessions	30 Gambling Economic Opportunities Awareness Sessions	7 Gambling Economic Opportunities Awareness	6 Gambling Economic Opportunities Awareness	6 Gambling Economic Opportunities Awareness
		Revenue gambling taxes collected from online betting and land-based operators	R850 Million Revenue Collected	R1.21 Billion Revenue Collected	R242 Million Revenue Collected	R240 Million Revenue Collected	R259 Million Revenue Collected
2.	Compliant Gaming Industry to Thrive	Compliance maturity level	New Indicator	Level 4 Compliance	Level 3 Compliance	Level 4 Compliance	Level 4 Compliance
		Number of systems audits conducted	New Indicator	75 Systems Audits	15 Systems Audits	15 Systems Audits	15 Systems Audits
3.	Displaced Illegal Gambling in the Province	Number of sweeps conducted	46 Sweeps Conducted	50 Sweeps Conducted	10 Sweeps Conducted	10 Sweeps Conducted	10 Sweeps Conducted
		Number of community awareness campaigns on illegal gambling activities conducted	New Indicator	20 Community Awareness Campaigns on Illegal Gambling	03 Community Awareness Campaigns on Illegal Gambling	03 Community Awareness Campaigns on Illegal Gambling	03 Community Awareness Campaigns on Illegal Gambling
4.	Educated and Informed Public Regarding Responsible Gambling.	Number of responsible gambling awareness campaigns conducted	New Indicator	60 Responsible Gambling Awareness Campaigns	12 Responsible Gambling Awareness Campaigns	12 Responsible Gambling Awareness Campaigns	12 Responsible Gambling Awareness Campaigns
5.	Empowered Communities Located in the Province through SED/CSI Initiatives	Percentage of SED/CSI initiatives / programmes implemented	Number of SED/CSI Initiatives /Programmes Implemented	100% SED/CSI nitatives	100% SED/CSI Initiatives	100% SED/CSI Initiatives	100% SED/CSI Initiatives
6.	Implemented Research and Evaluation Outcomes and Findings	Number of empirical research projects commissioned	05 Research Outputs Commissioned	05 Research Outputs Commissioned	01 Research Output	01 Research Output	01 Research Output
		Number of impact evaluation projects conducted	New Indicator	05 Impact Evaluation Conducted	01 Impact Evaluation Conducted	01 Impact Evaluation Conducted	01 Impact Evaluation Conducted

NO	STRATEGIC OUTCOMES	OUTCOME / OUTPUT INDICATOR	BASELINE OF PREVIOUS FIVE-YEAR TARGETS BY END OF 2024/25	FIVE-YEAR TARGETS BY END OF 2029/30	MTEF (THREE-YEAR TARGETS)		
					2026/27	2027/28	2028/29
7.	Implemented Principles of Corporate Governance, Organisational Performance and Reporting	Organisational maturity level	Level 04 Organisational Maturity	Level 05 Organisational Maturity	N/A	Level 04 Maturity	N/A
		Records and document management efficiency maturity level	New Indicator	Level 04 Records / Document Efficiency Maturity	Level 02 Records/Document Maturity	Level 03 Records/Document Maturity	Level 03 Records/Document Maturity
		Enterprise Risk Management Maturity Level	New Indicator	Level 05 Risk Maturity	Level 03 Risk Maturity	Level 03 Risk Maturity	Level 04 Risk Maturity
		Board Governance Assessment Maturity Index	New Indicator	Level 05 Board Governance Assessment Maturity Index	Level 03 Board Governance Assessment Maturity Index	N/A	N/A
		Ethics Assessment Maturity Level	New Indicator	Level 04 Ethics Maturity	Level 02 Ethics Maturity	Level 03 Ethics Maturity	Level 03 Ethics Maturity
		Financial Management and Procurement Efficiency Maturity Level	New Indicator	Level 05 Financial Management and Procurement Efficiency Maturity	Level 02 Financial Management and Procurement Efficiency Maturity	Level 03 Financial Management and Procurement Efficiency Maturity	Level 04 Financial Management and Procurement Efficiency Maturity
8.	Maximised Benefit of AI and Digitization Technology in the Regulation Processes	ICT Efficiency Maturity Level	New Indicator	Level 04 ICT Efficiency Maturity	Level 02 ICT Efficiency Maturity	Level 03 ICT Efficiency Maturity	Level 03 ICT Efficiency Maturity
9.	ECGB Positioned as an Employer of Choice	Human Resources Maturity Index	New Indicator	Level 04 Human Resources Maturity Index	Level 03 Human Resources Maturity Index	Level 04 Human Resources Maturity Index	Level 04 Human Resources Maturity Index

N/A - Indicates that no target set for those years.

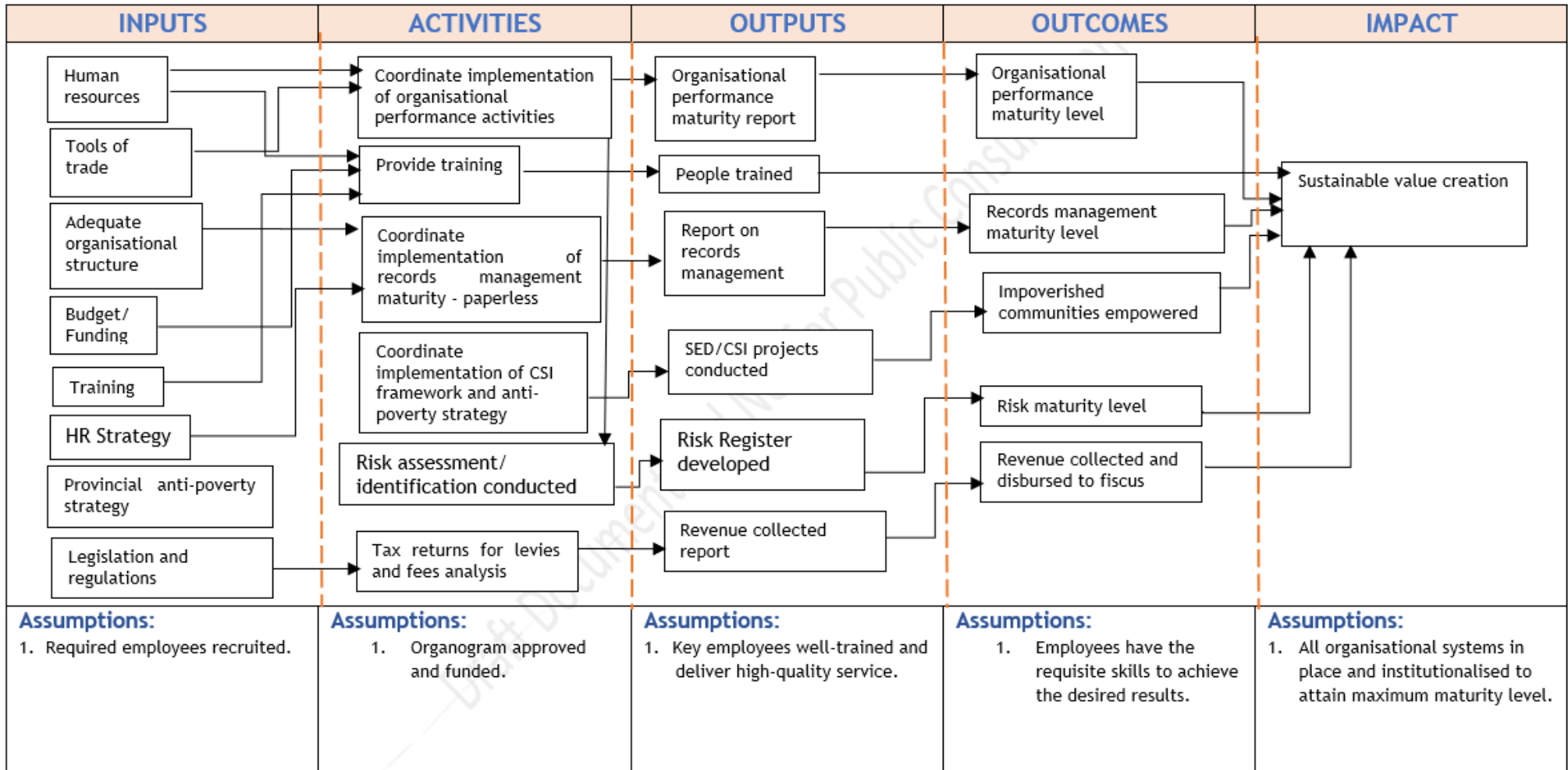
ANNEXURE: B - THEORY OF CHANGE PROCESS (TOC)

Hierarchy of the Theory of Change/Causal Pathways



The Entity has **three key areas where theories of change (TOC) have been developed**. These are (1) Corporate Management, (2) Gambling Regulation, and (3) Responsible Gambling, Public Education and Knowledge Management.

Corporate Management Theory of Change



Corporate Management Theory of Change Narrative

Over and above the awarding of different types of licenses and the collection of revenue for the provincial fiscus, the ECGB has the corporate responsibility to identify and support socio-economic development initiatives to empower communities that are in areas compounded with poverty. In addition, it has the responsibility to support impoverished communities in terms of the Provincial Anti-poverty Strategy, including designated and vulnerable groups which are youth, the elderly, disabled persons, and women.

In terms of license conditions, licensees are expected to contribute a certain percentage of their GGR by implementing sustainable CSI Projects where they operate in the province. A CSI framework was developed and approved by the Board in order to guide the implementation of sustainable CSI projects by provincial licensees, either as individual companies or in collaboration with each other.

Human resources are important enablers towards the implementation of the organisational strategy. Having a well-informed structure is believed to enable the ECGB to contribute to the sustainability and success of the organisation, especially in meeting the organisation's planned targets and objectives. In relation to strategic alternatives, setting related outcomes, and developing mechanisms to manage related risks, ECGB is obliged to identify, assess, and manage its business risks to preserve its strategic outcomes and targets.

The Organisational Maturity Index is an assessment tool that will be used to assess the ECGB's performance, governance, and accountability. Outcomes of such assessment then inform appropriate strategies to be utilised to strengthen performance, governance functionality, and effectiveness in the organisation.

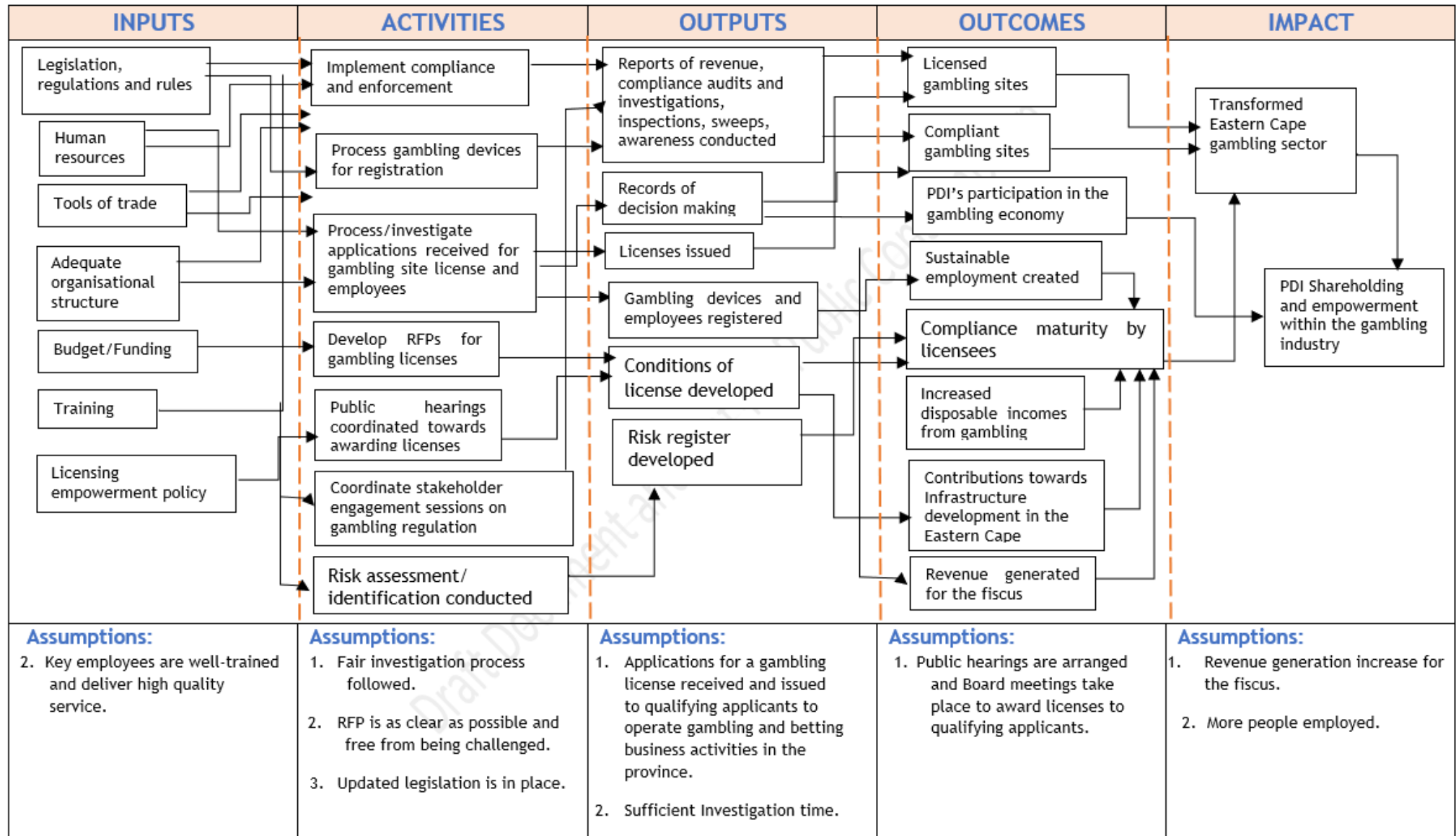
For the theory of change to achieve the desired results, the following services are implemented:

- ➔ Human Resources Management provides a strategic and change agent role; it performs an employee champion role, including improved employee relations, and acts as an employer of choice.
- ➔ Successful risk management has to be integrated into business operations from an enterprise-wide perspective and assists in identifying areas for improvement and prioritising risk management activities.
- ➔ ECGB is an employer of choice in managing its human capital.
- ➔ Excellent, quality and professional corporate services with excellent people and processes to optimise the service delivery and offerings of the ECGB.
- ➔ Building an environment of trust, transparency, and accountability necessary for fostering long-term financial stability and ethical business integrity through the development and creation of a paperless environment, as well as measuring the extent to which ECGB views records management as an operational and strategic priority.
- ➔ Maximisation of socio-economic development benefits for communities in the province located in impoverished areas.
- ➔ Implementation and contribution towards the achievability of the Eastern Cape Anti-Poverty Strategy, ECGB Corporate Social Investment Policy, and the CSI Framework and License Conditions.
- ➔ Social Cohesion and Safe Communities in terms of Priority 5 of the Seven Priorities derived from the Electoral Mandate and State of the Nation Address.

To achieve the desired results, the following should be in place:

- ➔ Alignment with government priorities
- ➔ Leadership
- ➔ Accountability
- ➔ Adequate financial and human resources
- ➔ Adequate systems
- ➔ Research and business intelligence
- ➔ Trust and collaborations
- ➔ Skilled implementers
- ➔ Dedicated and active citizens
- ➔ Embracing of change
- ➔ Constant interaction and communication with the relevant stakeholders

Gambling Regulation Theory of Change



Gambling Regulation Theory of Change Narrative

The ECGB creates opportunities for industry role players to apply for different types of gambling licenses in terms of the Eastern Cape Gambling Act, 1997 (Act No.5 of 1997) (as amended) (“the Act”). A request for proposal is published, inviting individual business organisations or entrepreneurs to apply for available types of licenses.

Following the allocation of temporary and permanent licenses to qualified operators, the signing of conditions of license and the commencement and functionality of a licensed gambling establishment, audit and compliance services ensure adherence to the legislation and other regulatory instruments.

Mitigating all forms of illegal gambling (slot machines/online gambling) and unfair competition, as well as protecting both operators and punters from unscrupulous gambling operators.

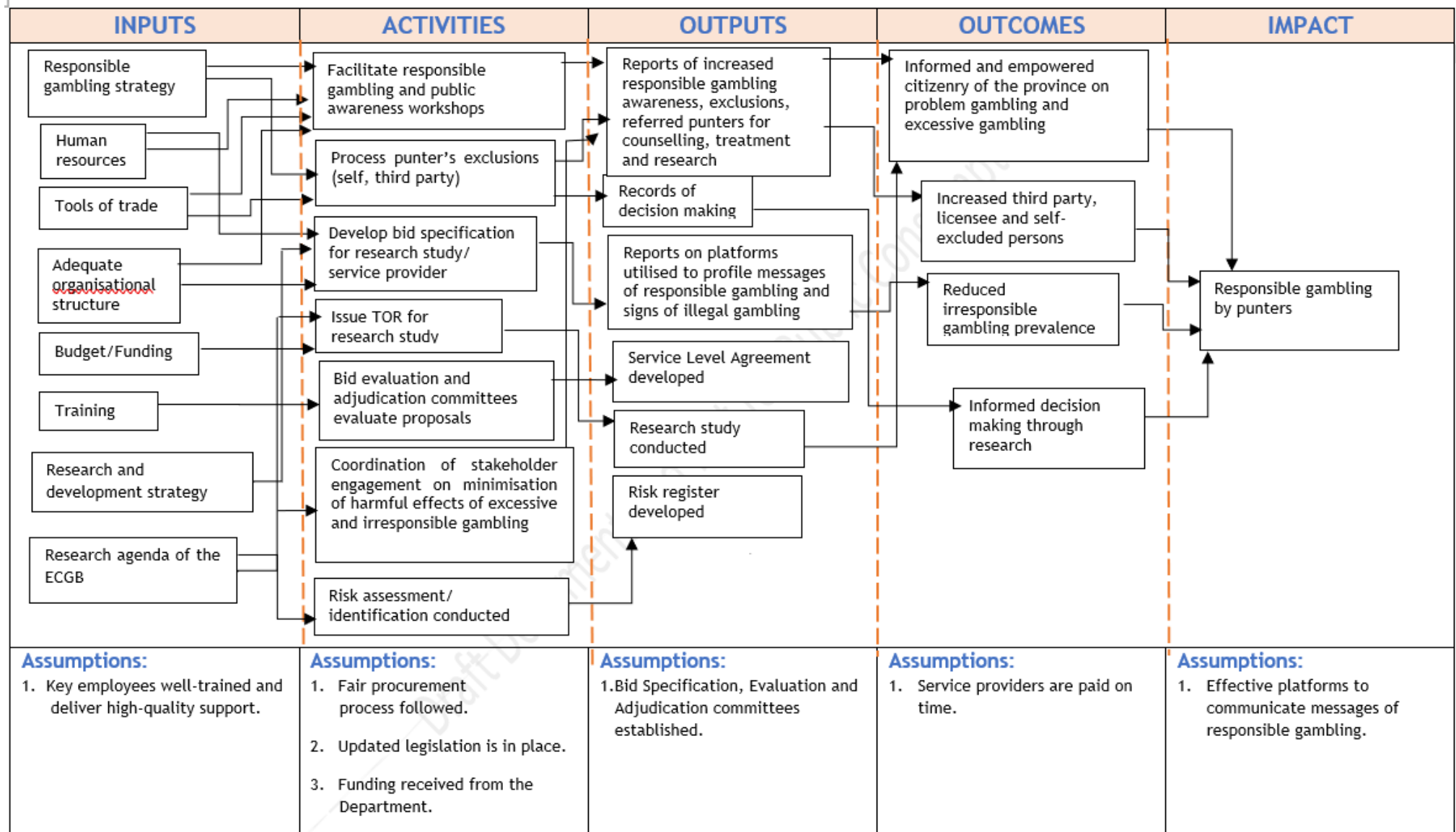
For the theory of change to achieve the desired results, the following services are therefore implemented:

- ➔ Gathering of information with respect to the Applicant’s business activities, and those of related parties, to ensure that gambling is conducted in a manner that promotes the integrity of the gaming industry and does not cause harm to the public interest.
- ➔ Reviewing the Applicant’s supporting documentation (and assertions made therein) included in their application for such licenses to establish if the information truly reflects the integrity and sound financial position of the Applicant and its shareholders.
- ➔ Ensuring that the Applicants and related parties comply with the respective laws, viz, the Eastern Cape Gambling Act, the National Gambling Act, as well as other statutory and ethical codes of conduct.
- ➔ Gathering and assessing relevant information about the Applicant to make recommendations to the Board i.r.o the suitability of the Applicant with reference to the criteria spelled out in the applicable gambling legislation and/or RFP.
- ➔ Facilitating the registration of all applicants and awarding of licenses and registration certificates to suitably qualified applicants.
- ➔ Provision of quality assurance on the completeness, accuracy, and validity of Taxes and Fees by verifying, recalculating, and reporting the findings.
- ➔ Conducting compliance audits to ensure adherence to Conditions of License, Bid Commitments, FICA and ECGB legislation by inspecting, corroborating, enquiring and confirming the completeness, accuracy and validity of the information and reporting the findings.
- ➔ Audit adherence to ECGB legislation by observing the process of installation of gaming software and testing its functionality.
- ➔ Audit the viability of the licensee’s operations by analysing their audited annual financial statements.
- ➔ Review and approval of the licensee’s Internal Control Systems and/or procedure manuals.
- ➔ Maintain Compliance Barometer to assess the maturity level of compliance by the industry.
- ➔ Conduct annual review of license period financial guarantees.
- ➔ Conducting compliance inspections and verifications of gambling-related activities in all licensed gaming establishments and operations in the province to ensure compliance with gambling laws, rules, regulations, license conditions, and internal control systems.
- ➔ Monitor and ensure the integrity of all systems and procedures related to gambling devices.
- ➔ Liaise with other provincial Gambling Boards regarding certified testing laboratories, manufacturers and licensees.
- ➔ Processing requests for gambling equipment, including transportation, change of floor plans, change of job compendiums, systems, and game changes, denomination changes, Letter of Certification of new equipment in the industry, surveillance view changes, and any other changes that affect the game.
- ➔ Maintain a database of gambling devices by monthly reconciliation of devices on internal systems such as GRS, licensees’ gambling devices lists, and Route Monitoring Systems.
- ➔ Conduct investigations and closure of all illegal gaming activities in the province.
- ➔ Oversee the destruction of all dysfunctional gambling equipment, devices, and confiscated illegal gambling equipment.

To achieve the desired results, the following should be in place:

- ➔ Leadership
- ➔ Accountability
- ➔ Adequate financial and human resources
- ➔ Adequate systems
- ➔ Research and business intelligence
- ➔ Trust and collaborations
- ➔ Skilled implementers
- ➔ Dedicated and active citizens
- ➔ Embracing of change
- ➔ Constant interaction and communication with the relevant stakeholders

Responsible Gambling, Public Education and Knowledge Management Theory of Change



Responsible Gambling, Public Education and Knowledge Management Theory of Change Narrative

The ECGB, as a gambling regulator, is expected to promote the use of research and the generation of knowledge in order to make decisions and direct actions to improve research outcomes that are grounded in evidence from research. ECGB is committed to generating a reliable body of valid data and research information about gambling in the province that will ensure all decisions relating to gambling are evidence-based. As a regulated industry, the gambling industry is no different and, as such, requires rigorous and continuous research due to various factors such as technological advances in gaming, which require the regulator to be well-informed about such developments to regulate effectively.

The ECGB, as a responsible regulator, acknowledges that gambling can be an elusive, ambiguous, and excessive act, among other things, and requires the utmost care and awareness of the harms of problem gambling. Gambling sites and modes have become more accessible, not just the infrastructure or physical sites to gamble, but also through smartphones and the Internet. Addicted gamblers often have other addictions which occur simultaneously, such as drug and alcohol abuse, which communities may not be aware of or informed about.

For the theory of change to achieve the desired results, the following services are therefore implemented:

- ➔ Development of high-quality research that enables the evidence-based advancement of responsible gaming programmes, and problem gambling prevention and treatment.
- ➔ Review the Research and Development Strategy and research agenda of the ECGB.
- ➔ Development and Implementation of a Knowledge and Management Strategy of the ECGB.
- ➔ Evaluate various activities and functions of the ECGB, including the regulatory functions of the ECGB in terms of the Research and Development Strategy and Instructions of the Board.
- ➔ Develop and inculcate the culture of conducting and using research findings for evidence-based decision making and planning, especially by relevant Budget Programmes of the ECGB.
- ➔ Creation of a platform for effective involvement of the research community, government, strategic partners, and other relevant stakeholders.
- ➔ Publicise research findings using different platforms to communicate relevant findings and recommendations of the research conducted.
- ➔ Mobilise research resources by co-partnering with different state agencies and organisations in conducting specific and related research jointly and collaboratively.
- ➔ Conduct Workshops and Sessions for Minimisation of Harmful Effects of Excessive and Irresponsible Gambling at Workplace – Private and Public Servants Empowerment.
- ➔ Utilise integrated communication, media and public outreach programme and outside broadcast, billboards, industrial theatre, various events.
- ➔ Utilise schools as gambling, alcohol and drugs free zones - Taking Risks Wisely - School Programme.
- ➔ Engaging various community platforms to communicate messages of responsible gambling - community advocacy.

To achieve the desired results, the following should be in place:

- ➔ Alignment with government priorities
- ➔ Leadership
- ➔ Accountability
- ➔ Adequate financial and human resources
- ➔ Adequate systems
- ➔ Research and business intelligence
- ➔ Collaborations
- ➔ Skilled implementers
- ➔ Dedicated and active citizens
- ➔ Embracing of change
- ➔ Constant interaction and communication

33. ANNEXURE: C

LIST OF REPORTABLE / PROXY INDICATORS FOR TRACKING DURING THE IMPLEMENTATION OF THE STRATEGY

NO.	STRATEGIC OUTCOME	OUTPUT/ OUTCOME INDICATOR	RATIONALE FOR THE CHOICE OF THE OUTPUT/ OUTCOME INDICATORS	COORDINATING/ RESPONSIBLE BUDGET SUB-PROGRAMME	REPORTING PERIOD BY THE INDUSTRY
1.	Transformed, Ethical and Sustainable Gambling Operations in the Province	Percentage Minimum licenses held by PDIs in the Gambling Sector	<ul style="list-style-type: none"> ➤ Organisation does not generate revenue, rather collects and disburses it to the fiscus – putting a target that is not in the control of the organisation. 	Investigation and Licensing	Bi-Annual
2.		Rand Value of Gambling Industry Investment Spend in Infrastructure.	<ul style="list-style-type: none"> ➤ Economic transformation and job creation, which are part of the seven priorities derived from the electoral mandate and State of the Nation Address. Eastern Cape Provincial Priorities. ➤ Implementation of license conditions and bid commitments. 	Investigation and Licensing	Bi-Annual
3.		Rand Value of Local Procurement in the Province by the Gaming Industry.	<ul style="list-style-type: none"> ➤ Economic transformation and job creation, which are part of the seven priorities derived from the electoral mandate and State of the Nation Address. Eastern Cape Provincial Priorities. ➤ Implementation of license conditions and bid commitments. 	Audit and Compliance Services	Bi-Annual
4.	Compliant Gaming Industry to Thrive	Rand Value Contribution of the Gambling Industry SED/CSI	<ul style="list-style-type: none"> ➤ Implementation of the ECGB CSI Framework and license conditions. ➤ Maximisation of socio-economic development benefits for communities located in impoverished areas of the province. ➤ Implementation and contribution towards the achievability of the Eastern Cape Anti-Poverty Strategy. ➤ Eastern Cape Provincial Priorities. ➤ Social cohesion and safe communities in terms of Priority 5 of the seven priorities derived from the Electoral Mandate. ➤ State of the Nation Address. 	Audit and Compliance Services	Bi-Annual
5.		Employment Equity Status Statistics by the Industry	<ul style="list-style-type: none"> ➤ Economic transformation and job creation, which are part of the seven priorities derived from the electoral mandate and State of the Nation Address. Eastern Cape Provincial Priorities. ➤ Implementation of license conditions and bid commitments. 	Audit and Compliance Services	Bi-Annual
6.	Compliant Gaming Industry to Thrive	Number of remote/virtual audits conducted	<ul style="list-style-type: none"> ➤ Implementation of license conditions and bid commitments. ➤ The compliance barometer is utilised to gauge the compliance level of the licensees and to incentivise them by reducing their submitted Financial Guarantee according to their compliance level. 	Audit and Compliance Services	Bi-Annual

NO.	STRATEGIC OUTCOME	OUTPUT/ OUTCOME INDICATOR	RATIONALE FOR THE CHOICE OF THE OUTPUT/ OUTCOME INDICATORS	COORDINATING/ RESPONSIBLE BUDGET SUB-PROGRAMME	REPORTING PERIOD BY THE INDUSTRY
7.	Empowered Communities Located in the Province through SED/ CSI Initiatives	Number of Functional Enterprise Development Projects by the Gaming Industry	<ul style="list-style-type: none"> ➤ Economic transformation and job creation, which are part of the seven priorities derived from the Electoral Mandate and State of the Nation Address. ➤ Implementation of license conditions and bid commitments. ➤ Desired impact of socio-economic (CSI) projects delivered by licensees and directly by the Board. 	Audit and Compliance Services	Bi-Annual
8.		Monitored Established Trusts and/or Foundations as a Result of Gambling License Provision	<ul style="list-style-type: none"> ➤ Special-purpose vehicles that have been established as a result of the provision of a gambling license to disburse funds in terms of license conditions, or trust deeds. ➤ All have a relationship with the ECGB, and such a relationship should be maintained to ensure that good corporate governance is adhered to in those trusts and foundations. ➤ License conditions should be amended to reflect this requirement, including responsibilities of reporting and accounting to the ECGB in terms of their planned work and the impact that they are making because of gaming proceeds. ➤ A comprehensive monitoring and evaluation framework will have to be developed to guide what trusts and/or foundations have to report to the ECGB. 		
9.	Displaced Illegal Gambling in the Province	Rand Value Estimation of Lost GGR from Confiscated Illegal Gambling Equipment	<ul style="list-style-type: none"> ➤ Adherence to and implementation of license conditions, bid commitments, different pieces of legislation, and approved frameworks and/or regulations. The Eastern Cape gaming industry is conducted honestly and competitively, with maximum contribution to society. ➤ Protected gambling operators from unlicensed gambling operators and illegal competition of incidents of illegal gambling. ➤ Adherence to the 4th Industrial Revolution requirements in protecting and supporting the gambling industry in the province. 	Inspections, Law Enforcement, Responsible Gambling, and Public Education	Quarterly
10.		Number of Cases Involving Illegal Gambling Operators			Quarterly
11.		Number of Illegal Gambling Sites Closed Down (Including Online Gambling Sites)			Quarterly
12.		Number of Illegal Gambling Equipment Confiscated and Destroyed			Quarterly
13.		Succession Rate of Prosecuted Cases Involving Illegal Gambling Operators			Quarterly
14.	Educated and Informed Public Regarding Responsible Gambling	Number of Self, Third-Party, and Licensee-Excluded Persons	<ul style="list-style-type: none"> ➤ Management of emerging data or information regarding self and third-party exclusion. ➤ Raise punter awareness and educate punters about the harm associated with excessive gambling. 	Inspections, Law Enforcement, Responsible Gambling, and Public Education	Quarterly
15.		Number of Referrals Made to Counselling and Treatment			Quarterly

NO.	STRATEGIC OUTCOME	OUTPUT/ OUTCOME INDICATOR	RATIONALE FOR THE CHOICE OF THE OUTPUT/ OUTCOME INDICATORS	COORDINATING/ RESPONSIBLE BUDGET SUB-PROGRAMME	REPORTING PERIOD BY THE INDUSTRY
16.	Implemented Principles of Corporate Governance, Organisational Performance, and Reporting	Number of Litigations Ruled in Favour of the ECGB and Recovered Costs	<ul style="list-style-type: none"> ➤ Litigation risk is the possibility that legal action will be taken because of ECGB's action, inaction, regulatory services, or licensing. ➤ Gambling regulation is considered a litigious environment; hence, there is a need to employ some type of litigation risk analysis and management to identify key areas where the litigation risk is high, thereby enabling appropriate measures to be taken to limit or eliminate those risks. ➤ Adherence to the 4th Industrial Revolution requirements in protecting and supporting the gambling industry in the province. 	Legal Services	Quarterly
17.	Maximised Benefit of AI and Digitization Technology in the Regulation Processes	Industry technological responsive training conducted	<ul style="list-style-type: none"> ➤ Implementation of ICT innovation, digital, automation, and paperless processes through artificial intelligence-driven services. ➤ Exploration of ICT technologies and artificial intelligence to detect illegal gambling operations and activities within the province. ➤ Joint exploration of ICT virtual audits and developing an ICT virtual audit system and standard operating procedure to be utilised. ➤ Development of digital transformation strategy, a concept that encapsulates digitization, digitalization, and automation. ➤ Accelerating transformation of business activities, processes, competencies, and models to fully leverage the changes and opportunities of digital technologies within the ECGB. ➤ All maturity assessments to be conducted objectively and independently from all members of the ECGB. ➤ Punter protection on all online platforms, including web-based and related or integrated channels. ➤ Adherence to the 4th Industrial Revolution requirements in protecting and supporting the gambling industry in the province. 	Gaming Control, Regulatory Affairs, and Systems	Bi-Annual

DISTRICT DEVELOPMENT MODEL

34. ANNEXURE: D

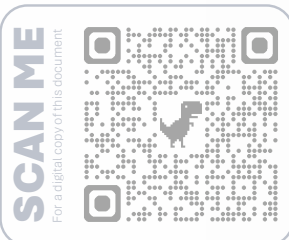
NO	STRATEGIC OUTCOMES	OUTCOME / OUTPUT INDICATOR	PROJECTS FOR DDM IMPLEMENTATION IN THE THREE YEARS (MTEF PERIOD)	LOCATION IN THE DISTRICT	BUDGET ALLOCATED	STAKEHOLDER RESPONSIBLE
1.	Transformed, Ethical and Sustainable Gambling Operations in the Province	Number of Key Gambling Licenses Issued	26 Gambling Licenses to be issued	Licenses are issued to all qualified applicants in the various municipalities in the province. Applicants to apply for a gambling license cannot be determined upfront, except after the RFP has been issued.	Budget cannot be determined upfront, as it depends on the type of license to be issued.	ECGB and Private Sector (licensees and prospective licensees)
		Number of Gambling Economic Opportunities Awareness Sessions Conducted	19 Gambling Economic Opportunities Awareness Sessions to be held	Gambling Economic Opportunities Awareness sessions will be conducted in all Districts and Metro Municipalities in the province.	No budget except the costs of travelling (S&T) to implement the services in the Districts.	ECGB, Local and District Municipalities; Development Agencies; Business Chambers; DEDEAT.
2.	Compliant Gaming Industry to Thrive	Number of Compliance Audits Conducted	240 Compliance Audits to be conducted	Compliance audits will be conducted with all licensees located in all Districts and Metro Municipalities in the province to verify compliance with license conditions, wherein, among others, SED/CSI projects implemented, SMME supplier support in terms of procurement, and buying in the Eastern Cape.	No budget except the costs of travelling (S&T) to implement the services in the Districts.	ECGB
		Number of Inspections Conducted	330 Inspections conducted	Inspections will be conducted with all licensees located in all Districts and Metro Municipalities in the province.	No budget except the costs of travelling (S&T) to implement the services in the districts.	ECGB
3.	Displaced Illegal Gambling in the Province	Number of Sweeps Conducted	30 Sweeps conducted	Sweeps will be conducted in all five zones based in all the Districts and Metro Municipalities in the province.	No budget except costs of travelling (S&T) to implement the services in the districts.	ECGB, SAPS Local and District Municipalities; DEDEAT
		Number of Illegal Gambling Awareness Campaigns	9 Illegal Gambling Awareness Campaigns	Illegal Gambling Awareness Campaigns will be conducted in all five zones based in all the Districts and Metro Municipalities in the province.	No budget except costs of travelling (S&T) to implement the services in the districts.	ECGB, DEDEAT, and Local Municipalities
4.						
5.	Educated and Informed Public Regarding Responsible Gambling	Number Responsible Gambling Awareness Campaigns	39 Responsible Gambling Awareness Campaigns	Responsible Gambling Awareness Campaigns will be conducted in all five zones based in all the Districts and Metro Municipalities in the province.	No budget except costs of travelling (S&T) to implement the services in the districts.	ECGB and SARGF, DEDEAT, and Local Municipalities
6.	Empowered Communities Located in the Province through SED/CSI Initiatives	Percentage of SED/CSI Initiatives / Programmes Implemented	100% SED/CSI Initiatives /Programmes implemented	SED/CSI Initiatives/Programmes implemented in all five zones based in all the Districts and Metro Municipalities in the province. ECGB licensees are based in all the District Municipalities in the province, wherein they are required in terms of license conditions to implement CIS projects in the poorest wards of the province.	1% of GGR OR 2% of net profit after tax by licensees. ECGB contributes 1% of its budget to the Equitable Share allocation.	ECGB and Private Sector (Licensees), DEDEAT, District and Local Municipalities



PUBLIC ENTITY'S GENERAL INFORMATION

REGISTERED NAME OF THE PUBLIC ENTITY
Eastern Cape Gambling Board¹

Registered Office Address	ECGB Building , Quenera Park , Quenera Drive Beacon Bay, East London, 5241
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Contact Telephone Number	+27 43 702 8300
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Website	www.ecgb.org.za
External Auditors	Auditor-General of South Africa, Eastern Cape Province 69 Frere Road, Vincent, East London, 5217 PO Box 13252, Vincent , 5217
Bankers Information	Standard Bank of South Africa PO Box 7037, East London, 5200
Board Secretariat	Ms T Dumalisile



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