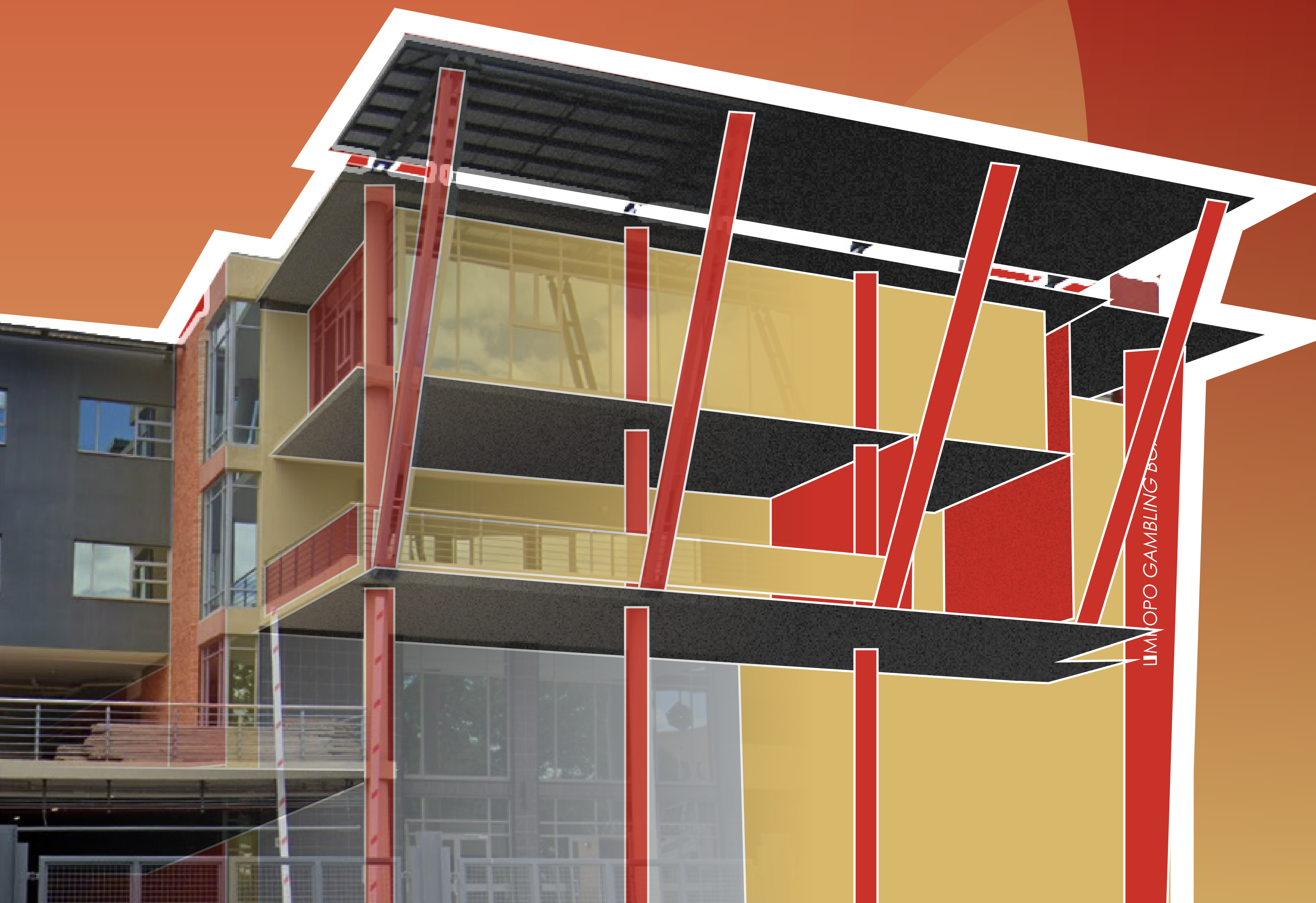
LIMPOPO GAMBLING BOARD

STRATEGIC PLAN 2025-2030



EXECUTIVE AUTHORITY STATEMENT

The Limpopo Gambling Board draws its mandate from the Constitution, Part A of Schedule 04. The LGB is mandated to regulate gambling in the Limpopo province in terms of the Limpopo Gambling Act, No. 03 of 2013. The priorities and commitments that the Board outlines in its Strategic Plan are aligned to the national and provincial priorities, specifically the NDP Five-Year Implementation Plan, draft MTDP 2024–2029 and the revised Limpopo Development Plan. Further, the priorities of the Board are aligned to the policy imperatives of the ruling party in the Country and the National Gambling Act (Act No. 07 of 2004). In developing this five-year Strategic Plan, the Board and the Management underwent extensive consultations with relevant stakeholders including the Department of Economic Development, Environment and Tourism. The Board is responsible for ensuring that the policy priorities set out in this plan are aligned to the mandate of the Department, because the Board is accountable to the Executive Authority. Yet, the Executive Authority is also responsible for providing strategic direction and oversight of the Board in developing and implementing the strategic priorities and policies of the Board. I hereby take this opportunity to endorse and approve this Strategic Plan of Limpopo Gambling Board for further processing by the relevant oversight institutions and subsequent implementation by the Board.

Honourable T.B. Matibe
MEC for Economic Development, Environment and Tourism

CHIEF EXECUTIVE OFFICER STATEMENT

The Limpopo Gambling Board was established in terms of the Limpopo Gambling Act, No. 4 of 1996 and was retained in terms of the Limpopo Gambling Act, No. 3 of 2013.

In the previous planning period, the Entity was able to achieve all the targets set annually and has received unqualified audit opinions in the last five years. The LGB has made a major contribution to economic growth and to addressing unemployment by the licensing of various gambling sites. Revenue collection has improved over the years and this has assisted in fiscus health of the province.

The Entity was able to make a difference in the lives of poor people by contributing through the social investment programme to the villages around Limpopo province. This has assisted in improving the quality of life of the community members.

The Entity contributes towards the following priority areas:

- Priority 1: Inclusive Growth & Job Creation – the current gambling licensed sites have contributed towards job creation through direct jobs and indirectly through outsourced services. Issuing of the additional licenses would assist in creating additional jobs.
- Priority 2: Reduce Poverty & Tackle High Cost of Living by addressing the challenges of illegal gambling in the communities and facilitating socio-economic intervention programmes such as corporate social responsibility by the Entity and the gambling industry.
- Priority 3: Build a Capable, Ethical & Developmental State through improving governance, implementing the capacity building programmes and professionalisation of the gambling industry. The Entity will focus on modernising its operations to improve efficiency and perform business with ease in the gambling industry.

The preparation of the Strategic Plan was a participatory approach where engagements with various stakeholders were held. Valuable contributions were made during these engagements.

Mr. M.G. Makoko
Chief Executive Officer

OFFICIAL SIGN-OFF

It is hereby certified that this Strategic Plan:

- Was developed by the Management of the Limpopo Gambling Board under the guidance of the Honourable Mr T.B Matibe.
- Takes into account all the relevant policies, legislation, and other mandates for which the Limpopo Gambling Board is responsible.
- Accurately reflects the Impact and Outcomes which the Limpopo Gambling Board will endeavour to achieve over the period 2025 - 2030.

Mr. L.K. Mathavhane
Programme 3: Compliance

Ms. E Hlangwini
Programme 4: Law Enforcement

Ms M. Molepo
Chief Financial Officer / Programme 3: Finance

Dr. D. Malesa
Programme 2: Corporate Services

Mr. M.G. Makoko
Chief Executive Officer / Programme 1: Governance

Mr. M.E. Tjiane
Chairperson

Mr. T.B. Matibe
Executive Authority: Department of Economic Development, Environment and Tourism

List of Abbreviations, Acronyms and Initialisms

4IR	4th Industrial Revolution
AGSA	Auditor-General of South Africa
AI	Artificial Intelligence
AML	Anti-Money Laundering
APP	Annual Performance Plan
AR	Augmented Reality
ATF	Anti-Terrorism Financing
BBBEE	Broad-Based Black Economic Empowerment
BO	Beneficial Ownership
CA (SA)	Chartered Accountant South Africa
CEO	Chief Executive Officer
CFO	Chief Financial Officer
COVID-19	Corona Virus Disease of 2019
CSI	Corporate Social Investment
DNFBP	Designated Non-Financial Business and Professions
CSI	Corporate Social Investment
DNFBP	Designated Non-Financial Business and Professions
DTIC	Department of Trade, Industry, and Competition
ENTITY	Limpopo Gambling Board
FATF	Financial Action Task Force
FICA	Financial Intelligence Centre
FLASH	Firearm, Liquor and Second-Hand Goods
GGR	Gross Gaming Revenue
GNU	Government of National Unity
HR	Human Resources Management
IA	Internal Audit
IAGR	International Association of Gambling Regulators
ICT	Information Communications Technology
LDP	Limpopo Development Plan
LEDET	Limpopo Department of Economic Development, Environment and Tourism
LGB	Limpopo Gambling Board
LPM	Limited Pay-out Machines
MCS	Monitoring and Control Systems
MEC	Member of Executive Council
MTDP	Medium Term Development Plan
MTEF	Medium-Term Expenditure Framework
NDP	National Development Plan
NGB	National Gambling Board
NPA	National Prosecuting Authority
PDI	Previously Disadvantaged Individuals
PESTLE (Analysis Tool)	Political, Economic, Social, Technological, Legal and Environmental

List of Abbreviations, Acronyms and Initialisms

PFILMS (Analysis Tool)	Personnel, Finance, Infrastructure, Leadership, Management and Systems
PFMA	Public Finance Management Act
POPIA	Protection of Personal Information Act
PWA	Progressive Web Apps
RA	Registered Auditor
RSA	Republic of South Africa
SAPS	South African Police Service
SAQA	South African Qualifications Authority
SARGF	South African Responsible Gambling Foundation
SARS	South African Revenue Service
SCM	Supply Chain Management
SLA	Service Level Agreement
SMME	Small, Medium and Micro Enterprises
TR	Treasury Regulations
VR	Virtual Reality

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PART A
OUR MANDATE

1. CONSTITUTIONAL MANDATE

In terms of Part A of Schedule 4 of the Constitution of the Republic of South Africa, Act No. 108 of 1996, casinos, racing, gambling and wagering are matters of concurrent National and Provincial Legislative competence.

2. LEGISLATIVE AND POLICY MANDATES

PUBLIC FINANCE MANAGEMENT ACT, NO. 1 of 1999
The Public Finance Management Act is used to regulate the management of finances. In terms of the Public Finance Management Act, No.1 of 1999, the Limpopo Gambling Board is classified as a Schedule 3C public Entity.

LIMPOPO GAMBLING ACT, NO. 3 OF 2013
The Limpopo Gambling Board was established in terms of the Limpopo Gambling Act, No. 4 of 1996 and was retained in terms of the Limpopo Gambling Act, No 3. of 2013.

The Limpopo Gambling Act, No. 3 of 2013 came into operation on 1 September 2014 and it consequently repealed the Limpopo Gambling Act, No. 4 of 1996. The Act empowers the MEC to establish and appoint the Board to manage the affairs of the Entity. The objectives of the Entity are to license, regulate and monitor gambling activities in the province.

NATIONAL GAMBLING ACT, ACT NO. 7 OF 2004
The Entity must comply with national norms and standards during the licensing process. The National Gambling Act empowers the Minister to prescribe the maximum number of casino licenses that may be granted in the Republic and in each province.

THE CRIMINAL PROCEDURE ACT, NO. 51 OF 1977
The Law Enforcement Inspectors of the Entity are declared as Peace Officers in terms of Section 334 and are conferred with the powers in terms of chapter 2 of the abovementioned Act.

OTHER RELEVANT LEGISLATION USED TO REGULATE GAMBLING
- National Lotteries Act, No. 57 of 1997 (relevant in terms of inter-governmental co-operation and illegal gambling criminal charges);
- Prevention of Organised Crime Act, No. 121 of 1998 (relevant in terms of illegal gambling activities and for the forfeiture of assets used in commission of offences);
- Prevention and Combating of Fraud and Corruption Act, No. 12 of 2004 (relevant in terms of preventing corrupt activities and fraud within the gambling industry);
- Financial Intelligence Centre Act, No. 38 of 2001 (relevant in terms of the LGB being appointed as a supervisory body to monitor the implementation of FICA by its licensed entities); and
- Broad-Based Black Economic Empowerment Act, No. 53 of 2003 (Section 10 of the Act requires the Entity to consider BBBEE requirements in executing its functions).

3. INSTITUTIONAL POLICIES AND STRATEGIES GOVERNING THE FIVE-YEAR PLANNING PERIOD

a) **National Development Plan (NDP) Vision 2030**
The NDP is an overarching long-term national plan for South Africa. The main thrust of the NDP is to transform and grow the economy, eliminate poverty and reduce unemployment and inequality by 2030. The NDP further aims to build a capable, ethical and developmental state. LGB, as one of the government entities in Limpopo, is expected to implement the NDP objectives. The NDP Five-Year Implementation Plan is a medium-term plan guiding the attainment of the NDP priorities. It encapsulates the seven priorities for the current 6th administration for implementation.

b) **Limpopo Development Plan (LDP), as being revised**
The LDP is an overarching five-year plan for Limpopo province, which is aligned to the NDP in terms of key focus areas. The main thrust of the LDP is industrialisation, inclusive economic growth and job creation with trickle effects on poverty, unemployment and inequality. It is worth noting that the Office of the Premier is currently reviewing the LDP.

c) **Medium-Term Development Plan (MTDP) 2024–2029**
The MTDP is the governments' monitoring framework for the NDP Five-Year Implementation Plan for the current 7th government administration. The MTDP reflects the commitments of the ruling political party, which is currently the Government of National Unity (GNU), the commitments drawn from the NDP and other policy pronouncements of government, such as the State of the Nation Address and the State of the Province Address. The MTDP sets out the tone for the implementation of three key focus areas of this government as outlined through the State of the Nation Address in 2024. In other words, the MTDP reflects how government will measure its performance against the commitments made in all policy documents including the election manifesto of the ruling party. Based on these policy commitments, LGB, working together with LEDET, is expected to contribute to implementing the following priority areas at the provincial level:
   - **Priority 1: Inclusive Growth & Job Creation,**
   - **Priority 2: Reduce Poverty & Tackle High Cost of Living,**
   - **Priority 3: Build a Capable, Ethical & Developmental State.**

d) Limpopo Green Economy Plan

The Green Economy Plan views green economy as a sustainable development path based on addressing the interdependence between economic growth, social protection and natural ecosystem. The Entity will develop and implement a policy and a plan, which will be monitored by the office of the CEO.

e) The following policy mandates are key to the Board in its endeavour to achieve its legislative mandates:

RESPONSIBLE GAMBLING STRATEGY

The South African Responsible Gambling Foundation in partnership with the Limpopo Gambling Board addresses problem gambling by conducting various activities. These activities include research and monitoring, public education and awareness, training, treatment and counselling.

LIMPOPO GAMBLING REGULATIONS, SEPTEMBER 1997

The Limpopo Gambling Regulations were promulgated in terms of the Limpopo Gambling Act, No. 4 of 1996 to provide for the regulation of the various forms of gambling in the province. New Regulations in terms of the Limpopo Gambling Act, No. 3 of 2013 are in the process of being drafted by LEDET.

4. RELEVANT COURT RULINGS

None.

PART B

OUR STRATEGIC FOCUS

1. VISION

To be the leading, exemplary and innovative regulator in the world.

2. MISSION

To regulate the gambling industry in a responsible and ethical manner for the benefit of the people of the province by ensuring compliance with legislation, promoting responsible gambling and facilitating sustainable local economic development.

3. VALUES

The Limpopo Gambling Board has identified the values below as the principles that will govern behaviour of all employees within the organisation.

VALUE	DESCRIPTION
Integrity	To operate in accordance with the highest moral and ethical standards.
Accountability	To accept responsibility towards our most important resources, our employees, and to maximise the development and utilisation thereof.
Consultation	To strive towards a healthy relationship through interactive communication and consultation with our stakeholders.
Transparency	To openly fulfil the commitment to our stakeholders with honesty and integrity.
Inclusivity	To create an environment where everyone feels welcome, valued and respected, regardless of their background or identity. To afford equal opportunity to all.
Diversity	To accept and respect the uniqueness and difference of all people.

4. SITUATIONAL ANALYSIS

GLOBAL GAMBLING OUTLOOK

The LGB is a member of the International Association of Gambling Regulators (IAGR), which consists of representatives from gambling jurisdictions throughout the world. Its mission is to advance the effectiveness and efficiency of gambling regulation. The association explores issues of leadership in the gambling industry that involve a greater public policy advocacy role, establishing international best practice standards, advancing common standards and practices towards greater harmonisation, accreditation for regulatory professionals, evaluations and education delivery. The LGB benefits from the conferences, workshops and networking sessions organised by IAGR, as well as collaborations with fellow jurisdictional members.

Current global issues that will influence the outlook of gambling in the next five years include the opening of sports betting in the United States of America, the shift to online gambling and the role played by technological advancements in the process towards gambling regulation.

OVERVIEW OF THE GLOBAL GAMBLING INDUSTRY

The global gambling sector in 2025 is poised for robust growth, driven by technological advancements, evolving consumer preferences and expanding regulatory frameworks in new markets. With a market size that surpassed $260 billion in 2024, the sector is expected to continue its upward trajectory, propelled by both traditional gambling formats and innovative digital offerings.

KEY TRENDS AND DEVELOPMENTS

Digital Transformation and Online Gambling

Online gambling remains the fastest-growing segment, supported by the widespread adoption of smartphones and increased internet penetration. In 2025, the global online gambling market is valued at approximately $95 billion and is projected to grow at a compound annual growth rate (CAGR) of 10% to 12% through 2030.

Key drivers include the rise of mobile-first gaming platforms, live dealer games and personalised user experiences powered by artificial intelligence (AI).

Emergence of New Markets

Regulatory liberalisation in emerging economies, particularly in Latin America, Africa and parts of Asia, is unlocking significant growth opportunities. Countries such as Brazil, India and Nigeria are expected to become major hubs for gambling activities, given their large populations and increasing disposable incomes. The United States of America continues its rapid expansion in sports betting following the Supreme Court's 2018 decision to strike down the federal ban. By 2025, over 30 states had legalised sports betting, contributing to an estimated $10 billion in annual revenue from this segment alone.

Technological Innovation

Blockchain technology is transforming the gambling industry by enhancing transparency and security. Decentralised platforms and cryptocurrency-based transactions are becoming increasingly popular among tech-savvy gamblers. The integration of virtual reality (VR) and augmented reality (AR) technologies is creating immersive gambling experiences, especially in casino gaming. VR casinos are anticipated to capture a larger share of the market, with user engagement levels significantly higher than traditional online platforms.

Focus on Responsible Gambling

Governments and operators are increasingly prioritising responsible gambling initiatives to address growing concerns over addiction and financial harm. Enhanced AI tools are being deployed to monitor user behaviour, while stricter age-verification protocols and spending limits are being enforced globally.

E-Sports Betting and Gamification

The popularity of e-sports betting has surged, appealing to people of younger demographics who engage in the gaming culture. By 2025, the global e-sports betting market was valued at over $20 billion, with continued growth expected as new games and tournaments emerge. Gamification elements, such as loyalty rewards, challenges and in-game achievements, are being incorporated into gambling platforms to enhance user retention and satisfaction.

MAJOR FORECASTS FOR THE NEXT FIVE YEARS

Revenue Growth

The global gambling market is forecast to exceed $350 billion by 2030, driven by a CAGR of between 6% and 7%. Online gambling is expected to account for over 30% of the total market by the end of the decade. Asia-Pacific is expected to remain the largest regional market, with North America and Europe following closely behind. Emerging markets in Latin America and Africa are expected to exhibit the highest growth rates.

Product Innovation

Skill-Based Gambling: Games that blend gambling with skill-based mechanics, such as poker and fantasy sports, will gain traction among younger, tech-savvy audiences.

AI-Driven Personalisation: Gambling platforms will increasingly use AI to deliver tailored recommendations, predictive analytics and real-time customer support.

VR and AR Casinos: The adoption of VR and AR will accelerate, with major operators investing heavily in creating fully immersive digital casinos that mimic real-life gambling environments.

Hybrid Models: The convergence of traditional and digital gambling, such as live streaming of physical casino games to online players, will bridge the gap between physical and virtual experiences.

Consolidation and Partnerships

The gambling sector is expected to witness significant mergers and acquisitions as larger operators seek to expand their market share and diversify offerings. Partnerships between technology providers and gambling operators will also play a pivotal role in driving innovation.

Regulatory Evolution

As more governments recognise the economic potential of legalised gambling, regulations will continue to evolve. However, the implementation of stringent measures is anticipated to ensure player protection and combat illegal gambling activities.

CHALLENGES FACING THE SECTOR

Despite its optimistic outlook, the gambling sector faces several challenges:

a) Regulatory Uncertainty: Sudden policy shifts or stringent regulations in key markets could impact revenue streams.
b) Cybersecurity Threats: The increasing reliance on digital platforms exposes operators to heightened risks of cyberattacks.
c) Social Stigma: Negative perceptions of gambling in certain cultures may hinder growth in specific regions.
d) Economic Factors: Global economic instability or reduced disposable incomes could dampen gambling expenditure.

Overall, the global gambling sector in 2025 and beyond is therefore characterised by dynamic growth and innovation, driven by digital transformation and expanding market access. While challenges persist, the industry's ability to adapt to changing consumer demands and leverage technological advancements positions it for a promising future. Over the next five years, operators and stakeholders will need to navigate regulatory landscapes, embrace responsible gambling practices and invest in cutting-edge solutions to stay competitive in this rapidly evolving industry.

GAMBLING IN AFRICA

The gambling sector in Africa is undergoing a significant transformation, characterised by rapid growth, technological adoption and regulatory developments. With a young population, increasing internet penetration and rising disposable incomes, Africa presents a fertile ground for the expansion of gambling activities. By 2025, the sector is expected to experience substantial growth, driven by online gambling, sports betting and advancements in technologies such as artificial intelligence (AI) and big data.

KEY DRIVERS OF GROWTH

Emergence of New Markets

- Regulatory Reforms: Several African countries, including Nigeria, Kenya and South Africa, are revising their gambling regulations to accommodate new forms of betting and improve market transparency.
- Untapped Potential: Countries such as Ghana, Uganda and Tanzania are emerging as new markets for gambling due to their expanding middle-class populations and growing urbanisation.
- Investment Attractiveness: Improved economic stability and government support are attracting foreign and domestic investments in the gambling industry.

Online Gambling and Mobile Gaming

- Africa's burgeoning mobile-first economy is a significant driver of online gambling. With mobile penetration exceeding 50% in many countries, operators are leveraging mobile platforms to reach a wider audience.
- Online gambling, particularly casino games and poker, is growing in popularity due to the convenience it offers to players who can gamble from the comfort of their homes. However, this is not the case in South Africa since interactive gambling is still illegal. At the same time, however, online betting is permitted since the internet is used as the conduit for betting.
- Affordable smartphones and data plans are enabling more users to access gambling platforms, which is fuelling a projected CAGR of 12%-15% in online gambling revenue through to 2030.

Sports Betting Dominance

Sports betting is the leading segment in Africa's gambling industry, with football (soccer) being the most popular sport among bettors. Markets in countries such as Nigeria, Kenya and South Africa are particularly lucrative, with sports betting accounting for over 40% of total gambling revenue in the region. Live betting and in-play wagering are emerging trends that appeal to the younger, tech-savvy population.

Technological Advancements

Artificial Intelligence (AI)

AI is playing a pivotal role in enhancing user experience through personalised recommendations, chatbots for customer support and fraud detection mechanisms. AI-powered tools are also being used for responsible gambling initiatives, identifying patterns of problematic behaviou and issuing timely interventions.

Big Data Analytics

Operators are leveraging big data to analyse customer preferences and behaviour, which enables them to offer tailored promotions and games. Data analytics also aids market segmentation, helping companies to identify the most lucrative demographics and regions.

Blockchain and Cryptocurrencies

Blockchain technology is gaining traction in Africa, as it offers secure, transparent and decentralised gambling platforms. Cryptocurrency payments are becoming popular, particularly in regions where traditional banking infrastructure is underdeveloped. This trend is enhancing accessibility for unbanked populations.

Mobile-Optimised Platforms

Mobile gaming platforms are being developed with a focus on user-friendly interfaces and localised content, catering to the diverse cultural and linguistic landscape of Africa. Progressive web apps (PWAs) are emerging as a cost-effective alternative to native apps. They provide a seamless experience even on low-end devices.

Virtual Reality (VR) and Augmented Reality (AR)

While still in its nascent stages, VR and AR technologies are being explored by African operators to create immersive gambling experiences, particularly in online casinos.

Collaborations and Partnerships

Cross-Industry Collaborations

Partnerships between gambling operators and telecommunications companies are facilitating the rollout of mobile-friendly platforms and payment solutions. Collaboration with fintech firms is enabling innovative payment methods, such as mobile money and cryptocurrency transactions.

Government and Private Sector Initiatives

Governments are working with private operators to regulate the industry, which should ensure responsible gambling and the prevention of illegal activities. Public-private partnerships are fostering the development of infrastructure, such as data centres and broadband networks, to support the growth of online gambling.

Challenges and Risks

a) Regulatory Uncertainty
The lack of uniform regulations across African countries creates barriers for operators looking to expand across the continent. Corruption and bureaucratic inefficiencies can further complicate the regulatory environment.

b) Social and Cultural Resistance
Gambling faces opposition in some communities due to cultural and religious beliefs, which could hinder its growth in specific regions.

c) Problem Gambling and Addiction
The rapid growth of gambling, particularly online platforms, raises concerns about addiction and its social consequences. Efforts to implement responsible gambling practices will need to be intensified to address these issues.

d) Cybersecurity Threats
As the industry becomes more digitised, the risk of cyberattacks increases, necessitating significant investments in cybersecurity measures.

FUTURE OUTLOOK

Market Growth

The African gambling market is expected to exceed $20 billion in annual revenue by 2030, with a CAGR of 8%-10% driven by online gambling and sports betting. At the same time Nigeria, South Africa and Kenya will remain the largest markets, while smaller nations such as Ghana and Uganda will experience accelerated growth.

Product Innovation

Gamification and skill-based games will gain popularity, with an appeal to younger audiences who value interactive and competitive experiences. Operators will continue to integrate AI, VR and blockchain to enhance user experience and operational efficiency.

Sustainability and Social Responsibility

Governments and operators will need to focus on sustainable growth by addressing issues such as addiction, fraud and underage gambling. Investments in community development and education initiatives could enhance the industry's reputation and social acceptance.

The gambling sector in Africa holds immense potential that is driven by technological innovation and which expands markets to include a young, dynamic population. However, operators are expected to navigate regulatory complexities, cultural sensitivities and social concerns to unlock the full potential of this burgeoning industry. By embracing collaboration, leveraging new technologies and prioritising responsible gambling, the African gambling market is poised for a prosperous future.

GREY LISTING OF SOUTH AFRICA

The grey listing of South Africa by the Financial Action Task Force (FATF), effective 24 February 2023, for failing to fulfil anti-money laundering (AML) and anti-terrorism financing (ATF) measures still stands. The country in general is working hard to reverse the status, and the gambling sector is no exception to these efforts. As a result, the gambling sector in South Africa is contributing to two of the eight areas of improvement that relate directly to the gambling industry from a regulatory perspective. These two areas are:

a) The need to improve risk-based supervision of Designated Non-Financial Businesses and Professions (DNFBPs) and demonstrate that all AML/CFT supervisors apply effective, proportionate and effective sanctions for non-compliance;
b) The need for the government to ensure that competent authorities have timely access to accurate and up-to-date Beneficial Ownership (BO) information on legal persons and arrangements and apply sanctions for breaches of violations by legal persons to BO obligations.

Upon finalising a Memorandum of Understanding with the Financial Intelligence Centre (FIC), the LGB will continue to collaborate with the FIC to address areas of strategic deficiencies as identified by FATF. In this regard, a risk-based methodology for supervising licensees has been developed by the nine provincial gambling Boards in South Africa. The methodology will be implemented during this financial year.

The LGB already uses the existing registries to monitor Beneficial Ownership. This will contribute to improving the Beneficial Ownership deficiency.

LICENSING

The licensing of LPMs is the first phase limit as prescribed by Regulation 13 of the National Gambling Act, No.7 of 2004. The Entity has notified the National Gambling Board (NGB) of the pending socio-economic impact study prior to the Minister of the Department of Trade, Industry and Competition making a decision on further licensing of limited payout machines (LPMs) in the Limpopo province. Processes are underway to conduct the study, which is expected to be completed during the first quarter of 2025/26.

The promulgation of the new gambling regulations will enable the LGB to issue Independent LPM Site Operator licences (ISO) once the Minister of DTIC has given the go ahead for further licensing. The licensing of Independent ISOs will boost the profile of BBBEE operators in the province.

All casino licences allocated to the Limpopo province in terms of the National Gambling Act, No. 7 of 2004 are operational. The casinos contribute immensely to the developmental agenda of the provincial government as they create direct employment in the casino operations, hotel and other concessionaire amenities located in the casino precincts. Furthermore, casinos continue to contribute to community social responsibility projects for the advancement of the communities they operate in.

The LGB has licensed five bingo operators and seven bingo sites to operate in Lephalale, Bela-Bela, Senwabarwana, Musina, Tzaneen, Phalaborwa and Groblersdal. Collectively, the bingo operators are licensed to operate a minimum of 751 bingo seats and a maximum of 2 800 bingo seats. They currently operate 1125 bingo seats.

The number of operational bookmaker sites stands at 61 out of the 95 bookmaker sites licensed. At the same time, the number of operational totalisator sites has declined from 25 to 22.

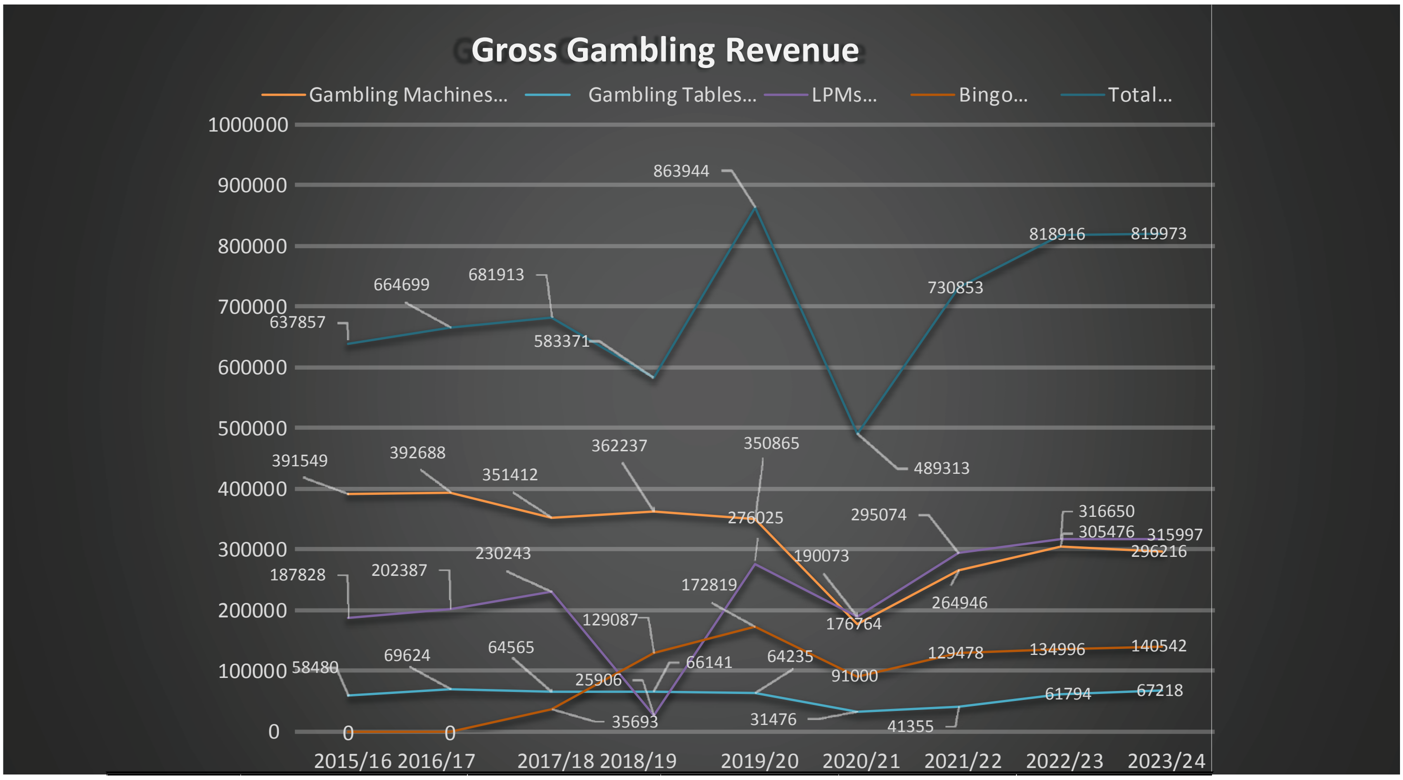
The prominent rise of illegal online gambling facilities in Limpopo poses a threat to licensed gambling entities, as they contribute to the reduction of revenue generated by licensed entities and, in some cases, closure of the licensed sites due to declining revenues.

STAKEHOLDER RELATIONS

The LGB will continue to formalise relations with stakeholders by entering into Memoranda of Understanding to collaborate on various matters of mutual interest in responsible gambling, training, BBBEE, information sharing, research, benchmarking, communications, regulatory compliance, marketing, and anti-money laundering and terrorist financing. To this end the Entity has established relations with the South African Responsible Gambling Foundation, BMM Test Labs (Pty) Ltd, the South African Bookmakers Association, Limpopo Tourism Agency, Department of Social Development and the Financial Intelligence Centre.

GROSS GAMBLING REVENUE

The split of gross gambling revenue (GGR) and levies between gambling slot machines, gambling tables, bingo and LPMs since 2015/16 was as follows:

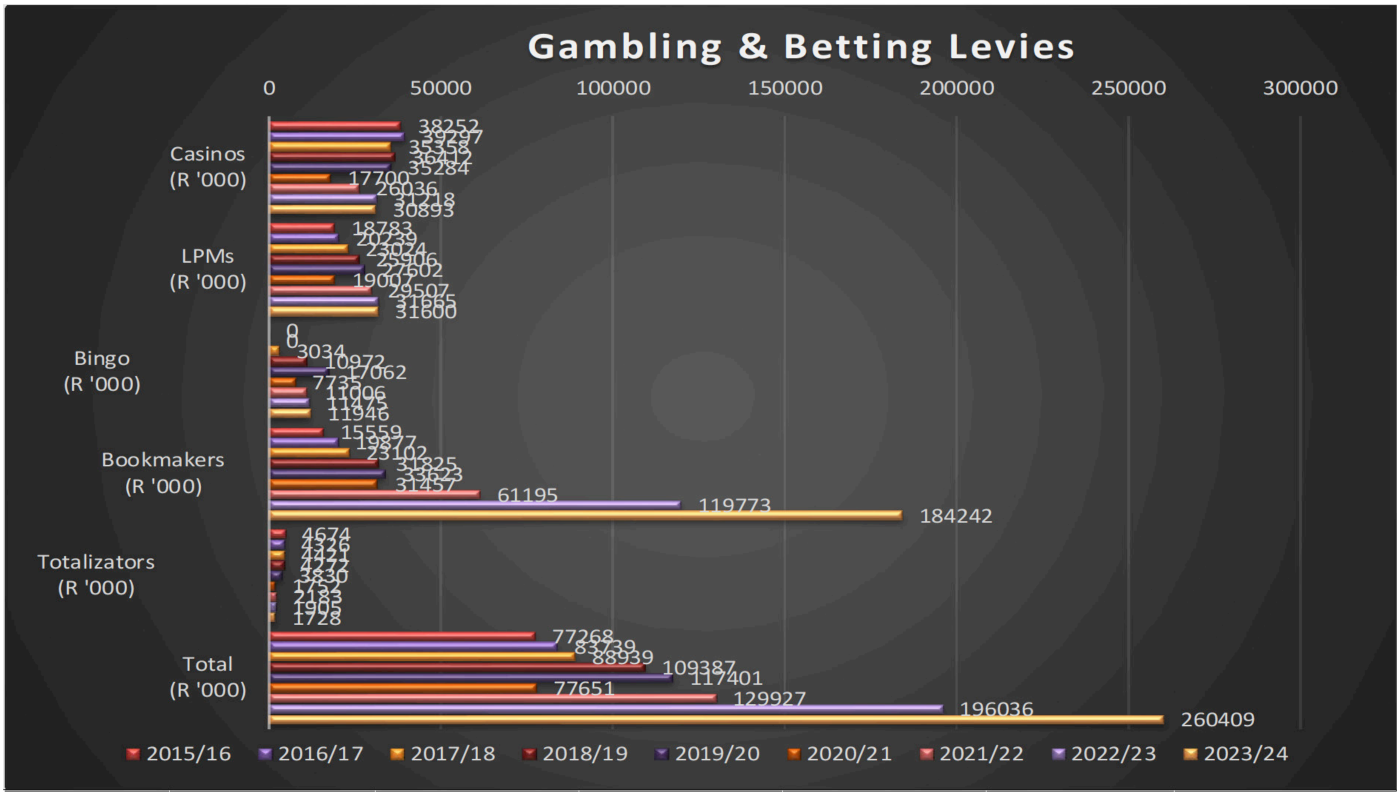


Year	Gambling Machines (R'000)	Gambling Tables (R'000)	LPMs (R'000)	Bingo (R'000)	Total (R'000)
2015/16	391 549	58 480	187 828	-	637 857
2016/17	392 688	69 624	202 387	-	664 699
2017/18	351 412	64 565	230 243	35 693	681 913
2018/19	362 237	66 141	25 906	129 087	583 371
2019/20	350 865	64 235	276 025	172 819	863 944
2020/21	176 764	31 476	190 073	91 000	489 313
2021/22	264 946	41 355	295 704	129 478	730 853
2022/23	305 476	61 794	316 650	134 996	818 916
2023/24	296 216	67 218	315 997	140 502	819 973
Variance	- 9 260	5 424	653	5 546	1 057
Variance %	-3%	9%	-0.2%	4%	0.1%

GAMBLING LEVIES

The total levies paid by licensees for the financial years 2015/16 to 2023/24 were as follows:

Figure 2:



Year	Casinos (R'000)	LPMs (R'000)	Bingo (R'000)	Bookmakers (R'000)	Totalizers (R'000)	Total (R'000)
2015/16	38 252	18 783	-	15 559	4 674	77 268
2016/17	39 297	20 239	-	19 877	4 326	83 739
2017/18	35 358	23 024	3 034	23 102	4 421	88 939
2018/19	36 412	25 906	10 972	31 825	4 272	109 387
2019/20	35 284	27 602	17 062	33 623	3 830	117 401
2020/21	17 700	19 007	7 735	31 457	1 752	77 651
2021/22	26 036	29 507	11 006	61 195	2 183	129 927
2022/23	31 218	31 665	11 475	119 773	1 905	196 036
2023/24	30 893	31 600	11 946	184 242	1 728	260 409
Variance	- 325	- 65	471	64 469	-177	64 373
Variance %	-1%	-0.2%	4%	54%	-9%	33%

The GGR for gambling machines and gambling tables has been declining over the last six years. The overall casino levies have fluctuated over the last nine years, which culminated in a decrease in levies collected from casinos in 2023/24 by -1% in comparison to 2022/23 due to changes in economic conditions.

Levies from bingo operators have increased by 4%, while levies for LPMs operators decreased by 0.2% due to changes in economic conditions and the closure of LPM sites. Levies from bookmakers increased by 54% and levies from totalisators decreased by 9% due to economic conditions.

The fluctuations in GGR and gambling levies over the past ten years can mainly be attributed to bingo sites being introduced, more bookmakers being opened and more LPM site licences being granted, which has resulted in the market share of existing gambling establishments, such as casinos, to destabilise. In addition, sport betting over the past 10 years has been growing consistently in the province and countrywide.

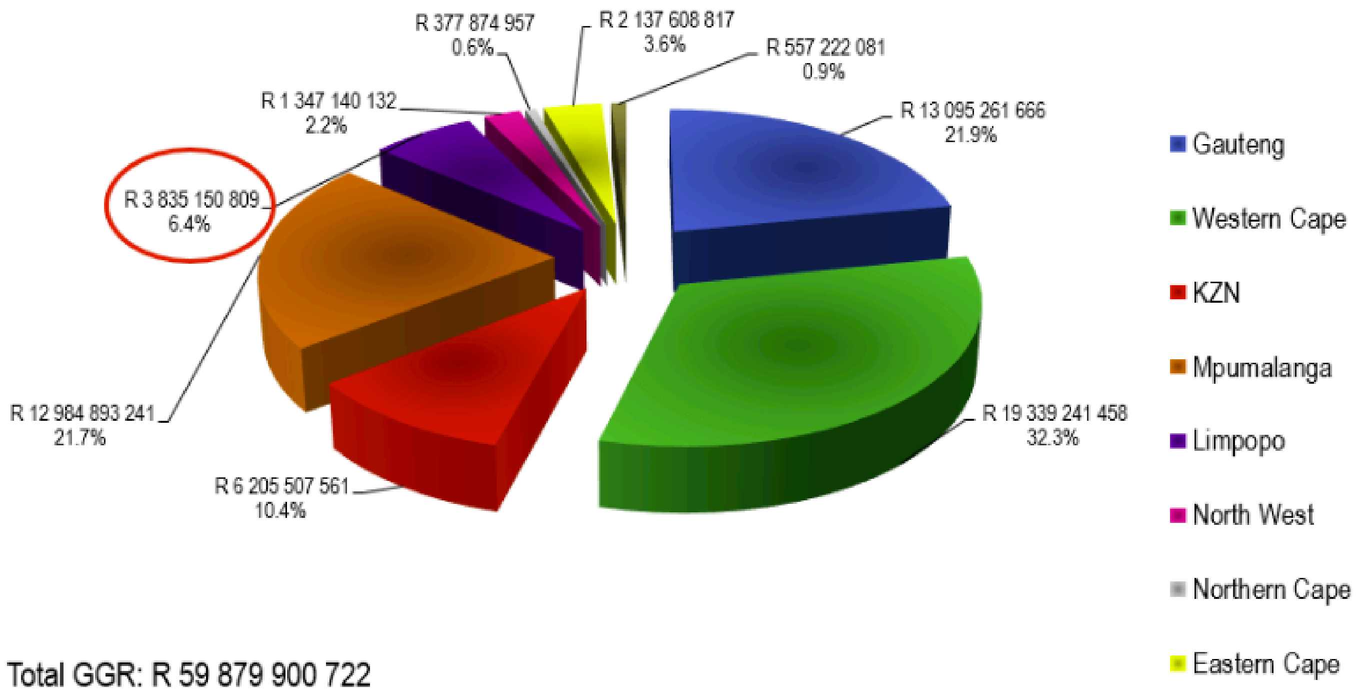
NATIONAL REVENUE OUTLOOK - GGR

Overall, national GGR in FY2022/23 totaled R 59.9 billion, a figure above that of the preceding year of R47.4 billion. In the 2023/24 financial year, Limpopo province contributed 6.4% to R 3 835 150 809 GGR generated nationally. The Limpopo contribution increased by 0.7% in comparison to the 2022/23 contribution. All provinces experienced positive growth, with the highest growth rate being in Mpumalanga, followed by Limpopo province.

Figure 3:

GGR per province, all modes, FY2023/24

Limpopo market share increased from 5.7% in FY2022/23 to 6,4% in FY2023/24



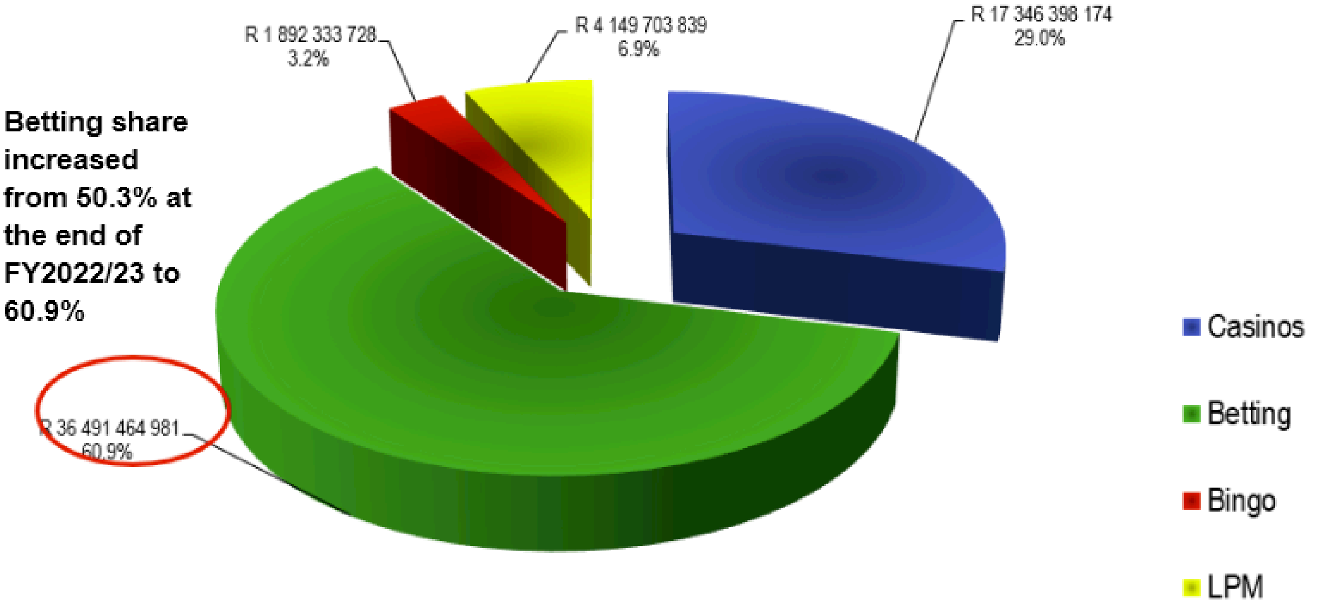
Total GGR: R59 879 900 722

Source: National Gambling Board (2024)

Figure 4:

GGR per gambling mode, all provinces FY2023/24

GGR generated in the gambling industry during FY2023/24 amounted to R59.9 billion. This represents a 27.1% increase from the previous year's GGR of R47.1 billion.
The largest share of GGR was generated by the betting industry, amounting to over half (60.9%) of industry GGR, with casinos now standing at 29.0% market share



Total GGR: R59 879 900 722

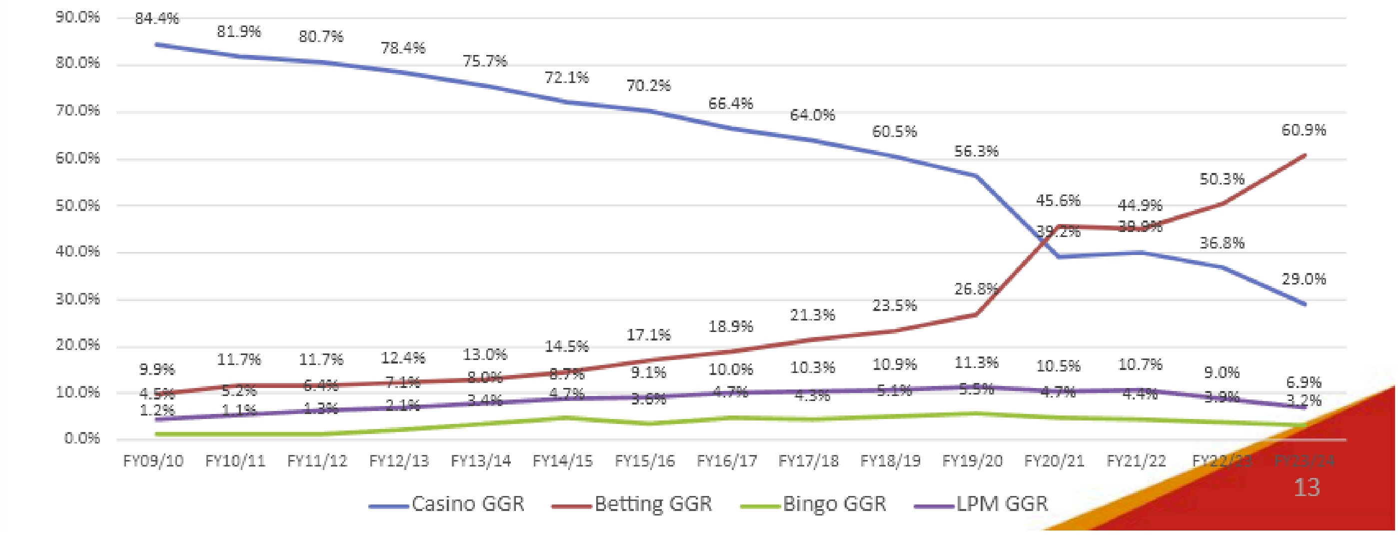
Source: National Gambling Board (2024)

The betting sector GGR continues to dominate the various modes of gambling at 60.9%, followed by casinos and LPMs GGR at 29% and 6.9%, respectively. At the same time, bingo took a share of 3.2%.

TREND IN SHARE OF TOTAL GGR

Figure 5:

Trend in share if total GGR, Comparison all modes (FY2009/10 – FY203/24)



Source: National Gambling Board (2024)

The GGR trends per gambling mode over the past 13 years show that casino GGR as a percentage of total national GGR for all modes of gambling has steadily declined from 84% in 2009/10 to 29% in 2023/24. On the contrary, the GGR for betting as a percentage of total national GGR for all modes of gambling has been on an upward trajectory from 9.9% in 2010 to 60.9% in 2023/24. The GGR for LPMs and bingo declined nationally to 6.9% and 3.2%, respectively.

NATIONAL REVENUE OUTLOOK – LEVIES

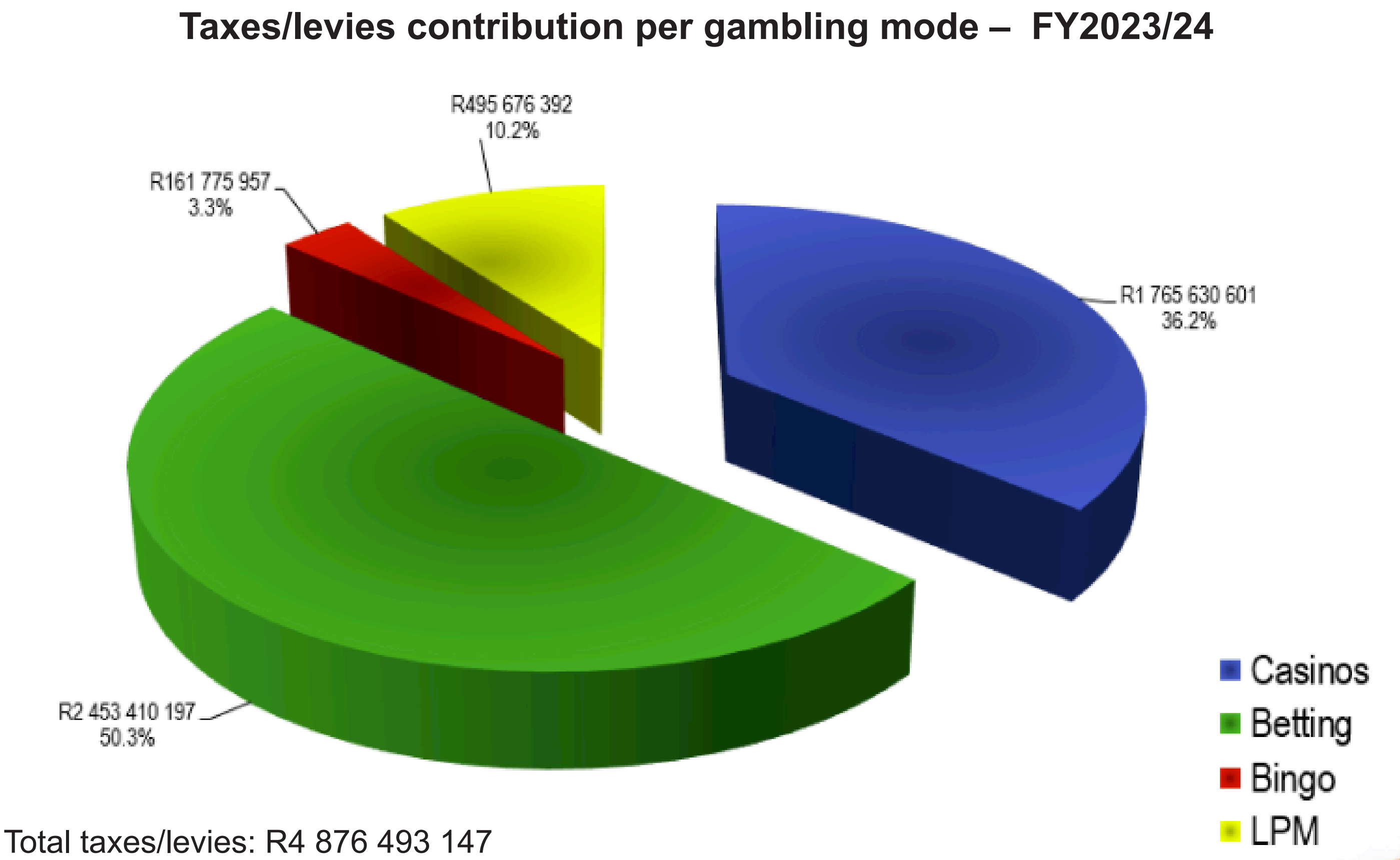
The gambling industry collected R4.8 billion in taxes/levies nationally in 2023/24 compared to R4.1 billion in 2022/23. This figure was a 7% increase compared to the previous year 2022/23. While the betting industry generated the largest amount of GGR, betting (50.3%) continues to contribute the larger share in levies relative to the casino (36.2%), LPM (10.2%) and bingo (3.2%) sectors.

The same GGR trends reflect in the levies collected during the same period. Limpopo province generated gambling levies amounting to R272 million, which comprises 5.6% of levies collected nationally in 2023/24.

TAXES/LEVIES CONTRIBUTION PER PROVINCE – FY2022/23

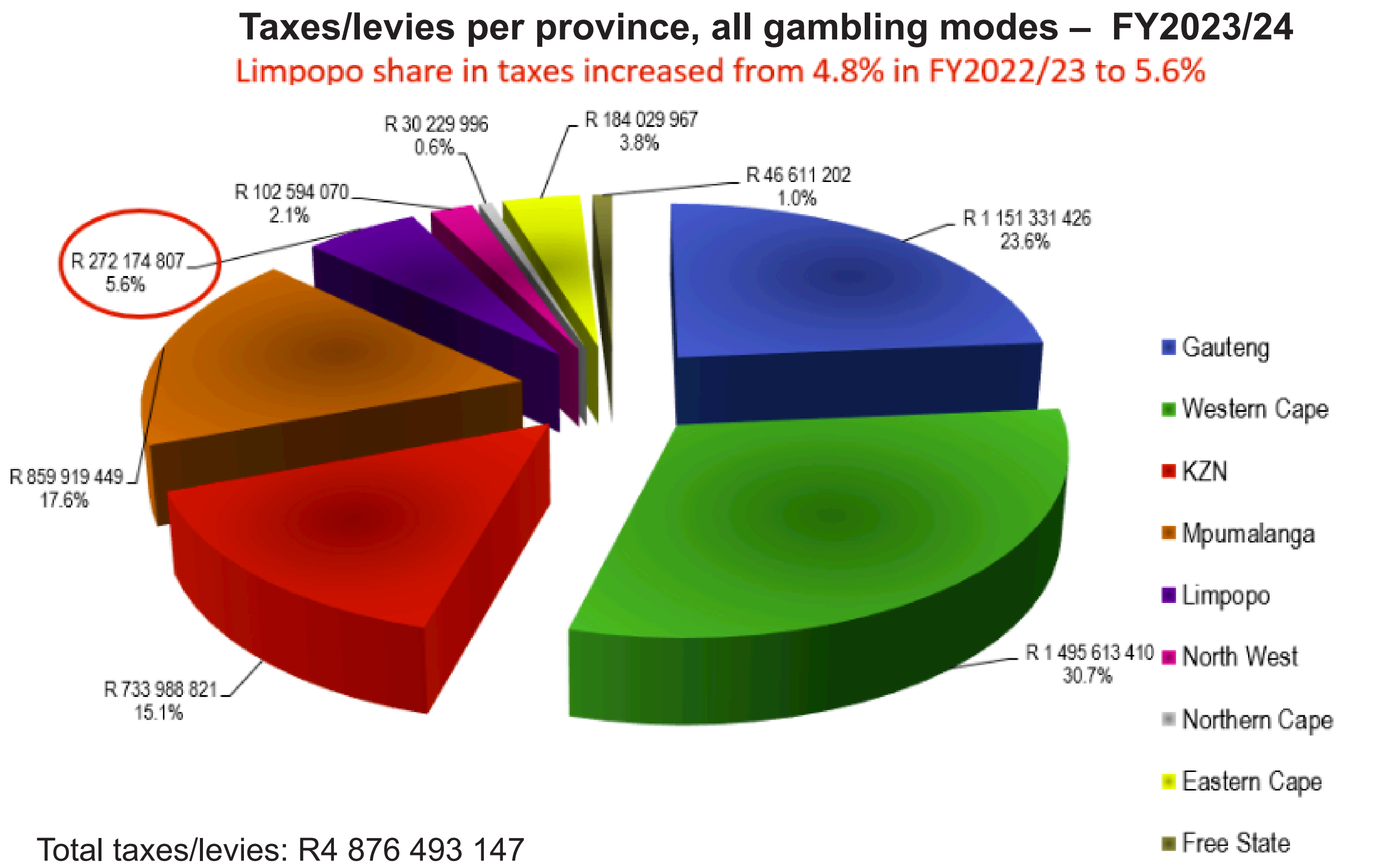
Gambling tax levied and collected by Provincial Licencing Authorities:

Figure 6:



Source: National Gambling Board (2024)

Figure 7:



Total taxes/levies: R4 876 493 147

Source: National Gambling Board (2024)

LAW ENFORCEMENT BUSINESS UNIT

During the sixth term of administration (2020–2025), the LGB has partnered with the South African Police Service (SAPS), the National Prosecuting Authority (NPA) and other relevant stakeholders responsible for the eradication of illegal gambling activities within the province. This collaboration assists in the protection and enhancement of the province's economy, as illegal gambling activities have a negative impact on revenue collection. To date, the Law Enforcement Business Unit has managed to achieve 100% of its targets in both investigations of illegal gambling activities and crime awareness campaigns.

Over the period 2020 to 2024, the unit conducted a total of 796 investigations. These investigations have led to the arrest of 407 individuals involved in illegal gambling operations. This demonstrates the commitment of the unit to enforcing the law and holding perpetrators accountable. Significant fines totaling R270 900 were collected as admission of guilt fines from illegal gambling operators. While these fines serve as a deterrent to some extent, there is a need for further action to address the underlying causes of illegal gambling and prevent recidivism. Law enforcement efforts in collaboration with SAPS, resulted in the confiscation of 1660 illegal gambling machines and 608 computers used for illegal online gambling activities. In addition, a total of R222 667.10 in illicit funds was confiscated, depriving criminals of their ill-gotten gains and disrupting their operations.

The 2020/21 budget cuts imposed by the Provincial Treasury hampered the operational activities of the Law Enforcement Unit, limiting their ability to combat illegal gambling effectively due to the onset of Covid-19. Despite these challenges, efforts were made to adapt and prioritise resources to address the most pressing issues with available means. Illegal gambling operators adapted their modus operandi in response to law enforcement efforts, making it more challenging to detect and combat their activities. This necessitated continuous vigilance and innovation on the part of law enforcement to stay ahead of evolving criminal tactics and disrupt illegal gambling networks effectively.

Since the 2022/23 financial year, Limpopo province has experienced widespread use of illegal gambling machines, which are often found in spaza shops operated by people who are not South African citizens, primarily situated in rural areas, with the supplier of the machines unknown. The unit works with the SAPS to ensure that illegal operators are arrested, and the illegal gambling machines are permanently removed from public spaces. These efforts resulted in disposal of 1394 illegal gambling machines. Another challenge is the operations of illegal online (interactive) gambling outlets that are operating without licenses and masquerading as internet cafés. These illegal gambling outlets are usually located in towns or shopping complexes, and use computer monitors for which the location of the server is unknown. For this mode of gambling, the unit depends largely on the police to collect evidential material that will assist in closing down the illegal gambling operations. The unit conducts raid operations to reduce this illegal gambling scourge.

In addition, the unit faces challenges related to a lack of effective legislation regarding online/computer/server-based illegal gambling and a fragmented approach in investigating illegal gambling in South Africa (with 11 pieces of legislation currently in South Africa). The prioritisation of illegal gambling activities as minor offences by SAPS and the modus operandi of illegal online gambling operators, who often refer cases to the High Court under urgent application, complicate the situation further. This is exacerbated by lack of representation, with civil cases not defended by the state in the High Court.

The Law Enforcement Business Unit conducted extensive outreach programmes and crime awareness campaigns in collaboration with other government departments to educate the public about illegal gambling and the consequences of participating in such activities. A total of 162 crime awareness campaigns were conducted during the sixth term of administration. These campaigns were further amplified through television, radio and newspaper advertisements to reach a broader audience and enhance public awareness. These campaigns have played a crucial role in empowering the public to recognise and report illegal gambling operations, thereby contributing to crime prevention efforts.

Moving forward, the Law Enforcement Business Unit will continue to work closely with the SAP, the NPA, the Department of Home Affairs and other law enforcement agencies to coordinate efforts and strengthen partnerships in combating illegal gambling. This multi-agency approach will ensure a comprehensive response to illegal gambling activities, leveraging the resources and expertise of various stakeholders. The Law Enforcement Business Unit plans to enhance its technological capabilities to better track and combat online gambling activities. The Unit will continue its crime awareness campaigns with a focus on all five municipal districts and expand partnerships with community organisations to improve local vigilance.

The desired impact of the Law Enforcement Unit's efforts is to significantly reduce illegal gambling activities within the province, thereby protecting the local economy and ensuring a safer community. Investigations are conducted for reported crimes to gather evidence, identify suspects and build cases for prosecution. The impact of these investigations is holding perpetrators accountable, ensuring justice is served and deterring future illegal activities. Proactive measures will be taken to prevent crime and maintain public safety, including joint operations with SAPS and other law enforcement agencies. The desired impact of these crime prevention efforts is a reduction in the occurrence of criminal activities to create a safer environment for the community and enhance public trust in law enforcement. The ultimate goal is to create an environment where illegal gambling is minimised and community awareness is heightened, which could lead to increased reporting and prevention of such activities. Through continuous improvement in strategies, collaboration with stakeholders, and effective resource allocation, the Law Enforcement Unit strives to eradicate illegal gambling and contribute to the overall well-being and economic stability of the province.

The sixth term of administration has seen significant achievements in the fight against illegal gambling, despite challenges posed by budgetary constraints and evolving criminal tactics. Through proactive law enforcement efforts, community engagement and enhanced collaboration, the Entity has made significant strides in disrupting illegal gambling networks and safeguarding communities.

5. EXTERNAL ENVIRONMENT ANALYSIS PESTLE

	Opportunities (External)	Threats (External)	Strategy to leverage on opportunities and minimise impact of threats
Political	1. Political stability in Limpopo, due to retention of the previous ruling party. 2. Government of National Unity (GNU), intervention with policies and legislation being passed.	1. Political directives that might be contrary to the independence of the entity.	1. To strengthen the independence of the Entity in decision making.
Economic	1. Creation of job opportunities through the issuing of licences. 2. Licensing of online gambling. 3. Inclusive economic imperatives, by empowering targeted groups through SCM procurement. 4. Leveraging on social media (technological advancement).	1. Illegal gambling. 2. High unemployment as a result of automation and digitisation of the gambling industry. 3. Low economic growth. 4. Labour disputes. 5. Load-shedding/loadreduction. 6. Increasing inflation rates. 7. Increasing interest rates. 8. Issue of fronting by companies in order to obtain tenders targeted at designated groups. 9. Illicit financial dealings	1. Advocate the legalisation of interactive gambling. 2. Expand existing forms of gambling, such as online betting. 3. Collaborate with various stakeholders and community leaders. 4. Ensure fair labour practice and adherence to governing legislation, policies and procedures. 5. Develop innovative ways to run the operations. 6. Implement anti-money laundering processes.
Social	1. Ability to contribute to corporate social responsibility projects. 2. Include issues such as child headed families, etc. 3. Social media leverage	1. Community unrest. 2. Retrenchments by operators. 3. Excessive/irresponsible gambling. 4. Proliferation of gambling. 5. Increase in crime. 6. High reliance on social grants	1. Strengthen licence conditions on CSI and employment. 2. Monitor and review of licence conditions continuously. 3. Ensure operators follow the law when retrenching staff. 4. Implement the outcome of the socio-economic impact study on gambling. 5. Issue licences. 6. Increase gambling awareness.

	Opportunities (External)	Threats (External)	Strategy to leverage on opportunities and minimise impact of threats
Technology	1. Increase adoption of AI and automation. 2. Advancement in digital transformation enabling remote work and online services. 3. Expansion of online platform for online gambling services. 4. Social media for advertising and awareness of illegal gambling and to gamble responsibly.	1. Increased unemployment as a result of preference to online gambling. 2. Cyber crimes. 3. Cyber threats and data breaches. 4. High cost of implementing and maintaining new technologies. 5. Digital divide limiting access of new technologies to certain populations.	1. Upskill staff. 2. Automate and modernise LGB processes. 3. Collaborate with departments, other entities and the private sector.
Environment	1. Implementation of the green economy	1. Climate change.	1. Move towards a paperless and green environment. 2. Ensure an adequate ICT infrastructure
Legal	1. Contribution towards amendment of the National and Provincial Gambling Acts. 2. Partnership with the NPA, SAPS and other government departments. 3. Third-party exclusions from gambling.	1. Regulations require updating of various sections. 2. Interactive gambling regulations not promulgated. 3. Amended smoking legislation. 4. Non-compliance with legislation. 5. Utilising services of the State Attorney. 6. Process of excluding family members is cumbersome and costly.	1. Amendment of gambling regulations. 2. Review of legislation to address relevant emerging issues. 3. Keep updated with developments and ensure compliance with new and amended legislation. 4. Advocate responsive state law office. 5. Liaise with SARGF regarding third party exclusions.

6. INTERNAL ENVIRONMENT ANALYSIS

(PFILMS)

	Strength (Internal)	Weaknesses (Internal)	Strategy to address weaknesses and sustain strengths
Personnel	1. Competent personnel. 2. Diverse workforce. 3. Recognised labour union.	1. Inadequate organisational structure. 2. Poor accountability. 3. Ineffective teamwork. 4. Ineffective consultation with labour unions. 5. Inadequate skills. 6. Inadequate Implementation of performance management system.	1. Review organisational structure and align to strategy. 2. Celebrate employee successes. 3. Intensify employee wellness programmes. 4. Implement consequence management.
Finance	1. Leading entity with clean audit. 2. Leading entity in revenue collection.	1. Ineffective budget management. 2. Poor spending. 3. Poor implementation of procurement plan.	1. Resuscitate budget committee. 2. Train on budget for unit heads. 3. Properly implement the procurement plan.
Infrastructure	1. Green economy compliant building, to an extent. 2. Offsite disaster recovery in place.	1. No automated operations management system. 2. Building not 100% green compliant. 3. No infrastructure maintenance plan. 4. Weak compliance to OHS.	1. Source the automated operations management system. 2. Develop infrastructure maintenance plan. 3. Improve infrastructure to be 100% compliant to green economy. 4. Fully implement the OHS Plan.
Leadership (Board & Management)	1. Consultative leadership. 2. Functional board. 3. Competent management.	1. Delays in decision making. 2. Inadequate consequence management.	1. Improve decision-making processes. 2. Enforce the consequence management processes.
Management	1. Fully capacitated management.	1. Poor internal communication 2. Weak organizational culture 3. Ineffective implementation of policies and plans 4. No succession plan	1. Develop communication strategies and policies 2. Improve work ethic 3. Improved monitoring of policies 4. Implement succession plan
Systems	1. Adequate policies and procedures in place. 2. ICT systems are up to date. 3. Communication systems are in place.	1. Ineffective implementation of recruitment policies. 2. Non-compliance with some legislation. 3. Lotus system is ineffective. 4. No communication unit in place.	1. Enforcement recruitment policies. 2. Implement compliance dashboard. 3. Share best practices in ICT systems from other state entities. 4. Establish communication unit. 5. Develop a communication strategy. 6. Develop a marketing strategy.

7. ORGANISATIONAL ENVIRONMENT

The Entity strives to be the employer of choice and will therefore continue to implement interventions that will promote retention of employees. The Entity will provide a conducive environment that enables employees to deliver on the mandate of the Entity and continue to grow in their professional areas. The number of employees, compliance to legislation, policies to guide employees and well-being of employees is critical in this regard. The following factors that affect employees will be the focus areas in the medium-term expenditure framework (MTEF):

7.1 Organisational structure

The organisational structure of the Entity has a total of 73 positions and from this number, 65 positions are filled. This represents 89% of the positions filled. Therefore, the vacancy rate of the Entity is currently 11%. The remaining vacant positions are to be filled during the MTEF period starting from the 2024/25 financial year.

Included on the figures above are the eight critical positions at senior management: CEO; CFO; Senior Manager: Finance; Senior Manager: Compliance; Senior Manager: Legal Services; Senior Manager: Law Enforcement(vacant); Senior Manager : Corporate Services and Company Secretary.

The Entity has 11 (17%) employed youths in the Entity. The Entity has nine employees who are between 36 and 39 years who constitute 14% of the workforce. The above implies that 31% (48) of the workforce is below 40 years of age. A total number of 29 employees (45%) are in the age range 40 50, while those who are between 51 and 60 years constitute 20% of the workforce (13). Those who are over 60 years (3) constitute 5% of the workforce and one will retire at the end of the 2024/2025 financial year. The remaining two employees will retire in the 2025/2026 financial year. The above implies that the Entity should invest more in the development of employees who are aged 50 and below as they constitute the higher percentage of the workforce. The employees who are 40 years and below are to be encouraged to share skills to maintain institutional memory.

The plan is to improve youth employment and to employ people with disabilities to fill the remaining vacant positions.
Furthermore, the Entity continues to invest in the country's youth development by recruiting interns. The recruitment of 10 interns is in progress and the plan is to continue to recruit interns during the MTEF period.

7.2 Employment Equity

Compliance with employment equity is a high priority for the Entity. This is done not only in compliance with legislation purposes but also to ensure that the Entity continues to be able to achieve its mandate. To this end, from the 65 positions filled, the Entity has 35 (54%) female employees and 30 (46%) male employees. This is a positive result towards balancing employment requirements for the previously excluded individuals. Furthermore, at senior management level, there are 4 (57%) women and 3 (43%) men. The Entity will continue to ensure compliance with this matter during the MTEF, as and when positions become vacant. Currently one employee (1.5%) is a person with disability. The Entity plans to improve on this category in the MTEF by recruiting additional employees living with disabilities and ensure that there is more than the norm of 2%. Attention will be given to the other categories (Indian, Coloured and White employees) as there are few employees in these categories. Targeted recruitment strategies will be implemented to address all gaps identified in compliance with employment equity.
The Entity has recently developed an employment equity plan to address the disparities. The Entity will implement the revised Employment Equity Plan in the MTEF, which will assist to attend to some of the gaps already indicated.

7.3 Capable workforce

The Entity has implemented a workplace skills plan in order to build the capacity of employees. Employees were awarded bursaries and the Entity continued to encourage and to pay for membership of professional bodies of the employees. The Entity has started the process of succession planning and it is planned that the process will be implemented during the MTEF period. This will ensure that there is no gap in the Entity due to resignations and retirement. The Entity implemented its performance management policy as one of the tools to optimise and improve efficiency and performance within the Entity. The Entity has embarked on a number of the employee wellness activities. These interventions will ensure that employees are encouraged to continue working and give their best performance in good health. These interventions will continue to promote efficiency in the Entity, improve morale of employees, reduce turnover, attract talented workers, reduce absenteeism, and enhance decision making and productivity of employees.

7.4 Human Resource Policies

A well-drafted set of policies and procedures ensures that the organisational rules, standards, values, culture and benefits are clearly outlined. This also assists the Entity in managing risks and eliminating disputes. The Entity continued to review the human resources policies. A total number of 17 human resources policies were approved by the Board. The remaining policies will be concluded in 2025/2026 financial year. The 17 reviewed policies will also be monitored, and any gaps identified will be addressed. These policies will continue to guide the operations of the Entity and boost the motivation and morale of employees.

7.5 ICT Capacity

The Entity recognises the critical role of Information and Communication Technology (ICT) in enabling its operations and enhancing service delivery. Therefore, the Entity has prioritised the development and maintenance of ICT capacity as a strategic focus area. During the MTEF period, the Entity will implement initiatives to:

- Invest in modern ICT infrastructure to improve operational efficiency and support digital transformation;
- Provide employees with ICT training to enhance their digital skills and ensure they can effectively use the systems and tools available;
- Develop and implement policies and procedures to govern ICT usage and ensure compliance with relevant legislation and best practices;
- Strengthen cybersecurity measures to protect the Entity's data and systems from threats;
- Enhance ICT support services to minimise downtime and address technical issues promptly.

These measures will ensure that the Entity's workforce is equipped with the tools and knowledge needed to perform their roles effectively and support the achievement of the Entity's mandate.

8. STRATEGIC PLANNING PROCESS

The following stakeholders were consulted during the process:

- Board members of Limpopo Gambling Board,
- Senior Management and staff of Limpopo Gambling Board,
- Department of Economic Development, Environment and Tourism (LEDET),
- Department of Trade, Industry and Competition,
- Provincial Treasury,
- Office of the Premier,
- National Gambling Board,
- South African Police Service,
- South African Responsible Foundation and Gambling operators.

The table below depicts the process that was followed in the development of the Strategic Plan:

July 2024	Consultation with licensees
19–20 August 2024	Planning meetings with management
28–29 August 2024	Planning meeting with MEC and Board
09 October 2024	Planning meeting with management
30 October 2024	Recommendation by the Audit & Risk Committee for approval of the Board
October 2024	Approval of the Board for sbmission to LEDET
31 October 2024	Submission of Draft Strategic Plan & APP to LEDET
16 January 2025	Planning meeting with management
22 January 2025	Planning meeting with the Board
29 January 2025	Recommendation by the Audit & Risk Committee for approval of the Board
January 2025	Approval of the Board for submission to LEDET
31 January 2025	Submission of Final Strategic Plan & APP to LEDET

PART C

MEASURING OUR PERFORMANCE

1. INSTITUTIONAL PERFORMANCE INFORMATION

2. MEASURING OUR IMPACT

Impact Statement	A regulated, fully compliant and socially responsible gambling environment in Limpopo.

3. MEASURING OUR OUTCOMES

PROGRAMME 1: GOVERNANCE

MTDP Priority	Priority 3: Build a Capable, Ethical & Developmental State		
Commitments	**Promote Accountability, Transparency & Good Governance**		
Outcome	**Outcome Indicator**	**Baseline (2020–2025)**	**Five Year Target (2025–2030)**
A sustainable, efficient and effective organisation.	Compliance level with policy directives.	New Indicator	100%
	Research projects completed.	01	01
Improved local and international relations with other gambling regulators and related institutions.	Signed Memorandum of Understanding / Agreements in place.	10	06

3.1 Explanation of Planned Performance over the Five-Year Planning Period

This programme provides the overall support and management of the Entity in accordance with the Limpopo Gambling Act, the PFMA and other relevant legislation in order to achieve the mandate of the institution. The programme provides support to the core programmes in order to achieve the mandate of the institution by providing guidance to all other business units with regard to finance, personnel, information technology and procurement to use resources efficiently and effectively in line with the PFMA. The Entity will strengthen integrated planning and implementation by collaborating with other stakeholders.

All Board Members and Executive Management will be required to complete and submit financial disclosures in order to maintain transparency and accountability. Having an efficient and effective organisation that is sustainable will assist the Entity to contribute towards achieving a capable, ethical and developmental state that the country aspires it to become. This will, in turn, assist the Entity to have an impact on the lives of ordinary people in the gambling fraternity by having a regulated, fully compliant and socially responsible gambling environment in Limpopo. Attainment of an unqualified audit outcome report from the independent auditors, specifically the Auditor-General South Africa (AGSA), will be used as a yard stick to measure the sustainability, efficiency and effectiveness of the Board in discharging its functions.

Further, the Entity will strive to sustain an unqualified audit outcome with no findings, which is a clear demonstration of the high level of compliance with all the laws and regulations governing the preparations and submission of Annual Financial Statements. An unqualified audit outcome is a sign of a sustainable, efficient and effective organisation.
As an overall goal, the programme is designed to ensure that the Entity functions efficiently, transparently and sustainably while maintaining full compliance with legislation. By achieving an unqualified audit outcome, the Entity can serve as a model of good governance and contribute to the broader goals of promoting ethical leadership and responsible gambling practices in Limpopo.

As an overall goal, the programme is designed to ensure that the Entity functions efficiently, transparently and sustainably while maintaining full compliance with legislation. By achieving an unqualified audit outcome, the Entity can serve as a model of good governance and contribute to the broader goals of promoting ethical leadership and responsible gambling practices in Limpopo.

PROGRAMME 2: CORPORATE SERVICES

MTDP Priority	Priority 3: Build a Capable, Ethical & Developmental State		
Commitments	Professionalise public service		
Outcome	Outcome Indicator	Baseline (2020–2025)	Five Year Target (2025–2030)
A sustainable, efficient and effective organisation.	A capable workforce	New Indicator	100%

3.2 Explanation of Planned Performance over the Five-Year Planning Period

The Corporate Services Business Unit aims to provide strategic and operational multidisciplinary services and professional partnerships to business units, to support and enable the core Business Units to achieve their objectives through value-adding programmes, systems, processes, policies and knowledge management. As enablers of good processes and employee performance, Corporate Services will contribute and underpin all strategic focus areas of the Entity. It will be a corporate centre of excellence in relation to human resources strategies, organisational design and development services, HR and related policies, change management, labour relations, general HR and business consultative services and also corporate administrative functions, including employee interaction and personnel administration.

It will further provide support in terms of facilities, records management and security-related matters within the Entity. The business unit will ensure processes related to the creation and maintenance of a system to deal with records throughout the Entity's lifecycle. This business unit will provide a blueprint regarding facilities management within the Entity and ensure that all employees and the property of the Entity are secured at all times.

PROGRAMME 3: FINANCE

MTDP Priority	Priority 3: Build a Capable, Ethical & Developmental State		
Commitments	Promote Accountability, Transparency & Good Governance		
Outcome	Outcome Indicator	Baseline (2020–2025)	Five Year Target (2025–2030)
A sustainable, efficient and effective organisation.	Compliance level with policy directives.	Unqualified audit outcome maintained.	Unqualified audit outcome maintained.
	Compliance level with policy directives	100%	100% invoices paid within 30 days of receipt.
		40%	40% procurement budget spent on women-owned businesses.
		New indicator	30% procurement budget spent on youth-owned businesses.
		New indicator	07% procurement budget spent on persons with disability-owned businesses.

3.3 Explanation of Planned Performance over the Five-Year Planning Period

The Finance Unit mandate is to support the Entity to achieve its mandate through providing guidance to the core units on finance, procurement and information technology in line with the PFMA and its prescripts.

By the Entity sustaining an unqualified audit opinion without findings, it will be a measure of the Entity's effectiveness in ensuring good financial governance and sustainability. The Entity's objective is to maintain the unqualified audit opinion without findings over the next five years and beyond. In addition, the Entity will ensure compliance with laws and regulations governing the preparations and submission of Annual Financial Statements.

PROGRAMME 4: COMPLIANCE

MTDP Priority	Priority 1: Inclusive Growth & Job Creation		
Commitments	Grow & support rural enterprises/SMMES		
Outcome	Outcome Indicator	Baseline (2020–2025)	Five Year Target (2025–2030)
Improved responsible gambling in Limpopo.	Responsible gambling awareness campaigns.	254	500
Transformed gambling industry that enables sustainable jobs in Limpopo.	Compliance with licence conditions.	New indicator	98%
Improved compliance with legislation.	Compliance with legislation by licensees.	New indicator	98%

3.4 Explanation of Planned Performance over the Five-Year Planning Period

Since the onset of gambling being legalised, the ownership structure of the gambling industry has generally not been transformed, thus excluding previously disadvantaged and historically excluded individuals. The regulation and monitoring of gambling in Limpopo is aimed at ensuring that the gambling industry is inclusive, contributes to economic development and creates more jobs by 2030. During 2024–2026 the Board will amend the licence conditions to ensure that the licensees comply with the BBBEE Act. In addition, the Entity will monitor the implementation of the license conditions through compliance audits and inspections.

In line with Section 4(1)(b) of the Limpopo Gambling Act, No. 3 of 2013, the LGB aims to protect the public from the negative effects of gambling and to ensure responsible gambling. This will be achieved by conducting 500 responsible gambling awareness campaigns in collaboration with the licensees and the South African Responsible Gambling Foundation (SARGF). The SARGF provides research, education and awareness, treatment and counselling to problem gamblers. Overall the LGB ensures compliance with legislation and aims to ensure better compliance with relevant legislation by Licensees. The achievement of the identified outcomes will assist the Entity to realise its impact and eventually contribute towards full implementation of the three MTDP priorities. To achieve all of the above, the Entity will require collaboration from all relevant stakeholders. Further resources in terms of funding, personnel and ICT tools is critical to enabling the Entity to achieve its outcomes and impact.

PROGRAMME 5: LAW ENFORCEMENT

MTDP Priority	Priority 2: Reduce Poverty & Tackle High Cost of Living		
Commitments	Strengthen enforcement against illegal gambling activities and promote community awareness		
Outcome	Outcome Indicator	Baseline (2020–2025)	Five Year Target (2025–2030)
All modes of illegal gambling activities combatted.	Investigations and crime awareness conducted.	New Indicator	1470

3.5 Explanation of Planned Performance over the Five-Year Planning Period

The primary objective over the next five years is to strengthen enforcement against illegal gambling activities and promote community awareness in the Limpopo province. The strategic plan focuses on achieving significant progress in these areas through targeted actions and collaborations.

Over the next five years, the Law Enforcement Unit will focus on reducing illegal gambling activities by conducting a total of 1220 investigations. To achieve this goal, collaboration and strengthening partnerships with key stakeholders such as SAPS, NPA, NGB and Department of Home Affairs will be crucial. Workshops will be provided to stakeholders directly involved in the investigation process to ensure they stay ahead of evolving illegal gambling tactics. The unit will focus not only on reactive measures but also on proactive strategies. Regular engagement with the Community Policing Forum (CPF) and participation in joint operations will be prioritised. Community leaders and stakeholders will be involved in promoting community-led crime prevention strategies to foster a collective effort in combating illegal gambling.

In addition to investigating illegal gambling activities, the unit aims to conduct 250 crime awareness campaigns by 2030. Public awareness and community engagement will be key components of the strategic plan. These campaigns will be expanded in collaboration with other government departments and community organisations. Mass media advertisements, print media and outdoor advertisements will be used to reach a broader audience and educate the public on the dangers of illegal gambling. This comprehensive approach will empower the community to recognise and report illegal gambling operations, and contribute to crime prevention efforts.

To successfully implement this strategic plan, a comprehensive budget and resource allocation will be essential. This includes financial allocation for personnel, crime awareness and operational expenses. Effective budget planning and management will ensure all activities are funded and executed efficiently, supporting the goal of reducing illegal gambling and safeguarding communities.

4. KEY RISKS AND MITIGATIONS

OUTCOME	KEY RISK	RISK MITIGATION
A sustainable, efficient and effective organisation.	• Insufficient budget to carry out mandate.	• Engage the shareholder (LEDET) and Provincial Treasury on alternative sources of funding such as charging the commission and retention of surplus funds. • Request additional funding via budget adjustments.
	• Key-person dependency (reliance on knowledge and/or availability of one person – lack of succession planning).	• Fill vacancies per organisational structure. • Review organisational structure. • Approve and implement succession plan.
	• Loss of crucial Entity data.	• Develop a records management system. • Maintain the offsite storage facility.
	• Failure to meet the legislated targets for promoting businesses by designated groups.	• Develop an internal database of suppliers. • Collaborate with LEDET on identifying designated groups.
Transformed gambling industry that enables sustainable jobs in Limpopo.	• Failure to meet economic development imperatives by licensees.	• Include economic imperatives criteria for evaluation of licence application. • Monitor compliance with licence conditions.
Improved local and international relations with other gambling regulators and related institutions.	• Lack of advanced knowledge of the gambling industry and manner of regulation.	• Benchmark with other gambling regulators and related institutions.
Improved responsible gambling in Limpopo.	• Increased incidents of problem gambling.	• Continuously educate and create awareness though visible responsible gambling campaigns.
Improved compliance with legislation by licensees.	• Failure to address/comply with anti-money laundering (AML) and anti-terrorism financing (ATF) measures.	• Implement risk-based methodologies for supervising licensees on AML & ATF.
All modes of illegal gambling activities combatted.	• Proliferation of illegal gambling activities in the province.	• Investigate and raid using the Law Enforcement Business Unit in partnership with SAPS. • Illegal gambling awareness to communities. • Update on amendments of Limpopo Gambling Act.

5. PUBLIC ENTITIES

Name of Public Entity	Mandate	Outcomes
Not applicable.		

PART D

TECHNICAL INDICATOR DESCRIPTION (TID)

PROGRAMME 1: GOVERNANCE

Indicator Title	Compliance level with policy directives
Definition	To facilitate the declaration of Financial Interests by the Board and committee members to promote transparency and accountability To facilitate the annual disclosure of financial interests by the Executive Management
Source of Data	Declaration of Financial Interest forms by Board and committee members Financial interest disclosure forms by Executives
Method of Calculation & Assessment	Actual number of completed and signed declarations of Financial Interest forms submitted in relation to the total number of Board and committee members who submitted multiplied by 100 Actual number of completed and signed financial interest disclosure forms submitted in relation to the total number of Executive Management who submitted multiplied by 100
Assumptions	Decisions that are ethical, objective and unbiased
Disaggregation of Beneficiaries	Not applicable
Spatial Transformation	Not applicable
Desired Performance	Decisions that are ethical, objective and unbiased
Indicator responsibility	Chief Executive Officer

Indicator Title	Research projects completed
Definition	To conduct and complete empirical research projects on various topics to assist the Board in planning and decision making, informed by the outcome of evidence-based research. The research focus areas would include transformation of the gambling industry, promotion of responsible gambling, the impact of illegal gambling activities and technological impact of the Fourth Industrial Revolution in the gaming industry.
Source of Data	Research reports, books, journals articles
Method of Calculation & Assessment	Simple counting of number of research projects completed
Assumptions	The LGB Board is able to plan on the basis of empirical research
Disaggregation of Beneficiaries	None
Spatial Transformation	None
Desired performance	Informed decision making based on empirical research evidence
Indicator responsibility	Chief Executive Officer

Indicator Title	Signed Memorandum of Understanding / Agreements in place
Definition	The indicator refers to the establishment of formal collaborations with local and international gambling regulators and organisations for the purpose of benchmarking, information sharing and collaborating on regulatory issues
Source of Data	Memorandum of Understanding, Annual Performance Plan, Research reports, books, journals articles
Method of Calculation & Assessment	Count and review the number of signed Memorandum of Understanding/Agreements
Assumptions	The LGB will build good relationships with stakeholders
Disaggregation of Beneficiaries	Not applicable
Spatial Transformation	Not applicable
Desired Performance	Effective collaborations with other regulators or organisations
Indicator Responsibility	Senior Manager: Compliance

PROGRAMME 2: CORPORATE SERVICES

Indicator Title	Implementation of the WSP
Definition	Total number of trainings attended for the year based on the Workplace skills plan
Source of Data	Approved workplace skills plan
Method of calculation / Assessment	The actual number of trainings attended for the year
Assumptions	To improve organisational performance
Disaggregation of Beneficiaries	Not applicable
Spatial Transformation	Not applicable
Desired Performance	Improving staff performance
Indicator Responsibility	Senior Manager: Corporate Services

Indicator Title	Performance Agreements signed
Definition	Signed performance agreements for the current financial year submitted to the HR Unit by 30 April. For new appointments, the signed performance agreement should be submitted within two months of the appointment.
Source of Data	Performance agreement
Method of Calculation / Assessment	Actual number of signed performance agreements submitted divided by the total number of employees in the Entity x 100
Assumptions	To improve organisational performance
Disaggregation of Beneficiaries	Not applicable
Spatial Transformation	Not applicable
Desired Performance	Improving staff performance
Indicator Responsibility	Senior Manager: Corporate Services

Indicator Title	Annual performance assessment conducted
Definition	Performance assessment conducted by Management and the HR Unit for the previous financial year by the end of the second quarter of the current financial year
Source of Data	Bi-annual performance appraisals
Method of Calculation / Assessment	Actual number of performance appraisals signed divided by the total number of LGB employees x 100
Assumptions	Elimination of low morale and poor performance
Disaggregation of Beneficiaries	Not applicable
Spatial Transformation	Not applicable
Desired Performance	Improving staff performance
Indicator Responsibility	Senior Manager: Corporate Services

PROGRAMME 2: FINANCE

Indicator Title	Unqualified audit outcome
Definition	To maintain a professional and financially transparent and accountable administration
Source of Data	Audit Reports, Draft Annual Report and Draft Annual Financial Statements
Method of Calculation / Assessment	Audit report indicating audit outcome as submitted by AGSA, assess the audit opinion expressed by the auditors on the Annual Financial Statements and the reported performance on predetermined outcomes/objectives
Assumptions	To have continued professional, transparent and accountable administration
Disaggregation of Beneficiaries	Not applicable
Spatial Transformation	Not applicable
Desired performance	Sustained unqualified audit outcome
Indicator responsibility	Chief Financial Officer

Indicator Title	Compliance level with policy directives
Definition	The indicator refers to compliance levels for the following components within the finance programme: invoices paid within 30 days of receipt of a valid invoice and preferential procurement budget used to empower women-owned businesses, preferential procurement budget used to empower youth-owned businesses, preferential procurement budget used to empower disability-owned businesses in line with Preferential Procurement Regulation 2022.
Source of Data	a) Invoice register b) Spend report and CSD c) Spend report and CSD d) Spend report and CSD
Method of calculation / Assessment	a) Invoices paid divided by received invoices multiple by 100% b) Actual number of invoices received divided by the number of women-owned businesses multiplied by 100 to obtain a percentage c) Actual number of invoices received divided by the number of youth-owned businesses multiplied by 100 to obtain a percentage d) Actual number of invoices received divided by the number of disability-owned businesses multiplied by 100 to obtain a percentage
Assumptions	Availability of budget
Disaggregation of Beneficiaries	a) All suppliers b) 40% for women c) 30% for youth d) 07% for disability
Spatial Transformation	Not applicable
Indicator Responsibility	Chief Financial Officer

PROGRAMME 3: COMPLIANCE

Indicator Title	Awareness campaigns
Definition	Responsible gambling awareness campaigns conducted, including physical or online public educational and awareness campaigns. The campaigns will include planned activities to raise public awareness on the effects of excessive gambling and the services offered by the South African Responsible Gambling Foundation.
Source of Data	Responsible Gambling Awareness Strategy & Annual Plan and Invitations
Method of calculation / Assessment	Count number of Responsible Gambling Campaigns conducted
Assumptions	The public will be aware of the effect of gambling irresponsibly
Disaggregation of Beneficiaries	Not applicable
Spatial Transformation	Not applicable
Desired Performance	Reduce the incidents of problem gambling
Indicator Responsibility	Senior Manager: Compliance

Indicator Title	Compliance with licence conditions
Definition	Conduct compliance audits or monitoring reviews to ensure that Licensees adhere to gambling legislation and licence conditions
Source of Data	Applications delivery note/Applications register and investigation reports
Method of Calculation / Assessment	Count the number of compliance audits and/or monitoring reports
Assumptions	All the licensed entities meet the licensing requirements and, Licensees will adhere to licence conditions and legislation
Disaggregation of Beneficiaries	Not applicable
Spatial Transformation	Not applicable
Desired Performance	Licensees compliant with applicable legislation
Indicator Responsibility	Senior Manager: Compliance

Indicator Title	Compliance with legislation by Licensees
Definition	Conduct compliance audits or levy audits or monitoring reviews, compliance inspections conducted on casino, bingo and LPM site licensees to ensure that Licensees adhere to gambling legislation and licence conditions
Source of Data	Compliance Audit Operational Plan and Gambling Control Operational Plan
Method of Calculation / Assessment	Count the number of compliance audits and/or levy audits and/or monitoring reports and count number of Compliance inspections conducted
Assumptions	Count number of compliance audits conducted and the compliance inspection reports
Disaggregation of Beneficiaries	Not applicable
Spatial Transformation	Not applicable
Desired Performance	Licensees compliant with applicable legislation and licence conditions
Indicator Responsibility	Senior Manager: Compliance

PROGRAMME 4: LAW ENFORCEMENT

Indicator Title	Investigations and crime awareness conducted
Definition	This refers to conducting investigations on identified illegal gambling activities and enquiries to verify suspicious or reported illegal gambling activities
Source of Data	Tips from members of the public/informers, undercover operations and invitations from stakeholders and crime awareness year plan and invitations
Method of Calculation / Assessment	Count the number of investigations conducted, count number of crime awareness campaigns conducted, count the number of investigation reports and attendance registers for crime
Assumptions	Reduced illegal gambling activities
Disaggregation of Beneficiaries	Not applicable
Spatial Transformation	Rural and urban
Desired Performance	Reduction of illegal gambling activities
Indicator Responsibility	Senior Manager: Law Enforcement

ANNEXURES TO THE STRATEGIC PLAN

ANNEXURE A: NSDF AND THE DISTRICT DELIVERY MODEL

Areas of Intervention in the NSDF & DDM	Five-Year Planning Period								
	Project Name	Project Description	Budget Allocation	District Municipality	Specific Location	Project Leader	Social Partners	Longitude	Latitude
Not applicable									

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