Casual Gaming and Gambling on the Internet – 2nd edition

Social Gaming, Skill Gaming, Online Bingo, Online Lotteries, and Others

London/Munich, December 2010

Go to http://www.casual-gaming.mecn.net to obtain full report
Summary

Online casual gaming and gambling have been around for some time but have generally kept a low profile. Now this seems about to change, and more and more eyes in the industry look at the casual sectors as new growth areas:

- **Recent heavy investments** by PartyGaming, 888, Playtech, ... in the online bingo industry indicate the casual segment’s growing importance.
- **Social gaming** offers, such as Zynga Poker, are currently dominating the strategic discussions in the online gambling industry.
- **Casual players are the primary revenue-generating** segment in liberalised markets, as the example of Italy shows.
- Fantasy sports and skill gaming are more and more used as **strategies to enter markets with legal restrictions** (e.g., U.S.).
- **Online lotteries and number games** have moved into the spotlight as one of the last “untouched” sectors worth USD billions.

As the issues above indicate, the list of relevant developments is long - therefore, we have decided to update our well received report on the casual gaming and gambling market and publish a brand-new second edition.

**Definition - what is casual gaming and gambling?**

What distinguishes casual gaming from casual gambling? **Casual gaming** includes all games where predominantly skill and know-how determine the outcome of the game. On the other hand, in **casual gambling** predominantly luck and chance determine the outcome of the game. This report deals with both gaming and gambling as both target the recreational casual player mainly playing for fun.

**Exhibit: Core sectors of the online casual gaming and gambling market – and how they differ**

<table>
<thead>
<tr>
<th>Casual gambling – Outcome primarily determined by luck</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bingo</strong></td>
</tr>
<tr>
<td>• Game of chance where randomly selected numbers are drawn, and players match those numbers to those appearing on pre-printed cards.</td>
</tr>
<tr>
<td>• Especially popular in the U.S., U.K., Italy, and Spain.</td>
</tr>
<tr>
<td><strong>Instant / scratch win games</strong></td>
</tr>
<tr>
<td>• Games of chance based on simple game design – usually similar instant tickets sold via retail channels.</td>
</tr>
<tr>
<td>• Many state lotteries, such as the U.K. National Lottery, offer instant win games.</td>
</tr>
<tr>
<td><strong>Keno, lotto, number games</strong></td>
</tr>
<tr>
<td>• Fixed-odds or pari-mutuel number games.</td>
</tr>
<tr>
<td>• Sector dominated by state lotteries.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Casual gaming – Outcome primarily determined by skill and know-how</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Skill gaming</strong></td>
</tr>
<tr>
<td>• Internet games that are won because of skill rather than luck.</td>
</tr>
<tr>
<td>• Many operators try to eliminate elements of chance.</td>
</tr>
<tr>
<td>• Examples: Solitaire, Zuma, 9-Ball Pool, Mahjong, ...</td>
</tr>
<tr>
<td><strong>Fantasy sports</strong></td>
</tr>
<tr>
<td>• Games where players create an individual virtual team to compete against other teams based on statistics of real-life professional athletes or sports teams.</td>
</tr>
<tr>
<td>• Most popular in the U.S. for football and baseball.</td>
</tr>
<tr>
<td><strong>Social gaming</strong></td>
</tr>
<tr>
<td>• Games integrated in social communities such as Facebook.</td>
</tr>
<tr>
<td>• Mostly play-money games of chance such as Zynga Poker.</td>
</tr>
</tbody>
</table>

Source: IDGA, MECN
Content of report

The report analyses some of the most relevant topics – such as:

- **Social gaming, communities, and networks** – A first and unique analysis of social gaming from the perspective of gambling operators, including a Zynga Poker case study, online gambling companies following Zynga’s footsteps, operators’ strategies regarding social gaming, overview of Facebook offers of online gambling operators, opportunities and challenges for online gambling, ...

- **Online bingo and skill gaming** – Detailed analyses of the key offers of the casual sector, including breakdown of market figures, regional overview, ...

- **Lotto and number games, instant/scratch, fantasy sports**, ... – Many of these casual offers have long been neglected but are at the brink of becoming key growth sectors for the industry. Our research is the first to dig deeper into these sectors and provide insights regarding market size, forecasts, key market players, ...

- **Business models, revenue sources, success factors**, ... – The report also examines the business and revenue models of casual gaming and gambling including commissions, B2B, advertising, ...

- **Industry outlook and recommendations** – An overview of future growth drivers, key market players in the future, and recommendations for private and state operators.

The report also includes unique insights we gathered from our survey of ca. 40 market insiders and operators.

In total, the report has **112 pages** and **94 graphs/exhibits**.

**Table of contents**

**PART 1 - INTRODUCTION**

1 AN INTRODUCTION TO CASUAL GAMING AND GAMBLING 5
   1.1 The online gambling industry turns casual, finally 5
   1.2 Casual gaming attracts more and more interest 6

2 THE RELEVANCE OF CASUAL GAMES FOR ONLINE CASINO, POKER, AND BETTING 12
   2.1 Casual gaming and gambling as the “Trojan horses” for casino, poker, and betting? 12
   2.2 Does conversion from casual gaming to poker, casino, and betting work? 13
   2.3 Women, the key casual gamers 14

3 CASUAL GAMING/GAMBLING - ON THE WAY TO BECOMING A SUSTAINABLE BUSINESS 21

**PART 2 - CASUAL IN DETAIL – FROM SOCIAL GAMING TO ONLINE LOTTERIES**

4 SOCIAL GAMING, COMMUNITIES, AND NETWORKS – OPPORTUNITIES FOR ONLINE GAMBLING? 23
   4.1 Introduction into the world of networks and social communities 23
   4.2 Overview of online gambling operators active on social networks and communities 24
   4.3 Social gaming – currently the most discussed topic in the industry 29
      4.3.1 An introduction to social gaming 29
      4.3.2 Zynga – best practice when it comes to social gaming 30
      4.3.3 Zynga Poker – online poker goes social gaming 31
      4.3.4 First online gambling companies in Zynga’s footsteps 33
      4.3.5 Nearly everybody will increase social gaming and community offers 34
   4.4 Where are the opportunities and challenges for online gambling? 35
   4.5 MMOGs – new dimension of online gambling or “just” a marketing vehicle? 39
5 SKILL GAMING 41
  5.1 Introduction – what are games of skill? 41
  5.2 Market size of skill gaming – 2010 to 2015 44
  5.3 Popular skill games 45
  5.4 Regional differences in skill gaming 47
  5.5 Overview and evaluation of skill gaming sites 49

6 ONLINE BINGO 51
  6.1 Bingo – an introduction 51
  6.2 Market size of online bingo – 2010 to 2015 52
  6.3 Regional market analyses – U.K., Spain, Italy 55
  6.4 New developments/trends in the online bingo industry 58
  6.5 Overview of online bingo sites and selected operators 58

7 ONLINE LOTTERIES – A MARKET THAT WAS LONG NEGLECTED, TOO LONG 61
  7.1 Online lotteries – an introduction 61
  7.2 Key players and business models in the interactive lottery market 62
  7.3 The recent decision of the ECoJ – the end of many (state) lottery monopolies? 64
  7.4 Market size of online lotteries – 2010 to 2015 65

8 ONLINE KENO 68
  8.1 Online keno – mostly the first step toward number games 68
  8.2 Market size of online keno – 2010 to 2015 70

9 ONLINE INSTANT/SCRATCH GAMES 72
  9.1 Scratch/instant games – can the success be migrated from retail to online? 72
  9.2 Online scratch cards offered by private operators 73
  9.3 Market size of online instant lotteries and scratch card games – 2010 to 2015 74

10 FANTASY SPORTS – POTENTIAL ENTRY STRATEGY FOR RESTRICTIVE MARKETS? 76
  10.1 The fantasy sports players - similar target group as poker and betting 76
  10.2 Business model and market 76
  10.3 Online gambling operators offering fantasy sports 77
  10.4 Potential first step into the U.S. market for online gambling operators 77
  10.5 Overview and evaluation of fantasy sports offers 78

11 MAHJONG – THE DOOR OPENER IN GAMBLING CRAZY ASIA 79
  11.1 Introduction to the game 79
  11.2 Relevant mahjong online sites 80

12 SWEEPSTAKES - THE FREE CASUAL ENTERTAINMENT 81
  12.1 Introduction 81
  12.2 Sweepstakes offered by private operators 82

PART 3 - THE BUSINESS OF CASUAL GAMING AND GAMBLING

13 THE MAIN REVENUE SOURCES 85
  13.1 Overview of key revenue streams 85
  13.2 Commission revenues – key of the B2C business 86
  13.3 B2B / 3rd-party license agreements and distribution deals 87
  13.4 Advertising 89
  13.5 Other revenue sources 90

14 KEY SUCCESS FACTORS IN THE CASUAL GAMING/GAMBLING INDUSTRY 92

15 INDUSTRY OUTLOOK AND RECOMMENDATIONS 93
  15.1 Future growth drivers 93
  15.2 The key players in the future 96
PART 4 – CASE STUDIES

16 CASE STUDIES AND DETAILED ANALYSES OF SELECTED ONLINE BINGO OPERATORS
  16.1 PartyBingo / Cashcade
  16.2 Bingo.com

17 CASE STUDIES AND DETAILED ANALYSES OF SELECTED SKILL GAMING OPERATORS
  17.1 King / Midasplayer
  17.2 GameDuell
  17.3 WorldWinner
  17.4 GameAccount
  17.5 iWin
  17.6 Pogo

18 CASE STUDIES AND DETAILED ANALYSES OF SELECTED FANTASY SPORTS OPERATORS
  18.1 Fanball
  18.2 FanDuel
  18.3 ESPN Fantasy and Games

19 GREENTUBE – CASE STUDY OF A LEADING CASUAL GAMES DEVELOPER

20 METHODOLOGY

21 LIST OF EXHIBITS

List of exhibits

PART 1 - INTRODUCTION

Exhibit 1: Core sectors of the online casual gaming and gambling market – and how they differ ...............5
Exhibit 2: Overview of acquisitions, investments, and cooperations in the casual gaming/gambling market .................................................................................................................................7
Exhibit 3: Overview of casual gaming/gambling software supplier ........................................................................8
Exhibit 4: Casino/slot games at online bingo sites ........................................................................................ 12
Exhibit 5: “Real” gambling offers and links to them on casual gaming/gambling sites ....................................13
Exhibit 6: Conversion rate from skill gaming and online bingo to gambling (casino, poker, betting) – Results of MECN survey ...............................................................................................................14
Exhibit 7: Motivations for casual gamers – Results of MECN survey ..................................................................14
Exhibit 8: Future relevance of women as target group for the online gambling industry – Results of MECN survey ..........16
Exhibit 9: Women poker tournaments .................................................................................................................................16
Exhibit 10: Traditional poker marketing targeting males ......................................................................................17
Exhibit 11: Examples of online gambling sites targeting women .................................................................................18
Exhibit 12: Gambling activities by gender – most popular gambling types for women ........................................19
Exhibit 13: Games revenue compared to Bwin’s total revenue – 2007 to 2010 ..............................................21
Exhibit 14: Bingo revenue compared to PartyGaming’s total revenue – 2007 to 2010 ........................................22

PART 2 - CASUAL IN DETAIL – FROM SOCIAL GAMING TO ONLINE LOTTERIES

Exhibit 15: Overview of the most relevant networks and communities .................................................................24
Exhibit 16: Overview of Facebook offerings of key online gambling operators ..............................................25
Exhibit 17: Overview of Twitter offerings of key online gambling operators .......................................................26
Exhibit 18: GameDuell games on Facebook ...........................................................................................................27
Exhibit 19: Overview of YouTube offerings of key online gambling operators ..................................................28
PART 3 - THE BUSINESS OF CASUAL GAMING AND GAMBLING

Exhibit 75: Relevance of revenue streams for skill gaming operators – Results of MECN survey ..................85
Exhibit 76: Relevance of revenue streams for online bingo operators – Results of MECN survey ................86
Exhibit 77: Example of matches offered and the associated fees and prizes .............................................86
Exhibit 78: Commission scheme of PartyGammon ....................................................................................87
Exhibit 79: “Correlation” of commission to total entry fees – example of WorldWinner ...............................87
Exhibit 80: Overview of B2B partnerships of top skill gaming operators ....................................................88
Exhibit 81: Top B2B subdomains of casual operators in % of total unique visitors (users) .........................88
Exhibit 82: Current and future major B2B partners for casual gaming operators – Results of MECN survey ............................................................................................................................................89
Exhibit 83: Advertising at casual gaming sites ............................................................................................89
Exhibit 84: Example of in-game advertising in casual games ........................................................................90
Exhibit 85: Best marketing channels for targeting casual gamers – Results of MECN survey .......................92
Exhibit 86: Drivers/factors most likely to shape the casual gambling industry in the next 2-3 years .............93
Exhibit 87: Mergers and acquisitions expected in the next 2-3 years – Results of MECN survey ................94
Exhibit 88: Relevant geographical regions for casual gaming and gambling in the future – Results of MECN survey ................................................................................................................................................95
Exhibit 89: Examples of casual gambling offered by state lotteries ............................................................95
Exhibit 90: Future casual gambling strategies, increase of investments dominates – Results of MECN survey ........................................................................................................................................96
Exhibit 91: Market players who will dominate the casual gaming and gambling markets in 2-3 years .........96
Exhibit 92: The relevance of casual gambling for key online gambling operators in 2-3 years – Results of MECN survey ........................................................................................................................................97

Exhibit 93: Example of Greentube games ....................................................................................................112
Exhibit 94: Industry sectors of survey participants ........................................................................................113
## Companies mentioned in this report

<table>
<thead>
<tr>
<th>Acclaim</th>
<th>Fraxis International</th>
<th>PartyGaming</th>
</tr>
</thead>
<tbody>
<tr>
<td>Altice Ventures</td>
<td>Free Bingo</td>
<td>PartyGamon</td>
</tr>
<tr>
<td>Amazon</td>
<td>Fremantle Media</td>
<td>PartyPoker</td>
</tr>
<tr>
<td>Ambient Sound Investments</td>
<td>Fresh Games</td>
<td>Piper Jaffrey</td>
</tr>
<tr>
<td>Andreessen Honwitzi</td>
<td>Friendstar</td>
<td>PKR</td>
</tr>
<tr>
<td>Anteup Magazine</td>
<td>Fueps</td>
<td>Play89</td>
</tr>
<tr>
<td>Apan Partners</td>
<td>Full Tilt</td>
<td>Playdrom</td>
</tr>
<tr>
<td>Atac Media</td>
<td>Fun Time Bingo</td>
<td>Playfish</td>
</tr>
<tr>
<td>Austrian Lotteries</td>
<td>Gala Bingo</td>
<td>Pogo</td>
</tr>
<tr>
<td>Baldor Capital</td>
<td>Gala Coral</td>
<td>PokerStars</td>
</tr>
<tr>
<td>Baseline Ventures</td>
<td>GameAccount</td>
<td>PokerStrategy</td>
</tr>
<tr>
<td>Beast Gaming</td>
<td>Gamedek</td>
<td>Pool Empire</td>
</tr>
<tr>
<td>BeatYa</td>
<td>GameDuell</td>
<td>Podsharks</td>
</tr>
<tr>
<td>Bellatio Bingo</td>
<td>GamesGrid</td>
<td>Prime Scratch Cards</td>
</tr>
<tr>
<td>Bet365</td>
<td>Gamesville</td>
<td>Product Madness</td>
</tr>
<tr>
<td>Betable</td>
<td>General Catalyst Partners</td>
<td>Publishers Clearing House</td>
</tr>
<tr>
<td>Betdaxq</td>
<td>Global Gaming Entertainment</td>
<td>RealTime Fantasy Sports</td>
</tr>
<tr>
<td>Betfair</td>
<td>Go Girl</td>
<td>RedBus Bingo</td>
</tr>
<tr>
<td>Betsidson</td>
<td>Google</td>
<td>Reddi</td>
</tr>
<tr>
<td>Big Box Bingo</td>
<td>Greentube</td>
<td>Redpoint Ventures</td>
</tr>
<tr>
<td>Big City Bingo</td>
<td>Greylock Partners</td>
<td>Roller Bingo</td>
</tr>
<tr>
<td>Big Fish</td>
<td>Happy Bingo.com</td>
<td>Salmon River Capital</td>
</tr>
<tr>
<td>Bingotto</td>
<td>Hi</td>
<td>Sandbox</td>
</tr>
<tr>
<td>Bingo Cabin</td>
<td>Hitwise</td>
<td>Saturn Bingo</td>
</tr>
<tr>
<td>Bingo Day</td>
<td>Holztbrink Netwons</td>
<td>Scratch2Cash</td>
</tr>
<tr>
<td>Bingo Funland</td>
<td>Hopa</td>
<td>Scratchcard Heaven</td>
</tr>
<tr>
<td>Bingo Gratis</td>
<td>Hubub</td>
<td>Second Life</td>
</tr>
<tr>
<td>Bingo Liner</td>
<td>I-Mahjong.com</td>
<td>Sega</td>
</tr>
<tr>
<td>Bingo Mafia</td>
<td>Intenwetten</td>
<td>Shanda Interactive Entertainment</td>
</tr>
<tr>
<td>Bingo Port</td>
<td>ITV Bingo</td>
<td>Shaor's Bingo</td>
</tr>
<tr>
<td>Bingo.com</td>
<td>iWin</td>
<td>Silent Gaming</td>
</tr>
<tr>
<td>Binglotto.se</td>
<td>Jackpot City</td>
<td>Skill Games</td>
</tr>
<tr>
<td>BingoOld</td>
<td>Jackpotjoy</td>
<td>Skillit</td>
</tr>
<tr>
<td>Bingos.co.uk</td>
<td>Jadestone</td>
<td>SkyBet</td>
</tr>
<tr>
<td>Bingos.com</td>
<td>King.com</td>
<td>Softbank</td>
</tr>
<tr>
<td>Bingos.net</td>
<td>Kleiner Perkins Caufield &amp; Byers</td>
<td>Spark Capital</td>
</tr>
<tr>
<td>BingoWinZingo</td>
<td>Ladbrokes</td>
<td>Sportbinget</td>
</tr>
<tr>
<td>BlueIbingo</td>
<td>Liberty Media</td>
<td>Starbet</td>
</tr>
<tr>
<td>Bonnier Gaming</td>
<td>Linden Lab</td>
<td>StumbleUpon</td>
</tr>
<tr>
<td>Burda Media</td>
<td>Linkedin</td>
<td>SunBingo</td>
</tr>
<tr>
<td>Butineo</td>
<td>Lotomatica</td>
<td>Svenska Spel</td>
</tr>
<tr>
<td>Bwai</td>
<td>Lycoki Bingo</td>
<td>Tencent International</td>
</tr>
<tr>
<td>Carbon Poker</td>
<td>Madwin</td>
<td>Think Bingo</td>
</tr>
<tr>
<td>Cash for Skills</td>
<td>Magnetise Media</td>
<td>ThinkEquity</td>
</tr>
<tr>
<td>Cashball</td>
<td>Mahjong Time</td>
<td>Tiger Global Management</td>
</tr>
<tr>
<td>Cashcade</td>
<td>Mahjongclub</td>
<td>Tiki Bingo</td>
</tr>
<tr>
<td>Cheeky Bingo</td>
<td>Mapaku Bingo</td>
<td>Tombola</td>
</tr>
<tr>
<td>Clarius Capital</td>
<td>Maria Bingo</td>
<td>Top Fox</td>
</tr>
<tr>
<td>CostaBingo</td>
<td>Maria Poker</td>
<td>Tournament Games</td>
</tr>
<tr>
<td>Cozy Games</td>
<td>Mecca Bingo</td>
<td>Tournament Games</td>
</tr>
<tr>
<td>Craydeplay</td>
<td>Midlands</td>
<td>U.K. Gambling Commission</td>
</tr>
<tr>
<td>Cryptologic</td>
<td>Miniclip</td>
<td>U.K. National Lottery</td>
</tr>
<tr>
<td>Cyber Bingo</td>
<td>Minxy Bingo</td>
<td>Unibet</td>
</tr>
<tr>
<td>DataGames</td>
<td>Mino-Bingo</td>
<td>Union Square Ventures</td>
</tr>
<tr>
<td>Daut Limited</td>
<td>MUB.com Fantasy</td>
<td>United Games</td>
</tr>
<tr>
<td>DCM</td>
<td>Money Gaming</td>
<td>Upinor</td>
</tr>
<tr>
<td>Digital Sky Technologies</td>
<td>Moon Bingo</td>
<td>Veikkas</td>
</tr>
<tr>
<td>Dominoes Stars</td>
<td>MSN Games</td>
<td>Virtual Sports</td>
</tr>
<tr>
<td>Doubleclick</td>
<td>MySpace</td>
<td>Virtue Fusion</td>
</tr>
<tr>
<td>Dragonfish</td>
<td>Mytopia</td>
<td>Walt Disney</td>
</tr>
<tr>
<td>El Cartonazo</td>
<td>Napster</td>
<td>Watercooler/Kabam</td>
</tr>
<tr>
<td>ElBingo</td>
<td>NBC</td>
<td>WeightWatchers</td>
</tr>
<tr>
<td>Electronic Arts</td>
<td>NexGames</td>
<td>William Hill</td>
</tr>
<tr>
<td>Endemol</td>
<td>NetCollections</td>
<td>Wink Bingo</td>
</tr>
<tr>
<td>ESPN Fantasy and Games</td>
<td>NetPlay TV</td>
<td>World Mahjong Championship</td>
</tr>
<tr>
<td>Euro Gaming</td>
<td>New Bingo Billy</td>
<td>World Series of Mahjong</td>
</tr>
<tr>
<td>Everest Poker</td>
<td>Nintedo</td>
<td>WorldWinner</td>
</tr>
<tr>
<td>Expext</td>
<td>Norsk Tipping</td>
<td>WorldWinner</td>
</tr>
<tr>
<td>Facebook</td>
<td>Nyx Interactive</td>
<td>Yahoo</td>
</tr>
<tr>
<td>Fanbail</td>
<td>Online Bingo EU</td>
<td>YouTube</td>
</tr>
<tr>
<td>FanDuel</td>
<td>OPAP</td>
<td>Zynga</td>
</tr>
</tbody>
</table>
About authors and contact information

MECN - Media & Entertainment Consulting Network

MECN is a network of experts on issues concerning the media and entertainment industry. Together we provide in-depth knowledge, analysis, and advice to global clients. For the gambling industry, we provide market insights and strategic support to various clients ranging from bookmakers to state lotteries. For more information see www.mecn.net.

Media & Entertainment Consulting Network
MECN UK
Office 404, 4th floor
Albany House - 324/326 Regent Street
London W1B 3HH
United Kingdom

E-mail: info@mecn.net
www.mecn.net
Fax order form for the report:
Casual Gaming and Gambling on the Internet - 2nd edition
Social Gaming, Skill Gaming, Online Bingo, Online Lotteries, and Others

Fax to +49 (0) 89 3835 6786 or +44 (0) 207 692 4089

Please send me an electronic version (pdf) of the report (24-hour delivery):
Casual Gaming and Gambling on the Internet - 2nd edition

Personal Information

Mr/Mrs/Dr: ___________________________  First Name: ___________________________  Last Name: ___________________________

Company Name: ___________________________  City: ___________________________

Address: ___________________________  Country: ___________________________

Post Code: ___________________________  Telephone: ___________________________

Email: ___________________________  Company VAT/TVA/MOMS/IVA number: ___________________________

Signature: ___________________________

Date: _____/_____/_____

Payment Details

☐ Please invoice my company
☐ Please debit my ☐ Visa ☐ Mastercard ☐ Amex

Card No.: ____________ ____________ ____________ ____________

Expiration Date: ____________ / ____________

Card Holder Name: ___________________________

Signature: ___________________________

Contact us:

For questions, please contact reports@mecn.net

London / UK
MECN GmbH
Office 404, 4th Floor - Albany House
324/326 Regent Street
London W1B 3HH - UK
Tel.: +44 (0) 207 692 4088
Fax: +44 (0) 207 692 4089
info-uk@mecn.net

Munich / Germany
MECN Germany
Fürstenrieder Str. 279a
81377 Munich
Germany
Tel.: +49 (0) 89 7412 0235
Fax.: +49 (0) 89 7412 0102
info-germany@mecn.net

London / UK
MECN GmbH
Office 404, 4th Floor - Albany House
324/326 Regent Street
London W1B 3HH - UK
Tel.: +44 (0) 207 692 4088
Fax: +44 (0) 207 692 4089
info-uk@mecn.net

Munich / Germany
MECN Germany
Fürstenrieder Str. 279a
81377 Munich
Germany
Tel.: +49 (0) 89 7412 0235
Fax.: +49 (0) 89 7412 0102
info-germany@mecn.net