HCL

LET'S TALK
APPLICATIONS

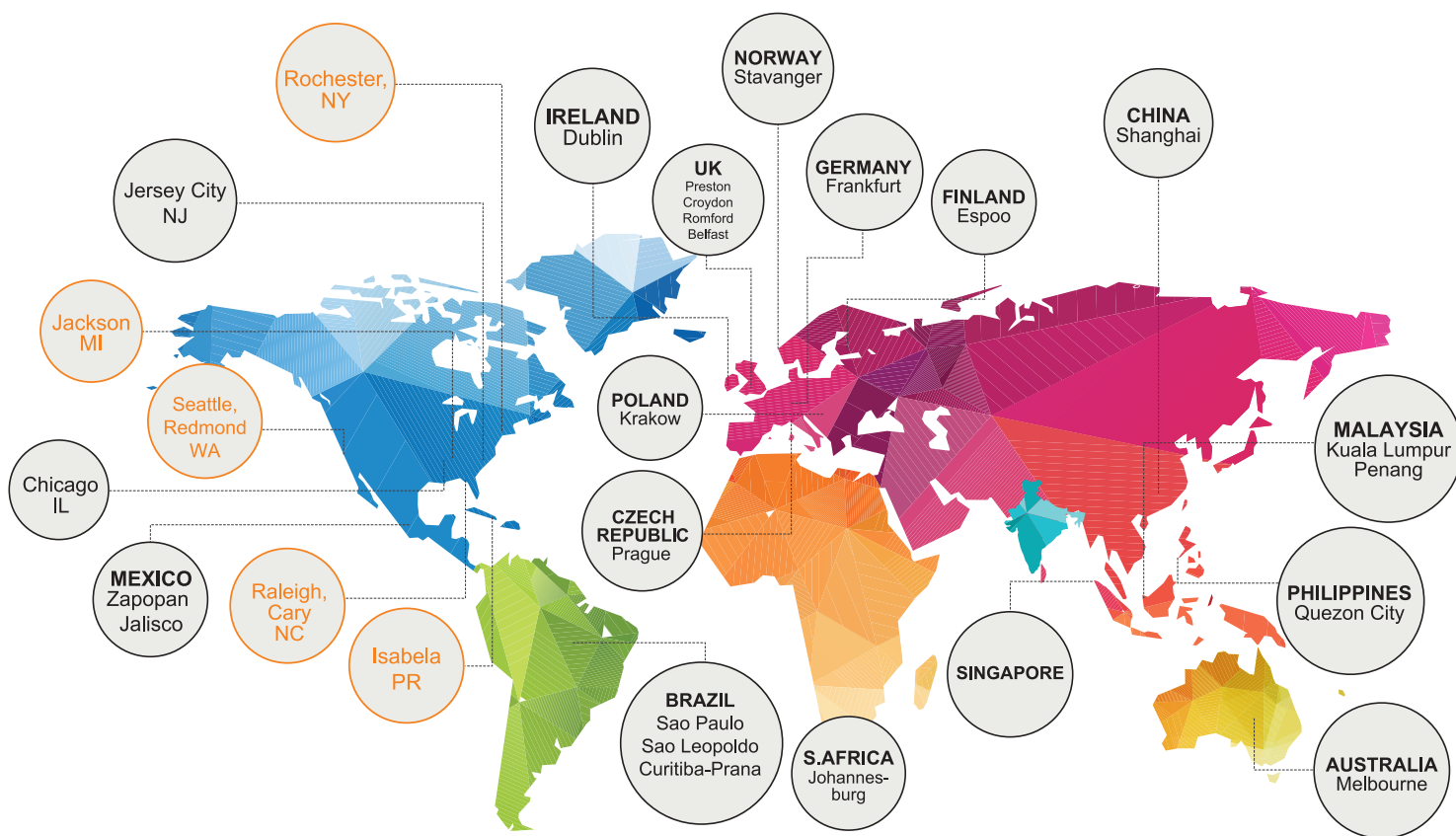THE ALWAYS–ON
DIGITAL GAMING WORLD
INCREDIBLE GAMING EXPERIENCE WITH ABSOLUTE EFFICIENCY

ABOUT HCL

HCL TECHNOLOGIES

Technology led business transformation: R&D, IT Applications, BPO, IT Infrastructure

88,000 EMPLOYEES
REVENUE–USD 5 BILLION

GLOBAL MARKET FOCUS
WWW.HCLTECH.COM

HCL INFOSYSTEMS

Hardware, services and ICT systems integration, computing, storage, networking, security, telecom, imaging and retail

7,000 EMPLOYEES
REVENUE–USD 1.4 BILLION

INDIA AND EMERGING MARKET FOCUS
WWW.HCLINFOSYSTEMS.IN

100,000 EMPLOYEES

HCL ENTERPRISE

$6.4 BN TOTAL REVENUE

SERVICE LINES

33.1% Infrastructure Services

28.4% Custom Application Services

17.3% Enterprise Application Services

4.3% Business Services

16.9% Engineering and R&D Services

INDUSTRIES

Manufacturing 33.3%

Consumer Services 17.4%

Financial Services 26%

Life Sciences & Healthcare 11.6%

Public Sector 7.8%

Others 3.9%

* As of December, 2014

Rochester, NY

IRELAND
Dublin

NORWAY
Stavanger

CHINA
Shanghai

Jersey City
NJ

UK
Preston
Croydon
Romford
Belfast

GERMANY
Frankfurt

FINLAND
Espoo

Jackson
MI

Seattle,
Redmond
WA

POLAND
Krakow

MALAYSIA
Kuala Lumpur
Penang

Chicago
IL

CZECH
REPUBLIC
Prague

PHILIPPINES
Quezon City

MEXICO
Zapopan
Jalisco

Raleigh,
Cary
NC

Isabela
PR

BRAZIL
Sao Paulo
Sao Leopoldo
Curitiba-Prana

SINGAPORE

AUSTRALIA
Melbourne

S.AFRICA
Johannes-
burg

GLOBAL DELIVERY LOCATIONS

■ India Delivery Locations (8)   ○ Delivery Locations Outside India (25)   ○ ITAR Compliant Delivery Centers (5)

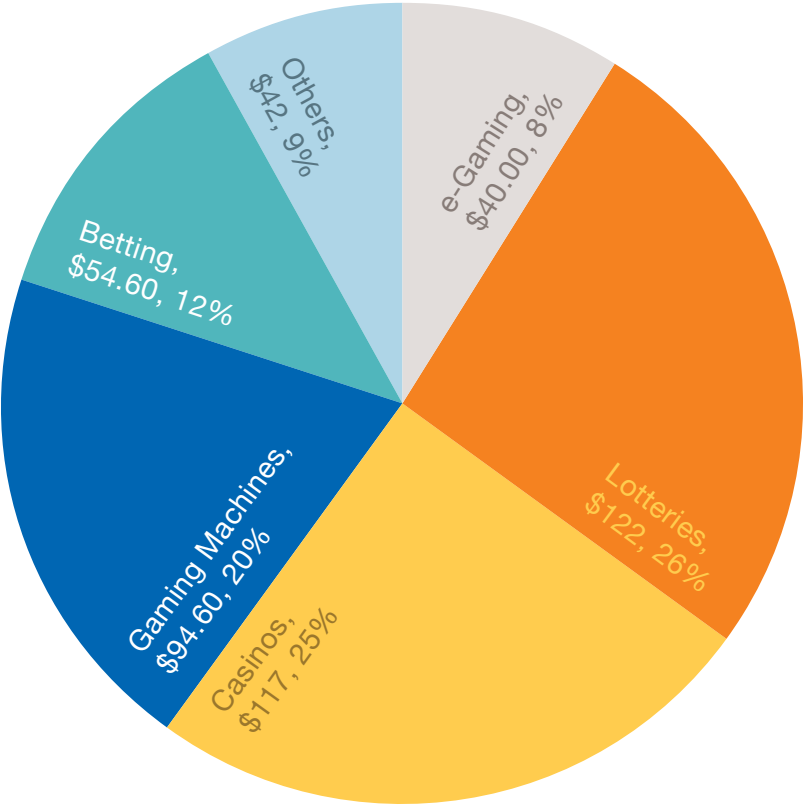| Multi-tenant: Supports Multi-service & clients	Follow the sun model	Culturally Diverse	Scalable
Multi-lingual Capability	De Risks, Security, Data sensitivity and regulatory compliances	Standardized Deliver: Local company with Global HCL standards	Proximity Advantage

ABOUT
THE INDUSTRY

The USD 470 billion global wager gaming industry is characterized by variable growth patterns due to economic conditions, government regulations and changing consumer behavior. All these long-standing attributes are reflected in a range of challenges and opportunities that are faced by the industry's established players and by those contemplating entering the market.

Casino and lottery businesses are spreading their boundaries, entering into new geographies and expanding into the interactive gaming space to attract new customers and retain existing ones. The technology implications of these business dynamics require the development of next-generation platforms that can create a 360 degree customer view, provide a unified gaming experience and stay high on the innovation agenda to tap into young and socially connected customers.

EXPLOSIVE GROWTH OF THE GLOBAL GAMING INDUSTRY

Others, $42, 9%

e-Gaming, $40.00, 8%

Lotteries, $122, 26%

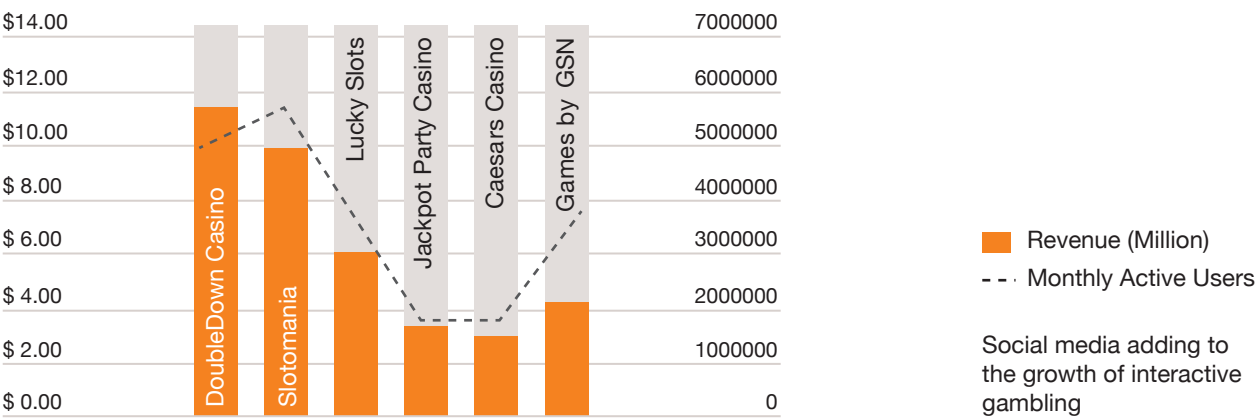Betting, $54.60, 12%

Gaming Machines, $94.60, 20%

Casinos, $117, 25%

*Estimated market size (In $billion) 2014

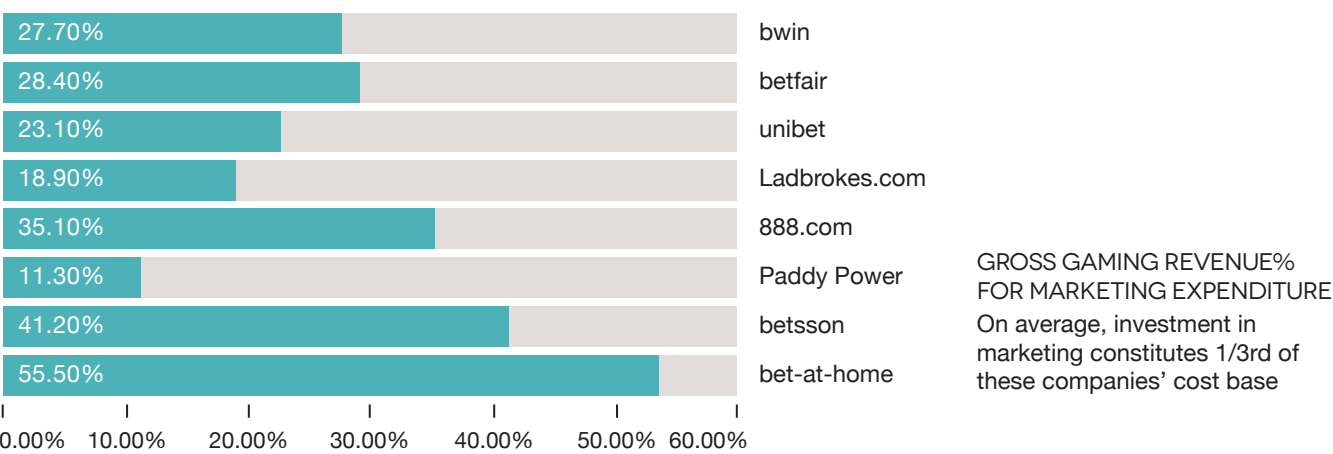E-Gaming Globally is a $40 billion industry in revenue and is forecasted to grow upto $46 billion in the coming year

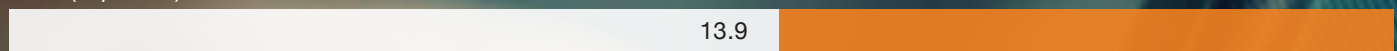# THE SOCIAL EVOLUTION OF WAGERING GAMES

Social Casino Gambling

Revenue (Million)
- - - Monthly Active Users

Social media adding to the growth of interactive gambling

Chart categories: DoubleDown Casino, Slotomania, Lucky Slots, Jackpot Party Casino, Caesars Casino, Games by GSN

Left axis: $0.00, $2.00, $4.00, $6.00, $8.00, $10.00, $12.00, $14.00

Right axis: 0, 1000000, 2000000, 3000000, 4000000, 5000000, 6000000, 7000000

INDUSTRY TRENDS

Intense competition in the gaming industry is leading to aggressive marketing

Company	Percentage
bwin	27.70%
betfair	28.40%
unibet	23.10%
Ladbrokes.com	18.90%
888.com	35.10%
Paddy Power	11.30%
betsson	41.20%
bet-at-home	55.50%

Axis: 0.00%, 10.00%, 20.00%, 30.00%, 40.00%, 50.00%, 60.00%

GROSS GAMING REVENUE% FOR MARKETING EXPENDITURE

On average, investment in marketing constitutes 1/3rd of these companies' cost base

MOBILITY: ANYWHERE. ALWAYS ON. ANYTIME

GLOBAL MOBILE GAMING REVENUE

2016 (expected)

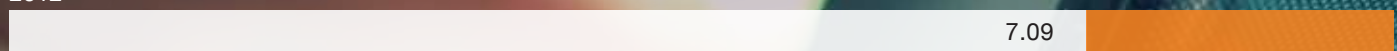13.9

2013

8.5

2012
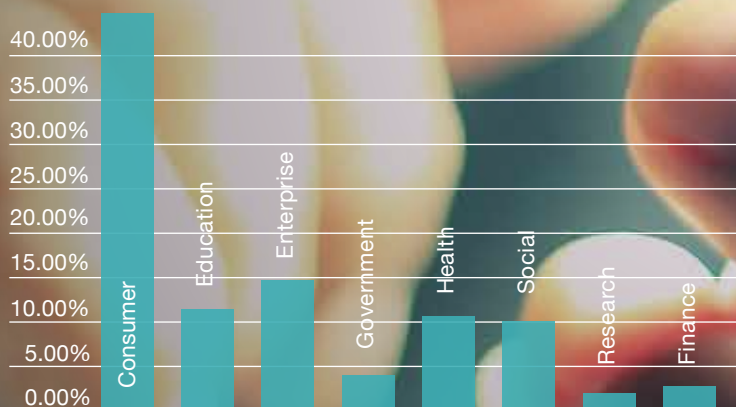
7.09

| 0% | 20% | 40% | 60% | 80% | 100% |
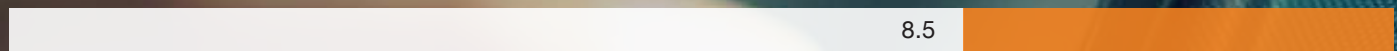
- ▢ SmartPhones (Revenue in $ billions)
- ▮ Tablets (Revenue in $ billions)

CAGR 2012–1016   TOTAL – 27.3% Tablets - 47.6% | Smartphones - 18.8%

GAMEPOCALYPSE: THE SPREAD OF GAMIFICATION

GAMIFICATION SYSTEMS BY INDUSTRY

Bar chart with y-axis from 0.00% to 40.00% in 5.00% increments. Categories: Consumer, Education, Enterprise, Government, Health, Social, Research, Finance.

- ▮ Share of Gamification Systems

More industries are applying gamification, for both customers and their employees

HCL OVERVIEW AND GAMING CAPABILITIES

HCL is a leading IT services provider delivering Run the Business (RTB) and Change the Business (CTB) services bringing innovation around key business and technology imperatives such as enhancing customer experience, leveraging big data analytics, adopting Cloud computing and digital systems integration.

SOME QUICK FACTS

• Gartner recognizes HCL as the industry's leading innovation partner in Media & Entertainment (M&E)

• HCL is recognized as a leader in Forrester Wave™ - software product development services for the first quarter of 2014

• HCL is recognized as a leader in Forrester Wave™ - EMEA applications outsourcing for the first quarter of 2014

GAMING CAPABILITIES

HCL is a value partner for gaming across the globe with over 15 years' experience in end-to-end technology leadership and deep domain competencies. Our gaming capabilities include technologies specifically designed for lottery, casinos and interactive gaming.

We are trusted by:
- The top four gaming solution providers
- The world's largest lottery operator
- One of the world's largest interactive gaming service providers

HCL MEDIA & ENTERTAINMENT: GAMING ZONE

HIGHLIGHTS OF HCL'S GAMING MICRO−VERTICAL

HCL is a value partner for gaming across the globe with over a **15-year footprint** in **end-to-end technology leadership** and **deep domain competencies.**

HCL GAMING

Casinos

Working with the world's largest casino operator

Working with the top 4 gaming solution providers

Regulatory approvals from the Nevada Gaming Commission

Listed consultant at Gaming Standards Association

Interactive Game

Working with one of the world's largest interactive gaming service providers

Regulatory approval from Alcohol and Gaming Commission, Ontario

High success rates for GLI certifications

Lottery

Over 15 years of experience

End-to-end experience in system implementation and product engineering of lottery systems

Working with the world's largest lottery operators

HCL IN THE M&E ECOSYSTEM

MICRO-VERTICALIZED

- $500+ MILLION
- 13+ YEARS OF FOCUS
- 10,000+ CONSULTANTS AND SMES
- ECOSYSTEM PLAYER

GARTNER RECOGNIZES HCL AS THE INDUSTRY'S LEADING INNOVATION PARTNER IN M&E

FOCUS ON INVESTMENTS AND INNOVATION

- 6 MEDIA SPECIFIC LABS
- 35 SOLUTION ACCELERATORS
- INDUSTRY PARTNERSHIPS

LEADER IN FORRESTER WAVE™: SOFTWARE PRODUCT DEVELOPMENT SERVICES, Q1 '14

RICH EXPERIENCE

- 40+ STRATEGIC CUSTOMERS (20+ GLOBAL 500)
- 45% TRANSFORMATION REVENUE

LEADER IN FORRESTER WAVE™: EMEA APPLICATIONS OUTSOURCING, Q1 '14

GAMING SERVICE PORTFOLIO

WIDE ARRAY OF GLOBAL GAMING SERVICES TO ENHANCE YOUR GAMING EDGE

	Casinos	Interactive	Lottery/ Video Lottery	
PRODUCT AND APPLICATION SERVICES (Development, Maintenance, System Integration and Testing)	Casino management system	Gaming management system	POS systems-retailer-based self-service	**AMERICA**
	Property management system	Online lottery portal instant games	Central system-transaction processing, accounting and promotion	
	Interfaces with slots/tables and other casino systems	Online Casino/Bingo/Poker	Back office-retailer,player, products management and instant tickets	
	Kiosk/POS	Player card management Loyalty	Real games/Poker games/Keno games	
	Player lifecycle management CRM/Loyaity	Sports betting integration	BI/Analytics/Reporting	**EUROPE**
	Reguratory realted systems	Wallet management	Inventory management/ order and distribution	
	✔ **Manual testing and test automation/Moblie testing**			
Infrastructure Services	Performance testing, Network testing, Game adaptation	Help Desk	Customer delivery management	
	✔ **24x7 hotline support**			**APAC**
Business Services	Dev Ops	DC Operations	Client Services	
	Finance and Accounting	Supply Chain Operation	Marketing Operations	

Foundation Accelerators	Enterprise Function as a Service	ALT ASM™	Digital System Integration	zCMO	Enterprise of Future
	IT Standardization/ Platform Transformation	Proactive and predictive IT Management	Mobile, Social, Digital readiness and Analytics	Digital Marketing Platform	DC Consolidation Outsoure Playout Services

SOLUTIONS

HCL is an integrator, accelerator and value creator across the M&E ecosystem and is known for its cutting-edge solutions listed in the table below.

SOLUTIONS/ACCELERATORS	
Casino Floor Mobility Solutions	Multiple iPad-based solutions for surveys, average bets, and membership sign ups on the casino floor.
GamEdge	A CRM-unified solution for casinos offering services related to patron management, loyalty management, segmentation, analytics, and VIPs.
Marketing Kiosks	Integrated marketing kiosks for customer engagement across campaigns, rewards, loyalty, parking and gaming.
Augmented Reality	Enhanced second-screen experience to engage consumers through gamification and other such applications via mobile and wearable technology such as Google Glass.
Digital Marketing Platform	A combination of elements of technology to provide a single view of insights and the customer through a multichannel hub for marketing needs.
MICE Solution	A one-stop mobility solution for event management along with interfaces to other systems of the hotel/casino.
Legacy Modernization Accelerators	End-to-end service propositions to accelerate application modernization, using various tools and frameworks such as PRIZM, application modernization factory, and ServiceMesh.
Platform Engineering Accelerators	Tools and frameworks such as eDAT, Intelligence Sustenance Engineering (ISE) and Platform Acceleration Suite (PAS) to provide an exceptional engineering experience to customers.

RESULTS ACHIEVED FOR CLIENTS ACROSS THE GLOBE

- Over 675,000 lottery transactions per minute (TPM) with 99.95 percent uptime

- Improved operational efficiency by 1200 hours/year for a large casino house

- POS implementation for 700 stores

- Increased yearly gaming apps upgrade (from 48 to 100) per year

- Released many products on game platforms

- Four customer-delivery implementations

CUSTOMER LOYALTY WITH CASINOS IS HARD TO IMAGINE

HCL helps casino technology service providers deliver remarkable loyalty experience to customers

ABOUT THE CLIENT

The client is a leading provider of casino technology to the biggest casino operators in the world.

BUSINESS CHALLENGE

The client wanted to develop a unified platform for loyalty management; additionally, its existing upgrade process was hampering time to market.

HCL'S SOLUTIONS

- Undertook the end-to-end development of a touch screen on top of the electronic gaming machines to make non-gaming services available to players on the casino floor

- Developed a patron management solution known as "GameEdge"

- Increased yearly gaming apps upgrade by automating testing lab processes

- Supported casino management system modules such as player account management and chip management

- Developed a bonus controller application for a wide area jackpot

- Implemented shared services implementation and improved processes for remote gaming server (the client's key distribution method of casino-style games) leading to cost reduction and higher business agility

BENEFITS DELIVERED

- Automated testing lab processes for yearly gaming app upgrades at the testing lab

- Developed 44 game themes and 12 class II games on multiple OS

- Enabled yearly dollar savings of 65% though testing services

- Implemented a unified solution for patron management with a 360 degree integrated view across all revenue centers

- Delivered a highly personalized loyalty experience

BUILDING A ROAD MAP TO FUTURE LOTTERY SOLUTIONS

99.95% uptime for more than 675k lottery transactions per minute

ABOUT THE CLIENT

The client is a leading player in the regulated lottery market, providing integrated technology, creative content and business services to effectively manage and grow today's evolving gaming markets.

BUSINESS CHALLENGE

The client was looking for a partner in growth to help strategize future roadmap, modernize existing solutions and innovate new lottery solutions.

HCL'S SOLUTIONS

- Lottery application portfolio transformation

- Developing and supporting lottery enterprise systems and a back-office applications suite including the Instant Ticket Processing System, Business Intelligence Systems, Retailer Management, and more

- Transforming the lottery applications portfolio from thick client legacy technologies to a thin client web-enabled, high-performance and scalable system on J2EE platform

- Conceptualizing, developing and implementing a Mobile POS retailer solution for android platform

- Developing Java-based touch screen Point of Access (POA) and continuously up-grading firmware, device drivers, GUI layer, and more

- Developing interactive lottery sites for Luxembourg, NZ and other emerging markets

- Lottery platform implementation across the globe

- Over 30 service delivery implementations across the world - USA, South Australia, the UK, Finland, NZ, Belarus, and others

- 60 sites supported globally through software services and 24×7 hotline support

- Consolidation of software delivery hubs

- Video lottery terminal service delivery

- Implementations of localized game adaptations; customization of game templates based on market regulations, math, sound & graphics and hardware

- VLTs and VLT games' testing, ensuring a high Game Laboratories International (GLI) certification success rate

- Back office transformation

- Finance and Accounting business services for the international division

- SAP Consolidation and implementation across 21 countries

BENEFITS DELIVERED

- Helped increase sales from $100/terminal to $330/terminal in 18 months

- Reduced Mean Time To Repair (MTTR) from 80 hours to 35 hours in 24 months

- $1 million projected saving with the implementation of the mobile POS

- Supported more than 675k lottery Transactions Per Minute (TPM) with 99.95 percent uptime for high-profile lottery operations

CASE STUDY

DIGITIZING THE
GAMBLING ENVIRONMENT
ADM services for an interactive gaming platform for
a leading gaming service provider

ABOUT THE CLIENT

The client is one of the world's leading interactive gaming service providers developing software and systems for digitally distributed gambling entertainment.

BUSINESS CHALLENGE

The client wanted to leverage size and scale benefits of an offshore gaming service provider for services that had been previously provided in-house.

HCL'S SOLUTIONS

Development and enhancements for the interactive gaming platform, covering the following products:

- Player Account Management System (PAMS)
  - Game Portal
  - Game Engine
  - Random Number Generator
- Development of game products such as:
  - Poker
  - Bingo
  - Casino
- Customer Delivery-PAMS plateform and games site implementation

- Support Services:
  - Tech 24×7-L1.5 services, data center disk usage, memory usage monitoring, and more
  - Tech Ops-L2 and L3 support for end customers
- 100 man-years of game adaptation and platform implementation with GLI certifications for casino gaming equipment business of the client

BENEFITS DELIVERED

- Successfully integrated bingo, roulette and poker and casino-style games, for clients across the globe-in the U.S., Canada, Spain, UK, Norway and Sweden
- Participated in four greenfield customer-delivery implementations
- Supporting over 90 customers through the maintenance/enhancement model
- Supporting 6 major product releases and 16 minor releases in the game platform, poker and the casino product
- Rebadging 160 technical operations service employees

ABOUT THE CLIENT

The client is the operator of the world's largest casino with revenues exceeding $14 billion and a presence in the U.S., Singapore and Macau.

BUSINESS CHALLENGE

The client was looking for an IT partner to establish a global shared service center to help increase the operational efficiency of the casino floor.

HCL'S SOLUTIONS

- Casino Application Portfolio Transformation

  - Developing, maintaining, integrating and supporting the portfolio of casino systems-customer relationship, casino management products, player management, lodging and post-trip management

  - Developing a comp tracking justification system and a housekeeping product interface

  - Testing/implementing the meeting room optimization system and a travel agent commission processing system

  - Implementing an E-affidavit system

  - Enhancing and bug fixing of loyalty websites

  - Systems integration for Commercial Off-The-Shelf (COTS) products for casino management

- Innovative Casino Solutions

  - Developing of a self-service marketing kiosk with more than 75 promotion launches and interactive games.

  - Developing innovative mobility solutions enhance the productivity of casino floor operations such as player signup on mobile devices, average bets and game speed surveys

BENEFITS DELIVERED

- Improved the operational efficiency by 1,200 hours/annum by implementing an electronic solution to record table game performance and game speed surveys

- By implementing a mobiloity solution, reduced penalties paid to the Casino Regulatory Authority by 10%, which was levied for overstaying or allowing banned players

- By implementing a mobility solution, increased player registration in casinos by 1% per annum

- Reduced operating costs over the term by at least 25% through labor arbitrage, productivity improvements and application modernization and optimization

APPLICATION
SUPPORT &
MAINTENANCE

BIG DATA &
BUSINESS
ANALYTICS

BUSINESS
ASSURANCE
& TESTING

CLOUD, DIGITAL
EXPERIENCE &
MOBILITY

COLLABORATION,
CONTENT & SOCIAL

CUSTOMER
RELATIONSHIP
MANAGEMENT

DIGITAL
SYSTEMS
INTEGRATION

E-COMMERCE
& OMNI-CHANNEL

ENTERPRISE
RESOURCE
PLANNING

HUMAN
CAPITAL
MANAGEMENT

MODERN
APPLICATION
DEVELOPMENT

PLATFORMS &
INTEGRATION

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BEYOND THE CONTRACT

HCL