



Casino Association of South Africa



*The 2010 Survey of
Casino Entertainment in South Africa*



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Message from the Chairman

David Coutts-Trotter
Chairman

A mere three years ago, few of us could have foreseen just how ferocious the economic downturn would be or for how long its effects would be felt in South Africa's leisure and tourism sectors. The recession has brought turmoil to even the most sophisticated markets, thrown banking regulation into disarray and created unprecedented degrees of international investor uncertainty.

For South Africa, the remarkable thing is that we have been spared its worst excesses. We are not approaching the levels of failure facing Europe's weakest economies such as Greece, Ireland and Portugal, nor are we faced by anything approaching a sovereign debt crisis.

But the recovery from the recession of the past two years has been slow, and the casino industry has felt the full effects of difficult trading conditions. Although the World Cup brought some temporary relief to the local economy, our customers have tended to spend less, there has been some decline in inbound tourism, and there has been some decline in footfall at the country's casinos and resorts.

However, towards the end of the year under review, economic activity was showing tentative signs of revival and we had reason to believe that casino revenues would show an improvement for the first time since 2008. Declining interest rates, receding inflation and growth in disposable income should stimulate consumer spending.

That South African casino operators have continued to invest in the refurbishment, expansion and upgrading of their properties is proof of the relative resilience of the industry in the face of economic adversity. As this edition of the Survey shows, the industry has maintained its growth trajectory, albeit at a slower pace than previous years. Overall, South Africa's legal gaming and lottery market is estimated to have grown by 2.8% in 2010 and our casinos, which have 73% of the gaming market, continue to dominate the sector.

In the 2010 financial year, gambling in South Africa experienced Gross Gaming Revenue in excess of R16.2 billion, of which casino gambling accounted for R13.5 billion. By any measure this is a massive quantum of consumer expenditure, which yields very considerable tax revenues to provincial and national economies.

That makes it all the more imperative that those who make policy, regulate the gambling industry and research its impact should

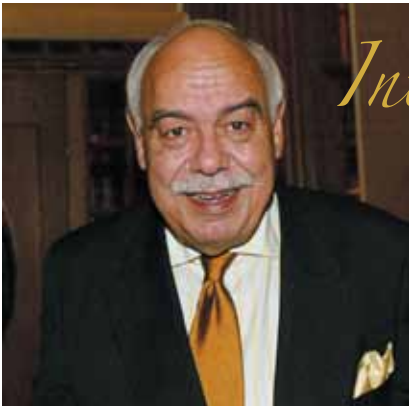
have convenient access to a reliable source of information. It is thus one of the main objectives of CASA to provide high quality, policy-relevant information, analysis and advice to Government, regulators and interested citizens who wish to understand better the extent and nature of our industry.

It has been said before, but bears repetition, that without an evidence-based approach to public policy, accountability and policy assessment suffers, and public scrutiny of government regulation becomes difficult. Above all, the emphasis on policy decisions that can be defended by demonstrable evidence moves us forward from mere compliance with rules and procedures, to a focus on real-world outcomes that matter to the citizens and communities among whom we conduct our business.

In numerous gambling jurisdictions, there have been examples of well-intended policy that has resulted in unintended consequences because policy makers have either ignored the weight of the available evidence or because they have chosen to bend before popular prejudice. South Africa, fortunately, has escaped misdirected policy outcomes of this sort, and that is largely because bodies such as CASA and the National Responsible Gambling Programme have been able to influence policy by the provision of reliable and empirical information, the bedrock of good public policy.

In this country, research into gambling behaviour began almost concurrently with the introduction of legalized gambling, and we are fortunate in having extensive survey-based information about the socio-economic impacts of gambling and estimates of the prevalence of problem gambling. At the same time, the National Gambling Board and its provincial equivalents have been meticulous in producing annual audited statistical data.

This edition of the Survey of Casino Entertainment should go some way towards ensuring that South Africa's casino gaming environment and its governing policy is informed by robust data and continues to be delivered in the public interest.



Introduction

Derek Auret
Chief Executive

2010 marks the seventh year in which the Casino Association of South Africa has published its annual Survey of Casino Entertainment, an integral part of our mandate to assemble and disseminate factual and reliable information about the casino industry to all interested parties. To fulfill this brief adequately, CASA is entirely reliant on its member companies for the procurement of data.

Every effort is made to ensure the accuracy of the contents of this survey and in this, CASA depends heavily on the input of the casino members. I believe the publication represents a dependable source of information which provides the reader with a comprehensive insight into the state of the country's casino sector, its contribution to national and provincial tax revenues, its corporate social investment activities and its efforts to create a gambling environment in which consumers are protected from harm.

As the data demonstrates, the South African casino industry is a major contributor of employment, tax revenues and economic development nationally and in the provinces and local communities where it operates. The past year has, however, been an exceptionally difficult one for the industry. We have faced depressed consumer spending, declining gaming revenues and increases in operating costs. Nor is there any assurance that full economic recovery or a return to buoyant trading conditions in South Africa will come soon, particularly because there are fresh concerns of a second recession in the global economy. This would inevitably have the effect of further weakening the already tentative current strength of the domestic economy and could dent emerging investor sentiment.

That said, there are a number of positive and encouraging indicators - interest rates are at a 30-year low, inflation seems to be under control, and the disposable income of households has been steadily improving in the wake of high wage settlements.

On the regulatory front, there have been delays in the publication of the Gambling Review Commission's report, which is expected to provide new insights into the country's gambling industry and set guidelines for potential changes to South African gaming laws.

We remain optimistic that the findings of the Commission - and any policy recommendations that flow from it - are based on reliable evidence and empirically-sound research. It has not always been apparent that legislators or policy makers have been particularly rigorous in their attempts to understand either the lessons of international research or the consequences of proposed

interventions in the business of the industry. All too often, anecdotal hearsay or unscientific prejudice are allowed to influence what should be a rational debate and create a climate which is not conducive to the establishment of a stable, predictable and coherent regulatory environment. Thus far, however, there are good signs of solid engagement with industry by the regulators in this regard.

From the outset of its work, CASA has engaged closely and constructively with the Commission and will continue to engage with the regulatory authorities and political policy-makers in order to ensure an outcome that boosts confidence in investment decisions, does not add to an already top-heavy regulatory regime, and acknowledges the considerable progress made by CASA and the National Responsible Gambling Programme in the combating of problem gambling.

There have also been delays in the implementation of the National Gambling Amendment Act, which will legalise and regulate online gambling. The timeframe for the completion of the Act's regulations is unclear but it seems unlikely that this will happen in the near future.

While online gambling remains illegal in South Africa, it has nevertheless been a rapidly growing sector. It has therefore been gratifying to note that the National Gambling Board has begun to take action against those who seek to receive "winnings" from these illicit operations. While the number of such cases thus far has been limited, the recent judgment of the North Gauteng High Court against Piggs Peak online casino is a clear indication that both the regulatory authorities and the banking sector are taking this scourge seriously and are prepared to act decisively to protect the legitimate interests of casino operators who operate within the bounds of the law.

A further major focus across South Africa's corporate world during the past year has been analysis of the implications of the King III Report on Corporate Governance, which imposes new obligations, responsibilities and standards on the way we conduct business, the manner in which we account to our stakeholders, and the way in which we interact with the environment.



With its emphasis on sustainability, the King III Code of Governance Principles will have far-reaching practical implications for our member companies' boards of directors, for management and for our stakeholders. The code places great stress on ethical leadership which takes into account the legitimate expectations of shareholders, employees, customers, suppliers and industry regulators. It incorporates issues such as social responsibility, respect for human rights, the development of brand and reputation, and the effective management of stakeholder relationships.

All of these developments have served to emphasise CASA's unique role as not only the official representative of the interests of the country's legal casino gaming industry, but as a repository of knowledge about the sector. Without a clear-headed

understanding of the facts and figures about gambling and its impacts, it is virtually impossible for policy-makers to make rational and effective decisions about the regulation, taxation and social organisation of the activity.

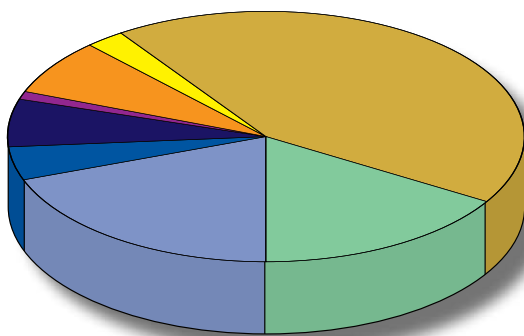
CASA's objective, therefore, in publishing the Survey of Casino Entertainment is to provide legislators, regulators, researchers and the general public with a comprehensive information resource about the important role the industry plays in the economies of communities nationwide. I am confident we have reached that goal, and hope that this edition of the Survey will prove as useful as its predecessors in providing the reader with all the information that is required to understand the dynamics of South Africa's casino industry.

National Gambling Statistics

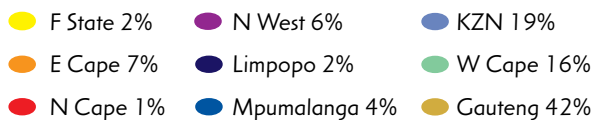
2009/10 FINANCIAL YEAR

In 2010 the National Gambling Board (NGB) published its survey of national gambling statistics for the 2009/2010 financial year, ending 31 March 2010, in which it reported that gross gambling revenue for all sectors for the year was R16.268 billion, a 2% increase over the previous year's R15.921 billion.

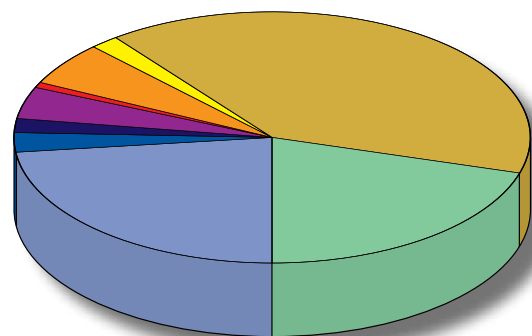
GROSS GAMBLING REVENUE PER PROVINCE
2009/2010 Financial Year



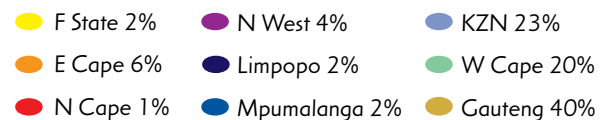
TOTAL R16 268 BILLION (all sectors)



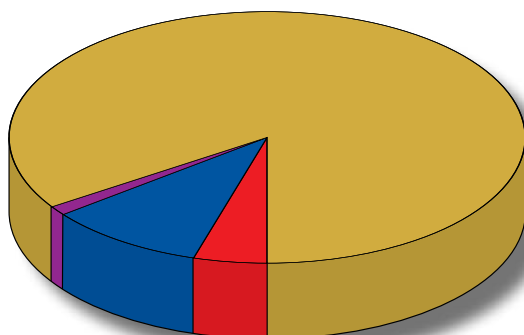
TAX CONTRIBUTION PER PROVINCE
2009/2010 Financial Year



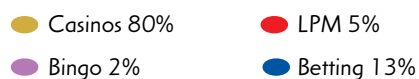
TOTAL R1 575 BILLION (all sectors)



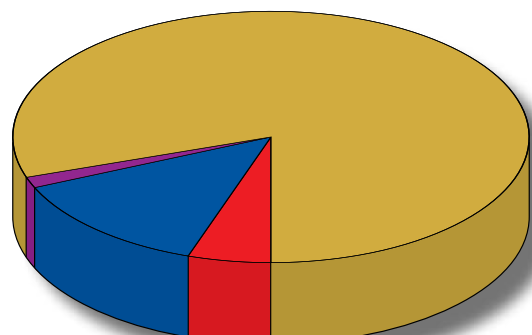
GGR PER GAMBLING MODE
2009/2010 Financial Year



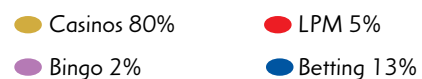
TOTAL R16 268 BILLION



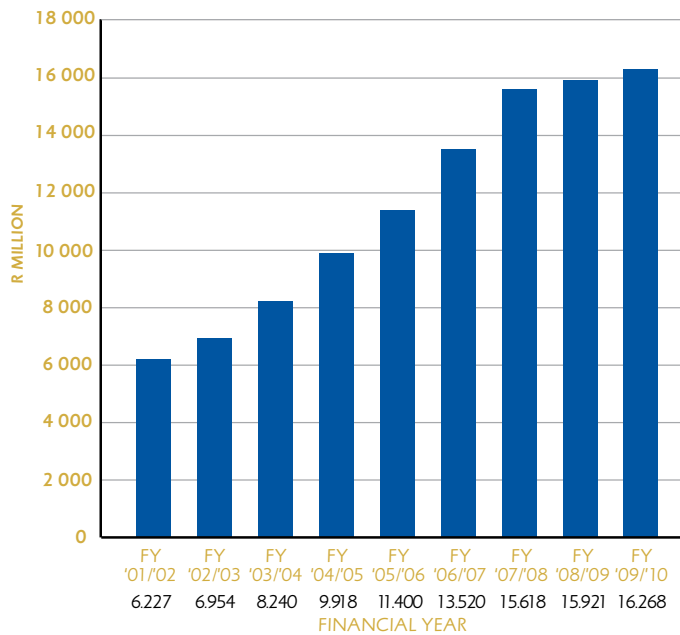
TAX PER GAMBLING MODE
2009/2010 Financial Year



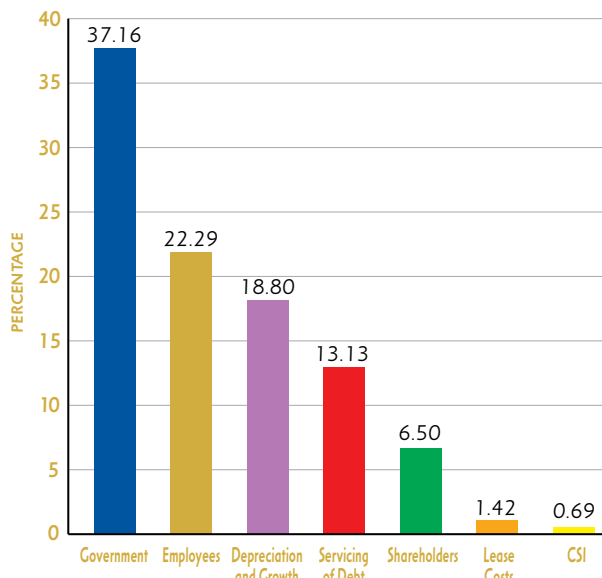
TOTAL R1 575 BILLION



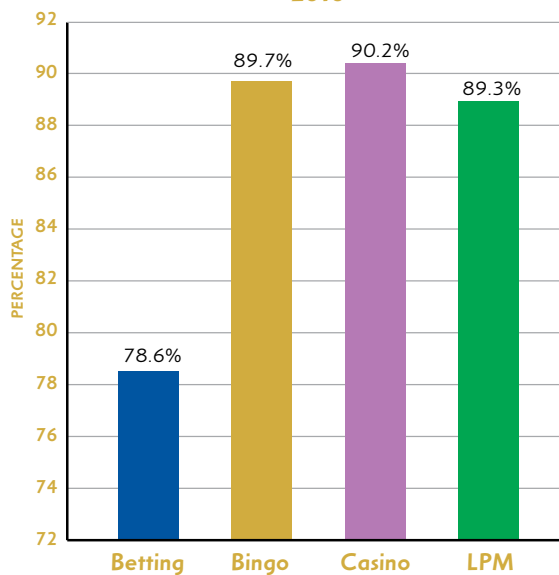
INCREASE IN GAMBLING ACTIVITIES GGR ALL MODELS



CASINO INDUSTRY VALUE ADDED STATEMENT: WHERE THE MONEY GOES



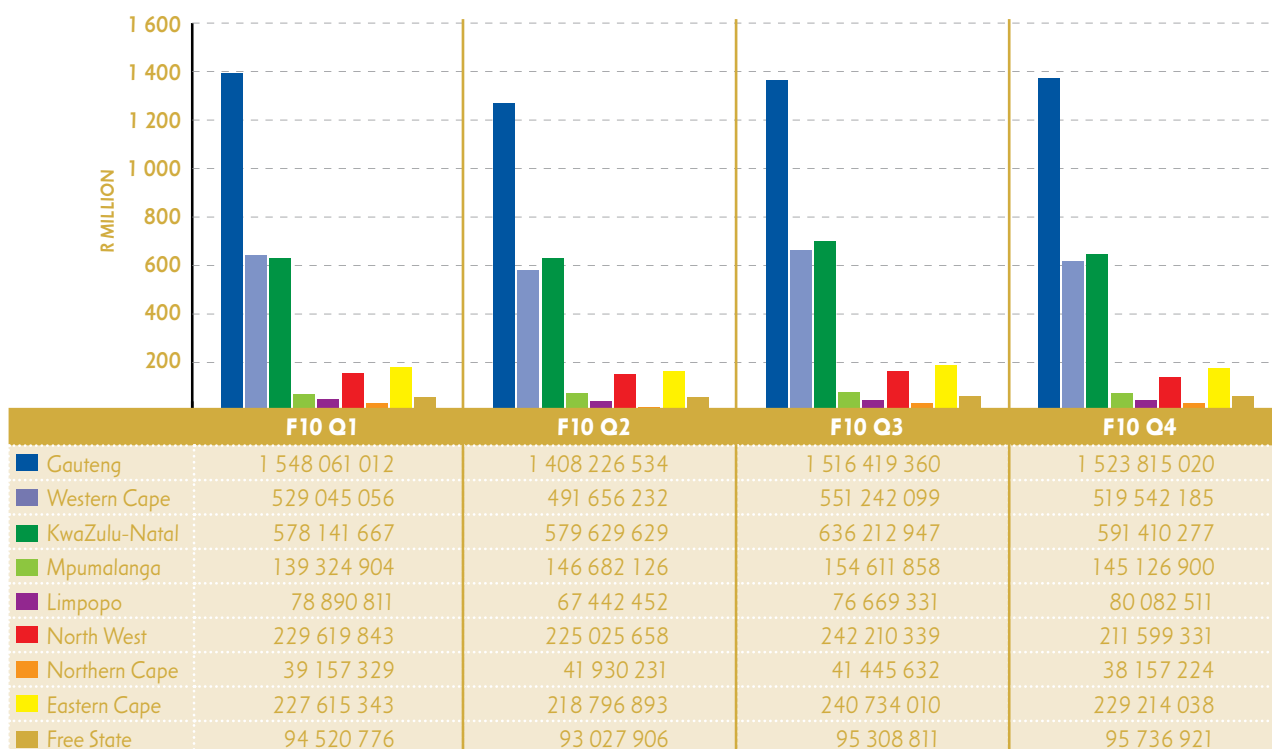
PERCENTAGE OF RTP PER GAMBLING MODE 2010



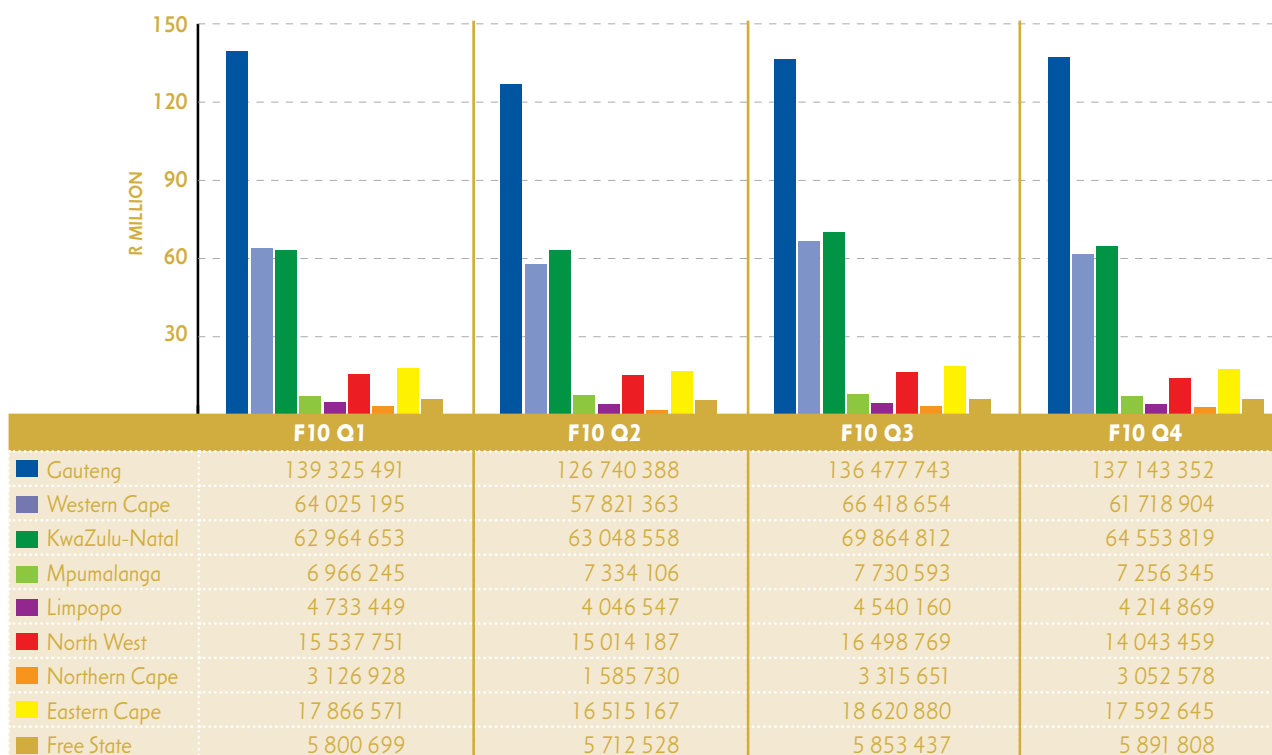
National Gambling Statistics

2009/10 FINANCIAL YEAR

QUARTERLY CASINO GGR 2009/2010 Financial Year

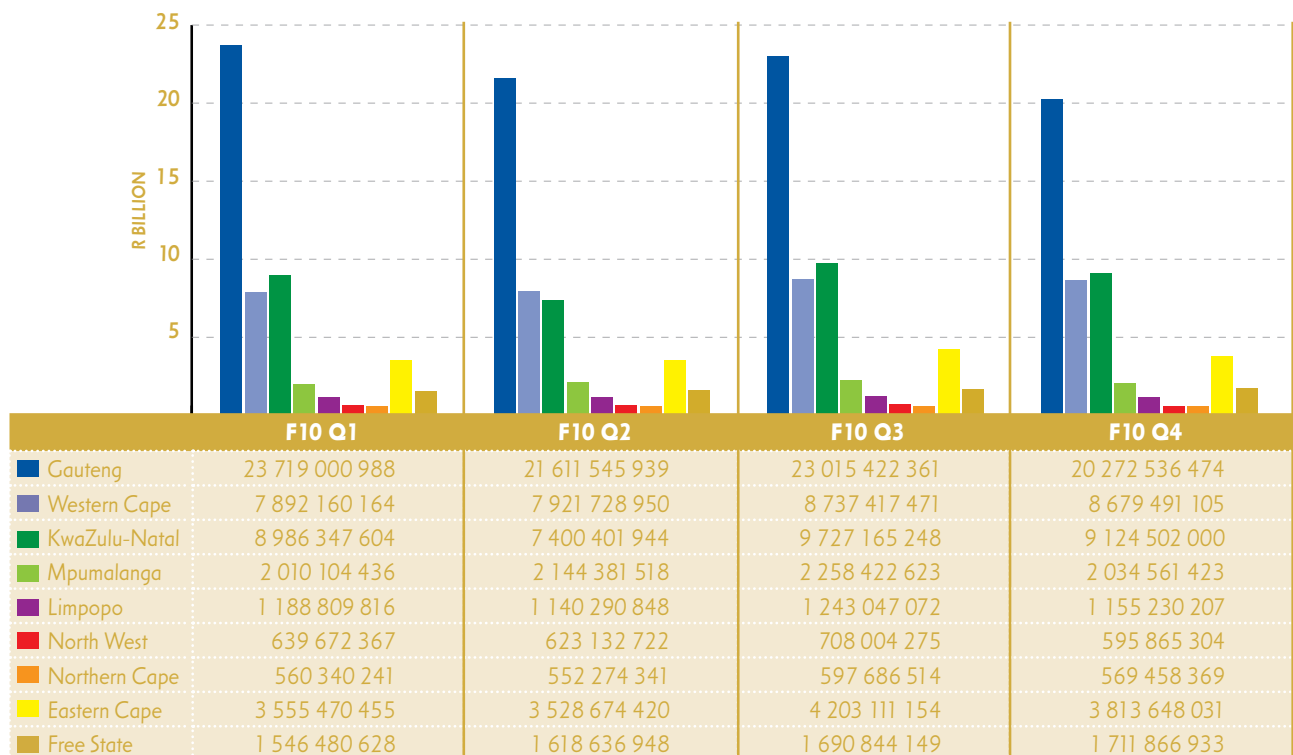


QUARTERLY CASINO TAX / LEVIES 2009/2010 Financial Year





QUARTERLY CASINO TURNOVER
2009/2010 Financial Year



Overview of Casino Entertainment



CASINO GROUP HOLDING LICENCES IN SOUTH AFRICA

	Sun International	Peermont Global	London Clubs International	Tsogo Sun	Gold Reef	TOTAL	Not CASA members
Eastern Cape	2			1	1	4	
Free State	2	1			1	4	
Gauteng	2	1	1	1	2	7	
KwaZulu-Natal	1	1		2	1	5	
Limpopo	1	1				2	
Mpumalanga		1		2		3	
North West	2	2				4	
Northern Cape	1					1	2
Western Cape	2			1	2	5	
Total	13	7	1	7	7	35	2

Profile of South African Casinos

Current number of casinos	35	ENTERTAINMENT AREAS	
Proposed number of casinos	40	No of areas	62
Number of tables	842	Size	59 451m ²
Number of machines	22 191	Capacity	18 186
Casino employees	34 022	No of guests	1 736 206
Gross casino gaming revenue	R14 billion	Employees - full time	916
Casino gaming tax revenue	R1 billion	Casuals	265
Visitors	59 126 173	Total annual turnover	R179 million
Corporate Social Investment	R107 million	RETAIL OUTLETS	
NEW EXPANSIONS/REFURBISHMENTS		No of shops	117
Value of expansions/refurbishment over past year	R833 million	Employees - full time	399
Size of expansion/refurbishment	5 238m ²	Casuals	82
No of new employees as a result of expansion	118	Total annual turnover	R212 million
THEATRES		HOTELS	
No of theatres	16	No of hotels	42
Size of expansion/refurbishment	22 311m ²	Size of hotels	21 838 rooms
Capacity	13 154	No of beds	9 349
No of shows	1 794	Ave occupancy percentage	60%
No of tickets sold	879 558	Percentage foreign vs domestic occupants	4%
Total revenue	R41 million	No of guests	1 866 115
Employees - direct	120	Employees - direct	1 101
Employees - indirect	1 248	Employees - indirect	690
RESTAURANTS		Total annual turnover	R1 billion
No of restaurants	156	CONFERENCE FACILITIES	
Size	62 683m ²	Size	42 349m ²
Capacity	25 428	Capacity	38 076
Employees - full time	3 577	No of conventions	8 605
Casuals	1 440	No of delegates	842 091
Total annual turnover	R1 billion	Employees - direct	262
FAST FOOD OUTLETS		Employees - indirect	3 132
No of outlets	80	Total annual turnover	R268 million
Employees - full time	571	SPORTING EVENTS	
Casuals	117	No of events	41
Total annual turnover	R167 million	No of participants	23 013
CINEMAS		No of spectators	127 850
No of cinemas	62	Employees - direct	1 484
Size	19 421m ²	Employees - indirect	696
Capacity	10 985	Total annual turnover	R76 280 813
No of shows	78 052	TOTAL ANNUAL TURNOVER - OTHER FACILITIES	
No of tickets sold	3 172 743	TOTAL EMPLOYEES - OTHER FACILITIES	
Total Revenue	R103 million	TOTAL EMPLOYEES - OTHER FACILITIES AND CASINOS	
Employees - direct	126	R3 billion	
Employees - indirect	92	16 318	
		50 340	

Profile of South African Casinos by Province: Eastern Cape

Current number of casinos 4 Proposed number of casinos 5 Number of tables 79 Number of machines 1 783 Casino employees 2 914 Gross casino gaming revenue R916 million Casino gaming tax revenue R71 million Visitors 4 067 800 Corporate Social Investment R6 million	ENTERTAINMENT AREAS No of areas 9 Types of entertainment Radio Station, Games Arcade, Child Care Size 3 669m ² Capacity 33 No of guests for 2009/2010 2 700 Employees - full time 129 Total annual turnover R8 million								
NEW EXPANSIONS/REFURBISHMENTS Value of expansions/refurbishment over past year R7 million Size of expansion/refurbishment 1 652m ² Type of expansion/refurbishment Fixtures and Fittings, 3 additional cinemas No of new employees as a result of expansion 15 No of theatres 2 Size of expansion/refurbishment 3 280m ² Capacity 1 343 No of shows 90 No of tickets sold 2009/2010 33 885 Total revenue R217 640	RETAIL OUTLETS No of shops 31 Employees - full time 128 Total annual turnover R88 million								
RESTAURANTS No of restaurants 14 Size 6 895m ² Capacity 1 602 Employees - full time 327 Casuals 25 Total annual turnover R77 million	HOTELS No of hotels 3 Size of hotels 316 rooms No of beds 664 Ave occupancy percentage 75% Percentage foreign vs domestic occupants 4% No of guests for 2009/2010 240,748 Employees - direct 60 Total annual turnover R39 million								
FAST FOOD OUTLETS No of outlets 8 Employees - full time 9 Casuals 8 Total annual turnover R21 million	CONFERENCE FACILITIES Size 5 005m ² Capacity 2 960 No of conventions in 2009/2010 427 No of delegates for 2009/2010 37 391 Employees - direct 43 Employees - indirect 35 Total annual turnover R7 million								
CINEMAS No of cinemas 12 Size 6 776m ² Capacity 1 728 No of shows 22 265 No of tickets sold for 2009/2010 407 288 Total Revenue R14 million Employees - direct 38	PROVINCIAL GAMING TAX BASE <table> <tr> <th>Taxable revenue (millions)</th><th>Rates of tax</th></tr> <tr> <td>0-4</td><td>3.0%</td></tr> <tr> <td>4-8</td><td>5.0%</td></tr> <tr> <td>>8</td><td>10.0%</td></tr> </table>	Taxable revenue (millions)	Rates of tax	0-4	3.0%	4-8	5.0%	>8	10.0%
Taxable revenue (millions)	Rates of tax								
0-4	3.0%								
4-8	5.0%								
>8	10.0%								



PORT ELIZABETH: THE BOARDWALK CASINO AND ENTERTAINMENT WORLD

Date opened	October 2000
Operator	Emfuleni Resorts (Pty) Ltd
Management company	Sun International Management Ltd
Total capital investment	R484 million
Employees	789
Permanent	189
Casual	157
Outsourced	443
Slots	762
Tables	23
Visitors	1 932 593

EAST LONDON: HEMINGWAYS CASINO

Date opened	September 2001
Operator	Tsogo Sun Emonti
Management company	Tsogo Sun Casino Management Company
Total capital investment	R239 million
Employees	511
Permanent	249
Outsourced	262
Slots	391
Tables	12
Visitors	1 268 995

BIZANA: WILD COAST SUN

Date opened	December 1981
Operator	Transkei Sun International (Pty) Ltd
Management company	Sun International Management Ltd
Total capital investment	R188 million
Employees	1 363
Permanent	451
Casual	251
Outsourced	661
Slots	450
Tables	16
Visitors	651 365

QUEENSTOWN: QUEEN'S CASINO

Date opened	December 2007
Operator	Gold Reef Resorts
Management company	Gold Reef Resorts and Kat Leisure
Total capital investment	R129 million
Employees	251
Permanent	225
Casual	14
Outsourced	12
Slots	180
Tables	28
Visitors	214 847



Profile of South African Casinos by Province: Free State

Current number of casinos	4	HOTELS	
Proposed number of casinos	4	No of hotels	2
Number of tables	33	Size of hotels	51 rooms
Number of machines	830	No of beds	72
Casino employees	960	Ave occupancy percentage	63%
Gross casino gaming revenue	R379 million	No of guests for 2009/2010	18 890
Casino gaming tax revenue	R23 million	Employees - direct	21
Visitors	2 429 855	Employees - indirect	4
Corporate Social Investment	R2 million	Total annual turnover	R4 million
THEATRES		CONFERENCE FACILITIES	
No of theatres	1	Size	578m ²
Size of expansion/refurbishment	285m ²	Capacity	720
Capacity	100	No of conventions in 2009/2010	460
No of shows	312	No of delegates for 2009/2010	38 360
No of tickets sold 2009/2010	950	Employees - direct	6
Total revenue	R76 000	Employees - indirect	116
Employees - direct	1	Total annual turnover	R5 million
Employees - indirect	7	PROVINCIAL GAMING TAX BASE	
RESTAURANTS		Taxable revenue (millions)	Rates of tax
No of restaurants	5		5.7%
Size	1 499m ²		
Capacity	730		
Employees - full time	125		
Casuals	33		
Total annual turnover	R24 million		
FAST FOOD OUTLETS			
No of outlets	3		
Employees - full time	11		
Casuals	1		
Total annual turnover	R2 million		
ENTERTAINMENT AREAS			
No of areas	3		
Types of entertainment	Sports Bar, Floor Bar, Games Arcade		
Size	260m ²		
Capacity	320		
No of guests for 2009/2010	298 191		
Employees - full time	36		
Total annual turnover	R3 million		
RETAIL OUTLETS			
No of shops	3		
Employees - full time	14		
Total annual turnover	R2 million		

BETHLEHEM: FRONTIER INN AND CASINO

Date opened	November 2006
Operator	Peermont Global (Eastern Free State) (Pty) Ltd
Management company	Peermont Global (Pty) Ltd
Total capital investment	R110 million
Employees	198
Permanent	130
Casual	30
Outsourced	38
Slots	130
Tables	11
Visitors	298 181

BLOEMFONTEIN: WINDMILL CASINO

Date opened	September 2005
Operator	Sun International Management Ltd
Management company	Sun International
Total capital investment	R203 million
Employees	371
Permanent	191
Casual	15
Outsourced	165
Slots	300
Tables	13
Visitors	1 158 000

THABA 'NCHU: NALEDI SUN

Date opened	May 1989
Operator	Sun International
Management company	Sun International
Total capital investment	R17 million
Employees	99
Permanent	77
Casual	2
Outsourced	20
Slots	150
Visitors	200 000

WELKOM: GOLDFIELDS CASINO AND ENTERTAINMENT CENTRE

Date opened	December 2003
Operator	Goldfields Casino and Entertainment Centre (Pty) Ltd
Management company	Gold Reef Resorts
Total capital investment	R133 million
Employees	292
Permanent	224
Outsourced	68
Slots	250
Tables	9
Visitors	773 674



Profile of South African Casinos by Province: Gauteng

Current number of casinos 7 Proposed number of casinos 7 Number of tables 326 Number of machines 8 742 Casino employees 11 824 Gross casino gaming revenue R6 billion Casino gaming tax revenue R540 million Visitors 22 845 329 Corporate Social Investment R59 million	ENTERTAINMENT AREAS No of areas 27 Types of entertainment Comedy Club, Cinemas, Children's Games, Ten Pin Bowling etc Size 21 277m ² Capacity 5 025 No of guests for 2009/2010 345 603 Employees - full time 198 Casuals 121 Total annual turnover R112 million				
NEW EXPANSIONS/REFURBISHMENTS Value of expansions/refurbishment over past year R538 million Type of expansion/refurbishment Breeding centre for animals, hotel, parking, Emporium No of new employees as a result of expansion 19	RETAIL OUTLETS No of shops 46 Employees - full time 151 Casuals 34 Total annual turnover R79 million				
THEATRES No of theatres 8 Size of expansion/refurbishment 14 119m ² Capacity 9 574 No of shows 952 No of tickets sold 2009/2010 719 224 Total revenue R35 million Employees - direct 67 Employees - indirect 1 216	HOTELS No of hotels 13 Size of hotels 1 729 rooms No of beds 2 224 Ave occupancy percentage 79% Percentage foreign vs domestic occupants 8% No of guests for 2009/2010 640 334 Employees - direct 383 Employees - indirect 289 Total annual turnover R359 million				
RESTAURANTS No of restaurants 60 Size 26 080m ² Capacity 10 501 Employees - full time 1 492 Casuals 536 Total annual turnover R475 million	CONFERENCE FACILITIES Size 14 733m ² Capacity 15 516 No of conventions in 2009/2010 3 761 No of delegates for 2009/2010 444 327 Employees - direct 106 Employees - indirect 2 087 Total annual turnover R110 million				
FAST FOOD OUTLETS No of outlets 32 Employees - full time 277 Casuals 47 Total annual turnover R71 million	SPORTING EVENTS No of events 11 Type of events Tennis, off-road racing, boxing, cycling etc No of participants 4 042 No of spectators 45 089 Facilities used Theatre, car park, restaurant, gaming Employees - direct 27 Employees - indirect 45 Total annual turnover R457 365				
CINEMAS No of cinemas 27 Size 6 625m ² Capacity 5 569 No of shows 41 714 No of tickets sold for 2009/2010 1 488 863 Total Revenue R59 million Employees - direct 73 Employees - indirect 14	PROVINCIAL GAMING TAX BASE <table> <tr> <th>Taxable revenue (millions)</th><th>Rates of tax</th></tr> <tr> <td></td><td>9%</td></tr> </table>	Taxable revenue (millions)	Rates of tax		9%
Taxable revenue (millions)	Rates of tax				
	9%				

MABOPANE: MORULA SUN CASINO

Date opened	June 1989
Operator	Sun International
Management company	Sun International Management Ltd
Total capital investment	R205 million
Employees	564
Permanent	411
Casual	4
Outsourced	149
Slots	510
Tables	12
Visitors	834 395

FOURWAYS: MONTECASINO

Date opened	November 2000
Operator	Tsogo Sun Casinos (Pty) Ltd
Management company	Tsogo Sun Casino Management Company
Total capital investment	R2 billion
Employees	2 427
Permanent	1 161
Casual	48
Outsourced	1 218
Slots	1 714
Tables	76
Visitors	8 825 731

JOHANNESBURG: GOLD REEF CITY CASINO

Date opened	October 1998
Operator	Akani Egoli (Pty) Ltd
Management company	Akani Egoli Management (Pty) Ltd
Total capital investment	R2 billion
Employees	1 618
Permanent	1 043
Casual	25
Outsourced	550
Slots	1 600
Tables	50
Visitors	2 580 705

VANDERBIJLPARK: EMERALD CASINO RESORT

Date opened	December 1999
Operator	Emerald Safari Resort (Pty) Ltd
Management company	London Clubs International
Total capital investment	R622 million
Employees	946
Permanent	240
Casual	151
Outsourced	555
Slots	660
Tables	33
Visitors	1 320 992

KEMPTON PARK: EMPERORS PALACE HOTEL CASINO AND CONVENTION RESORT

Date opened	December 1998
Operator	Peermont Global (Pty) Ltd
Management company	Peermont Global (Pty) Ltd
Total capital investment	R3.2 billion
Employees	2 283
Permanent	1 389
Casual	118
Outsourced	776
Slots	1 724
Tables	74
Visitors	4 654 956

BRAKPAN: CARNIVAL CITY

Date opened	May 2001
Operator	Afrisun Gauteng (Pty) Ltd
Management company	Sun International Ltd
Total capital investment	R1 million
Employees	3 438
Permanent	722
Casual	20
Outsourced	2 696
Slots	1 750
Tables	57
Visitors	3 151 744

WEST RAND: SILVERSTAR CASINO RESORT

Date opened	December 2007
Operator	Silver Star Casino
Management company	Gold Reef Resorts
Total capital investment	R1 billion
Employees	548
Permanent	548
Slots	784
Tables	24
Visitors	1 476 806



Profile of South African Casinos by Province: KwaZulu Natal

Current number of casinos	5	ENTERTAINMENT AREAS	
Proposed number of casinos	5	No of areas	7
Number of tables	133	Types of entertainment	Games Arcade, Night Club
Number of machines	3 433	Size	3 614m ²
Casino employees	4 030	Capacity	1 940
Gross casino gaming revenue	R2 billion	No of guests for 2009/2010	91 557
Casino gaming tax revenue	R260 million	Employees - full time	50
Visitors	14 441 002	Casuals	35
Corporate Social Investment	R10 million	Total annual turnover	R15 million
NEW EXPANSIONS/REFURBISHMENTS		RETAIL OUTLETS	
Value of expansions/refurbishment over past year	R33 million	No of shops	5
Size of expansion/refurbishment	3 386m ²	Employees - full time	26
Type of expansion/refurbishment	Gaming expansion, hotel, conference areas	Casuals	16
THEATRES		Total annual turnover	R19 million
No of theatres	1	HOTELS	
Size of expansion/refurbishment	907m ²	No of hotels	5
Capacity	577	Size of hotels	17 290 rooms
No of shows	115	No of beds	573
No of tickets sold 2009/2010	46 290	Ave occupancy percentage	63%
Total revenue	R238 630	Percentage foreign vs domestic occupants	4%
Employees - indirect	3	No of guests for 2009/2010	116 992
RESTAURANTS		Employees - direct	183
No of restaurants	29	Employees - indirect	4
Size	12 572m ²	Total annual turnover	R88 million
Capacity	5 087	CONFERENCE FACILITIES	
Employees - full time	909	Size	2 819m ²
Casuals	357	Capacity	1 625
Total annual turnover	R209 million	No of conventions in 2009/2010	1 236
FAST FOOD OUTLETS		No of delegates for 2009/2010	80 872
No of outlets	11	Employees - direct	29
Employees - full time	184	Employees - indirect	69
Casuals	35	Total annual turnover	R22 million
Total annual turnover	R46 million	SPORTING EVENTS	
CINEMAS		No of events	11
No of cinemas	8	Type of events	Various
Size	3 579m ²	No of participants	8 650
Capacity	1 501	No of spectators	9 361
No of shows	203	Facilities used	Various
No of tickets sold for 2009/2010	840 331	Employees - direct	7
Total Revenue	R14 million	Employees - indirect	20
Employees - direct	10	PROVINCIAL GAMING TAX BASE	
Employees - indirect	30	Taxable revenue (millions)	Rates of tax
		30	9.0%
		>30	12.0%
		+ 0.5% local government levy	

DURBAN: SUNCOAST CASINO AND ENTERTAINMENT WORLD

Date opened	November 2002
Operator	Tsogo Sun KwaZulu-Natal (Pty) Ltd
Management company	Tsogo Sun Casino Management Company
Total capital investment	R1 billion
Employees	1 516
Permanent	967
Casual	63
Outsourced	486
Slots	1 330
Tables	50
Visitors	8 512 154

DURBAN: SIBAYA CASINO AND ENTERTAINMENT KINGDOM

Date opened	December 2004
Operator	Afrisun KZN (Pty) Limited
Management company	Sun International
Total capital investment	R740 million
Employees	1 648
Permanent	605
Casual	10
Outsourced	1 033
Slots	1 142
Tables	43
Visitors	3 180 933

EMPANGENI: UMFOLOZI CASINO

Date opened	May 2002
Operator	Peermont Global (KZN) (Pty) Ltd
Management company	Peermont Global Management (KZN) (Pty) Ltd
Total capital investment	R80 million
Employees	278
Permanent	222
Outsourced	56
Slots	261
Tables	10
Visitors	720 000

NEWCASTLE: BLACKROCK CASINO

Date opened	September 1999
Operator	Tsogo Sun
Management company	Tsogo Sun
Total capital investment	R4 million
Employees	326
Permanent	147
Casual	72
Outsourced	107
Slots	250
Tables	7
Visitors	322 135

PIETERMARITZBURG: GOLDEN HORSE CASINO

Date opened	September 2001
Operator	Gold Reef Resorts
Management company	Akani Msunduzi Management
Total capital investment	R414 million
Employees	262
Permanent	262
Slots	450
Tables	23
Visitors	1 705 780



Profile of South African Casinos by Province: Limpopo

Current number of casinos	2	RETAIL OUTLETS	
Proposed number of casinos	3	No of shops	3
Number of tables	23	Employees - full time	22
Number of machines	514	Total annual turnover	R3 million
Casino employees	894	HOTELS	
Gross casino gaming revenue	R303 million	No of hotels	2
Casino gaming tax revenue	R18 million	Size of hotels	184 rooms
Visitors	1 520 235	No of beds	294
Corporate Social Investment	R685 510	Ave occupancy percentage	64%
RESTAURANTS		Percentage foreign vs domestic occupants	5%
No of restaurants	2	No of guests for 2009/2010	49 489
Size	622m ²	Employees - direct	48
Capacity	300	Employees - indirect	14
Employees - full time	42	Total annual turnover	R92 million
Casuals	72	CONFERENCE FACILITIES	
Total annual turnover	R11 million	Size	1 592m ²
FAST FOOD OUTLETS		Capacity	750
No of outlets	2	No of conventions in 2009/2010	120
Employees - full time	8	No of delegates for 2009/2010	22 200
Casuals	3	Employees - direct	8
Total annual turnover	R2 million	Employees - indirect	62
ENTERTAINMENT AREAS		Total annual turnover	R5 million
No of areas	1	PROVINCIAL GAMING TAX BASE	
Types of entertainment	Sports Bar	Taxable revenue (millions)	Rates of tax
Size	431m ²		6.0%
Capacity	300		
No of guests for 2009/2010	15 600		
Employees - full time	10		
Total annual turnover	R1 881 169		



POLOKWANE: MEROPA LEISURE AND ENTERTAINMENT PTY LTD

Date opened	March 2002
Operator	Sun International
Management company	Meropa Casino Resort Manco (Pty) Ltd
Total capital investment	R224 million
Employees	596
Permanent	221
Outsourced	375
Slots	374
Tables	16
Visitors	881 000

THOHOYANDOU: KHORONI HOTEL CASINO AND CONVENTION RESORT

Date opened	October 2006
Operator	Peermont Global (Limpopo) (Pty) Ltd
Management company	Peermont Global (Limpopo) (Pty) Ltd
Total capital investment	R24 million
Employees	298
Permanent	185
Casual	3
Outsourced	110
Slots	140
Tables	7
Visitors	639 235



Profile of South African Casinos by Province: Mpumalanga

Current number of casinos 3 Proposed number of casinos 4 Number of tables 46 Number of machines 1 103 Casino employees 1 101 Gross casino gaming revenue R586 million Casino gaming tax revenue R29 million Visitors 3 494 470 Corporate Social Investment R2 million	RETAIL OUTLETS No of shops 3 Employees - full time 18 Casuals 7 Total annual turnover R5 million HOTELS No of hotels 5 Size of hotels 497 rooms No of beds 582 Ave occupancy percentage 57% Percentage foreign vs domestic occupants 11% No of guests for 2009/2010 146 566 Employees - direct 133 Employees - indirect 94 Total annual turnover R65 million CONFERENCE FACILITIES Size 2 268m ² Capacity 2 120 No of conventions in 2009/2010 772 No of delegates for 2009/2010 28 900 Employees - direct 10 Employees - indirect 144 Total annual turnover R8 million SPORTING EVENTS No of events 5 Type of events Golf, boxing, screenings of various sports No of participants 330 No of spectators 3 048 Facilities used Graceland arena, Country Club and restaurants Employees - direct 33 Employees - indirect 31 Total annual turnover R222 000 PROVINCIAL GAMING TAX BASE <table> <tr> <th>Taxable revenue (millions)</th><th>Rates of tax</th></tr> <tr> <td></td><td>5.7%</td></tr> </table>	Taxable revenue (millions)	Rates of tax		5.7%
Taxable revenue (millions)	Rates of tax				
	5.7%				
NEW EXPANSIONS/REFURBISHMENTS Value of expansions/refurbishment over past year R175 million Type of expansion/refurbishment Hotel, Salon Prive, Refurbishment casino No of new employees as a result of expansion 75					
RESTAURANTS No of restaurants 6 Size 740m ² Capacity 566 Employees - full time 55 Casuals 54 Total annual turnover R19 million					
FAST FOOD OUTLETS No of outlets 1 Employees - full time 2 Casuals 8 Total annual turnover R1 million					
CINEMAS No of cinemas 7 Capacity 1 110 No of shows 1 095 No of tickets sold for 2009/2010 245 993 Total Revenue R10 million Employees - direct 1 Employees - indirect 28					
ENTERTAINMENT AREAS No of areas 5 Types of entertainment Musicals, shows, Magic Company Size 2 22 m ² Capacity 2 710 Employees - full time 37 Casuals 51 Total annual turnover R16 million					

WITBANK: THE RIDGE CASINO & ENTERTAINMENT RESORT

Date opened	March 1998
Operator	Tsogo Sun
Management company	Tsogo Sun Holdings
Total capital investment	R380 million
Employees	281
Permanent	129
Casual	152
Slots	425
Tables	18
Visitors	1 440 000

SECUNDA: GRACELAND HOTEL, CASINO AND COUNTRY CLUB

Date opened	October 1997
Operator	Peermont Global
Management company	Peermont Global
Total capital investment	R250 million
Employees	495
Permanent	284
Casual	10
Outsourced	201
Slots	311
Tables	18
Visitors	912 500

NELSPRUIT: EMNOTWENI CASINO

Date opened	October 1997
Operator	Tsogo Sun
Management company	Tsogo Sun
Total capital investment	R170 million
Employees	325
Permanent	201
Casual	10
Outsourced	114
Slots	367
Tables	10
Visitors	1 141 970



Profile of South African Casinos by Province: Northern Cape

Current number of CASA-affiliated casinos	1	RETAIL OUTLETS	
Proposed number of casinos	3	No of shops	1
Number of tables	9	Employees - full time	7
Number of machines	250	Total annual turnover	R1 million
Casino employees	258	HOTELS	
Gross casino gaming revenue	R161 million	No of hotels	1
Casino gaming tax revenue	R11 million	CONFERENCE FACILITIES	
Visitors	908 567	Size	440m ²
Corporate Social Investment	R346 277	Capacity	180
NEW EXPANSIONS/REFURBISHMENTS		No of conventions in 2009/2010	93
Value of expansions/refurbishment over past year	R494 694	No of delegates for 2009/2010	8 570
Size of expansion/refurbishment	50m ²	Employees - direct	8
Type of expansion/refurbishment	Private gaming room	Employees - indirect	30
No of new employees as a result of expansion	2	Total annual turnover	R2 million
RESTAURANTS		PROVINCIAL GAMING TAX BASE	
No of restaurants	1	Taxable revenue (millions)	Rates of tax
Size	279m ²		8.0%
Capacity	86	(2% Development Trust)	
Employees - full time	35		
Casuals	1		
Total annual turnover	R4 million		
ENTERTAINMENT AREAS			
No of areas	1		
Types of entertainment	Live entertainment		
Size	358m ²		
Capacity	250		
No of guests for 2009/2010	20 090		
Employees - full time	12		
Casuals	2		
Total annual turnover	R2 million		



KIMBERLEY: FLAMINGO CASINO

Date opened	March 2002
Operator	Teemane (Pty) Ltd
Management company	Sun International
Total capital investment	R150 million
Employees	258
Permanent	159
Outsourced	99
Slots	250
Tables	9
Visitors	908 567

DESERT PALACE

NOT A MEMBER OF CASA

KURUMAN: LEITLHO RESORT AND ENTERTAINMENT WORLD

NOT A MEMBER OF CASA



Profile of South African Casinos by Province: North West

Current number of casinos	4	RETAIL OUTLETS	
Proposed number of casinos	4	No of shops	17
Number of tables	78	Employees - full time	4
Number of machines	1 730	Total annual turnover	R3 million
Casino employees	9 625	HOTELS	
Gross casino gaming revenue	R908 million	No of hotels	8
Casino gaming tax revenue	R61 million	Size of hotels	1 578 rooms
Visitors	2 001 626	No of beds	4 617
Corporate Social Investment	R7 million	Ave occupancy percentage	66%
NEW EXPANSIONS/REFURBISHMENTS		Percentage foreign vs domestic occupants	3%
Value of expansions/refurbishment over past year	R40 million	No of guests for 2009/2010	562 388
Type of expansion/refurbishment	Resort voltage upgrade, hotel refurbishment	Employees - direct	216
THEATRES		Employees - indirect	238
No of theatres	3	Total annual turnover	R477 million
Size of expansion/refurbishment	3 288m ²	CONFERENCE FACILITIES	
Capacity	1 400	Size	13 857m ²
No of shows	319	Capacity	13 535
No of tickets sold 2009/2010	61 778	No of conventions in 2009/2010	1 389
Total revenue	R2 million	No of delegates for 2009/2010	132 023
Employees - direct	52	Employees - direct	39
Employees - indirect	17	Employees - indirect	587
RESTAURANTS		Total annual turnover	R109 million
No of restaurants	22	SPORTING EVENTS	
Size	8 141m ²	No of events	14
Capacity	4 418	Type of events	Golf, Motor Cross, Swimming, Tennis
Employees - full time	292	No of participants	9 991
Casuals	206	No of spectators	70 352
Total annual turnover	R109 million	Facilities used	Golf courses, Motor Cross tracks, Swimming pools etc
FAST FOOD OUTLETS		Employees - direct	1 417
No of outlets	12	Employees - indirect	600
CINEMAS		Total annual turnover	R76 million
No of cinemas	2	PROVINCIAL GAMING TAX BASE	
Size	200m ²	Taxable revenue (millions)	Rates of tax
Capacity	203		3.0%
No of shows	1 825		
ENTERTAINMENT AREAS			
No of areas	1		
Types of entertainment	Entertainment Centre, Golf courses		
Size	99m ²		
Capacity	50		
No of guests for 2009/2010	7 300		
Employees - full time	401		
Casuals	39		
Total annual turnover	R505 794		



MMABATHO: MMABATHO PALMS CASINO HOTEL AND CONVENTION

Date opened	January 1999
Operator	Peermont Global (Pty) Ltd
Management company	Peermont Global (NW&L) (Pty) Ltd
Total capital investment	R252 million
Employees	310
Permanent	158
Outsourced	152
Slots	155
Tables	8
Visitors	258 823

PILANESBURG: SUN CITY

Date opened	December 1979
Operator	Sun International
Management company	Sun International Management Limited
Total capital investment	R1 billion
Employees	7 942
Permanent	1 417
Casual	1 180
Outsourced	5 345
Slots	601
Tables	38
Visitors	844 325

KLERKSDORP: RIO CASINO HOTEL CONVENTION RESORT

Date opened	September 2004
Operator	Peermont Global (Pty) Ltd
Management company	Peermont Global (NW&L) (Pty) Ltd
Total capital investment	R223 million
Employees	320
Permanent	190
Casual	50
Outsourced	80
Slots	274
Tables	13
Visitors	352 478

HAMMANSKRAAL: THE CAROUSEL CASINO AND ENTERTAINMENT WORLD

Date opened	November 1991
Operator	Sun International
Management company	Sun International
Total capital investment	R310 million
Employees	1 053
Permanent	261
Casual	82
Outsourced	710
Slots	700
Tables	19
Visitors	546 000



Profile of South African Casinos by Province: Western Cape

Current number of casinos	5	ENTERTAINMENT AREAS	
Proposed number of casinos	5	No of areas	8
Number of tables	115	Types of entertainment	Children's entertainment, shows, Night Clubs, Action Bar
Number of machines	3 806	Size	27 518m ²
Casino employees	2 416	Capacity	7 558
Gross casino gaming revenue	R2 billion	No of guests for 2009/2010	955 165
Casino gaming tax revenue	R250 million	Employees - full time	43
Visitors	7 417 289	Casuals	17
Corporate Social Investment	R21 million	Total annual turnover	R22 million
NEW EXPANSIONS/REFURBISHMENTS		RETAIL OUTLETS	
Value of expansions/refurbishment over past year	R39 million	No of shops	8
Size of expansion/refurbishment	150	Employees - full time	29
Type of expansion/refurbishment	Upgrade Spa and conference venue, gaming floor expanded	Casuals	25
No of new employees as a result of expansion	7	Total annual turnover	R14 million
THEATRES		HOTELS	
No of theatres	1	No of hotels	3
Size of expansion/refurbishment	432m ²	Size of hotels	193 rooms
Capacity	160	No of beds	323
No of shows	6	Ave occupancy percentage	74%
No of tickets sold 2009/2010	17 431	Percentage foreign vs domestic occupants	5%
Total revenue	R3 million	No of guests for 2009/2010	90 708
Employees - indirect	5	Employees - direct	57
RESTAURANTS		Employees - indirect	47
No of restaurants	17	Total annual turnover	R19 million
Size	5 855m ²	CONFERENCE FACILITIES	
Capacity	2 138	Size	1 057m ²
Employees - full time	300	Capacity	670
Casuals	156	No of conventions in 2009/2010	347
Total annual turnover	R89 million	No of delegates for 2009/2010	49 448
FAST FOOD OUTLETS		Employees - direct	13
No of outlets	11	Employees - indirect	2
Employees - full time	80	Total annual turnover	R2 million
Casuals	15	PROVINCIAL GAMING TAX BASE	
Total annual turnover	R24 million		
CINEMAS			
No of cinemas	6		
Size	2 241m ²		
Capacity	874		
No of shows	10 950		
No of tickets sold for 2009/2010	190 268		
Total Revenue	R7 million		
Employees - direct	4		
Employees - indirect	20		

CAPE TOWN: GRANDWEST

Date opened	December 2000
Operator	SunWest International
Management company	Sun International Management Ltd
Total capital investment	R62 million
Employees	1 048
Permanent	1 048
Slots	2 524
Tables	76
Visitors	5 552 671

CALEDON: CALEDON HOTEL SPA CASINO

Date opened	October 2000
Operator	Tsogo Sun Caledon (Pty) Ltd
Management company	Tsogo Sun Gaming (Pty) Ltd
Total capital investment	R159 million
Employees	368
Permanent	180
Casual	124
Outsourced	64
Slots	346
Tables	8
Visitors	263 073

LANGEBAAN: CASINO MYKONOS (PTY) LTD

Date opened	September 2000
Operator	Gold Reef Resorts Ltd
Management company	Gold Reef Management (Pty) Ltd
Total capital investment	R74 million
Employees	300
Permanent	200
Outsourced	100
Slots	300
Tables	9
Visitors	873 134

MOSSEL BAY: GARDEN ROUTE CASINO

Date opened	December 2002
Operator	Garden Route Casino (Pty) Ltd
Management company	Gold Reef Management (Pty) Ltd
Total capital investment	R168 million
Employees	352
Permanent	235
Outsourced	117
Slots	412
Tables	16
Visitors	394 078

WORCESTER: GOLDEN VALLEY CASINO

Date opened	November 2006
Operator	Worcester Casino (Pty) Ltd
Management company	Sun International Management Limited
Total capital investment	R187 million
Employees	348
Permanent	153
Outsourced	195
Slots	224
Tables	6
Visitors	334 333



Casino Company Profiles

TSOGO SUN GAMING

Tsogo Sun Gaming is one of two companies owned by Tsogo Sun Holdings, the largest black empowerment company in the leisure industry in South Africa. Tsogo Sun Holdings also owns 100% shares in the hotel interests of Southern Sun, the largest hotel and entertainment group in South Africa; as well as being responsible for the development of the Sandton Convention Centre.

Tsogo Sun Holdings has a shareholding split between Tsogo Investments (51%) and SABMiller (49%).

Tsogo Sun Gaming incorporates seven casino properties: Montecasino in Johannesburg, Suncoast Casino and Entertainment World in Durban, Hemingways Casino Resort in East London, The Ridge Casino and Entertainment Resort in Witbank, Emnotweni Casino and Entertainment World in Nelspruit, and the recently acquired The Caledon Casino, Hotel & Spa in the Overberg region of the Western Cape and Century Casino Newcastle.

GOLD REEF RESORTS LTD

Gold Reef Resorts Ltd's interests incorporate Akani Egoli (Pty) Limited, which operates Gold Reef City Casino and Theme Park, West Coast Leisure (Pty) Limited, which operates Mykonos Casino, Akani Msunduzi (Pty) Limited, which operates Golden Horse Casino, Garden Route Casino (Pty) Ltd, which operates The Garden Route Casino, Goldfields Casino and Entertainment Centre (Pty) Ltd, which operates Goldfields Casino, Silverstar Casino (Pty) Ltd, which operates Silverstar Casino, and Lukhanji Leisure (Pty) Ltd, which operates Queens Casino.

LONDON CLUBS INTERNATIONAL

London Clubs International (LCI) has been publicly quoted on the London Stock Exchange since 1994. It has casinos in London, Egypt, Lebanon, and South Africa (Emerald Casino Resort in Vanderbijlpark). The group operates wholly-owned casinos in the United Kingdom and joint ventures and management contracts overseas.

In 2006, the company was acquired by US-based Harrah's, the world's largest casino owner and operator.

PEERMONT GLOBAL

PeerMont Hotels, Casinos and Resorts is a hospitality and gaming company that operates in South Africa and Botswana. PeerMont has an excellent track record in the design, development, management, ownership and operation of multi-faceted integrated resorts, including hotels, casinos, convention centres, retail centres, health spas, restaurants, bars and other sport and entertainment facilities.

In April 2007 the Mineworkers Investment Company ("MIC") led a consortium that included management and community trusts in a buy-out of PeerMont valued at approximately R7.3 billion, the first and largest public to private broad-based black economic empowerment ("B-BBEE") transaction in South Africa at the time. The effective B-BBEE voting and economic interest in PeerMont established it as a leader in the gaming and hospitality industry - and touching well over a million South African lives.

This transaction was awarded the 2008 Barloworld Wits Business School BEE Deal of the Year Award and the 2008 Black Business Quarterly Award, effectively making PeerMont a leading empowered gaming and tourism company in South Africa.

PeerMont's competitive status is achieved by combining powerful shareholders, entrepreneurial management and corporate values with exceptional service, high quality products and incredible attention to detail. PeerMont also respects the traditions of local communities and prides itself on its Corporate Social Investment ("CSI") initiatives in disadvantaged communities.

PeerMont operates a total of 14 properties, nine in South Africa and five in Botswana. Collectively, these 14 properties offer 3 273 slot machines, 155 gaming tables and 1 631 hotel rooms. Recent development announcements include the refurbishment of the casino and a new hotel and convention centre development at Umfolozi Resort in Empangeni. By design, therefore, PeerMont operates in the casino, hotel and convention markets - different industries with different target markets, yet offering considerable synergies.

PeerMont Hotels, Casinos and Resorts include:

Emperors Palace Hotel Casino Convention Entertainment Resort, Johannesburg; Graceland Hotel Casino and Country Club,

Secunda; Mondazur Hotel at San Lameer, KwaZulu-Natal; Frontier Inn & Casino, Bethlehem; Umfolozi Hotel Casino Convention Resort, Empangeni; Rio Hotel Casino Convention Resort, Klerksdorp; Khoroni Hotel Casino Convention Resort, Thohoyandou; Taung Hotel Convention Resort, Taung and Mmabatho Palms Hotel Casino Convention Resort in Mafikeng. In Botswana, Peermont owns and manages The Grand Palm Hotel Casino Convention Resort and the Mondior hotel in Gaborone; the Metcourt hotel as well as the Sedibeng Casino in Francistown and Syringa Casino in Selebi Phikwe.

SUN INTERNATIONAL

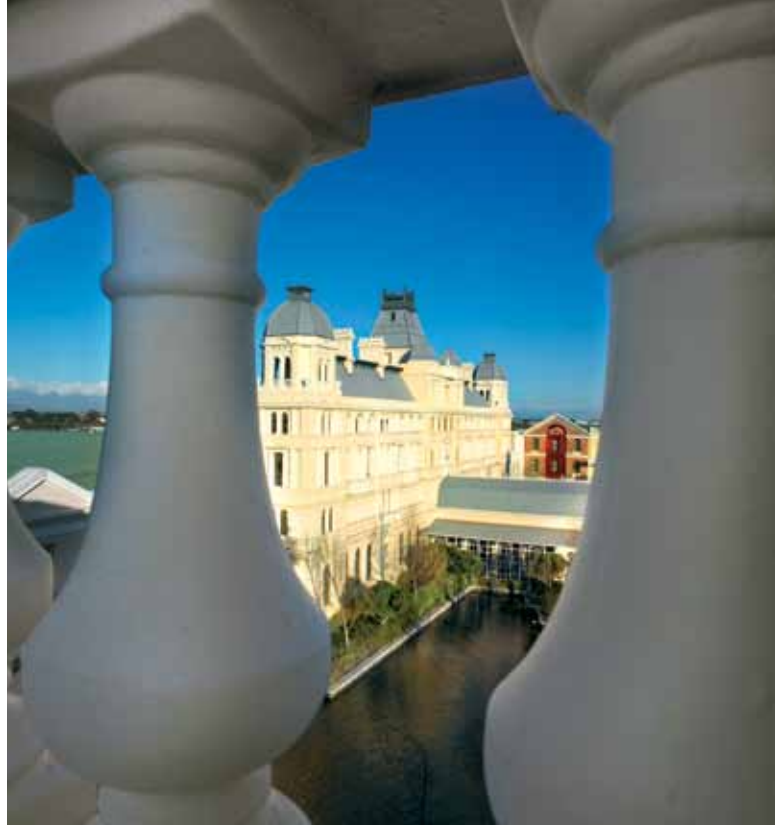
Sun International was established in 1983 and listed on the Johannesburg Stock Exchange in 1985. The group operates 22 casinos in southern Africa, including 13 of the 36 casino licences in South Africa.

As Africa's most significant tourism and leisure group, Sun International owns and operates internationally acclaimed tourism resorts, luxury hotels and urban entertainment operations in 15 regulated jurisdictions in eight countries, including South Africa, Zambia, Nigeria, Botswana, Namibia, Lesotho, Swaziland and Chile. More than half of this portfolio has been developed in the last ten years, with new projects having been launched in West Africa and South America.

Every day, over 50 000 customers from over 50 countries visit a Sun International property, accounting for over 250 000 room nights sold each year to international tourists.

Over a period of three decades, the group has invested more than R14 billion in new tourism infrastructure. It employs some 10 000 people, has indirectly created 50 000 new employment opportunities in the broader tourism industry, and it has been estimated that its business has a direct impact on the livelihood of more than 500 000 people in southern Africa.

Sun International is the leading casino operator in the southern hemisphere and enjoys a 41% share of the South African casino market.



Corporate Social Investment

GOLD REEF RESORTS

1. Introduction to Corporate Social Investment Activities.

Gold Reef's commitment to social and community upliftment is reflected in its contributions to a diverse range of beneficiaries and areas, which include preferential procurement and a commitment to black economic empowerment. CSI spend is principally focused on Education, Health and the promotion of South Africa's heritage. Each group operation has a formal CSI policy in place to establish and maintain relations with the communities in which it operates. Gold Reef Resorts Ltd's interests incorporate Akani Egoli (Pty) Limited, which operates Gold Reef City Casino and Theme Park, West Coast Leisure (Pty) Limited, which operates Mykonos Casino, Akani Msunduzi (Pty) Limited, which operates Golden Horse Casino, Garden Route Casino (Pty) Ltd, which operates the Garden Route Casino, Goldfields Casino and Entertainment Centre (Pty) Ltd, which operates Goldfields Casino, Silverstar Casino (Pty) Ltd, which operates Silverstar Casino, and Lukhanji Leisure (Pty) Ltd, which operates Queens Casino.

2. CSI Funding

The funding for CSI originates from the various operating units within the Gold Reef Group and is based on fixed percentages of gaming revenues or net profits before tax.

The Gold Reef's Group's total CSI spend for the period 1 April 2009 to 30 March 2010 amounted to R24,7 million.

3. Committed Human Resources

The Gold Reef Board of Directors or sub-committees oversee the effectiveness of the CSI spending. Gold Reef executive directors are responsible for the allocations, based on proposals submitted by the management of the various operating units.

4. Special Purpose Vehicles for CSI

Garden Route Community Trust

Garden Route Casino contributes 1% of its gaming revenues to the Garden Route Community Trust which ensures that donations are allocated to local projects such as AIDS hospices and recreational development programmes. The Garden Route Community Trust consists of 6 trustees, representing the

municipality, the community and the casino. These trustees meet quarterly to distribute the funds to worthy causes within the greater Mossel Bay area. The trustees review all the projects for effectiveness. Actual contributions made by the trust from April 2009 to March 2010 amounted to R2 306 916.

West Coast Community Trust

Mykonos Casino donates 5% of its audited pre-tax profits to the West Coast Community Trust which was established primarily to provide educational assistance to the local community. The West Coast Community Trust's trustees are responsible for identifying and distributing funds to these beneficiaries. The Trust provides regular written reports to the casino's board of directors and ensures the selection of credible beneficiaries with valid motivations. Actual contributions made by the Trust from April 2009 to March 2010 amounted to R3 363 663.

Goldfields Casino Community Development Trust

Goldfields Casino donates the greater of R200 000 or 1.5 % of profit after tax to the Goldfields Casino Community Development Trust which was established for the benefit of the community of the Free State Goldfields Area, with specific but not the only focus on job creation, community development and community involvement projects, to either upgrade existing facilities or to establish facilities within the community. The Goldfields Casino Community Development Trust's trustees are responsible for identifying and distributing funds to these beneficiaries. Actual contributions made by the Trust from April 2009 to March 2010 amounted to R93 208.

Zulu Kama Community Trust

Queens Casino donates a percentage of its management fees paid to its BEE partners to the Zulu Kama Community Trust. A Trust whose purpose is to benefit women, youth and disadvantaged individuals within 26 surrounding sponsorship programmes focusing on sport and cultural events to assist local development. Actual contributions made to the Trust by Queens Casino amounted to R251 653.

5. Provincial CSI

Gauteng

Project/Beneficiary	Amount	Area of focus
South African Apartheid Museum at Freedom Park	R4 395 936	Continuation of funding for the Apartheid Museum at Freedom Park
Ma Afrika Tikkun	R5 043 357	Akani Egoli t/a Gold Reef City Casino and Silverstar Casino have jointly committed to contributing
R7 million to Ma Afrika Tikkun in Orange Farm, focusing on the following areas of national and social concern: Healthcare, education, youth development, Skills transfer, job creation, care of orphans and vulnerable children and poverty alleviation. The donation consists of a once off amount of R6 million for the erection of a youth development centre on the Orange Farm Community Centre precinct and an additional R1 million per annum to cover ongoing operational costs for this facility.		
Responsible Gambling Programme	R1 598 734	Organisation which helps persons with gambling problems.
Community development and infrastructure	R1 925 197	Payment for the erection of street lights in the West Rand of Johannesburg.
Ithuba Skills College	R250 000	Funding required for the completion of construction of the Ithuba Skills College.
Christmas Wish list	R879 856	Medical costs paid on behalf of the 94.7 Christmas Wish list project.
CANSA - Westrand	R180 000	CANSA is a community-driven and volunteer-based organisation that has been fighting cancer to save lives for the past 79 years.
Dreamfields Soccer Project	R585 533	Soccer initiative for Westrand underprivileged kids
Other CSI Spend	R2 737 108	
Total	R17 595 721	



Corporate Social Investment

KwaZulu-Natal

Project/Beneficiary	Amount	Area of focus
Olwazini Discovery Centre (Science Centre)	R530 304	This is a centre which offers its facilities free of charge to schools and the community.
Responsible Gambling Programme	R291 590	Organisation which helps persons with gambling problems
The Careways Group	R74 735	Organisation that provides counselling to employees with HIV/AIDS
Other CSI Spend	R237 547	
Kwa-Zulu Natal Total	R1 134 176	

Western Cape

The amounts detailed below reflect the actual contributions made by the Garden Route Community Trust and the West Coast Community Trust from April 2009 to March 2010.

Project/Beneficiary	Amount	Area of focus
Garden Route Community Trust - Ruitersbos Primary School	R 149 374	A level sports field was built for this poor rural school in the Greater Mossel Bay area.
Garden Route Community Trust - Phelophepa Health Train	R 99 924	This medical train came into Mossel Bay for a week to provide free medical help to residents. The Trust paid for all the transportation of patients to and from the train.
Garden Route Community Trust - Maths and Science extra lessons / IT tuition	R 45 660	Maths and science extra lessons for high school learners were financed by the Trust along with the education in IT of 20 unemployed matriculants.
Garden Route Community Trust - Environmental - Upgrade of St Blaize Hiking Trail	R 369 321	This involved the alien bush clearing and restoration of one of South Africa's premier hiking trails around the coast of Mossel Bay
Garden Route Community Trust - Soccer field change rooms	R 627 000	Professional soccer change rooms were built on Mossel Bay's premier soccer fields with the municipality upgrading the fields to world class standard.
Garden Route Community Trust - Diaz Primary School	R 89 590	A soup kitchen was built at this school to provide learners with food who cannot afford it.
Garden Route Community Trust - Green Post	R 107 556	The Trust paid for a monthly environmental awareness page to be compiled and placed in the Mossel Bay Advertiser.
Garden Route Community Trust – Other CSI Spend	R 818 492	
West Coast Community Trust	R 2 564 513	Training costs for the youth and the unemployed in the local community.
West Coast Community Trust	R 770 000	Building costs for education centres and housing for the poor in the local community.
West Coast Community Trust -Other CSI Spend	R 29 150	
Total	R 5 670 579	

Free State

The amounts detailed below reflect the actual contributions made by the Goldfields Casino Community Development Trust. Goldfields Casino has committed to contribute an additional amount of R329 239 to the Trust for 2009.

Project/Beneficiary	Amount	Area of focus
Goldfields Casino Community Development Trust - House of Joy	R44 266	Donation of furniture and equipment to the House of Joy, a home for children.
Goldfields Casino Community Development Trust - Rage eye project	R43 329	Free eye tests and spectacles for local community
Goldfields Casino Community Development Trust - Other CSI Spend	R5 613	
Total	R93 208	

Eastern Cape

Project/Beneficiary	Amount	Area of focus
Zulu Kama Community Trust	R163 122	Community development & infrastructure
Other CSI Spend	R88 531	
Total	R251 653	



Corporate Social Investment

EMERALD CASINO (LONDON CLUBS INTERNATIONAL): CORPORATE SOCIAL INVESTMENT

London Clubs International's Emerald Foundation was created as a community development organisation, with the objective of partnering with other bodies to improve the quality of life of disadvantaged people in our communities.

Within the welfare area, the Foundation supports the physically and mentally disabled, abandoned or orphaned children, and HIV/AIDS victims. Support for these projects is sourced from as far afield as the UK and USA, while LCI's London-based office has launched the "Deal for Africa" programme which collects items for distribution in local townships.

The Emerald Foundation has partnered with sports stars like Aaron Mokoena (captain of the national South African Soccer Team) to conduct coaching clinics for young children.

In the field of small business development, the Emerald Foundation assists in the funding and mentoring of emerging entrepreneurs, assisting them in creating sustainable businesses and employment opportunities in their communities. Their achievements are further recognized through the Emerald Foundation Small Business Award Scheme.

The Emerald Foundation also supports organisations that provide home-based care to HIV/AIDS and Tuberculosis patients, assisting those who have difficulty accessing medical care and support provided by hospitals and clinics.

PEERMONT GROUP

CSI Philosophy

Peermont Hotels, Casinos and Resorts is South Africa's most empowered hospitality and gaming company. Peermont strongly believes that the purpose of our business is not only to generate wealth but also to fulfil our obligation to improve the wellbeing of communities in which each of our casinos and resorts operate. Peermont has, since inception, publicly committed itself to making a significant contribution towards broad-based black economic empowerment and sustainable community development initiatives. This is achieved through the continual provision of financial support,

skills training and leadership support through the various Peermont Trusts and initiatives. Peermont financially supports a range of projects falling within the four pillars of our CSI:

- Education
- Youth Development
- Entrepreneurial Development and
- Environmental Enrichment

The total CSI spend in South Africa by Peermont Trusts and CSI Funds amounted to **R28,5 million** in 2009, of which:

- R12,8 million was funded by donations from Peermont;
- R14,1 million was generated from investment income; and
- R1,6 million was funded from capital provided through previous Peermont donations and dividends.

Our CSI vehicles and initiatives

1. Peermont Education Trust (PET)

The PET offers full scholarships (covering the cost of tuition, books, mentorship, accommodation and living expenses) to young people from underprivileged backgrounds who have demonstrated the potential and ability to succeed in their chosen fields of study.

To date, the PET has produced a total of 65 university graduates in fields such as commerce, actuarial science, economics, mechatronics, physics, genetics, medicine and engineering (civil, mechanical and electrical). In addition the PET has sponsored over 300 learners under our Lesedi Industrial Skills Programme, which includes trades such as fitters and turners, millwrights, motor mechanics, electricians, draughting, hospitality and nursing. In 2010, the PET awarded 10 university scholarships and 75 learnerships under the Lesedi Industrial Skills Programme.

2. Peermont Children's Trust (PCT)

The purpose of the PCT is to provide social, educational and emotional upliftment to children in disadvantaged areas of the local municipalities in which we operate, primarily through financial support, thereby ensuring that the beneficiaries receive an improved quality of education and care.

The PCT has thus far refurbished two nursery schools benefiting about 1 50 disadvantaged children; erected 40 jungle gyms benefiting 12,000 learners; established 9 after-school care sites; donated funding for 6 tuck shops under Thuthukani projects; established 140 media centres benefiting about 182 000 learners; sponsored the Star School project since 2003 benefiting 1,200 learners; donated Maths and Science text books and equipment benefiting about 1,200 learners; sponsored netball coaching clinics for teachers; sponsored uniforms for 600 learners; contributed towards transport and school fees for about 60 disabled learners and sponsored career guidance workshops and resources for 15 schools benefiting about 12,000 learners.

3. Peermont School Support Programme (PSSP)

Under this programme, Peermont has partnered with eight carefully selected high schools in an investment that aims to equip these schools with the necessary financial and other resources to improve the quality of teaching and learning. The special focus is on Mathematics, Science, English and Technology. Together with the high schools, the beneficiaries of the programme include the schools' feeder primary schools. The schools are located within the Ekurhuleni and Sedibeng municipalities. The total budget for this programme amounts to R8 million per annum over a period of 5 years (i.e. R40 million in total).

The schools have been selected following an extensive and thorough screening process involving the services of consultants Funda Africa and educationists from Wits Education Department.

Our partner schools are as follows:

- Tembisa High School - Tembisa
- Germiston High School - Germiston
- Unity High School - Daveyton
- Sunward Park High School - Boksburg
- Thuto Lesedi Secondary School - Vosloorus
- Lethulwazi Secondary School – Vosloorus
- General Smuts High School – Vereeniging
- Rutasetjhaba Secondary School - Sebokeng



Corporate Social Investment

The programme has been endorsed by authorities of the GDE (Gauteng Dept of Education) and the GGB (Gauteng Gambling Board).

Under the programme, Peermont has agreed to make a once off grant of R100, 000 to each of the six schools that did not make the final selection.

Peermont has also established Computer Laboratories at each of the high schools to specifically offer remedial-type teaching (i.e. language comprehension and mathematics) to address the challenges and help bridge the gap posed by primary school learners entering secondary school. The project will also cover the costs towards insurance, ADSL rental, security and armed response. The objective of our ICT investment is to help modernize our schools and equip the learners with skills that will enable them to utilize such technology in the workplace after they leave school.

Notably, Sunward Park High School in Boksburg, one of the 8 sponsored schools under our programme, has recently achieved international success by being chosen as the official South African Academic Academy for the Diambars Football Academy. After the successful roll-out of the first Diambars Football Academy in Senegal eight years ago, Diambars is now unfolding the South Africa chapter of the initiative, in view of the 2010 FIFA World Cup, at Sunward Park.

The Diambars Football Academy together with Sunward Park Secondary School have created a sport-education orientated model that provides:

- Top level sport-education through Sunward Park Secondary School, which offers accommodation, education and physical training to children between the ages of 13 and 18. The students are expected to achieve high standards in football and education,
- Community-based social development programs, using the power of football as an effective tool to promote education generally.

Sunward Park has been chosen as the academic home for the students that have been selected to benefit under this football and education programme. Says principal A Peens, of Sunward Park, "My thanks goes out to Peermont for their great support and financial sponsorship, without which our group vision for education and growth in South Africa would not have been possible.

Sunward Park Secondary School would not be in the position to form this academic partnership with Diambars Football Academy. The Diambars Football Academy, together with Peermont School Support Programme and Sunward Park Secondary School are where education meets football."

4. Community Development and Infrastructure Funds

Over the past 5 years these funds have significantly impacted the community through the following projects.

4.1. Public Infrastructure

Costs are as follows:

- 2004 = R8 million
 - Tembisa walkways upgrading
 - Upgrading of "death bend" at airport / R21 interchange
- 2006 & 2007 = R4.6 million
 - Erected more walkways (Thokoza walkways) Jones Road & Griffiths off ramp upgrades
 - K157 / P157 interchange upgrade
 - Upgrade to Olifant fire station
- 2009 = R5.4 million
 - Jones Road infrastructure upgrade

4.2 East Rand Business Precinct

- This project is to prevent crime in the Jet Park and surrounding areas
- We have supplied and maintain two armed response vehicles that patrol the area
- We have repaired broken street lights, pot holes, etc in the East Rand Business Precinct.
- Costs are as follows:
 - 2008 = R940 000
 - 2009 = R605 000

4.3 Winnie Mandela Informal Settlement crime prevention

- A community upliftment project to reduce crime in this area
- Two police vehicles were sponsored and are fully maintained by the company
- Costs are as follows:
 - 2007 = R570 000
 - 2008 = R170 000
 - 2009 = R111 000

5. The East Rand Chambers of Commerce Trust (ERCoCT)

The East Rand Chambers of Commerce Trust (ERCoCT) is an enterprise development vehicle of Emperors Palace, a division of Peermont Global.

The objective of the ERCoCT is to make grant funding available to small and micro enterprises, self-help projects aimed at uplifting the socio-economic status of the poor and marginalized people within the jurisdiction of Ekurhuleni Metropolitan Municipality.

Recent key projects include:

Etwatwa Daveyton Kingsway and Wattville Chamber of Commerce and Industry (EDKWCC&I)

We provided funding to EDKWCCI to assist in the training of start ups, small, micro and medium sized member businesses in the area of tendering, advance costing and pricing for small contractors and entrepreneurship.

Grant: R616 000.00

Tembisa – Kempton Park Development Centre

The organisation provides skills development, helps create and sustain income generating projects and other social welfare relief projects for the benefit of the communities of greater Tembisa and Kempton Park areas.

Grant: R400 000.00

The Springs Business Linkage Centre (BLC)

The centre is administered by the Springs Chamber of Commerce and Industry and provides training programmes to small and medium sized businesses by way of mentoring and matching them with big business. The BLC has facilitated business worth over R50 million benefiting SMMEs across the board.

Grant: R525 250.00

African Olive Trading

We provided funding towards the training of technicians to attend an electrical technicians training programme over a period of one year.

Grant: R417 000.00

Umjwali Market Research

The grant funding was utilised for projects such as: business to business research, customer satisfaction research, product audits; mystery audits; and focus groups. About 94 field workers were trained in Market Research over 98 days.

Grant: R349 000.00



Corporate Social Investment

PC Financial Services

PC Financial Services provides financial management, tax planning and corporate compliance services to private and public companies, including government and NGOs. The funding went towards the training of four graduate trainees to qualify as financial officers.

Grant: R470 000.00

ITO Focus East Rand, Boksburg

The funding was provided for the training and skills development of 20 mainly previously disadvantaged individuals to obtain a qualification in Certificate in Management: Level 4 (Services Seta Qualification). Selected Learners were placed with participating companies in Ekurhuleni

Grant: R457 000.00

Thuthuka Ma-Africa Development Centre:

We provided grant funding to the organisation for the purpose of providing entrepreneurial business and financial management training to three co-operatives, benefiting about 88 entrepreneurs.

Grant: R75 000.00

Other Projects Included:

- Dhladhla Skills Development Academy
- Mape's Hair Institution
- Chapel Training and Employment Agency
- Khoali Education, Training and Development Consultants
- Makoya Spice and Mor

6. Peermont Southern Highveld Community Development Trust (PSHCDT)

The Trust offers scholarships to deserving students drawn from surrounding underprivileged communities. To date, the project has financially supported 8 students with full scholarships (including textbooks, tuition and accommodation) in fields such as Aeronautical Engineering, Chemistry, Dentistry and Medicine.

7. Peermont Dihlabeng Community Trust (PDCT)

The PDCT promotes community-based initiatives that relate to skills development and poverty alleviation through participation in various projects in areas in and around Bethlehem, Free State region. 50% of the funds are allocated to scholarships. The Trust allocates five scholarships each year to deserving and financially needy students.

8. North West (NW) CSI

Our NW properties spend in excess of R1.5 million per annum in the NW Province, of which R500 000 goes towards scholarships at the North-West University and the balance is allocated towards a wide variety of community upliftment projects such as contribution towards a soup kitchen at Naledi Life Skills centre, procurement of Christmas gifts for needy children, donating wheel chairs for handicapped basketball players and talent development for the youth interested in golf through the Junior Golf Foundation.



9. KwaZulu/Natal (KZN) CSI

Our Umfolozi and Mondazur properties support a variety of community projects including the Hope Feeding scheme and the Thuthukani Special School Feeding programme for deserving underprivileged children, the Bev's Orphanage, Lifeline Zululand, vegetable gardens and other relevant community projects.

10. Khoroni community education trust

The Trust was created to provide scholarships to deserving candidates from a disadvantaged background within the Vhembe municipality district of Limpopo.

CSI Projects – Actual CSI Spend:

January to December 2009	
2009 CSI Actual Spend By Peermont Trusts and Initiatives (South African units)	R
Peermont Education Trust (PET)	8 496 792
Peermont Children's Trust (PYT)	7 809 412
East Rand Chamber of Commerce Trust	3 188 456
Community Development Fund	715 189
Public Infrastructure Fund	5 408 492
Thuthuka / Peermont School Support Programme	628 727
Other Emperors Palace projects	583 464
Umfolozi CSI projects	350 378
Graceland CSI Projects	189 459
SHCDT – Graceland	203 619
Khoroni CSI Projects	85 269
Frontier - CSI projects	36 357
FIDCT – Frontier	129 475
Rio CSI Projects	431 420
Mmabatho CSI Projects	155 127
Mondazur CSI Projects	13 934
Head Office CSI Projects	66 078
Total	28 491 649

Funding of 2009 Actual CSI Spend (South African Units)

Funded by Peermont Group donations, investment income and capital from previous Peermont donations and dividends	R
Peermont donations (see breakdown below)	12 758 040
Investment income	14 070 141
Capital utilised	1 663 467

2009 Donations by Peermont Group (South African units)

	R
Emperors Palace 2009 Donations	
Peermont Education Trust	1 165 040
Peermont Children's Trust	1 165 040
Community Development	4 660 161
Public Infrastructure	2 330 081
Other projects: - e.g. Brakpan school: revamp school lab and build chemical store	583 464

Rest of Group 2009 Donations

Umfolozi	350 378
Graceland	26 216
SHCDT – Graceland	60 000
Khoroni	85 269
Frontier	36 357
FIDCT - Frontier	129 475
Rio	1 931 420
Mmabatho	155 127
Mondazur	13 934
Head Office	66 078
Total Peermont Group 2009 Donations (South Africa)	12,758,040

Corporate Social Investment

Sun International

Sun International as a group has strategically amended its CSI commitment to a focused and dedicated resourced effort relating to Social Economic Development (SED). This effort includes projected increases in monetary resources, escalating to a total of 4% of profit after tax by the end of 2013. The distribution of the available resources will be directed towards obtaining the optimum benefit in term of the Broad-Based Black Economic Empowerment Codes. Appropriately, contributions will be directed to Social Economic Development.

The main focus of Sun International's social investment expenditure is on health and welfare, education, community development sports, arts and culture. In the field of health and welfare, among the group's major beneficiaries is Reach for a Dream Foundation, which fulfils the dreams of children who have life-threatening illnesses. Other beneficiaries include the Tapologo AIDS Hospice in the North West, Emmanuel's Haven in the Eastern Cape (which provides counselling, care and training and runs a hydroponics farm producing vegetables for sustenance), and the Naledi Hospice which provides palliative care to families. Another flagship project is SHAWCO in Cape Town, where students were able to treat over 4 200 patients at 160 clinics throughout the Cape Peninsula. More than 477 students were active in these clinics, due to the extra capacity provided by GrandWest's funding.

On the education front, the Study Trust (Fig 1), which is an independent national bursary organisation, has been partnered with Sun International to grant bursaries to carefully selected students who are pursuing studies that are aligned to the business of the Group. Carnival City supports the Matshidiso School (Fig 1) for children with special needs and provides technical skills such as sewing, embroidery, bread-making, cooking, metalwork and woodwork. Bakubung Primary School (Fig 1) is supported by Sun City and has 527 students. Two classrooms were built and this has alleviated over-crowding and provided a better learning environment for the students. Windmill Casino provides funding to the Martie Du Plessis School (Fig 1) for children with special needs for the acquisition of books, magazines, newspapers and computers. GrandWest CSI's Bursary Fund awards bursaries to students from disadvantaged backgrounds to help provide access to a better education and the mainstream economy. Support for community development organisations has included assistance to Blisters for Bread (Fig 1), a project which raises funds for Peninsula School Feeding to feed thousands of Western Cape schoolchildren who would otherwise be going to school on empty stomachs. Other beneficiaries have included the National Sea Rescue Institute (Fig 1), the South African Chefs Association (Fig 1) and the Wildlife Trust.

Sun International has for several years been a major sponsor of the South African Paralympic (Fig 1) team and is also a founding member of the Arts and Culture Trust, which has supported more than 500 projects since 1996.



FIG 1

Project	Period	Amounts Funded (R)
Disability Sport SA	2003 - 2009	6 136 843
SA Chefs Association	2004 -2008	758 400
NSRI Projects	2006-2009	742 325
CSI Bursary Fund	2007-2009	2 428 592
Blisters for Bread	2005-2009	6 692 893
Martie Du Plessis Library	2006-2009	341 671
Matshidiso LSEN School	2006-2008	1 176 261
Bakubung Primary	2009-2009	350 000
Study Trust - Bursaries	2009-2010	884 000
		19 510 985

The group has also been active in CSI projects in neighbouring countries, including its Worm Farm Project in Zambia, initiated to create an organic environment for all plants, herbs and flowers grown within the resort. This project empowers local communities economically by introducing environmentally friendly organic farming among communities. In Botswana, Gaborone Sun continues to Support the SOS children's village and donated funds that have assisted in the new village in Serowe. The village currently has 76 children who have benefited through additional facilities that were built. In Lesotho, Namibia and Swaziland various projects that have been in place for many years continued to receive support, including support for clinics that were built in and around the areas in which the units operate."

Provincial

At provincial level significant investments are and have been made in projects continued on a yearly or extended basis.

In the Eastern Cape the Boardwalk Casino spent R2 825 000.00 for the years 2008 and 2009 with the bulk of this on development and sustainability support for the Emmanuel Haven HIV/ AIDS in Motherwell, contribution to the Association for the Physically Disabled and in education on a bursary scheme. Approximately R2 250 000.00 has been earmarked for enterprise development in the coming year. The Wild Coast Sun is committed to community development and a large part of the contributions are channelled to the Mbizana Development Trust being the primary vehicle for investing in the local community. The trust in 2008 contributed R3 870 756.00 to various projects and since its inception in 2004 to 2008 a total of R7 558 872.00. In 2009 a further R1 426 845.00 has been contributed.



PROVINCE: EASTERN CAPE

Category	2004	2005	2006	2007	2008	2009
Education	47 808	272 157	1 477 753	0	811 780	1 960 729
Health & Welfare	82 974	18 750	1 243 246	294 866	2 255 640	1 397 148
Sports & Recreation	5 300	2 000	95 086	42 000	69 114	188 552
Arts & Culture	0	0	33 760	30 000	54 505	118 265
Community Development	156 750	1 355 578	1 149 129	1 126 350	2 930 497	5 564 505
Other	0	4 000	151 496	62 390	82 176	428 362
TOTAL	292 832	1 652 485	4 150 470	1 555 606	6 203 712	9 657 564

Corporate Social Investment

Carnival City in Gauteng spent (for the years 2008 to March 2010) approximately R5 589 900.00 on various projects with a distribution profile for the period of 15% to Community Development, 10% to Sports, Arts and Culture, 30% on Education and 40% on Health and Welfare. Morula Casino and Hotel, also in Gauteng spent about R 1 099 315.00 on various projects the past years. These include a mobile clinic for the Mabopane and Winterveldt area, renovation of the Odi Hospital paediatric ward, food parcel schemes for pensioners and in education refurbishment of and a bursary scheme at the Tebogwana Secondary School. A community library was established at Morula and includes a computer facility for students in the area.

Through the means provide by Sun City and the Carousel, communities in the North West Province received approximately R8 000 000.00 in corporate social investment over the past years. In the case of the Carousel plus/minus R1 570 700.00 was spent on projects covering education, health and sports and culture during 2008 and 2009. Sun City spent approximately R5 186 000.00 on projects. These include the provision of housing as a joint venture with Nedbank and support in various elements such as the provision of new wards for the Tapologo Hospice in Phokeng.

The Northern Cape Province communities received investment from the small Flamingo Casino totalling R2 044 283.00 since 2003. Approximately 41% of that was spent in community development, 43% in education and the remainder spread over health, welfare sports and other worthwhile projects.

The Golden Valley Casino in Worcester, Western Cape Province, being new is developmental in its corporate social investment effort and for the period 2009 to 2010 has spend R54 000.00 in this year. GrandWest for the year July 2009 to March 2010 spent R4 182 211.00. The bulk of this was spent in Health and Welfare, R1 368 031.00 and in the University of Cape Town's SHAWCO (Students Health and Welfare Centres Organisation) aligned bursary scheme amounting to R1 803 032.00.

Limpopo Province communities and projects received R341 468.00 in investment, aid and sponsorships for July 2009 to March 2010 from Meropa Casino. In line with group focus the spend was largely aimed at education, health and community development.

PROVINCE: GAUTENG

Category	2004	2005	2006	2007	2008	2009
Education	491 708	965 553	212 876	1 414 301	994 878	1 970 243
Health & Welfare	347 723	838 640	441 495	645 959	1 413 832	400 004
Sports & Recreation	234 291	289 755	56 199	194 231	54 992	261 395
Arts & Culture	4 012	0	10 498	10 500	6 000	-1 200
Community Development	291 274	417 291	207 758	1 021 280	736 842	678 433
Other	7 710	617 044	328 623	155 327	199 349	92 605
TOTAL	1 378 722	3 130 288	1 259 455	3 443 605	3 407 901	3 403 489

PROVINCE: NORTH WEST

Category	2004	2005	2006	2007	2008	2009
Education	762 501	731 506	326 122	392 671	237 405	255 092
Health & Welfare	1,958,036.57	2 045 164	1 954 042	2 566 345	3 670 025	4 404 569
Sports & Recreation	68 381	1 483 842	66 978	127 346	140 956	277 761
Arts & Culture	8 240	32 390	14 217	433 187	354 083	40 673
Community Development	288 537	525 166	1 046 027	648 478	1 422 777	504 351
Other	176 167	215 875	258 167	401 989	330 976	193 103
TOTAL	3 261 863	5 033 942	3 665 553	4 570 016	6 156 222	5 675 550

PROVINCE: NORTHERN CAPE

Category	2004	2005	2006	2007	2008	2009
Education	0	26 973	5 000	310 484	209 158	282 146
Health & Welfare	59 527	1 431	76 141	43 099	24 897	17 487
Sports & Recreation	0	0	0	0	0	0
Arts & Culture	0	9 721	15 000	4 125	6 640	0
Community Development	0	106 000	140 587	7 411	20 195	560 421
Other	0	0	20 500	0	1 200	0
TOTAL	61 531	146 130	259 234	367 126	264 098	862 063

PROVINCE: WESTERN CAPE

Category	2004	2005	2006	2007	2008	2009
Education	115 639	1 168 040	2 592 911	4 433 591	1 042 357	1 896 955
Health & Welfare	238 777	857 548	1 641 680	2 675 026	4 681 612	3 571 633
Sports & Recreation	66 681	152 915	-	-	13 362	7 458
Arts & Culture	-	-	-	789	-	-
Community Development	126 799	815 984	-	15 921	-	-
Other	45 600	127 497	1 947 055	46 316	621 858	597 532
Enterprise Development	-	-	-	-	-	65 193
TOTAL	593 496	3 121 984	6 181 646	7 171 643	6 359 189	6 138 771
Special Projects						
SHAWCO					2 916 225	1 769 834
Bursaries					888 787	1 500 857
TOTAL	0	0	0	0	3 805 012	3 270 691
COMBINED TOTAL	593 496	3 121 984	6 181 646	7 171 643	10 164 201	9 409 462

PROVINCE: KWAZULU NATAL

Category	2004	2005	2006	2007	2008	2009
Education	236 000	7 500	426 000	181 602	1 255 580	1 206 438
Health & Welfare	100 000	145 537	300 847	2 049 869	281 893	813 647
Sports & Recreation	5 000	7 700	250 000	267 879	261 000	180 000
Arts & Culture	25 226	3 500	0	0	1 000	26 249
Community Development	0	0	86 000	0	0	0
Other	5 000	7 000	25 000	0	0	0
TOTAL	371 226	171 237	1 087 847	2 499 349	1 799 473	2 226 333

Corporate Social Investment

PROVINCE: FREE STATE

Category	2004	2005	2006	2007	2008	2009
Education	n/a	7 000	331 805	225 444	454 649	274 039
Health & Welfare	n/a	4 221	124 000	198 000	40 790	
Sports & Recreation	n/a	250 000 combined	60 418	68 853	28 900	
Arts & Culture	n/a					
Community	n/a	70 000	269 130	250 368	94 104	36 665
Other	n/a		388 685	117 272	345 568	
TOTAL	n/a	331 221	1 174 037	859 938	964 011	310 704

Sibaya Casino has spent in the province of Kwazulu Natal since 2004 R8 155 465.5. This includes R1 799 473.00 and R2 226 333 .00 in 2008 and 2009 respectively. Projects include construction and furnishing of the Mahatma Gandhi Thuthuzela Trauma Centre. Additional classrooms and the refurbishment of the Phumelela Primary School and media centres at the Victoria Primary School and Prospects Farm School were done.

Windmill Casino in the Free State Province committed to spend of R 1 464 000.00 in the categories. In community development and in conjunction with the SAPS projects were initiated which included street patrols and care-kit for children. In the education category self help projects, school class and bathroom facilities as well as fencing were provided.

Investments in major projects covering the areas of interest for the period 2008 to March 2010 are listed in the table below. This spend include part of the contributions listed in the provincial tables as well as contributions from the management company.

Category	Amount (R)
Health & Welfare	11 378 505
Education	5 910 554
Other	3 289 780
Total:	20 578 840

TSOGO SUN GAMING



Background

Hosken Consolidated Investments Ltd ("HCI") is the controlling shareholder of the Tsogo Sun Group.

HCI is a Black owned and controlled company, whose largest shareholder is the South African Clothing and Textile Workers Union "SACTWU" (which owns approximately 40% of the shares of the company), which can best be described as a "social owner".

SACTWU uses dividends received from HCI for the benefit of its members. HCI has, in its thirteen years of existence, distributed some R 850 million in cash and unbundled shares to SACTWU and MIC (the investment company of the National Union of Mineworkers and previous shareholder of HCI).

In addition, and most importantly, HCI has created some R4 billion in investment value for SACTWU. This social capital is securely invested in growth companies, principal of which in value is Tsogo Sun, ensuring a steady dividend flow to allow the maintenance and enhancement of the union's social projects.

The casino industry, through Tsogo Sun, has contributed dramatically to the rise of value in HCI, both through an increase in the HCI share price and with regard to secure dividend flows, which has created unprecedented social capital for the funding of projects benefiting many thousands of previously disadvantaged South Africans on a sustainable basis.

In addition to the creation of the social capital referred to above, the value created for HCI via Tsogo Sun's capital appreciation and dividends has allowed HCI itself to be in a position to make a greater impact on social development within the country through the HCI Foundation.

This Foundation is rapidly emerging as one of the most remarkable social responsibility vehicles associated with a Black Empowerment Company within South Africa

The HCI Foundation originated as the GABS Foundation. (GABS is the Golden Arrow Bus Service) and was created as the BBBEE partner for GABS, owning some 50% of the bus company.

As a result of HCI acquiring 100% of GABS the Foundation received a cash capital base, and as part of this acquisition HCI assumed the responsibility for the board of trustees of the

Foundation. The decision was made to restructure and redirect the programmes of the foundation that had been Western Cape focused only to a broader national basis.

As part of this restructure, Mr. Marcel Golding and Mr. Johnny Copelyn, the Chairman and CEO of HCI respectively, donated some 4,5 million HCI shares on a personal basis to the Foundation - at the time worth around R130 million. The Foundation bought another 0,5 million HCI shares from its own resources and over time these five million shares have grown in value to some R375 million with the total assets of the Foundation currently worth approximately R500 million.

This has provided an independent capital base for HCI's social development work equal to approximately 5% of the company's market capitalisation - estimated to be a good five times higher than any other SA corporation.

The largest source of the value in this capital base is ultimately the value of the investment by HCI in Tsogo Sun.

The Foundation distributes approximately R30 million per year to programmes that are associated with the upliftment of historically disadvantaged communities. The primary program is to provide some 1 200 bursaries to students at universities or technicons across the country.

Other programmes include, inter alia, a partnership with "Absolute Return for Kids" in Mpumalanga, as well as a partnership with the "Centre for Early Childhood Development" where the Foundation will benefit some 18 000 children nationwide.

HCI produces a social report of the Foundation work together with its Annual Report. These are available on their website www.hciholdings.co.za

In addition to the capital base provided by HCI and Messrs Golding and Copelyn, the Foundation now raises additional donations from other sources where possible.

HCI, being an investment holding company, does not interact directly with consumers, and as a result has not tried to develop the HCI brand as an independent brand. Nevertheless, as the owners or shareholders of companies who themselves are substantial brands –including GABS, Clover, Montecasino, Suncoast, Southern Sun Hotels and e-TV, it is the intention that

Corporate Social Investment

the Foundation gets used to enhance the social projects of these subsidiaries where possible.

Tsogo Sun Gaming CSI Projects

Tsogo Sun Gaming regards CSI as an essential strategic initiative that will contribute meaningfully to the maintenance of a stable political, social and economic environment. Tsogo Sun's "Touching Lives" strategy serves to provide the organisation with guidelines and tools to implement, administer, measure and report on the successes and failures of this initiative.

The over-riding philosophy of the strategy is to try alleviate the suffering of children affected or infected by HIV or AIDS – as such, this could include children who are also orphaned due to the epidemic.

HIV/AIDS affects society in many and varied ways, all of them requiring a great deal of attention. Tsogo Sun Gaming has identified children (young people from 0 – 18 years of age) as key to the focus areas outlined above. Furthermore, the company also ensured that its staff are educated on all aspects of AIDS (healthy eating, risks of infection, treatment options, living with AIDS etc) through its Staff Wellness Programme.

Notwithstanding its core focus being on HIV or AIDS, the company also supports other strategic social initiatives within the communities in which it operates.

These other initiatives include, inter alia,:

- Sport
- Arts and Culture
- Education
- The Environment

The total CSI and community development spend by Tsogo Sun Gaming since October 1997 (The opening of Emnotweni Casino – The first legalised casino in South Africa) amounts to in excess of R1,1 billion.

Although too numerous to mention, the highlights of each of the properties can be outlined as follows;

Emnotweni

- A R5 million contribution was made to the Lowveld Botanical Gardens to upgrade their facilities which included a new restaurant and retail area.
- A R1,5 million contribution was made to Penryn College in Nelspruit. Renowned not only for its academia, but for their community initiative – Penreach, the largest school-based outreach programme in Africa.
- With Nelspruit / Mbombela being a major stop-over destination for tourists travelling to the Kruger National Park as well as Mozambique, as part of the licence condition, Tsogo Sun agreed to build a second hotel – The 120 room Southern Sun Express Hotel at a cost of R17 million.

The Ridge Casino

- R1,5 million was donated to local government for the express purpose of investing in various community development projects.
- In the effort to improve the commercial and tourist appeal of Witbank, it was agreed to invest R4 million in the upgrade of the existing property through the development of cinemas.
- Over the years, The Ridge has largely focused their spend and efforts on local causes, namely:
 - *The Middleburg Care Village* – where in keeping with the 'Touching Lives' strategy, support is given to orphans of HIV/AIDS through the provision of scholarships, uniforms as well as access to medical treatment. In 2008, The Ridge made it possible for a deaf child to receive surgery in order to restore hearing in both his ears.
 - *The Immergroen Old Age Home* – where the property regularly provides essentials such as food parcels, mattresses, linen, blankets as well as facilitating outings for the elderly.

Hemingways Casino

- Tsogo Sun established the Amotala Trust and contributed R10 million to be administered and disbursed by the trustees to local communities.
- A fund of R1,5 million was made available to provide loans on favourable terms to emerging black small, medium and micro enterprises (SMME's)
- Although extensively involved in sports development and other worthy local corporate social initiatives, Hemingways continues to focus on the following two projects:
 - *Glen Stella Campus*, previously known as The House on the

Rock, is an orphanage caring for approximately 50 local children affected by HIV/AIDS. Hemingways provides extensive support to the school in the form of funding, expertise (man hours), infrastructure (upgrading of facilities), feeding, schooling, clothing and immunization. During the period when the school was temporary closed down by social services, Hemingways continued their support of the displaced children to ensure their ongoing care and education. The value of support to Glen Stella Campus is in excess of R150, 000.

- Nkwezana Public School provides education primarily to the children of the local farm labourers. In addition to Hemingways recently having built, stocked and secured the school's computer room, they also rebuilt and furnished the grade R classroom.

Montecasino

At what was once a fourway stop street, Montecasino designed and built the Witkoppen/ William Nicol intersection at a cost of R87 million. The Johannesburg Roads Agency had identified this upgrade 15 years previously but were unable to commission the work due to budgeting constraints.

This much needed interchange has provided significant traffic congestion relief (albeit counter cyclical to Montecasino's peak traffic periods i.e. predominantly night time and weekends as opposed to the standard morning and late afternoon peak times) and has undoubtedly contributed to the continued development and growth of the Fourways node and surrounds.

- The Montecasino Boulevard – a link road between Witkoppen and William Nicol was constructed at a cost of R5 million. This road, which is maintained by the property, provides access to not only Montecasino but to residential as well as other

business areas including a City Lodge Hotel, office parks, several restaurants and a nursery.

- A further R6 million was spent on additional infrastructure including the storm water attenuation in the area which is designed to alleviate the risk of flooding in the surrounding area all the way down to Dainfern.
- The Douglasdale Police Station was upgraded (including the construction of a lock-up jail facility and booking office) at a cost of R5 million.
- Montecasino supports the on-going operation of the Sandton Convention Centre at a net cost to date (2001 – April 2010) of over R412 million. To the best of our knowledge, we are not aware of any 'city' convention centres that are owned and operated by private companies. Usually they are owned by local government like the Durban Convention Centre and the Cape Town Convention Centre as 'loss leaders' to drive exhibitions, conferences and other similar events that serve as catalysts for economic and business tourism for the local economies. According to a study undertaken in 2009 by the University of Cape Town, the Sandton Convention Centre's economic impact on the broader S.A Economy from opening until 2009 is estimated at over R6 billion.
- Since 2003, Montecasino has operated the Montecasino Bird Gardens at a net cost of R9, 526,227. This facility serves not only as a tourist attraction and wildlife education venue – it also acts as a sanctuary for conservation purposes. The Montecasino Bird Gardens is home to 124 species of birds, 67 species of reptiles (including 8 species of invertebrates and 13 species of amphibians) and 17 species of mammals. To house the additional birds that are being re-located from



Corporate Social Investment

the Umgeni-Bird Park, additional cages and infrastructure have been built at a cost of R4,5 million.

- The 1900 seat Teatro at Montecasino opened in 2007 at a cost of R100 million. This theatre has given a much needed boost to the struggling local theatre industry. Not only has it allowed for Broadway and West End musicals to once again include South Africa in their tour line-up, but it has also provided another outlet for South African talent to perform and excel. All of the following international musicals that have been staged at the Teatro have featured a predominant or all-star S.A cast and crew.
 - Disney's The Lion King
 - Chicago
 - Disney's Beauty and the Beast
 - Disney's High School Musical
 - Andrew Lloyd Webbers' musical 'CATS'
 - Grease
 - Mamma Mia
 - Dreamgirls (March 2011)

In fact, 74.7 % of all productions staged at the Teatro (based on actual number of performances) have incorporated an almost total local cast.

The Lion King, Beauty and the Beast and High School Musical have all gone on to tour internationally with the South African cast.

- To assist, not only in Social Economic Development but also in the promotion of tourism, Montecasino spent R340 million on the development of the new 194 room Southern Sun Montecasino Hotel. This hotel, forecast to cost Tsogo Sun cumulative losses of approximately R85 million during the first four years of operation, was accelerated to accommodate the successful hosting of the 2010 Soccer World Cup – notwithstanding the recent world-wide recession coupled with the oversupply and lack of demand already for hotels in the node.
- In keeping with the corporate 'Touching Lives' CSI philosophy, Montecasino has provided support in the form of funding, facility maintenance, food and medical services for the Oasis Haven of Love in Randburg. Other regular beneficiaries include the Walter Sisulu Paediatric

Cardiac Ward as well as the S.A. Guide Dogs Association.

Suncoast Casino & Entertainment World

- A R10 million SMME fund was established to provide a favourable loan facility for emerging black SMME's.
 - Over R9,5 million was contributed to the local council for the relocation of the Durban Paddling Pools. These pools were originally part of the Waterworld on the Suncoast property and were deemed by council to be competition and therefore a possible distraction to the Ushaka Marine World development.
 - A further R165 million has been paid over to the council for inter alia, a contribution to a people mover system. (R70 million) as well as other infrastructure development and/or improvements.
 - Since opening, Suncoast has played a significant role in numerous local CSI and community upliftment projects. The most notable projects include;
 - Monthly support of The Gozololo Orphanage which cares for youngsters affected or infected with HIV/AIDS. This support, from 2006-2008, included funding, assistance with repairs and maintenance, as well as food and clothing. Since 2009, this support has been redirected to Vukukhanye – an orphanage within the community of Chesterville.
- The total combined value of support to both Gozololo and Vukukhanye is R562 000.
- Annual sponsorship of The Dolphin Cricket Union with particular focus on youth development. The total sponsorship value to date is over R2,26 million.
 - Annual sponsorship of the Suncoast Pirates Surf Lifesaving Club. This incorporates both the provision of lifesavers during the weekend and holiday periods as well as support of the 'Nipper programme' which is aimed at educating the youth (including children from previously disadvantaged communities) in water safety awareness. The total value of this sponsorship to date is R1,152,000.
 - The Suncoast Classic – one of the official golf tournaments on

the Winter Sunshine tour. Suncoast Casino is the official sponsor and organiser of the event. The total value of the sponsorship to date is over R1,5 million.

Tsogo Sun Gaming

- Over and above the aforementioned net operating cost of R9, 5 million for the Montecasino Bird Gardens, an additional R21, 989,000 has been spent on the Umgeni River Bird Park.
- Across the board, over R17, 5 million has been contributed towards the running of the National Responsible Gambling Programme.
- Since 2006, Tsogo Sun Gaming has sponsored the South African leg of the prestigious Duke of Edinburgh charity golf tournament at a cost of \$75 000 per annum (totalling \$375 000 or approximately R3 million). Of this sponsorship amount, \$65 000 p.a is paid directly to various charity or 'developmental' organisations.

This sponsorship excludes the individual donations and contributions made by the individual properties as a result of their golf fundraising efforts.

CSI Spend Summary

CSI Projects excluding the extensive HCI community programme detailed above under 'Background'

Since 1997 to end financial year 2009/2010

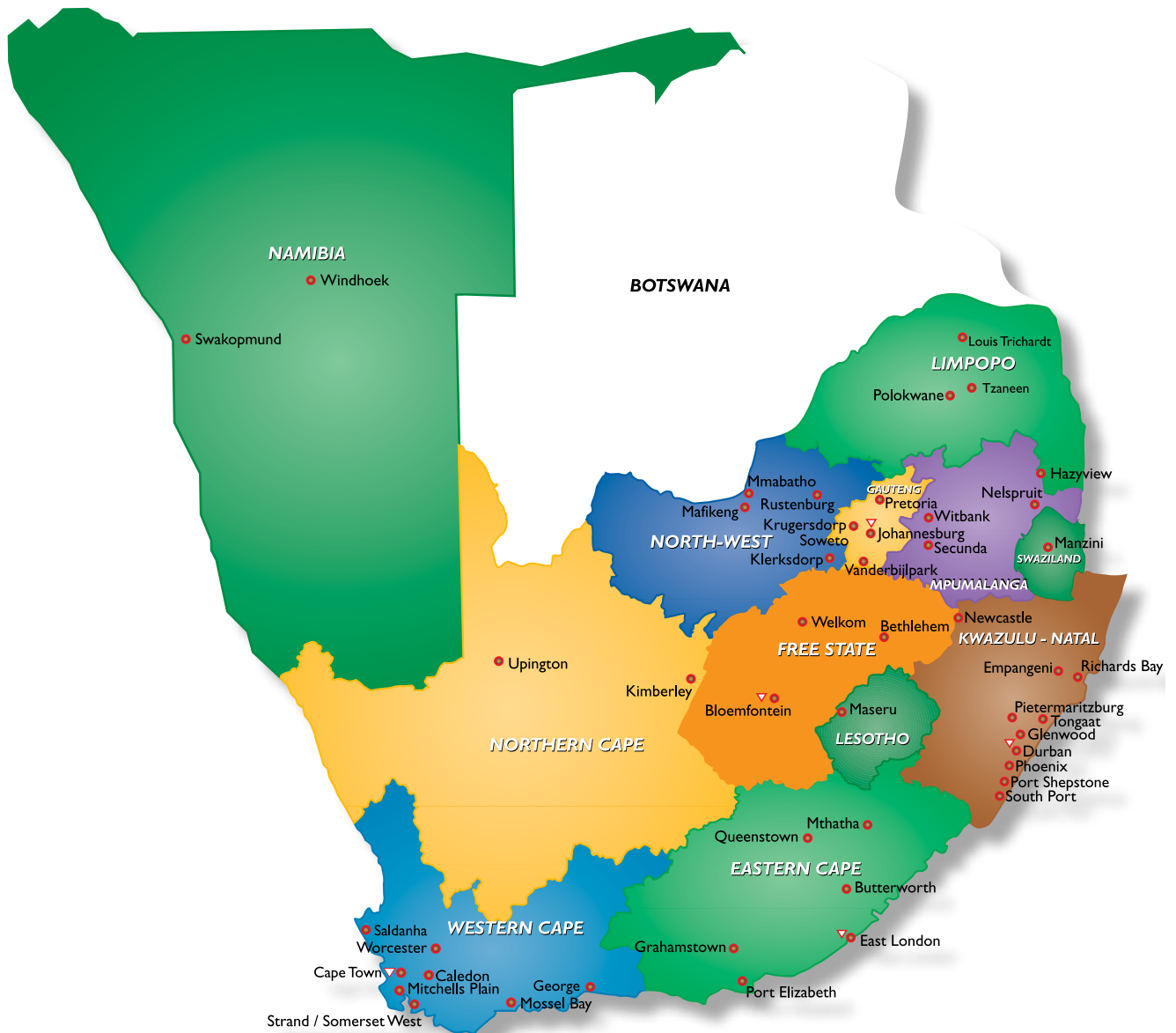
Emnotweni Casino (October 1997)	
	R
SS Express Hotel – 120 rooms	17 000 000
Contribution to Lowveld Botanic Gardens	5 000 000
Contribution to Penryn College	1 500 000
Education	292 563
Sport	509 227
Environment	383 554
Health and Welfare	662 983
	25 348 327

Montecasino (November 2000)	
	R
Sandton Convention Centre	412 603 048
Montecasino Bird Gardens	9 526 227
Witkoppen / William Nicol Intersection	87 000 000
Infrastructure incl Montecasino Blv	11 000 000
Construction of Douglasdale Police Station	5 000 000
Southern Sun Montecasino (Pivot)	340 000 000
Education	2 762 533
Sport	112 290
Environment	1 801 527
Health and Welfare	8 564 900
	878 370 525

Hemingways Casino (September 2001)	
	R
SMME Fund	1 500 000
Contribution to Amatola Community Trust	10 000 000
Education	155 506
Sport	176 818
Environment	210 989
Health and Welfare	5 791 712
	17 835 025

The Ridge (September 2002)	
	R
Contribution to community	1 500 000
Contribution to Tourism Projects	4 000 000
Education	306 367
Sport	50 616
Environment	65 506
Health and Welfare	678 644
	6 601 133

NRGP Treatment Centres



● Outpatient Treatment

▽ Inpatient Treatment

● Western Cape
Cape Town

Tygerberg
Bellville
Goodwood
Parow/Vasco

Helderberg
Strand
Somerset West

Oostenberg
Kuils River

Southern Suburbs
Kenilworth
Rondebosch

Cape Flats
Mitchells Plain

Southern Cape
George
Mossel Bay

Overberg
Caledon

Breederivier Valley
Worcester

West Coast
Saldanha

● Free State
Bloemfontein
Welkom
Bethlehem

● Northern Cape
Kimberley
Upington

● Eastern Cape
Butterworth
East London
Grahamstown
Mthatha
Port Elizabeth
Queenstown

● Limpopo
Louis Trichardt
(Makhado)
Polokwane
Tzaneen

● Mpumalanga
Hazyview
Nelspruit
Secunda
Witbank

● North-West
Klerksdorp
Mafikeng
Mmabatho
Rustenburg

● KwaZulu-Natal
Durban
Empangeni
Glenwood
Newcastle
Phoenix
Pietermaritzburg
Port Shepstone
Richards Bay
Southport
Tongaat

● Gauteng
Johannesburg
Soweto
Vanderbijlpark

North Rand:
Auckland Park
Braamfontein
Randburg
Sandton

Pretoria
Hatfield
Centurion
East Rand
Alberton
Benoni
Boksburg
Brakpan
Germiston
Kempton Park
Springs

West Rand
Krugersdorp
Roodepoort

● Swaziland
Manzini

● Lesotho
Maseru

● Namibia
Swakopmund
Windhoek

▽ Inpatient Treatment Centres
Bloemfontein
Cape Town
Durban
Johannesburg

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