



National Gambling Board
South Africa

a member of the **etc** group



**TIRAGATSO YA
LEKALA LA GO
KEMBOLA MO
AFORIKA BORWA**

2024-2025

PEGELO YA TSHOBOKANYO

DITENG

- 1.Puo ka Motlhankedikhuduthamagamogolo
- 2.Ditebogo
- 3.Diakeronime
- 4.Dintlha tsa Tlhaloso
- 5.Tshobokanyo ya Khuduthamaga

KGAOLO 1 DIPALOPALO TSA GO KEMBOLA TSA BOSETŠHABA

1. Matseno
2. Madi a dibetšhe a Mofuta wa go Kembola le Porofense
3. Palogotlhe ya Letseno la go Kembola la Mofuta wa go Kembola le Porofense
4. Tuelo ya Makgetho/Makgethwana ya Mofuta wa go Kembola le Porofense

KGAOLO 2 LEKALA LA DIKHASINO

1. Maitsholo a Mmaraka
2. Dipalopalo tsa go Kembola mo Lekaleng la Dikhasino
3. Palogotlhe ya Letseno la go Kembola

KGAOLO 3

1. Maitsholo a Mmaraka
2. Dipalopalo tsa go Kembola
3. Palogotlhe ya Letseno la go Kembola
4. Makgetho/Makgethwana

KGAOLO 4 LEKALA LA METŠHINE E E LEKANYEDITSWENG GO DUELA

- Maitsholo a Mmaraka
- Dipalopalo tsa go Kembola tsa diLPM
- Palogotlhe ya Letseno la go Kembola
- Makgetho/Makgethwana

KGAOLO 5 LEKALA LA BINGO

1. Maitsholo a Mmaraka
2. Dipalopalo tsa go Kembola tsa Bingo
3. Palogotlhe ya Letseno la go Kembola
4. Makgetho/Makgethwana

KGAOLO 6 TIRO

KGAOLO 7 MAEMO A PHETOLO YA MAATLAFATSO YA IKONOMI YA BANTSHO E E AKARETSANG BOTLHE



1. PUO KA MOTLHANKEDIKHUDUTHAMAGAMOGOLO

Boto ya Bosetšhaba ya go Kembola (NGB) e itumelela go tihagisa dipalopalo tsa sešeng tsa lekala la go kembola tsa ngwaga wa matlole wa 2024/25 (1 Moranang 2024 go ya go 31 Mopitlwe 2025). Jaaka e laetswe ke Karolo 65 ya *National Gambling Act, 2004* (Molao 7 wa 2004), NGB e ela tlhoko mefuta ya go kembola, šere ya mmaraka le maitsholo. Pegelo e e tlhalosa dintlha tsa botlhokwa tsa tiragatso ya ikonomi ya intaseteri, fa thutopatlisiso e e kwa thoko ya ditlamorago tsa ikonomi le loago, e e tserweng mo patlisisong ya bosetšhaba, e neelana ka mmono wa loago.

Go kembola ke intaseteri e e golang ka bonako mo nageng. ka palogotlhe ya madi a a betšhilweng a a fitlhileng go dithirilione di le R1.5 kwa bokhutlong jwa FY 2024/25. Palogotlhe ya letseno la go kembola (GGR), karolo e e bolokilweng ke ditheo tsa go kembola morago ga dituelo, tse di fitlhileng go dibilione di le R74.5. Mo dingwageng di le nne tse di tlileng pele ga ngwaga wa leroborobo wa (FY2020/21), intaseteri e dirile kgolo ya palogare ya 5.9%. Mo letlhakoreng le lengwe, dingwaga di le nne tse di latelang paka ya COVID-19 di bone kgolo ya palogare ka 34.1%.

Koketsego e e kwa godimo e supa gore intaseteri e itemogetse phetogo ya botlhokwa e kgolo go latela dikgoreletsi tse di bakilweng ke COVID-19, le go dirisa madi ga bareki mo go kemboleng go tihatlogile thata. Go kembola ga e tlhole e le selo se se sa tlwaelegang go fetogile go nna selo se se tlwaelegile thata.

Mokgwa wa botlhokwa o o tlhagelelang go tswa mo dipalopalong tsa sešeng ke gore lekala la go kembola e ne e le lona fela karolo e e dirileng kgolo e kgolo. Mekgwa ya go kembola mo mafelong a a rileng go akaretsa dikhasino, bingo, le metšhine e e lekanyeditsweng go duela (di-LPM), tsotlhe di itemogetse dikwelotlase. Ka jalo, seelo sotlhe sa kgolo ya 25.6% mo ngwageng o o fetileng se ne se kgweediwa gotlhelele ke go kembola, go go diragalang thata mo maranyaneng.

Se se bontsha ditšhono le dikgwetlho tsa intaseteri. Mo letlhakoreng le lengwe, katoloso e e bonako ya lekala la go kembola le tlhama ditšhono tsa batho ba bašwa ba ba tsenang mo mmarakeng, go tsaya karolo mo go tlameng ditiro. Gape le dira letseno le le oketsegileng la puso go tswela setšhaba molemo, le le fitlheletseng dibilione di le R5.8 ka FY 2024/25. Ka fa letlhakoreng le lengwe, ditlamorago tsa loago, segolobogolo go oketsega ga bothata jwa go kembola, di setse di tlhagelela thata. Se se gatelela tlhokego ya kabo e kgolo ya didiriswa tsa kalafi ya batho ba ba amegang mo bothateng jo le malapa a bona.

NGB e tswela go tshameka karolo ya botlhokwa thata ka go lemosa setšhaba ka ga dikotsi tse di amanang le go kembola le go gakatsa maiteko a tsibogelo ya tikologo ya ga jaana. Maiteko a rona a pateletso a ikaelela go fedisa ditiro tsa go kembola tse di seng ka fa molaong, go netefatsa gore bareki ba ikamanya fela le ditheo tse di latelang molao le didiriswa tse di netefaditsweng semolao tsa go kembola.

NGB e kokoanya tshedimosetso go tswa mo bothating jwa thebolo ya dilaesense jwa diporofense (di-PLA), go re kgontsha go sekaseka mekgwa ya go kembola ya mo Aforika Borwa le go itsise bannaleseabe ka ga bogolo le kgolo ya intaseteri ngwaga le ngwaga. Re leboga di-PLA tsotlhe ka seabe sa tsona sa go neela tshedimosetso le dipalopalo tse di dirileng gore kgatiso e e diragale.

Rre Lungile Dukwana

Motlhankedikhuduthamagomogolo wa Nakwana





*“Motho yo o nang le
maikarabelo o dirisetsa go
kembola go ijesa monate le
go itlosa bodutu.”*

2. DITEBOGO



Dithata tsotlhe tsa thebolo ya dilaesense tsa di porofense (di-PLA) di lebogelwa go romela tshedimosetso e e runnweng ka ga maitsholo a mmara, šere ya mmara le dipalopalo tsa go kembola ga mo diporofenseng ka mofuta wa go kembola, setheo le porofense.

BOIPOLELO

Boto ya Bosetšhaba ya go kembola (NGB) le Lefapha la Kgwebisano, Intaseteri le Kgaisano (**dtic**) ga di netefatse kgotsa go neelana ka dinetefaletso dife tsa kgwebo malebana le tshedimosetso ya nnete le dinewa tse di phasaladitsweng fano ka maikaelelo a go dirisiwa, le fa e le dinetefaletso tseo di se ka tsa tsewa di le teng ka molao malebana le tshedimosetso le dinewa tse di phasaladitsweng fano.

NGB le **dtic** mo tiragalong epe ga di kitla, le fa e le badiredi, batlhankedi kgotsa baemedi ba tsona, ba rwala maikarabelo a badirisi ba dinewa kgotsa tshedimosetso e e neetsweng, kgotsa go motho yo mongwe, ka ntlha ya tatlhegelo nngwe kgotsa tshenyo, e ka tswa e le ditlamorago kgotsa ka tsela nngwe, go akaretša mme e seng fela nako, madi kgotsa bopelonomi, e e tlhagelelang go tswa mo tirisong, tiro kgotsa phetolo ya dinewa kgotsa tshedimosetso, kgotsa go palelwa ke go fetisa Khopi ya tokumente efe fela e e rileng. Mo tirisong ya tshedimosetso kgotsa dinewa, badirisi ba nagana kotsi ya go ikaega ka dinewa kgotsa tshedimosetso eo mme gape ba dumalane go sireletsa kgatlhanong le tatlhegelo kgotsa tshenyo, go bulela le go pega NGB kgotsa **dtic** le badiredi ba yona, batlhankedi le baemedi molato wa mofuta ofe o o tswang mo tshedimosetsong kgotsa dineweng tse di senang nnete kgotsa boammaaruri, kgotsa tiriso ya tshedimosetso kgotsa dinewa. Go feta foo, ka go dirisa tshedimosetso e kgotsa dinewa modirisi o amogela gore ba na le maikarabelo ka bobone a go sekaseka nepagalo le go ikanyega ga tshedimosetso kgotsa dinewa tse di neetsweng le gore a ditshwantsho tse di neetsweng, kgotsa dikhopi tsa tsona, di ka nna le diphoso le tshedimosetso nngwe e e tlogetsweng mme ga di totobadiwe kgotsa go netefadiwa fa di le boammaaruri, di feletse kgotsa di nepagetse.

Tshedimosetso e e phasaladitsweng fano ga se ya kgwebo. Ga go motho ope, setheo kgotsa modirisi yo o tla rekisang, kgotsa go amogela, ka maikaelelo a thekiso kgotsa a go neela go rekisiwa ga, karolo nngwe le nngwe ya tshedimosetso kgotsa dinewa tse di neetsweng fano, e seng le fa e le go dirisa tshedimosetso ka tsela e e tlolang molao kgotsa molawanataolo mongwe le mongwe.

BANNALESEABE

Di-PLA tse di latelang di nnile le seabe mo go kokoanyeng pegelo e ka go romela dipalopalo tsa go kembola tse di runnweng tsa diporofense le tshedimosetso ya maitsholo a mmara:

- Boto ya go Kembola ya Kapa Botlhaba
- Boto ya go Kembola le Bothati jwa Nnotagi jwa Foreisetata
- Boto ya go Kembola ya Gauteng
- Bothati jwa Taolo ya Ikonomi ya KwaZulu-Natal
- Boto ya go Kembola ya Limpopo
- Taolo ya Ikonomi ya Mpumalanga
- Boto ya go Kembola ya Kapa Bokone
- Boto ya go Kembola ya Bokone Bophirima
- Boto ya go Kembola le Mabelo ya Kapa Bophirima



3. DIAKERONIME



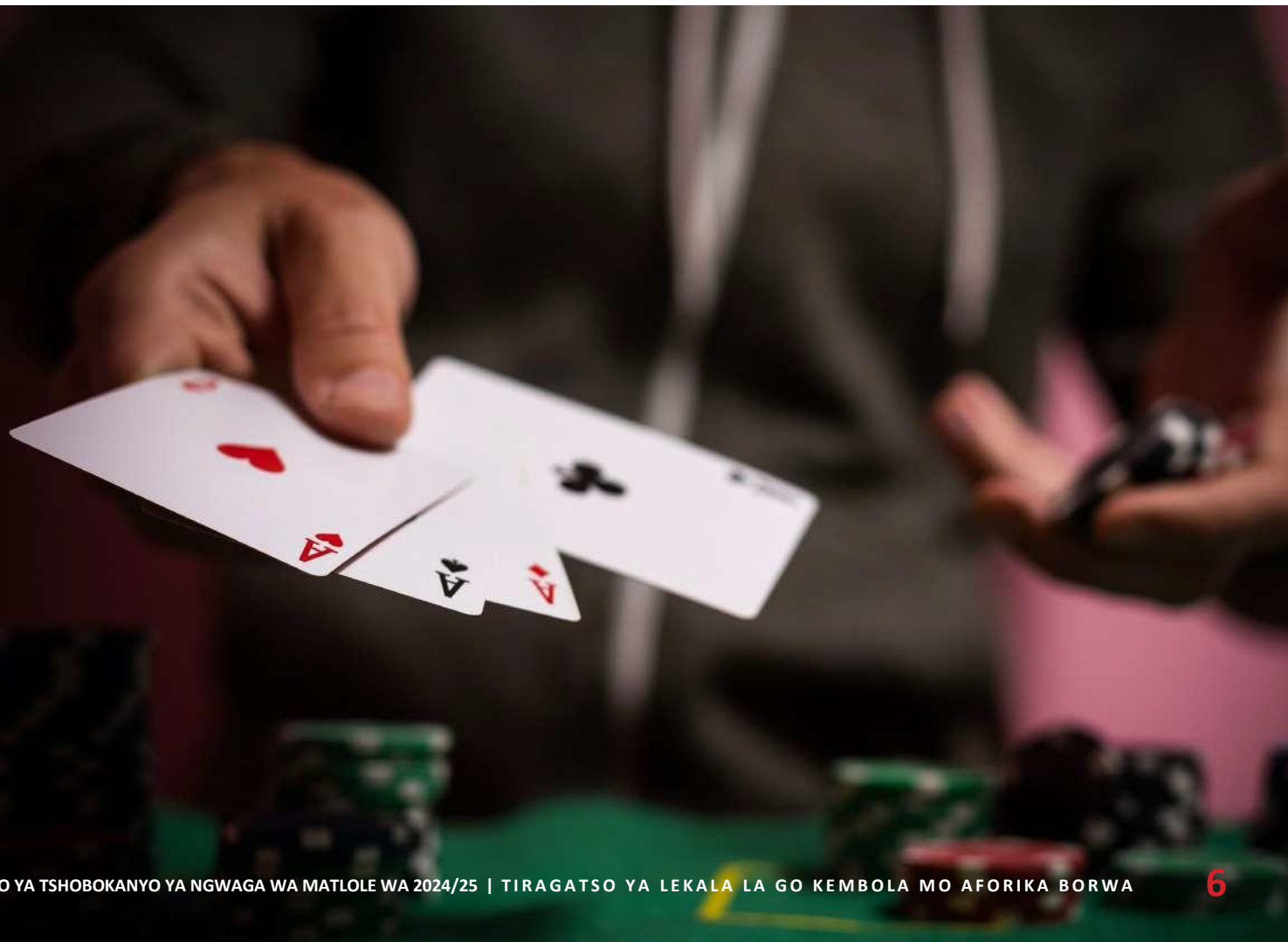
B-BBEE	Maatlafatso ya Ikonomi ya Bantsho e e Akaretsang Botlhe
EBT	Theminala ya Bingo ya Seileketeroniki
EC	Kapa Botlhaba
FS	Foreisetata
FY	Ngwaga wa Matlole
GDP	Kunoselegae ya Kakaretso
GGR	Palogotlhe ya Letseno la go Kembola
GP	Gauteng
KZN	KwaZulu-Natal
L	Limpopo
Di-	Metšhine e e Lekanyeditsweng go Duela
MP	Mpumalanga
N/A	Ga e tlhokege
NC	Kapa Bokone
NCEMS	Thulaganyokgolo ya Bosetšhaba ya go Tlhokomela ka Seileketeroniki
NGA	<i>National Gambling Act, 2004</i> (Molao 7 wa 2004)
NGB	Boto ya go Kembola ya Bosetšhaba
NW	Bokone Bophirima
Di-	Bothati jwa Diporofense jwa Thebolo ya Dilaesense
Qrt	Kotara
RTP	Madi a a Boelang Mmetšhi
dtic	Lefapha la Kgwebisano, Intaseteri le Kgaisano;
TO	Madi a Dibetšhe
WC	Kapa Bophirima
Yoy	Ngwaga-mo-Ngwageng



4. DINTLHA TSA TLHALOSO

Kotara	Tlhaloso
Badiri ba botlhokwa (ba ba nang le dilaesense)	Botsamaisi jo bogolo jo bo nang le dilaesense. Fa moamogelalaesense e le setheo sa kgwebo, mokaedi mongwe le mongwe kgotsa motlhankedi kgotsa mongwe yo o lekanang le setheo seo sa kgwebo le motho ofe yo o nang le dithata tsa go thapa kgotsa go fedisa bookamedi jwa badiri ba dikhasino; motho mongwe le mongwe yo o nang le dithata tsa go okamela kgotsa go kaela phetogo ya tiro ya metshameko kgotsa ya tshireletso; batho ba ba nang le dithata kgotsa maikarabelo a go laola lefapha le le lengwe kgotsa a le mantsi kgotsa ditiro tsa tsamaiso (dipalotlotlo, kerediti le dikokoanyo, mo madi a bewang teng, badiri, boruni jwa mo gare, tshireletso le go disa); motho mongwe le mongwe yo o emelang boto ka tihamalalo jaaka yo o botlhokwa kgotsa yo o tlokegang mo tsamaisong ya setheo; batho botlhe ba ka bongwe kgotsa jaaka karolo ya setlhophla ba leng karolo ya pholisi ya botsamaisi; maemo afe fela a tiro kgotsa motho yo ka kitsiso ya boto ya go kembola o tsewang e le modiri wa botlhokwa; mongwe le mongwe yo boto e tsayang a na le ditiro le maikarabelo a a bayang modiri mo maemong a botlhokwa a modiri.
Badiri ba bangwe ba metshameko (ba ba nang le dilaesense)	Motlatlhobi wa ditafola, morekisi/motlhokomedi, motshwaramatlole, khaontara, motlhokomedi yo o fetolang madi, moamogelabaeng, motlhokomedi wa babetshi, motlhokomedi wa tshireletsego, motlhokomedi wa metshine ya metshameko, motegeniki wa metshine ya metshameko, badiri ba ba disitseng (ba maemo a a kwa tlase), badiri ba go kokoanya dikoloto tsa metshameko, boruni jwa mo gare, badiri ba dipalotlotlo, tsamaiso ya datha le tiro efe fela e, ka kitsiso ya boto, e tsewang e le tiro ya go kembola ya mabaka a melawanataolo.
Badiri ba leruri (ba botlhokwa le ba bangwe)	Badiri ba botlhokwa le ba bangwe ba metshameko ya go kembola (ba ba nang le dilaesense).
Badiri ba nakwana	Moo kopo ya kwadiso e setseng e dirilwe go boto le tiro ya kgwebo ya batho ba ba nang le dilaesense ba tla tlhaolwang kgotsa go amega ka ntlha ya go diega. Dilaesense tseo tsa nakwana di ka rebolwa go letilwe dipelo tsa kopo ya mokopi ya ikwadiso (ka mantsewe a mangwe, laesense ya nakwana e e rebotsweng go lebeletse gore go rebotse laesense ya modiri wa leruri).
Motshine wa go kembola /motshine wa metshameko (e dirisiwa ka go fapaanngwa)	Motshinie wa metshameko, o o itsiweng ka tsela ya motshameko jaaka motshine wa go kembola, ke motshine wa khasino wa go kembola o o nang le di-reel tse tharo kgotsa go feta, tse di dikologang fa konopo e kgoromeditswe kgotsa setshwara se gogilwe (mefuta ya metshine ya bogologolo). Metshine e ya metshameko e itsiwe gape e le 'metshine ya letsogo le le lengwe' ka ntlha ya setshwara se le sengwe mo letlhakoreng la motshine (letsogo) le ka gone le kgona go tlogela mmetshi a sena madi (motshine wa bandit). Motshine o duela go ya ka diphethene tsa matshwao a a bonalang kwa pele ga motshinie fa o ema. Metshine ya metshameko ke mefuta ya go kembola e e tlwaelegileng mo dikhasinong le go dira 80% tsa palogare ya letseno la dikhasino.
Palogotlhe ya Letseno la go kembola (GGR)	Palogotlhe ya letseno la go kembola e tlhalosiwa jaaka boleng jwa ranta jwa palogotlhe ya letseno ya setheo sa go kembola go ya ka madi a a betshilweng, diphenyo tse di kwa tlase tse di duelwang batshameki.
Mabelo a dipitse	Mabelo a dipitse ke motshameko o mo go ona dipitse le bakgweetsi ba tsona ba tsayang karolo mo mabelong, jaaka gale go betshiwa mo dipholong tsa ona.
Yo o nang le dilaesense (mefuta yotlhe le mafelo a go kembola)	Yo o nang le laesense go tewa motho kgotsa setlamo se se nang le laesense e e amogelesegang, karata ya ikwadiso kgotsa setifikeiti se se ba letlang go neelana ka ditiro tsa go kembola tse di amogetsweng mo mafelong a a nang le dilaesense go batho ba ba fetang dingwaga di le 18.
Metshine e e lekanyeditsweng go duela (di-LPM)	Motshine o o lekanyeditsweng go duela o kaya motshine wa go kembola kwa ntle ga khasino, motshameko o o neelang madi le meputso e e lekanyeditsweng.
Madi a a Boelang Mmetshi (RTP)	Madi a a boelang mmetshi ke palogare ya madi a a busediwang go babetshi e e bonwang morago ga metshameko e mmalwa mme e seng nako le nako motshine wa go kembola o dirisiwa (palogotlhe ya madi a a boelang babetshi e bo e aroganngwa ka palogotlhe ya madi a a betshilweng ke babetshi).
Setheo sa go kembola se se nang le laesense (RO)	Mong wa metshine e e lekanyeditsweng go duela ke setheo sa semolao se se nang le laesense go nna le go dirisa metshinie e e lekanyeditsweng go duela, go tlhokomela le go kokoanya madi, le go duela makgetho le makgethwana go ya ka metshine e e ka fa tlase ga laesense ya yona

Kotara	Tlhaloso
Motsamaisi wa lefelo le le laolang metšhine ya go kembola	Motsamaisi wa lefelo le le laolang metšhine ya go kembola ke motho kgotsa setheo se se nang la laesense ya go laola metšhine e e lekanyeditsweng go duela e e leng ya mong wa yona mo mafelong a bona a a nang le dilaesense (a a itsiweng jaaka saete) le go dira gore e nne teng go dirisiwa ke maloko a setšhaba. [2]
Motshameko wa tafola	Mo dikhasinong, lereo 'motshameko wa tafola' le dirisiwa go farologanya motshameko e e jaaka blackjack, craps, roulette le baccarat e e tshamekelwang mo tafoleng e tshamekiwa ke batshameki ba le bantsi, jaaka croupier kgotsa poker dealer. [2]
Makgetho/Makgethwana	Lekgetho la go kembola le le duedisiwang ke le go kokoanngwa ke bathati ba thebolo ya dilaesense ba diporofense.
Totalisator/go betšha ga pari-mutuel (di dirisiwa ka go fapaanngwa)	Totalisator ke leina la thulaganyo ya go betšha motshameko wa phulu e e itirisang, e e tsamaisang go betšha ga pari-mutuel, e balela dituelo tsa di oto, e a di bontsha, le go tlhagisa ditekete go ya ka dibetšhe tse di tsenang. Go betšha ga pari-mutuel ke thulaganyo ya go betšha e mo go yona mefuta e e rileng ya go betšha e bewang mmogo mo phulung; makgetho le morokotso wa matlole a madi a go betšha o tloswang, mme dituelo tsa dioto di balelwa ka go arola palogotlhe ya madi a a setseng a go betšha gareng ga diphenyo tsotlhe tsa go betšha. [2]
Poelo go Mmetšhi (TO)	Madi a dibetšhe ke boleng jwa ranta jwa madi a a betšhilweng. Se se akaretsa 'tirisogape', e e kayang madi a a beilweng makgetlo a a fetang bongwe. 'TO' mo diotong tse di tlhomameng/tikologo ya ditšhono tsa go betšha ke, le fa go ntse jalo, e farologana le mefuta e mengwe ya go kembola ka tsela eo boleng jwa madi a a fetang mo ditafoleng tsa go betšha ga bo bonwe jaaka boleng jwa madi a a betšhilweng. Ke ka gone boleng jwa madi a a betšhilweng mo motshamekong a boela mmetšhi fa mmetšhi a ka fenywa go betšha, ka jalo tlhaloso ya nnete ya madi a a betšhilweng mo diotong tse di tlhomameng/bookmaking parlance ke madi a a betšhilweng go ntshiwa madi a dibetšhe tse di fentsweng, a a kana ka dioto tse di tlhomameng/gore selekanyo sa madi a a kgabaganyang tafola ga se bonwe jaaka thekiso. Seno ke ka gone madi a a beilweng/a betšhilwe/betšheng mo tiragalong a busediwa kwa motshameki fa motshameki a ka fenywa betšhe/betšhe, ka jalo tlhaloso ya nnete ya thekiso ka puo e e tlhomameng ya ditšhono/go betšha ke madi a a betšhilweng go fokodiwa dipeeletso tse di betšhilweng mo dibetšheng tse di fentseng, tse di lekanang le dioto tse di tlhomameng/kamogelodibetšhe.



5. TSHOBOKANYO YA KHUDUTHAMAGA

Kwa bokhutlong jwa ngwaga wa matlole wa 2024/25, dimilione di le R1.5 tsa madi a dibetšhe a a betšhilweng mo intasetering ya go kembola ya Aforika Borwa, ke koketsego ya 30.7% mo ngwageng o o fetileng. Palogotlhe ya Letseno la go betšha (GGR) e balelwa go dibilione di le R74.5, ke koketsego ya 25.6% mo ngwageng o o fetileng.

Tshekatsheko ya GGR ka mofuta wa go kembola e senotse gore go betšha go dirile go feta peditharo ya GGR ya intaseteri ka 70% (dibilione di le R52.0). Dikhasino le tsona di nnile le karolo e kgolo ya GGR ka dibilione di le R16.7 (22%). Intaseteri ya metšhine e e lekanyeditsweng go duela (di-LPM) ke lekala la boraro le legolo go gaisa ka (6%), le le tlhagisitseng dibilione di le R4.1 ka FY 2024/25. Lekala la bingo le dirile 2% tsa letseno ka dibilione di le R1.7.

Kgolo ya GGR go ralala mofuta ya go kembola e bontshitse gore go betšha e ne e le mokgweetsi a le nosi, ka go oketsa 44.7% fa e bapisiwa le ngwaga wa matlole o o fetileng. Mo pakeng eo, makala a dikhasino, di-LPM le bingo a wetse tlase ka 4.1%, 0.04% le 8.6%, ka go latelana. Se se bontsha phokotsego mo mefuteng ya go kembola e e mo mafelong a a rileng, jaaka fa bontsi jwa go betšha bo dirwa mo maranyaneng.

Mo maemong a bosetšhaba, lekala la go betšha ke mofuta o mogolo wa go kembola; le fa go ntse jalo, ditshekatsheko tsa diporofense di bontsha dikhasino tsa Gauteng, KwaZulu-Natal (KZN), Kapa Botlhaba, Bokone Bophirima, le Foreisetata, e le makala a magolo. Mo Gauteng, sekao, dikhasino di dirile GGR ya 56.1% mo go FY 2024/25. Lekala la go betšha le ne le laola mebaraka ya Kapa Bophirima ka (84.4%), Mpumalanga ka (95.9%), Limpopo ka (83.5%) le Kapa Bokone ka (59.8%).

Intaseteri ya go betšha e na le di-bookmakers le di-totalisator, ba ba betšhang mo metshamekong le mofuta e mengwe, mmogo le mabelo a dipitse. Lekalana le le di gogang kwa pele ke go betšha ga di-bookmaker mo metshamekong, go go dirang dibilione di le R47.9 tsa letseno la go betšha. Dinewa le tsona di bontsha gore 86% tsa go betšha di dirwa mo maranyaneng.

Mo lekaleng la dikhasino, Gauteng e dirile ka go fetisisa mo GGR ka 45%, e bo e latelwa ke Mpumalanga ka 41%. Kapa Bophirima e bo e etelela pele lekala la go betšha ka 37% tsa GGR. Mo lekaleng la di-LPM, Kapa Bophirima ka (22%) le KZN ka (21%) ke tsona diporofense tse di kwa godimo. Mo bingo, Gauteng ka (30%) le Kapa Botlhaba ka (24%) di dirile letseno le le kwa godimo.

Makgetho/makgethwana a a balelwang go dibilione di le R5.8 mo go FY 2024/25, ka 20.1% kwa godimo go feta ngwaga o o fetileng. Go betšha go dirile karolo e kgolo ya makgetho/makgethwana ka 59%, go bo go latela dikhasino ka (30%), di-LPM ka (9%) le bingo ka (2%).





SETSHWANTSHO SA INTASETERI YA GO KEMBOLA SA FY 2023/24 LE 2024/25

Lenaane1: Setshwantsho sa Intaseteri ya go kembola go tloga ka 31 Mopitlwe 2025

Sefetogi	FY 2024/25 Maitsholo a Mmaraka - go tloga ka Kotara 4 Dipalopalo - Palogotlhe ya Dikotara Tsotlhe	FY 2024/25 Maitsholo a Mmaraka - go tloga ka Kotara 4 Dipalopalo - Palogotlhe ya Dikotara Tsotlhe	FY 2024/25 Kotara 1	FY 2024/25 Kotara 2	FY 2024/25 Kotara 3	FY 2024/25 Kotara 4
Palo ya dikhasino tse di dirang	37	36	37	37	37	36
Palo ya metšhine e e dirang (dikhasino)	22,070	21,370	22,047	21,824	21,370	21,591
Palo ya ditafola tse di dirang (dikhasino)	955	890	954	926	936	890
Palo ya maemo a go kembola a a dirang (dikhasino)	35,748	28,362	34,993	35,285	34,680	28,362
Palo ya mafelo a go kembola di-totalisator a a dirang	366	325	366	357	368	325
Palo ya di-bookmakers tse di dirang	349	315	750	349	355	315
Palo ya mafelo a go kembola di-bookmakers a a dirang	594	553	601	591	589	553
Palo ya beng ba di-LPM ba ba dirang	2,599	2,546	2,555	2,530	25,66	2,546
Palo ya di-LPM tse di dirang	15,805	15,743	15,656	15,604	15,798	15,743
Palo ya mafelo a a dirang a bingo	70	73	66	65	66	73
Palo ya maemo a bingo a a dirang	12,290	13,452	12,290	11,755	12,270	13,452
Tse di tlwaelegileng	0	0	0	0	0	0
Ditheminale tsa Bingo tsa Seileketeroniki	12,290	13,452	12,290	11,755	12,270	13,452
Dipalopalo tsa bosetšhaba tsa go kembola: Madi a dibetšhe	R1,142,683,922,400	R1,500,660,968,064	R330,517,575,459	R694,221,309,756	R1,100,365,133,361	R1,500,660,968,064
Dipalopalo tsa bosetšhaba tsa go kembola: GGR	R59,306,767,610	R74,498,495,925	R17,273,080,690	R35,385,848,982	R55,448,071,997	R74,498,495,925
Dipalopalo tsa bosetšhaba tsa go kembola: Makgetho/makgethwana a a kokoantsweng	R4,840,977,357	R5,812,135,921	R1,344,122,195	R2,763,953,289	R4,335,779,634	R5,812,135,921

Lenaane 2: Palogodimo ya dilaesense tsa mofuta wa go kembola ka Porofense go tloga ka 31 Mopitlwe 2025

Palogodimo ya Dilaesense	Kapa Botlhaba	Foreisetata	Gauteng	KZN	Limpopo	Mpumalanga	Bokone Bophirima	Kapa Bokone	Kapa Bophirima
Palogodimo ya dilaesense tsa dikhasino	5	4	7	5	3	4	Di le 4 di a dira go setse e le 1	3	5
Palogodimo ya dilaesense tsa molaodi wa di LPM	2	Ga e a lekanyediwa	5	Ga e a lekanyediwa	Ga go na palogodimo ya tekanyetso	Ga e a lekanyediwa	Ga e a lekanyediwa	2	2
Palogodimo ya dilaesense tsa di-bookmaker	Ga e a lekanyediwa	Ga e a lekanyediwa , fa fela babetshi ba tlhoka go e dirisa mme e dira sentle	131	48	Ga go na palogodimo e e beilweng	Ga e a lekanyediwa , fa fela babetshi ba tlhoka go e dirisa mme e dira sentle	Ga e a lekanyediwa , fa fela babetshi ba tlhoka go e dirisa mme e dira sentle	19	Ga e a lekanyediwa
Palogodimo ya dilaesense tsa di-totalisator	Ga e a lekanyediwa	Ga e a lekanyediwa , fa fela babetshi ba tlhoka go e dirisa mme e dira sentle	1	2	Ga go na palogodimo e e beilweng	Ga e a lekanyediwa , fa fela babetshi ba tlhoka go e dirisa mme e dira sentle	Ga e a lekanyediwa , fa fela babetshi ba tlhoka go e dirisa mme e dira sentle	2	Ga e a lekanyediwa
Palogodimo ya dilaesense tsa bingo	15	Ga go neelo kgotsa thebolo ya dilaesense tsa bingo ga jaana	11	Ga e a lekanyediwa , fa fela babetshi ba tlhoka go e dirisa mme e dira sentle	Ga go na palogodimo e e beilweng	Ga e a lekanyediwa , fa fela babetshi ba tlhoka go e dirisa mme e dira sentle	Ga e a lekanyediwa , fa fela babetshi ba tlhoka go e dirisa mme e dira sentle	Ga go neelo kgotsa thebolo ya dilaesense tsa bingo ga jaana	Ga go neelo kgotsa thebolo ya dilaesense tsa bingo ga jaana





KGAOLO 1

DIPALOPALO TSA BOSETŠHABA TSA GO KEMBOLA

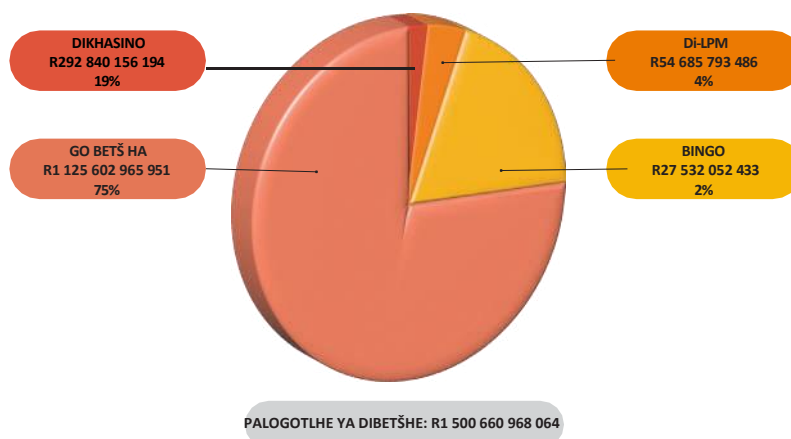
1. MATSENO

Maitlomo a karolo e ke go neelana ka thadiso ya dipalopalo tsa bosetšhaba tsa go kembola (ka mofuta wa go kembola le ka porofense) go ya ka dipalopalo tsa go kembola tsa diporofense tse di rometsweng ke di-PLA tsotlhe mo dipakeng tsa go bega jaaka go supilwe.

2. MADI A DIBETŠHE A MOFUTA WA GO KEMBOLA LE KA POROFENSE

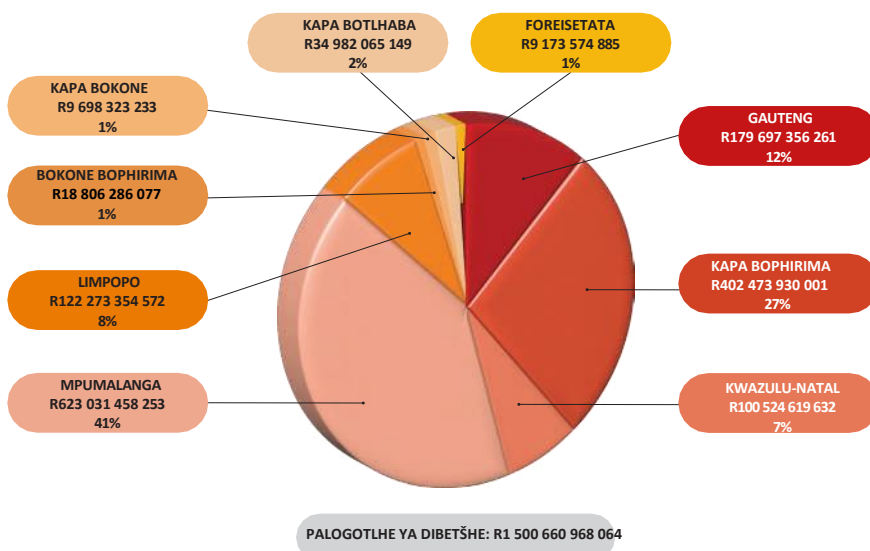
2.1 Palogotlhe ya dithirilione di le R1.5 e ne ya betšhiwa ka FY 2024/25. Se se emetse koketsego ya 30.7% go tswa mo mading a dibetšhe tsa ngwaga o o fetileng tsa dithirilione di le R1.1. Lekala la go kembola le dirile bontsi jwa madi a dibetšhe jwa intaseteri ka 75%. Mpumalanga le Kapa Bophirima di ne di di goga kwa pele, ka 41% le 27%, ka tatelano. Madi a dibetšhe a mofuta wa go kembola le ka porofense a bontshiwa mo Ditshwantshong 1 le 2.

MADI A DIBETŠHE A MOFUTA WA GO KEMBOLA, DIPOROFENSE TSOTLHE, FY 2024/25



Setshwantsho 1: Madi a dibetšhe a mofuta wa go kembola, diporofense tsotlhe FY 2024/25

MADI A DIBETŠHE A MOFUTA WA GO KEMBOLA, DIPOROFENSE TSOTLHE, FY 2024/25

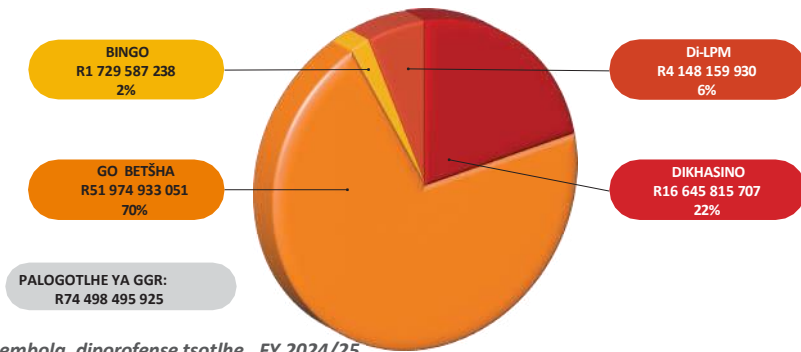


Setshwantsho 2: Madi a dibetšhe ka porofense, mofuta yotlhe, FY 2024/25

3. PALOGOTLHE YA LETSENO LA GO KEMBOLA KA MOFUTA WA GO KEMBOLA LE POROFENSE

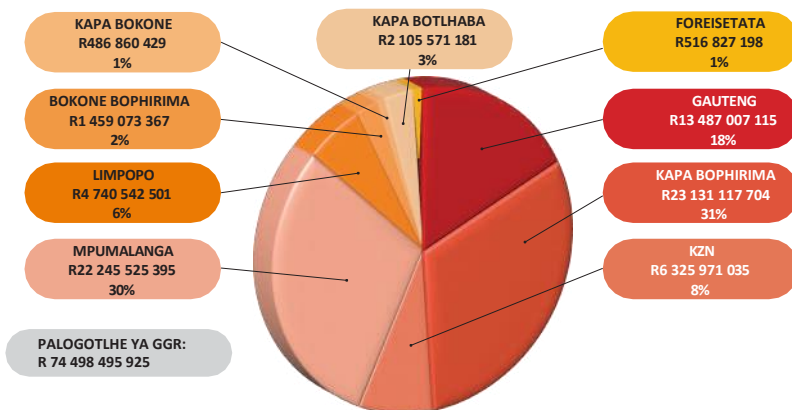
3.1 Palogotlhe ya dibilione di le R74.5 e ne ya dirwa mo go FY 2024/25. GGR e oketsegile ka 25.6% go tshwana le ngwaga o o fetileng. Go kembola go dirile go feta peditharo ya palogotlhe ya GGR ka 70% (go tswa mo šereng ya mmara ka ya 60% ka FY 2023/24). Kapa Bophirima ka (31%) e bone palo e e kwa godimo ya GGR e e tlhagisitsweng go ralala diporofense, e bo e latelwa ke Mpumalanga ka (30%). Diporofense tse ka bobedi di fetile Gauteng, e pele e neng e le mmara ka o mogolo go gaisa wa go kembola, o jaanong o emeng ka šere ya mmara ka ya 18%. GGR ka mofuta wa go kembola le porofense di bontshiwa mo Ditshwantshong 3 le 4.

GGR KA MOFUTA WA GO KEMBOLA, DIPOROFENSE TSOTLHE, FY 2024/25



Setshwantsho 3: GGR ka mofuta wa go kembola, diporofense tsotlhe, FY 2024/25

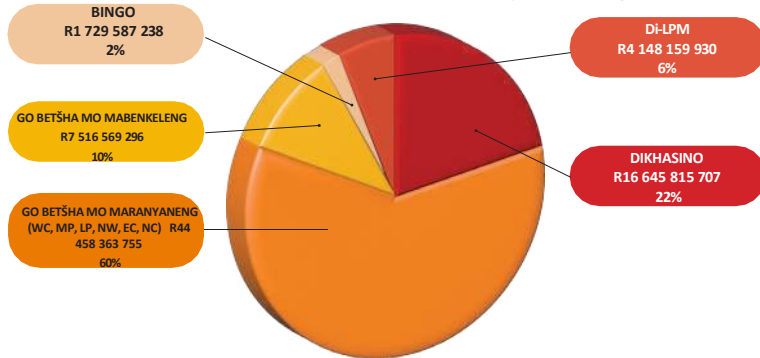
GGR KA POROFENSE, MEFUTA YOTLHE, FY 2024/25



Setshwantsho 4: GGR ka porofense, mefuta yotlhe, FY 2024/25

3.2 Setshwantsho se se fa tlase se tlamela ka phopholetso ya go betšha ga mo maranyaneng mabapi le mefuta e mengwe. Tshedimosetso e e sa kopanang ya go betšha mo maranyaneng le mo mabenkeleng e ne ya bonwa mo Kapa Bophirima, Mpumalanga, Limpopo, Bokone Bophirima, Kapa Botlhaba, le Kapa Bokone. Diporofense tse di setseng tse di sa tlamelang ka dipalopalo tse di sa kopanang, dithomelo tsa tsona tsa go betšha tsotlhe di mo palong e le nngwe ya go betšha mo mabenkeleng. Go ya ka phopholetso e le go ela tlhoko ditlhaelo tsa dinewa, 60% tsa go betšha gotlhe ga mo Aforika Borwa ke ga mo maranyaneng mo go FY 2024/25. Lebelela Setshwantsho 5.

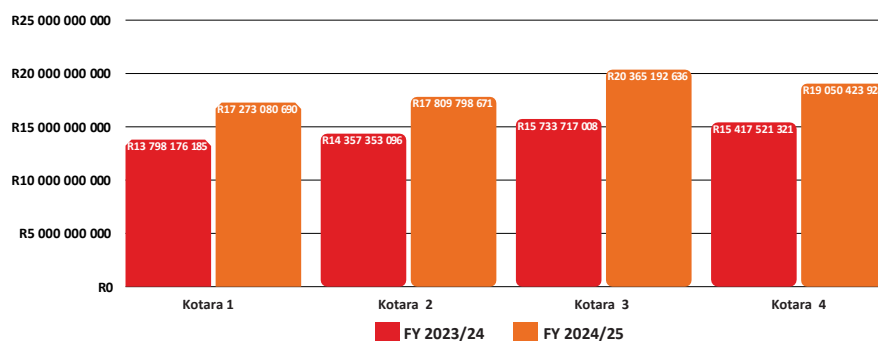
GGR KA MOFUTA WA GO KEMBOLA, GO KEMBOLA GO GO KGAOGANENG, DIPOROFENSE TSOTLHE, FY 2024/25



Setshwantsho 5: GGR, go Kembola ga go betšha mo dipalopalo tsa maranyane kgatthanong le kwa mafelong a go kembola, mefuta yotlhe, FY 2024/25

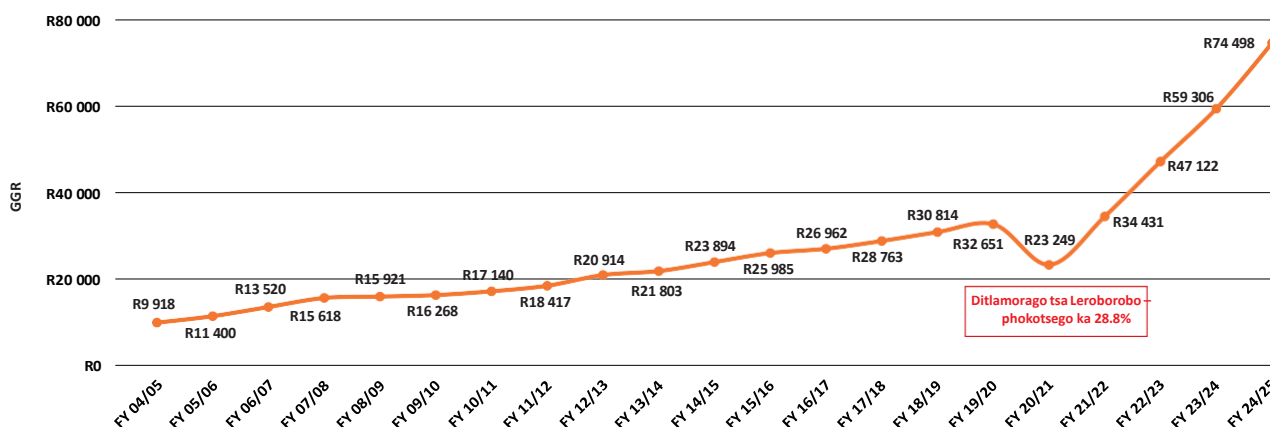
3.3 Kgolo ya kotara e bontshiwa mo Setshwantshong 6, e bontsha kgolo e ntle kotara nngwe le nngwe go tshwana le ngwaga o o fetileng.

TLWAELO YA GGR, MEFUTA YOTLHE LE DIPOROFENSE, FY 2023/24 – FY 2024/25



Setshwantsho 6: Tlwaelo mo GGR, mefuta yotlhe le diporofense, FY 2023/24 – FY 2024/25

3.4 Tlwaelo mo palogareng ya GGR e bontshiwa mo Setshwantshong 7. Pele ga leroborobo, intaseteri ya go kembola e ne e ntse e gola ka palogare ya seelo sa ngwaga le ngwaga sa 7.3%. Mo go FY 2020/21, intaseteri ya go kembola e latlhegetswe ke letseno la dibilione di ka nna R10, go tswa go dibilione di le R23.3 mo ngwageng o o fetileng, fa GGR ya khasino e ne e wetse tlase thata, ka 50% go tswa mo go FY 2019/20, ka ntlha ya ditlamorago tsa leroborobo la 2019 la bolwetse jwa coronavirus. Ngwaga o o latelang, intaseteri e ne ya tsoga ka 48.1%. Morago ga leroborobo, intaseteri ya go kembola e fetogetse kwa kgo long e kgolo thata.

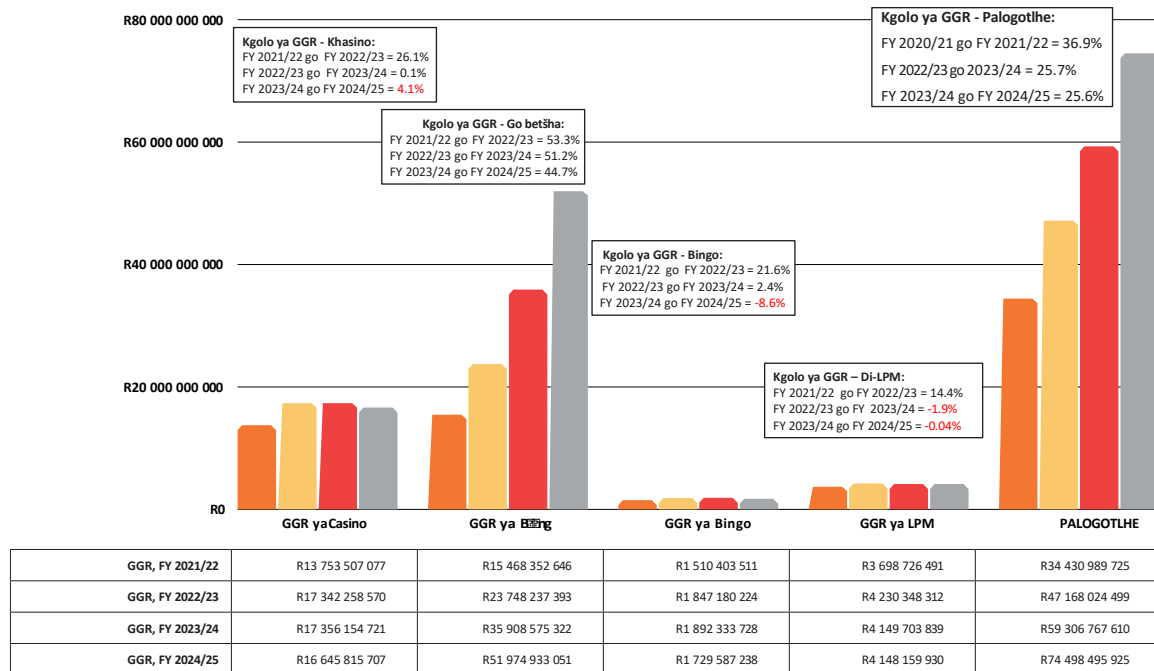


Setshwantsho 7: Tlwaelo mo GGR, mefuta yotlhe, FY 2004/05 go FY 2024/25

3.4.1 Ka kakaretso, GGR e atologile ka 25.6% ka nako ya FY 2024/25 go tshwana le ngwaga o o fetileng. Kgolo e e ne e kgweediwa fela ke lekala la go kembola, le le oketsegileng ka 44.7%, fa mefuta e mengwe ya go kembola e fokotsegile. GGR ya dikhasino e wetse tlase ka 4.1%, di-LPM di fokotsegile ka 0.04%, mme GGR ya bingo e fokotsegile ka 8.6%.

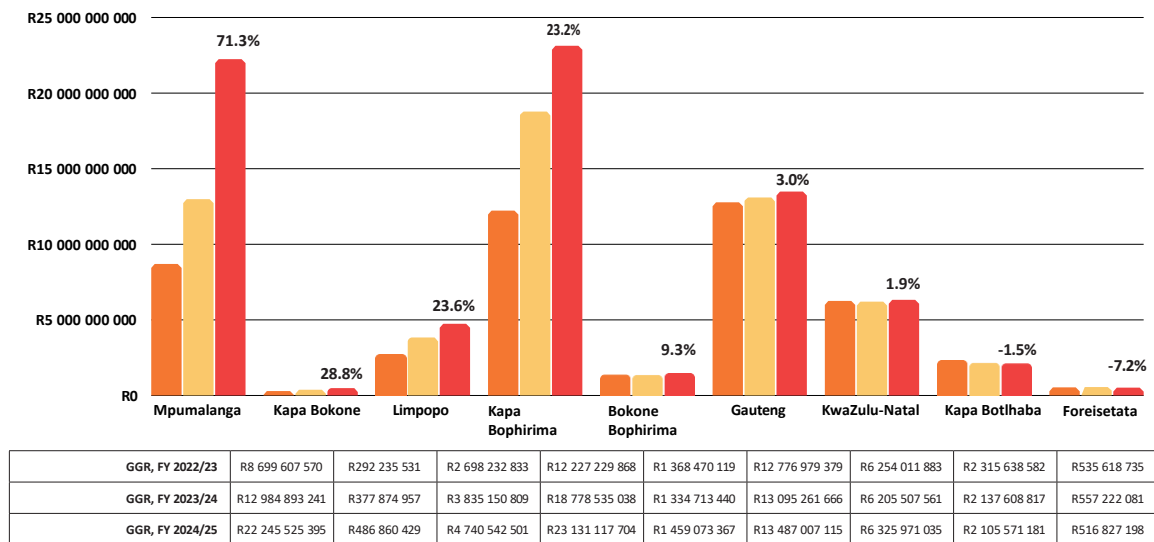
3.4.2 Kwa bokhutlong jwa FY 2024/25, Kapa Bophirima, Mpumalanga, Limpopo, le Kapa Bokone di itemogetse dielo tse di kwa godimo tsa kgolo, tse di simololang magareng ga 23.2% le 71.3%. Dielo tse di kwa tlase di bonwe mo Gauteng, KZN le Bokone Bophirima. GGR ya Kapa Botlhaba le Foreisetata di wetse tlase ka 1.5% le 7.2%, ka go latelana. Lebelela Setshwantsho 9.

KGOLO MO GGR (MEFUTA YOTLHE): FY 2021/22 – FY 2024/25



Setshwantsho 8: Kgolo mo GGR, mefuta yotlhe (FY 2021/22 - FY 2024/25)

SEELO SA KGOLO E E SA LEKANENG SA GGR MAGARENG GA DIPOROFENSE (FY 2022/23 - FY2024/25)

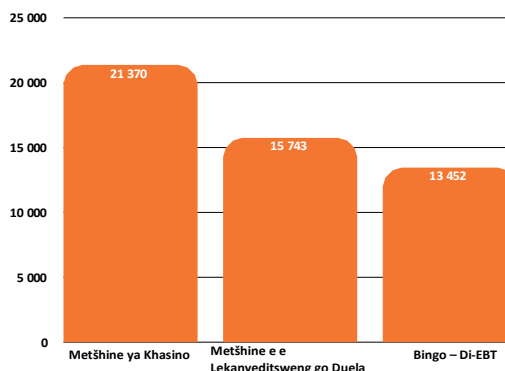


Setshwantsho 9: Kgolo ya GGR ka porofense (FY 2022/23 – FY 2024/25)

3.4.3 Naga ka bophara, go ne go na le metšhine ya go kembola e e teng go ka tshamekiwa mo dikhasinong, mo mafelong a di-LPM le a bingo. Bontsi jwa metšhine ya go tshameka e ne e le mo dikhasinong, tse di neng di na le metšhine e le 370 ya go tshameka.

Go ne go na le di-LPM tse di dirang di le 15 743 le ditheminale tsa bingo tsa seileketeroniki di le 13 452.

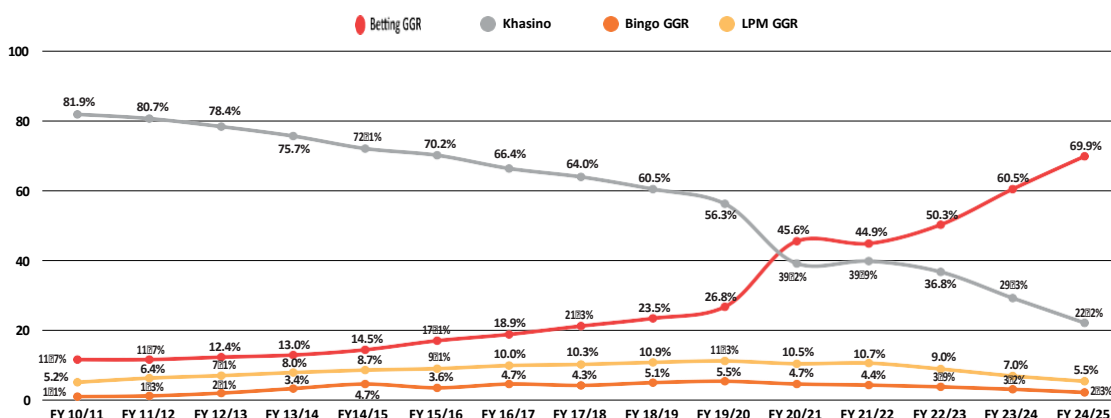
METŠHINE YA GO KEMBOLA, MEPUTA YOTLHE, DIPOROFENSE TSOTLHE, FY 2024/25



Setshwantsho 10: Palo ya metšhine ya go kembola mo khasinong, makala a LPM & bingo

3.4.4 Setshwantsho 11 se bontsha tlwaelo mo dišereng tsa mmara ka mo GGR magareng ga mefuta ya go kembola mo tsamaong ya nako. Mo go FY 2010/11, dikhasino di dirile GGR ya 81.9%. Šere ya tsona e wetse tlase mo tsamaong ya dingwaga, fa mefuta e mengwe ya go kembola e oketsegile mo šereng ya mmara ka. Mo go FY 2015/16, go betšha go simolotse go gola, ka kgolo ya seelo se se kwa godimo. Leroborobo le le simolotseng ka FY 2019/20, le fetotse mafelo a go kembola gotlhelele, ka kgolo ya 45.6% mo go betšheng fa dikhasino di wetse tlase go 39.8%. Mefuta e mebedi e e fetotse maemo, gore go betšha go di goge kwa pele go tloga foo. Pharologano magareng ga go betšha le dikhasino e tlogetse dišere tsa mmara ka 69.8% le 22.3%, ka go latelana, fa dišere tsa mmara wa di-LPM le bingo di wetse tlase go 5.6% le 2.3%, ka go latelana.

TLWAELO MO ŠERENG YA PALOGOTLHE YA GGR (FY 2010/11 - FY 2024/25)

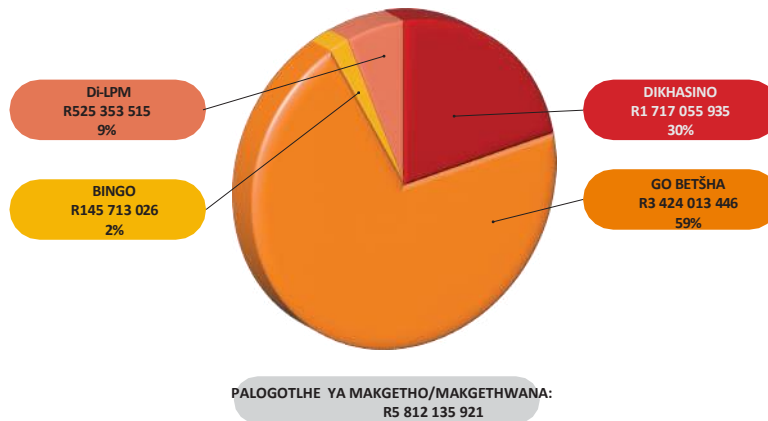


Setshwantsho 11: Tlwaelo mo šereng ya palogotlhe ya GGR, papiso ya mefuta yotlhe (FY 2010/11 – FY 2024/25)

4. TUELO YA MAKGETHO/MAKGETHWANA KA MOFUTA WA GO KEMBOLA LE POROFENSE

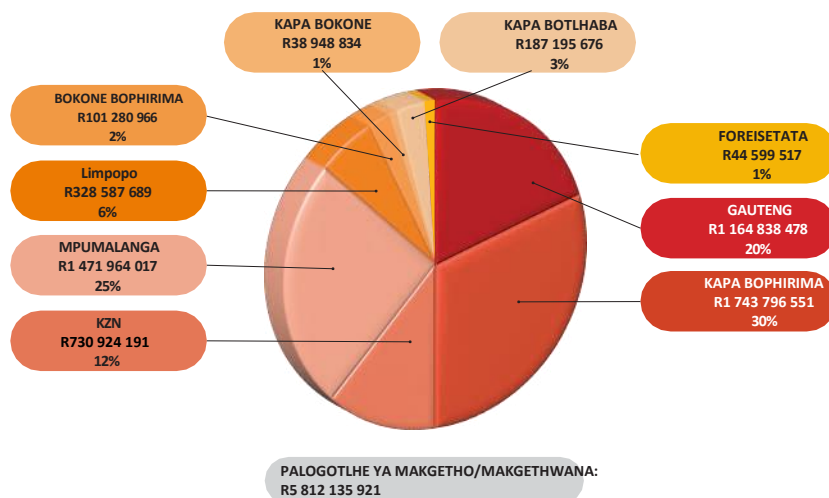
4.1 Palogotlhe ya dibilione di le R5.8 e ne ya kokoanngwa ka FY 2024/25, e leng 20.1% tse di fetang makgetho/makgethwana mo ngwageng o o fetileng wa matlole. Ka 59%, go betšha go tihagisitse šere e e kwa godimo ya makgetho le makgethwana magareng ga mefuta ya go kembola. Kapa Bophirima ka (30%) e na le šere e kgolo ya makgetho/makgethwana a a tihagisitsweng go ralala diporofense, jaaka go bontshiwa mo Ditshwantshong 12 le 13.

MAKGETHO/MAKGETHWANA KA MOFUTA WA GO KEMBOLA, DIPOROFENSE TSOTLHE, FY 2024/25



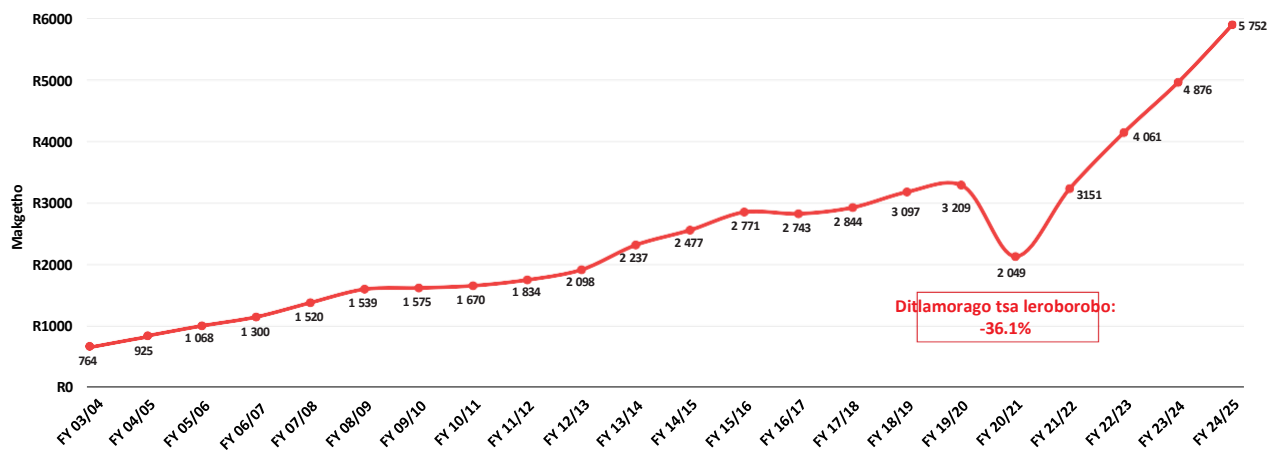
Setshwantsho 12: Makgetho/makgethwana ka mofuta wa go kembola, diporofense tsotlhe, FY

MAKGETHO KA POROFENSE, MEFUTA YOTLHE, FY 2024/25



Setshwantsho 13: Makgetho/makgethwana ka porofense, mefuta yotlhe, FY 2024/25

4.2 Makgetho a a kokoantsweng go tswa mo intasetering ya go kembola a ne a tlwaetse go tlatloga go fitlha ka FY 2020/21, fa a wela tlase ka 36.1%. Jaaka GGR, makgetho a oketsegile, ka tsela e e kwa godimo morago ga nako ya leroborobo.



Setshwantsho 14: Tlwaelo mo makgethong/makgethwaneng, mefuta yotlhe, ka FY – go tloga ka FY 2003/04 – FY 2024/25



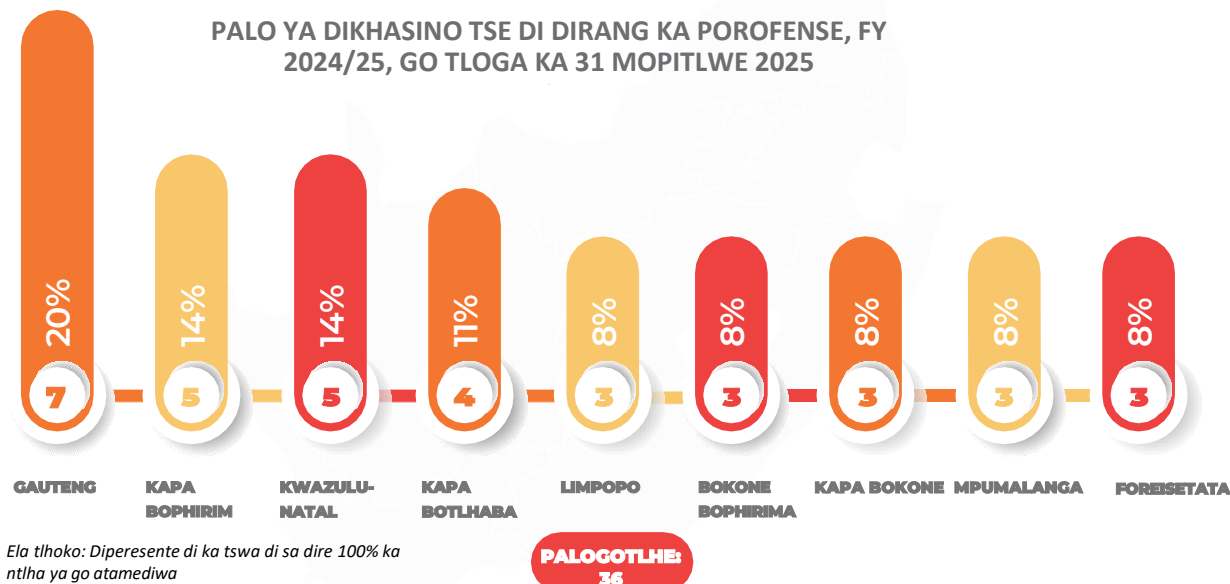
KGAOLO 2

LEKALA LA DIKHASINO

MAITSHOLO A MMARAKA

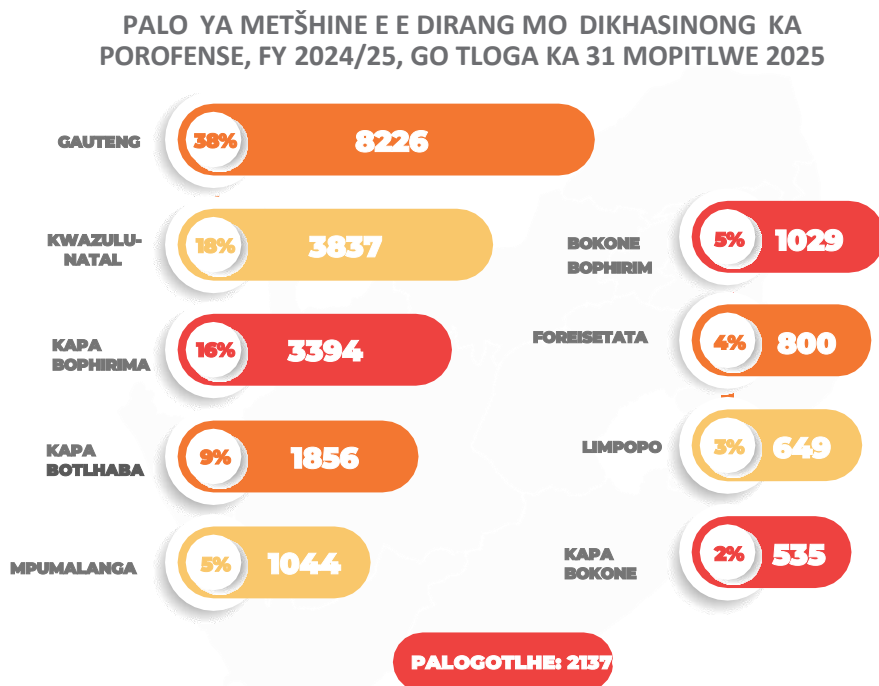
1.1 Go tloga ka 31 Mopitlwe 2025, palogotlhe ya dikhasino di le 36 (go tswa mo palogodimong ya dilaesense di le 41) di ne di dira mo Aforika Borwa. Boto ya go kembola ya Kapa Botlhaba e bega fa Khasino ya Mayfair e emisitse go dira ka Ferikgong 2025. Kapa Botlhaba ka jalo ga jaana e na le dikhasino di le nne tse di dirang.

1.2 Mo palogotlheng ya mmaraka wa dikhasino, bontsi jwa dikhasino di theilwe mo Gauteng ka (20%). Kapa Bophirima le KZN e le nngwe e na le dikhasino di le tlhano ka (13.9% e le nngwe), jaaka go bontshiwa mo Setshwantshong 15.



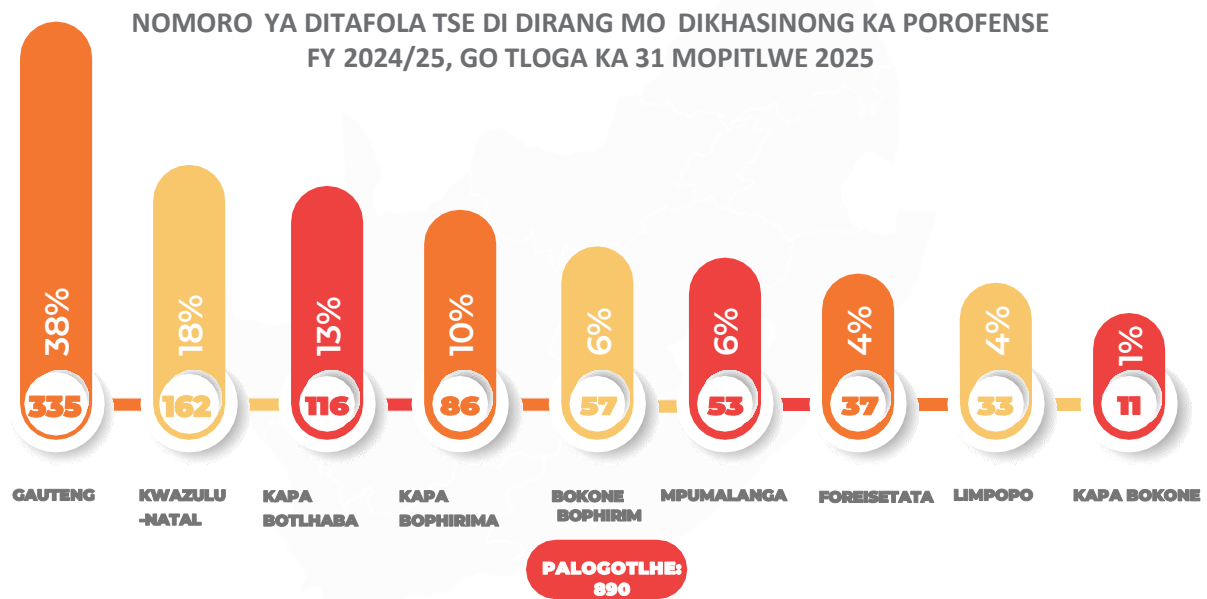
Setshwantsho 15: Palo ya dikhasino tse di dirang ka porofense, FY 2024/25, go tloga ka 31 Mopitlwe 2025

1.3 Go na le palogotlhe ya 21 370 ya metšhine ya metshameko go ralala naga. Gauteng e na le metšhine e mentsi thata ya metshameko mo dikhasinong, ka metšhine ya metshameko e le 8 226 ka (38%) fa e bapisiwa le diporofense tse dingwe. KZN le khasino ya Kapa Bophirima ka 18.0% le 16% tsa metšhine ya metshameko ya naga, ka go latelana.



Setshwantsho 16: Palo ya metšhine e e dirang mo dikhasinong ka porofense, FY 2024/25, go tloga ka 31 Mopitlwe 2025

1.4 Go na le ditafola di le 890 tse di dirang tsa dikhasino go ralala naga. Bontsi bo mo Gauteng, ka ditafola di le 335 tsa (38%). Kapa Botlhaba ka (13%) le KZN ka (18%) gape e na le palo e e kwa godimo ya ditafola tsa dikhasino.

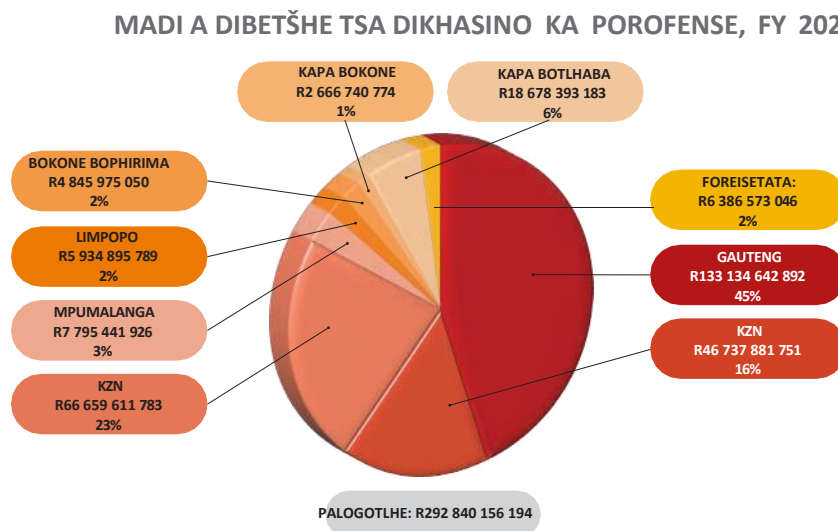


Setshwantsho 17: Palo ya ditafola tse di dirang mo dikhasinong ka porofense, FY 2024/25, go tloga ka 31 Mopitlwe 2025

2. DIPALOPALO TSA LEKALA LA GO KEMBOLA MO DIKHASINONG

2.1 MADI A DIBETŠHE

- 2.1.1 Palogotlhe ya boleng jwa madi a a betšhilweng mo dikhasinong mo go FY 2024/24 e ne e le dibilione di le R292.8. Se se dira 20% tsa palogotlhe ya madi a dibetšhe go ralala mefuta yotlhe ya go kembola. Madi a dibetšhe a dikhasino a fokotsegile ka 1.5% fa a bapisiwa le a ngwaga o o fetileng.
- 2.1.2 Gauteng ka (45%) e tlhagisa šere e kgolo ya madi a dibetšhe fa e bapisiwa le diporofense tse dingwe. Se se latela morago ga madi a a betšhilweng mo dikhasinong kwa KZN ka (23%) le kwa Kapa Bophirima ka (16%), jaaka go bontshiwa mo Setshwantshong 18.

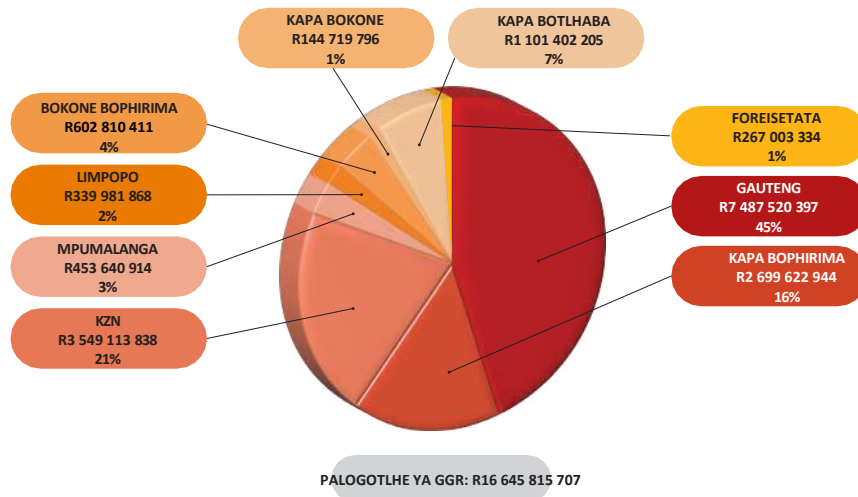


Setshwantsho 18: Madi a dibetšhe tsa dikhasino ka porofense, FY 2024/25

3. PALOGOTLHE YA LETSENO LA GO KEMBOLA

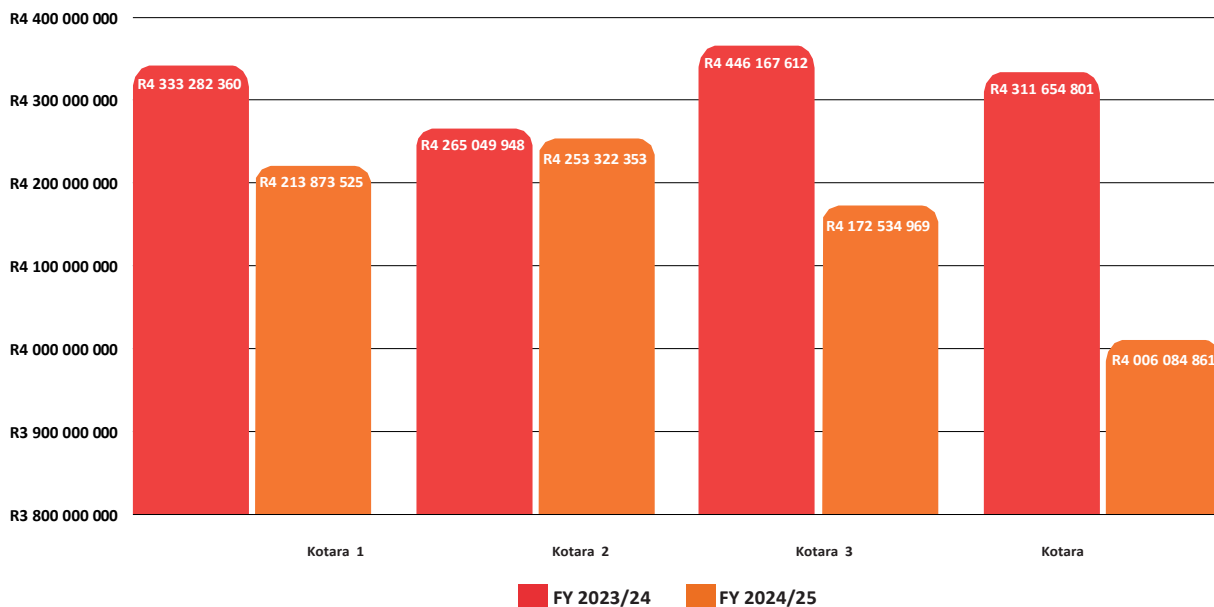
- Palogotlhe ya boleng jwa GGR e e dirilweng ke dikhasino mo go FY 2024/25 e ne e le dibilione di le R16.6. Se se emela 22% tsa GGR go ralala mefuta yotlhe ya go kembola. GGR ya dikhasino e fokotsegile ka 4.1% fa e bapisiwa le mo ngwageng o o fetileng.
- 3.2 Gauteng ka (45%) e tlhagisa šere e kgolo go gaisa tsotlhe ya GGR ya dikhasino fa e bapisiwa le ya diporofense tse dingwe. Se se latelwa ke GGR ya dikhasino tsa kwa KZN ka (21%) le Kapa Bophirima ka (16%), jaaka go bontshiwa mo Setshwantshong 19.

GGR YA DIKHASINO KA POROFENSE, FY 2024/25



Setshwantsho 19: GGR ya dikhasino ka porofense, FY 2024/2025

TLWAELO YA GGR, DIKHASINO, FY 2023/24–2024/25

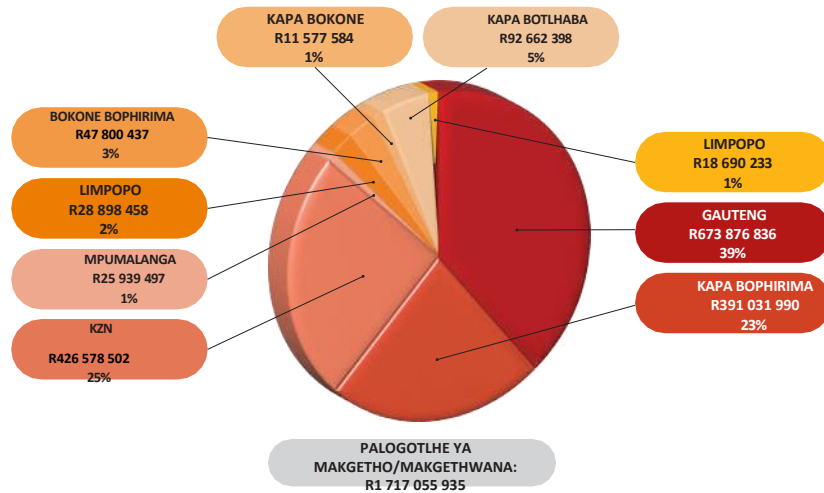


Setshwantsho 20: Tlwaelo ya GGR, dikhasino, FY 2023/24 – 2024/25

4. MAKGETHO/MAKGETHWANA

- Palogotlhe ya boleng jwa makgetho/makgethwana a dikhasino e e dirilweng ka FY 2024/25 e ne e le dibilione di le R1.7.
- 4.1 Boleng jo bo emela 30% tsa makgetho/makgethwana go ralala mefuta yotlhe ya go kembola. Makgetho/makgethwana a dikhasino a fokotsegile ka 2.9% fa a bapisiwa le mo ngwageng o o fetileng.
- 4.2 Gauteng ka (39%) e tlhagisa šere e kgolo ya makgetho/makgethwana a dikhasino fa e bapisiwa le diporofense tse dingwe. Se se latelwa ke makgetho/makgethwana a dikhasino mo KZN ka (25%) le Kapa Bophirima ka (23%), jaaka go bontshiwa mo Setshwantshong 21.

MAKGETHO/MAKGETHWANA A DIKHASINO KA POROFENSE, FY 2024/25



Setshwantsho 21: Makgetho/makgethwana a dikhasino ka porofense, FY 2024/25



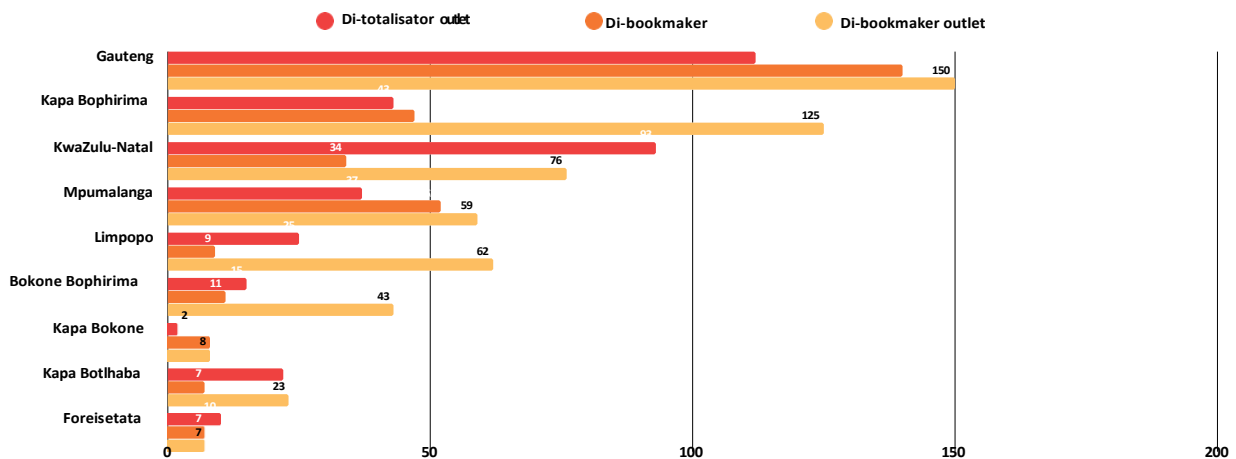
KGAOLO 3

**GO BETŠHA MO
MABELONG A DIPITSE LE MO
LEKALENG LA METSHAMEKO**

1. MAITSHOLO A MMARAKA

- 1.1 Porofense nngwe le nngwe mo nageng e na le totalisator e le nngwe e e dirang, ntle le KZN. Kwa KZN, Gold Circle le lthotho ke ditheo tsa di-totalisator le tsa mabelo. 4Racing ke totalisator e e mo diporofenseng tse dingwe tsotlhe. Di-bookmakers tse di nang le dilaesense di theilwe mo diporofenseng tsotlhe go ralala rephaboleki. Dibetšhe di ka bewa mo mabelong a dipitse le mo metshamekong (mo mabelong a dipitse le ka kwa mafelong a go betšha metshameko), mmogo le mo go sengwe sa tshoganyetso sa semolao.
- 1.2 Palo ya di-bookmaker tse di dirang tse di nang le dilaesense e fokotsegile go tswa go 349 go 315 mo ngwageng wa matlole o o fetileng, e bontsha kwelotlase ya 7.1%. Mafelo a a dirang a di-bookmaker a oketsegile ka 11.9%, go tswa go 531 go ya go 594. Mafelo a a dirang a di-totalisator a oketsegile go tswa go 299 go ya go 366. Go tloga ka 31 Mopitlwe 2025, Gauteng e ne e na le palo e e kwa godimo ya di-bookmaker tse di dirang tse di nang le dilaesense (140) le mafelo a di-totalisator (112).

PALO YA DI-BOOKMAKER TSE DI DIRANG, MAFELo A DI-TOTALISATOR LE DI-BOOKMAKER KA POROFENSE, FY 2024/25, GO TLOGA KA 31 MOPITLWE 2025



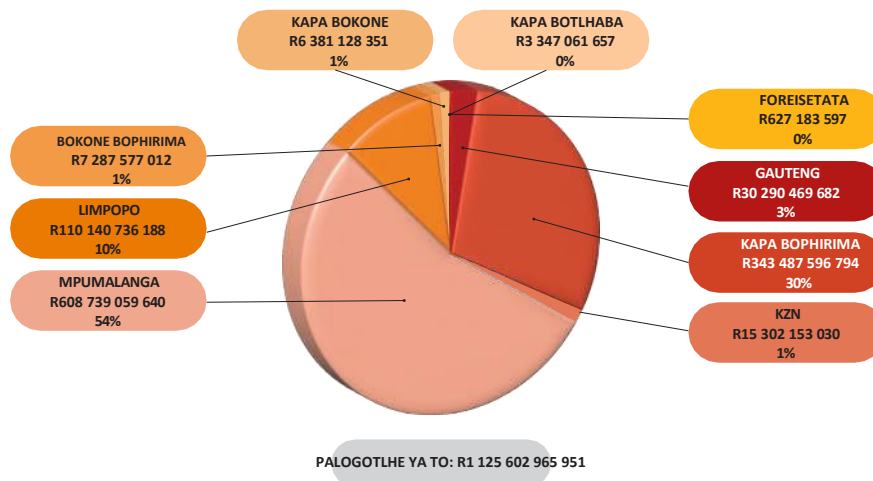
Setshwantsho 22: Palo ya di-bookmaker tse di nang le dilaesense tse di dirang, mafelo a di-totalisator le di-bookmaker, FY 2024/25, go tloga ka 31 Mopitlwe 2025

2. DIPALOPALO TSA GO KEMBOLA

2.1 MADI A DIBETŠHE

- 2.1.1 Palogotlhe ya boleng jwa madi a a betšhilweng mo mabelong a dipitse le mo lekaleng la go betšha la metshameko ka FY 2024/25 e ne e le dithirilione di le R1.1. Boleng jo bo bontsha 75% tsa madi a a betšhilweng go ralala mefuta yotlhe ya go kembola, se ke koketsego ya 47.9% mo lekaleng go tloga mo ngwageng o o fetileng.
- 2.1.2 Mpumalanga ka (54%) e dirile madi a mantsi thata a a betšhilweng mo intasetering ya mabelo a dipitse le mo intasetering ya go betšha mo metshamekong, e bo e latelwa ke Kapa Bophirima ka (30%) le Limpopo ka (10%), jaaka go bontshiwa mo Setshwantshong 23.

MADI A A BETŠHILWENG MO (DI-TOTALISATOR LE DI-BOOKMAKER), KA POROFENSE, FY 2024/25

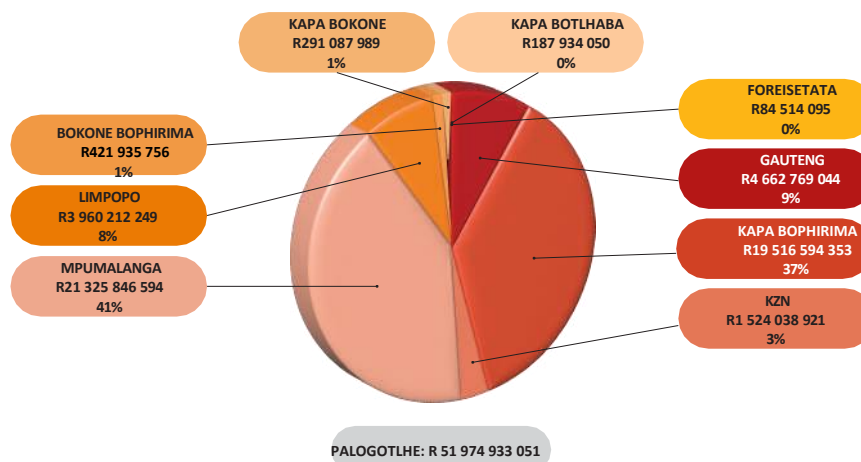


Setshwantsho 23: Madi a a betšhilweng a (di-totalisator le di-bookmaker), ka porofense, FY 2024/25

3. PALOGOTLHE YA LETSENO LA GO KEMBOLA

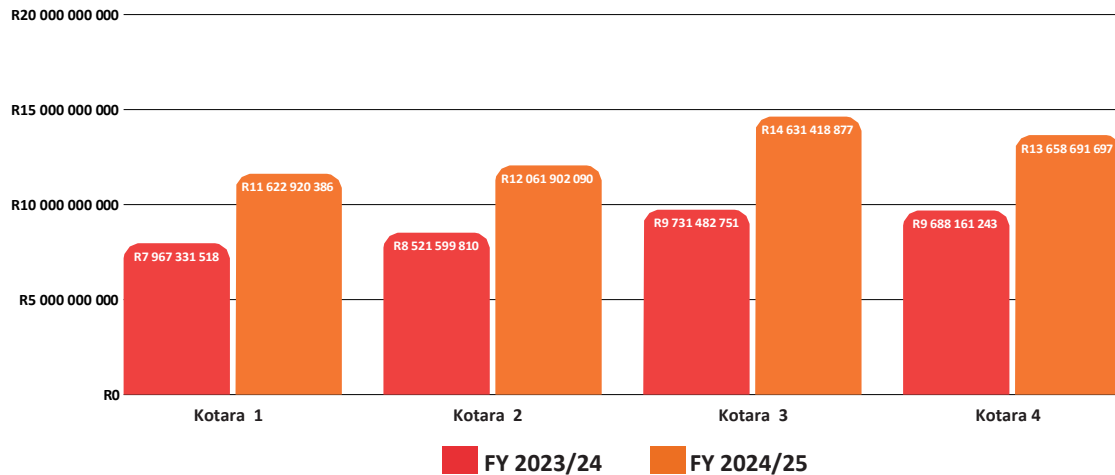
- 3.1 Palogotlhe ya boleng jwa GGR mo go betšheng mo mabelong a dipitse le mo lekaleng la metshameko ka FY 2024/25 e ne e le dibilione di le R52. Boleng jo bo supa 70% tsa GGR go ralala mefuta yotlhe ya go kembola, ka go bontsha koketsego ya 44.7% go tloga mo ngwageng o o fetileng.
- 3.2 Go tloga ka 31 Mopitlwe 2025, Mpumalanga ka (41%) e bontshitse GGR e e kwa godimo go gaisa e e dirilweng mo go FY 2024/25, e bo e latelwa ke Kapa Bophirima ka (37%) le Gauteng ka (9%), jaaka go bontshiwa mo Setshwantshong 12.

GGR YA GO BETŠHA (DI-TOTALISATORS LE DI-BOOKMAKER), KA POROFENSE, FY 2024/25



Setshwantsho 24: GGR ya go betšha (di-totalisator le di-bookmaker), ka porofense, FY 2024/25

TLWAELO YA GGR, GO BETŠHA (DI-TOTALISATOR LE DI-BOOKMAKER), KA KOTARA, FY 2023/24 – 24/25



Setshwantsho 25: Tlwaelo mo GGR, go betšha (di-totalisator le di-bookmaker), ka kotara, FY 2023/24-24/25

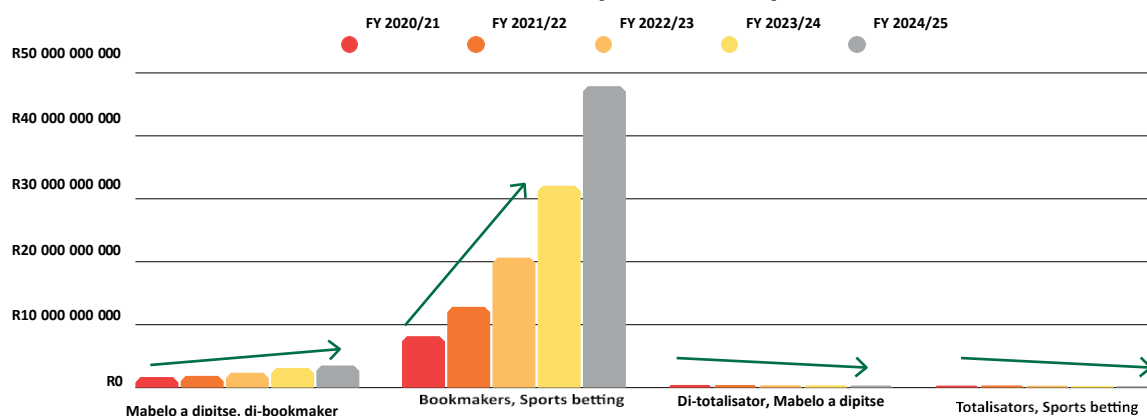
3.3 GGR ya di-bookmaker tsa mabelo a dipitse ka kakaretso e ntse e tlwaetse go tlhatloga mo tsamaong ya dingwaga, ka kgolo ya 29% mo go FY 2018/19 le ka 2% mo go FY 2019/20, jaaka go bontshiwa mo Setshwantshong 14. E ile ya phuthlhamo go le go nnye ka 2% mo go FY 2020/21, ngwaga wa ntlha wa leroborobo, mme ya boela mannong ka 11% mo ngwageng o o latelang. Mo go FY 2022/23, GGR e ne ya gola ka 26%, go latela kgolo ya 32.5% mo go FY 2023/24. Kgolo ya GGR e oketsegile ka 12.3% mo go FY 2024/25.

3.4 GGR e e dirilweng ke di-bookmaker mo go betšheng ga metshameko e ntse e tlwaetse go tlhatloga thata fa e sale go tloga ka FY 2017/18, jaaka go bontshiwa mo Setshwantshong 14. Kgolo ya GGR e ne e le 29% mo go FY 2018/19, mme ya oketsega gape ka 39% le 37% mo go FY 2019/20 le mo go FY 2020/21, ka go latelana. Mo go FY 2021/22, go betšha mo metshamekong go itemogetse kgolo e e kwa godimo ka 57%, go latela kgolo ya 61% mo go FY 2022/23. Mo go FY 2023/24, GGR e godile ka 55.3%, go latela kgolo ya 49.3% mo go FY 2024/25.

3.5 GGR ya di-totalisator tsa mabelo a dipitse e ntse e tlwaetse go ya tlase fa e sale ka FY 2018/19. Mo go FY 2018/19, GGR e ne ya phuthlhamo ka 1%. Mo go FY 2019/20, GGR e ne ya wa ka 15% mme ya itemogela kwelotlase e e maatla mo go FY 2020/21, ka ngwaga wa ntlha wa leroborobo, ya phuthlhamo ka 47%. Mo go FY 2021/22, GGR e ne ya tswelela go ya tlase, go phuthlhamo ka 2%, le go wela tlase go ya pele ka 7% mo go FY 2022/23. Kwelotlase e ne ya tswelela mo go FY 2023/24 ka 3.3%, go latela ka 10.6% mo go FY 2024/25.

3.6 GGR ya di-totalisator tsa go betšha mo metshamekong e ne e le kwa tlase ka tlwaelo go fitlha ka FY 2020/21, fa tlwaelo e e boela morago. Mo go FY 2018/19 le ka FY 2019/20, GGR e phuthlhamo ka 6% le 14%, ka tatelano. Mo go FY 2020/21 le ka FY 2021/22, GGR e ne ya oketsega ka 20% le 7%, ka tatelano, mme ya phuthlhamo ka 10% mo go FY 2022/23. FY 2023/24 e bone kwelotlase e nngwe ka 17.7% ka kakaretso. Mo go FY 2024/25, GGR e ne ya phuthlhamo ka 9.8%.

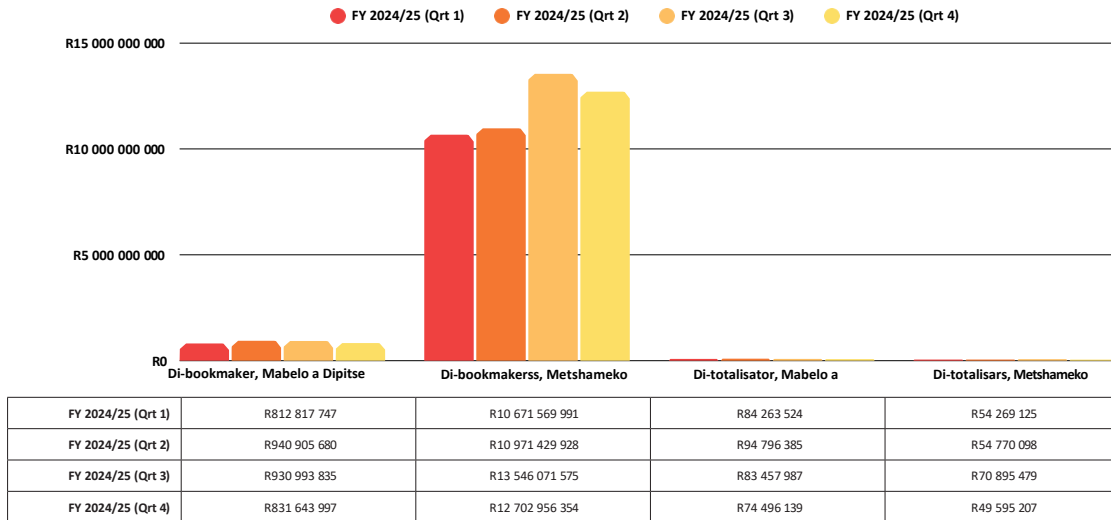
TLWAELO MO GGR, GO BETŠHA (DI-TOTALISATOR LE DI-BOOKMAKER), FY 2020/21–FY 2024/25



GGR, FY 2020/21	R1 683 065 295	R8 178 285 690	R426 477 279	R321 792 680
GGR, FY 2021/22	R1 872 054 678	R12 832 845 899	R419 575 899	R343 876 171
GGR, FY 2022/23	R2 364 529 632	R20 655 640 981	R390 157 132	R309 302 377
GGR, FY 2023/24	R3 132 420 216	R32 073 577 088	R377 183 168	R254 563 491
GGR, FY 2024/25	R3 516 361 259	R47 892 027 847	R337 014 035	R229 529 910

Setshwantsho 26: Tlwaelo mo GGR, go betšha (di-totalisator le di-bookmaker), FY 2020/21- 2024/25

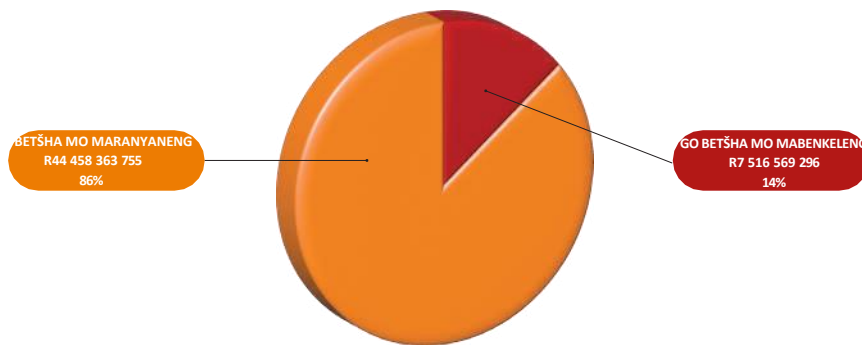
TLWAELO MO GGR, GO BETŠHA (DI-TOTALISATOR LE DI-BOOKMAKER), KA KOTARA, FY 2024/25



Setshwantsho 27: Tlwaelo mo GGR, go betšha (di-totalisator le di-bookmaker), ka porofense (ka kotara), FY 2024/25

3.7 Setshwantsho se se fa tlase se bontsha boleng jwa GGR e e dirilweng go tswa mo go betšheng ga mo maranyaneng fa go bapisiwa le go betšha ga mo mabenkeleng. Tshedimosetso e e sa kopanang ya betšha mo maranyaneng le mo mabenkeleng e ne ya tlamelwa ke Kapa Bophirima, Mpumalanga, Limpopo, Bokone Bophirima, Kapa Botlhaba le Kapa Bokone. Dipalopalo tsa go betšha tsa diporofense tse di setseng di akareditswe mo palogotlheng ya go betšha ga mo mabenkeleng. Go ya ka tshedimosetso e, go betšha mo maranyaneng go dirile 86% tsa letseno la go betšha.

GGR YA GO BETŠHA MO MARANYANENG KGATLHANONG LE MO MABENKELENG (WC, MP, LP, NW, EC, NC)

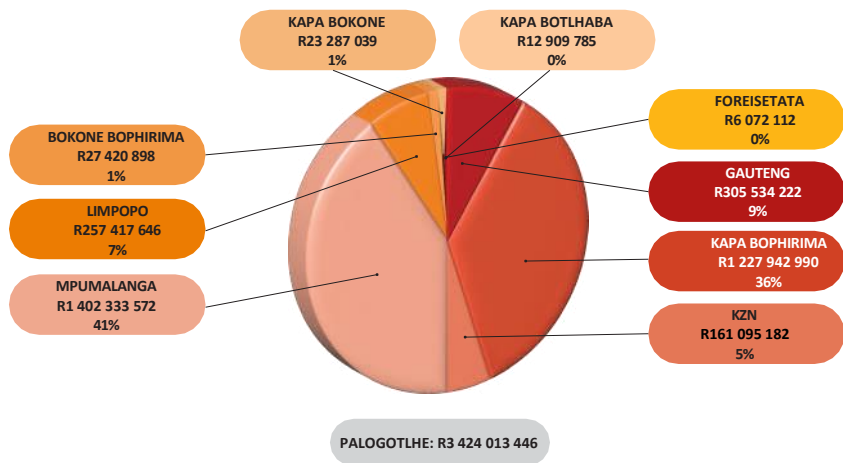


Setshwantsho 28: Go betšha mo maranyaneng kgatlhanong le mo mabenkeleng, diporofense tsotlhe, FY2024/25

4. MAKGETHO/MAKGETHWANA

- 4.1 Palogotlhe ya boleng jwa makgetho/makgethwana mo lekaleng la go betšha mo mabelong a dipitse le mo metshamekong ka FY 2024/25 e ne e le dibilione di le R3.4. Se se emela 59% tsa makgetho/makgethwana go ralala mefuta yotlhe ya go kembola, e tshwaya koketsego ya 41.8% mo pakeng e e tshwanang ya ngwaga o o fetileng.
- 4.2 Mpumalanga e ne ya tlagisa madi a a kwa godimo thata a makgetho a a kokoantsweng mo intasetering ya go betšha ka (41%), e bo e latelwa ke Kapa Bophirima ka (36%) le Gauteng ka (9%).

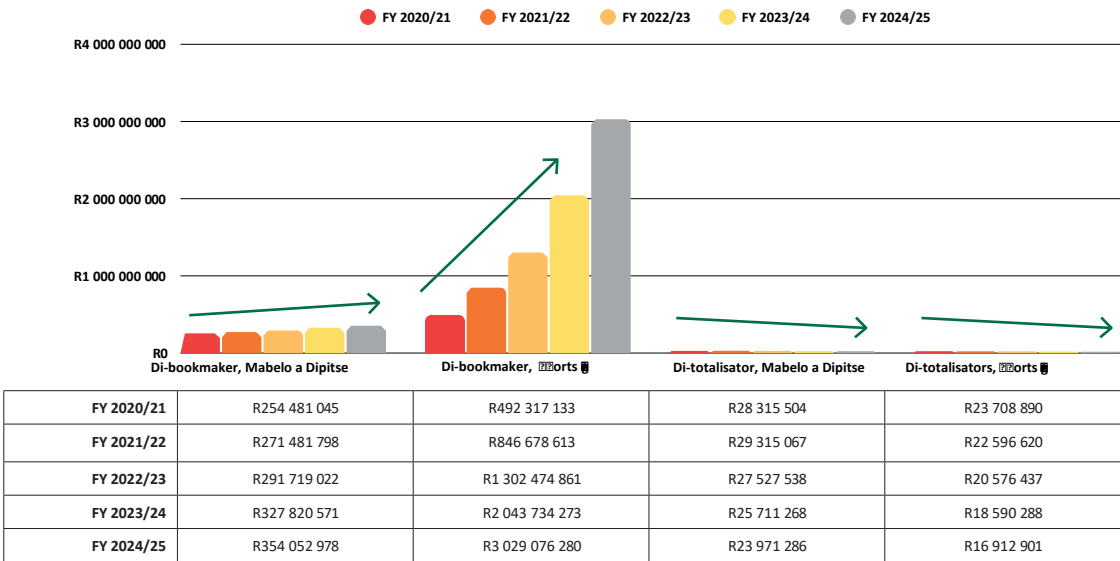
MAKGETHO/MAKGETHWANA A A KOKOANTSWENG MALEBANA LE GO BETŠHA (DI-TOTALISATOR LE DI-BOOKMAKER), KA POROFENSE, FY 2024/25



Setshwantsho 29: Makgetho/makgethwana a a kokoantsweng malebana le go betšha (di-totalisator le di-bookmaker), ka porofense, FY 2024/25

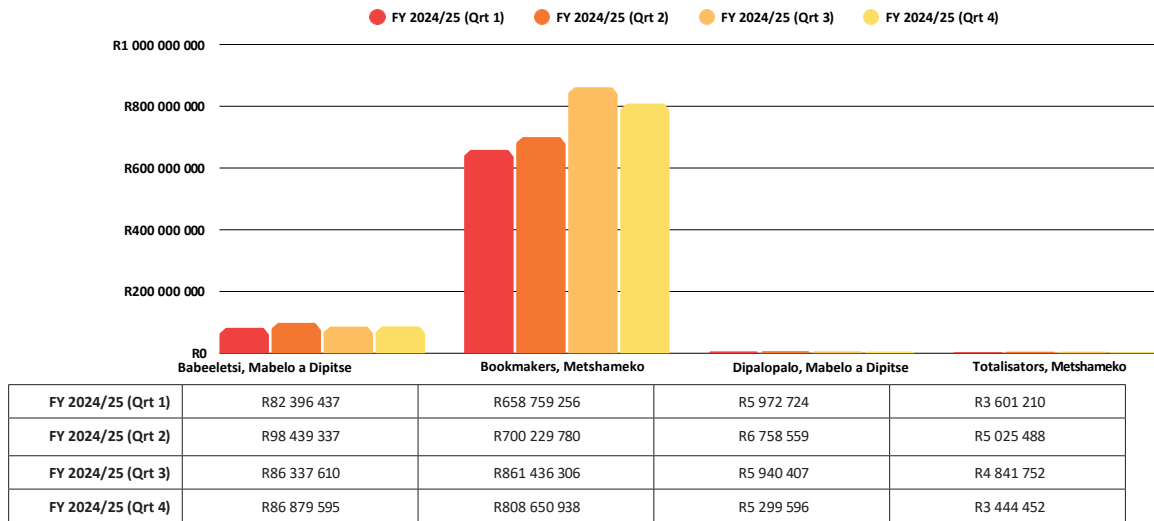
- 4.3 Kokoanyo ya makgetho/makgethwana go tswa mo di-bookmaker tse di neelang mabelo a dipitse a oketsegile mo pakeng ya FY 2018/19 go fitlha go FY 2022/23. Kgolo e ne e le 3% mo go FY 2021/22 le 2% mo go FY 2022/23. Makgetho/makgethwana a oketsegile ka 12% mo go FY 2023/24. Mo go FY 2024/25, makgetho a oketsegile ka 8%.
- 4.4 Makgetho/makgethwana go tswa mo di-bookmaker tsa metshameko ya go betšha a itemogetse kgolo e e kwa godimo fa e sale ka FY 2018/19, jaaka go bontshiwa mo Setshwantshong 17. Kgolo e ne e le 72% mo go FY 2021/22, go latela 54% mo go FY 2022/23. Ka FY 2023/24, palogotlhe ya matseno e oketsegile ka 60%, go latela koketsego ya 48% mo go FY 2024/25.
- 4.5 Makgetho/makgethwana a di-totalisator tsa mabelo a dipitse a ntse a tlwaetse go ya tlase fa e sale ka FY 2018/19, a retelelwa ka 6% mo go FY 2022/23. Kwelotlase e tswetse ka 7% mo dingwageng tse pedi tse di latelang.
- 4.6 Makgetho/makgethwana a a kokoantsweng go tswa mo metshamekong ya go betšha ka di-totalisator gape ka kakaretso a ntse a tlwaetse go ya tlase thata, ka kgolo e e kgethegileng ya 38% mo go FY 2020/21. Go latela se, makgetho/makgethwana a phutlhamo ka 5% mo go FY 2021/22 gape le ka 9% mo go FY 2022/23. Makgetho/makgethwana a wetle tlase gape ka 10% mo go FY 2023/24 le ka 9% mo go FY 2024/25.

TLWAELO MO MAKGETHONG/MAKGETHWANENG A A KOKOANTSWENG MALEBANA LE GO BETŠHA (DI-TOTALISATOR LE DI-BOOKMAKER) FY 2020/21 - FY 2024/25



Setshwantsho 30: Tlwaelo mo makgethong/makgethwaneng a a kokoantsweng malebana le go betšha (di-totalisator le di-bookmaker), FY 2024/25

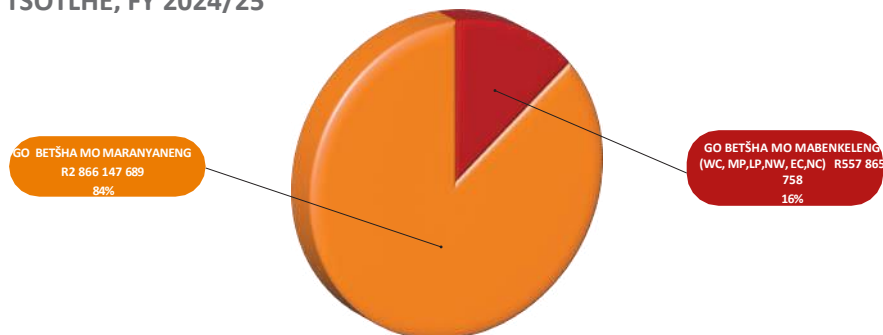
TLWAELO MO MAKGETHONG/MAKGETHWANENG A A KOKOANTSWENG MALEBANA LE GO BETŠHA (DI-TOTALISATOR LE DI-BOOKMAKER), FY 2024/25



Setshwantsho 31: Tlwaelo mo makgethong/makgethwaneng a a kokoantsweng malebana le go betšha (di-totalisator le di-bookmaker), FY 2024/25

4.7 Karolo e e tlhagisa palo e e bontshang kabo ya makgetho a go betšha magareng ga go betšha mo maranyaneng le mo mabenkeleng. E bontsha gore 84% tsa makgetho/makgethwana a tswa mo go betšheng ga maranyane, fa 16% di tswa mo go betšheng ga mabenkele.

MAKGETHO/MAKGETHWANA A GO BETŠHA MO MARANYANENG V MO MABENKELENG, DIPOROFENSE TSOTLHE, FY 2024/25



Setshwantsho 32: Makgetho/makgethwana a go betšha mo maranyaneng kgatlhanong le mo mabenkeleng, diporofense tsotlhe, FY 2024/25



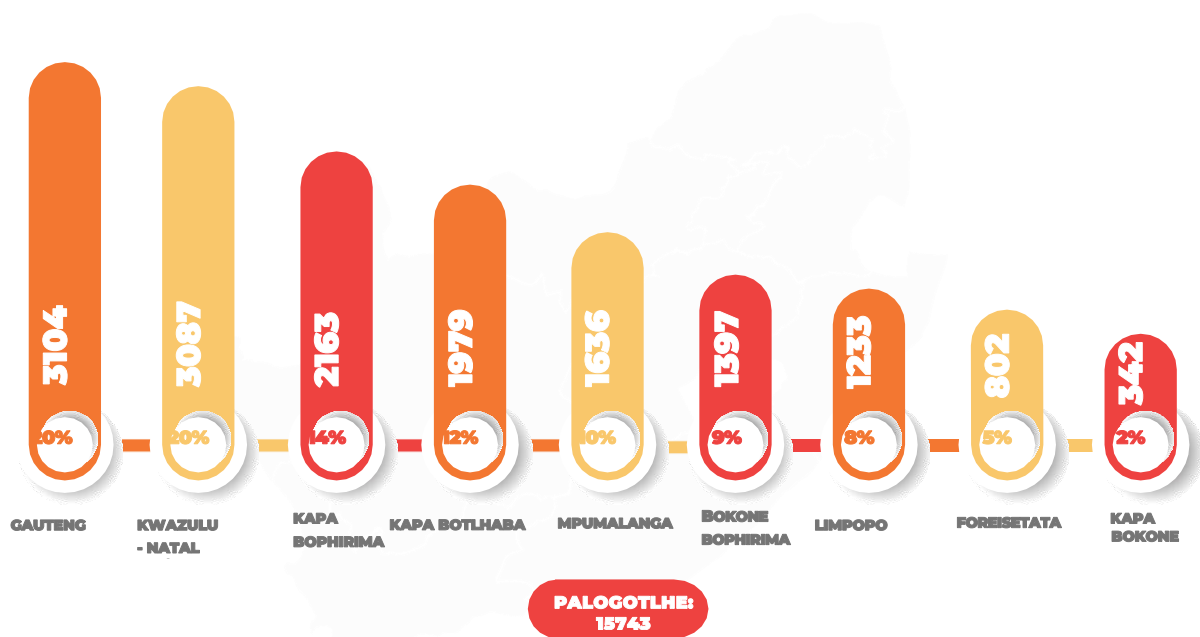
KGAOLO 4

LEKALA LA METŠHINE E E LEKANYEDITSWENG GO DUELA

1. MAITSHOLO A MMARAKA

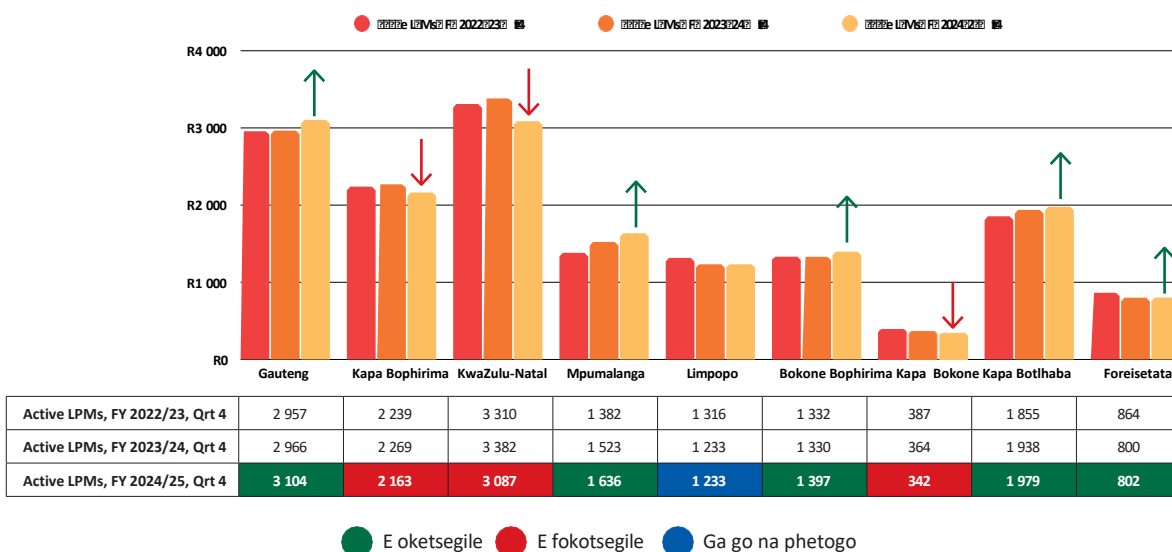
- 1.1 Batsayakarolo ba bagolo mo lekaleng la di-LPM ba kgaogantswe ka ditlhopha tse tharo: setlamo se se laolang di-LPM le mong wa motšhine yo o ikemetseng, mong wa lefelo le go beilweng di-LPM mo go lona le Thulaganyokgolo ya Bosetšhaba ya go Tlhokomela ka Seileketeroniki (NCEMS). Setlamo se se laolang di-LPM le mong wa metšhine yo o ikemetseng ke ditlamo tse di nang le dilaesense tse di letleletsweng go nna, go laola, le go dirisa di-LPM naga ka bophara. Beng ba mafelo a go beilweng di-LPM mo go ona a akaretsa dihotele tsa poraefete, di-pub, diresetšhuranta le mabenkele a a jaaka di-totalisator le di-bookmaker, a a mo nageng. NCEMS ke thulaganyo e kgolo e e disang le go lebelela di-LPM.
- 1.2 Palogotlhe ya di-LPM di le 15,743 di ne di dira gotlhe mo nageng kwa bokhutlong jwa FY 2024/25. Bontsi jwa di-LPM di ne di le kwa KZN ka (20%) le Gauteng ka (20%). Diporofense di le mmalwa di bone phokotsego mo palong ya di-LPM tse di dirang fa di bapisiwa le mo ngwageng o o fetileng, e leng Kapa Bophirima, KZN, le Kapa Bokone.

PALO YA DI-LPM TSE DI DIRANG KA POROFENSE, FY 2024/25, GO TLOGA KA 31 MOPITLWE 2025



Setshwantsho 33: Palo ya di-LPM tse di dirang ka porofense, FY 2024/25, go tloga ka 31 Mopitlwe 2025

PALO YA DI-LPM TSE DI DIRANG KA POROFENSE, FY 2022/23 GO 2024/25



Go tswa go FY 2023/24 go ya go FY 2024/25

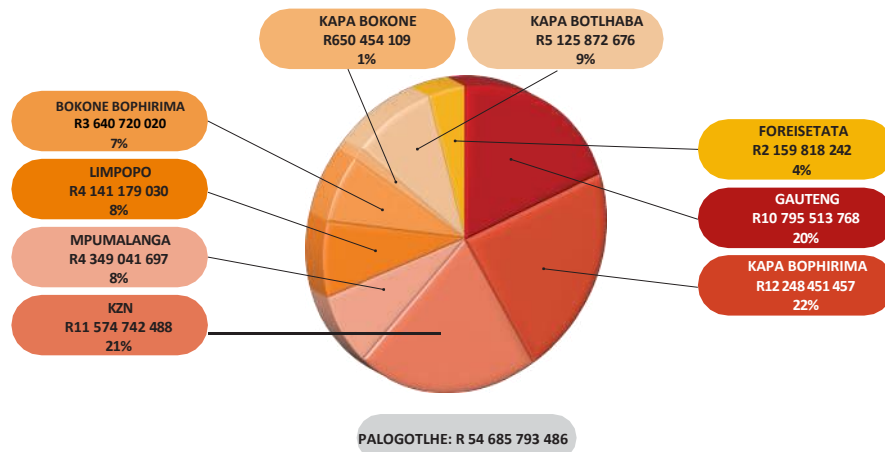
Setshwantsho 34: Palo ya di-LPM tse di dirang e bile di na le dilaesense, ka porofense, FY 2022/23 go ya go FY 2024/25

2. DIPALOPALO TSA DI-LPM TSA GO KEMBOLA

2.1 MADI A DIBETŠHE

- 2.1.1 Palogotlhe ya boleng jwa madi a a betšhilweng mo lekaleng la di-LPM ka FY 2024/25 e ne e le dibilione di le R54.7, e leng koketsego ya 1.8% fa e bapisiwa le ngwaga o o fetileng. Boleng bo bontsha 4% tsa madi a a betšhilweng go ralala mefuta yotlhe ya go kembola.
- 2.1.2 Dipalopalo tse di kwa godimo tsa madi a a betšhilweng mo lekaleng la di-LPM di ne di le kwa Kapa Bophirima ka (22%), e bo e latelwa ke KwaZulu-Natal ka 21%) le Gauteng ka (20%), jaaka go bontshiwa mo Setshwantshong 35.

MADI A A BETŠHILWENG A DI-LPM KA POROFENSE, FY 2024/25

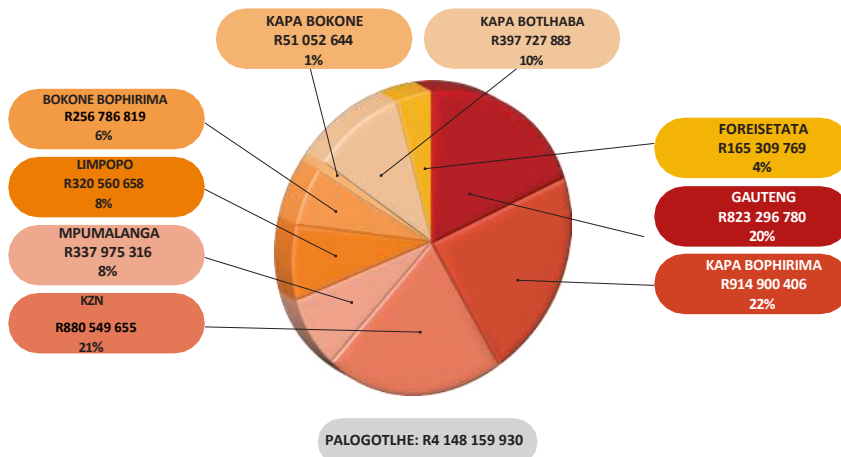


Setshwantsho 35: Madi a a betšhilweng a di-LPM ka porofense, FY 2024/25

3. PALOGOTLHE YA LETSENO LA GO KEMBOLA

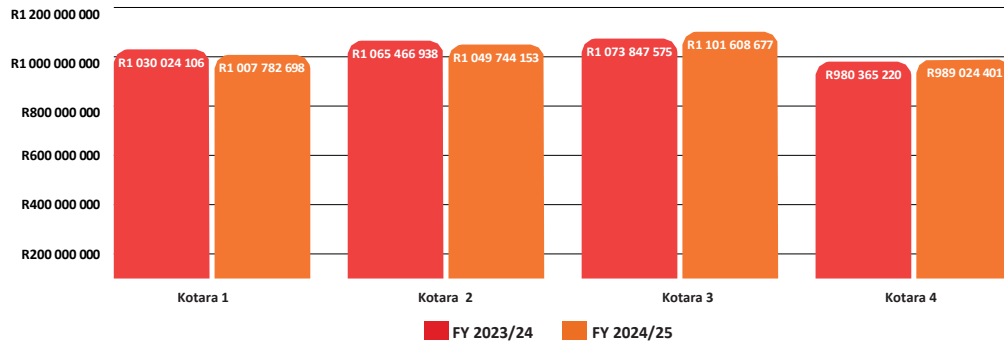
- 3.1 Palogotlhe ya boleng jwa GGR jo bo dirilweng mo lekaleng la di-LPM ka FY 2024/25 e ne e le dibilione di le R4.1. Se se bontsha phokotsego ya 0.04% fa e bapisiwa le ngwaga o o fetileng. Boleng jo bo bontsha palogotlhe ya GGR ya 6% tse di tlhagisitsweng ka mefuta yotlhe ya go kembola.
- 3.2 Kapa Bophirima e tlhagisitse GGR e e kwa godimo mo lekaleng la di-LPM ka 22%, e bo e latelwa ke KZN ka (21%) le Gauteng ka (19.8%), jaaka go bontshiwa mo Setshwantshong 36

GGR YA DI-LPM KA POROFENSE, FY 2024/25



Setshwantsho 36: GGR ya di-LPM ka porofense, FY 2024/25

TLWAELO YA GGR YA DI-LPMS, FY 2024/25

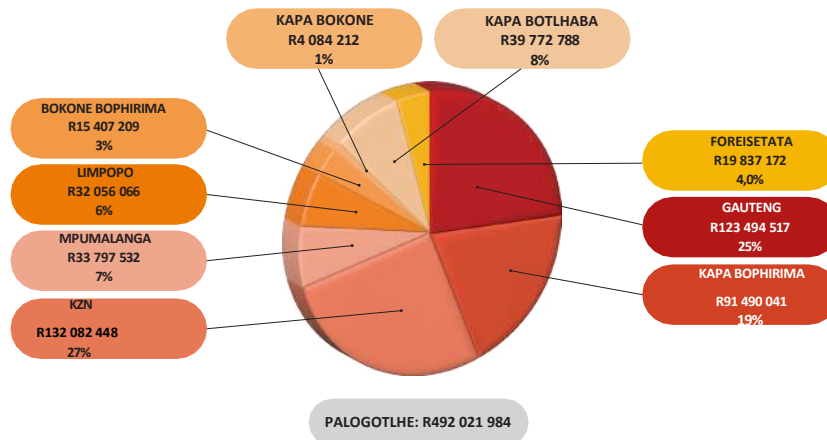


Setshwantsho 37: Tlwaelo mo GGR ya di-LPM, FY 2024/2025

4. MAKGETHO/MAKGETHWANA

- 4.1 Palogotlhe ya boleng jwa makgetho/makgethwana a a kokoantsweng ke di-PLA go tswa mo lekaleng la di-LPM ka FY 2024/25 e ne e le dimilione di le R492.0. Se se emela 9% tsa makgetho/makgethwana go tswa mo mefuteng yotlhe ya go kembola. Makgetho/makgethwana a di-LPM a fokotsegile ka 1% fa a bapisiwa le ngwaga o o fetileng.
- 4.2 KwaZulu-Natal e na le palo e e kwa godimo ya palo ya di-LPM tse di dirang e bile di na le dilaesense fa di bapisiwa le diporofense tse dingwe mme di baletswe go 27% tsa makgetho a a kokoantsweng ka FY 2024/25, jaaka go bontshiwa mo Setshwantshong 38.

MAKGETHO/MAKGETHWANA A DI-LPM KA POROFENSE, FY 2024/25



Setshwantsho: Makgetho/Makgethwana a di-LPM ka Porofense, FY 2024/25

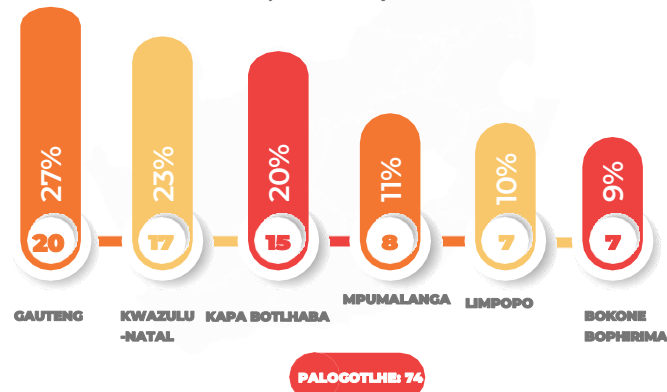


KGAOLO 5 LEKALA LA BINGO

1. MAITSHOLO A MMARAKA

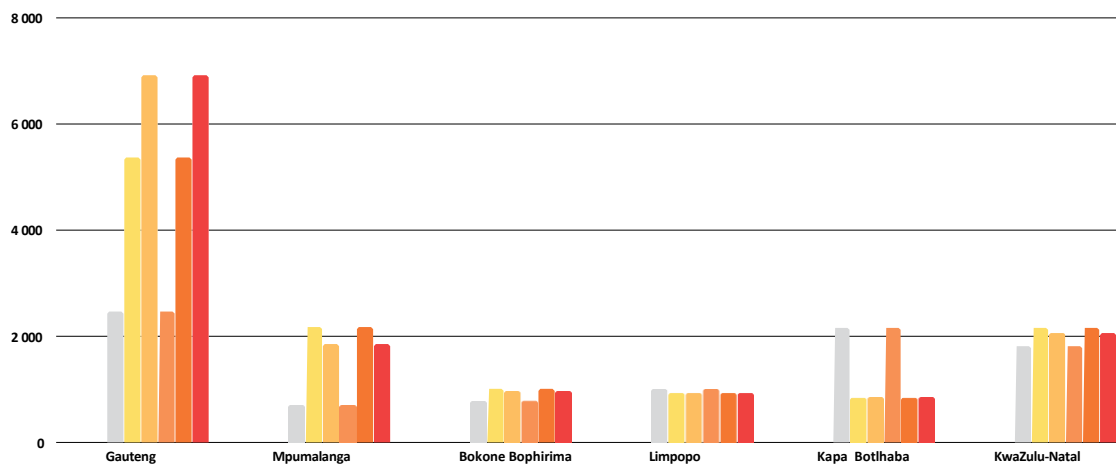
- 1.1 Mo diporofenseng di le robongwe mo Aforika Borwa, Bingo e setse e tsentswe tirisong mo diporofenseng di le thataro, e leng Gauteng, Mpumalanga, Limpopo, Bokone Bophirima, Kapa Botlhaba, le KZN. Palogotlhe ya palo ya diholo tsa bingo fa e sale di dira go tloga ka 31 Mopitlwe 2025, moo di le 20 di neng di dira kwa Gauteng, di le 15 kwa Kapa Botlhaba, di le 17 kwa KZN, di le supa kwa Bokone Bophirima, di le robedi kwa Mpumalanga le di le supa kwa Limpopo jaaka go bontshiwa mo Setshwantshong 39.
- 1.2 Palo ya maemo a bingo e e dirang e bontshiwa mo Setshwantshong 40. Maemo otlhe a bingo e ne e le a ditheminale tsa bingo tsa seileketeroniki, tse bontsi jwa tsona di leng kwa Gauteng.

PALO YA MAFELO A BINGO KA POROFENSE, FY2024/25 GO TLOGA KA 31 MOPITLWE 2025



Setshwantsho 39: Palo ya mafelo a bingo a a dirang ka porofense, FY 2024/25, go tloga ka 31 Mopitlwe 2025

PALO YA MAEMO A BINGO A A DIRANG KA POROFENSE, FY 2022/23 GO FY 2024/25 (GO TLOGA KA 31 MOPITLWE 2025)



Maemo a bingo a setso a a dirang, ngwaga wa	0	0	0	0	0	0
Maemo a bingo a setso a a dirang, ngwaga wa	0	0	0	0	0	0
Maemo a bingo a setso a a dirang, ngwaga wa	0	0	0	0	0	0
Di-EBT tse di dirang, 2022/23	2466	697	780	1003	2158	1813
Di-EBT tse di dirang, 2023/24	5369	2174	1010	928	824	2158
Di-EBT tse di dirang, 2024/25	6919	1854	958	928	837	2061
Maemo a tiro a bingo, FY	2466	697	780	1003	2158	1813
Maemo a tiro a bingo, FY	5369	2174	1010	928	824	2158
Maemo a tiro a bingo, FY	6919	1854	958	928	837	2061

E oketsegile E fokotsegile Ga go na phetogo

Go tloga ka FY 2023/24 go ya go FY 2024/25

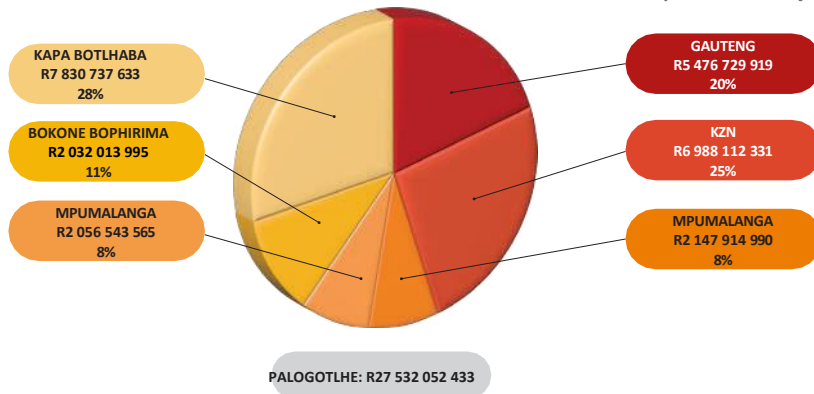
Setshwantsho 40: Palo ya maemo a bingo a a dirang ka porofense, FY 2022/23 go ya go 2024/25 (go tloga ka 31 Mopitlwe)

2. DIPALOPALO TSA GO KEMBOLA BINGO

2.1 MADI A DIBETŠHE

- 2.1.1 Palogotlhe ya boleng jwa madi a a betšhilweng mo lekaleng la bingo ka FY 2024/25 e ne e le dibilione di le R27.5, e emetse phokotsego ya 9.0% fa e bapisiwa le mo ngwageng o o fetileng. Boleng jo bo emela 2% tsa madi a dibetšhe go ralala mefuta ya go kembola.
- 2.1.2 Bingo e neetswe go tshamekiwa mo diporofenseng di le thataro, e leng Gauteng, KZN, Mpumalanga, Limpopo, Bokone Bophirima, le Kapa Botlhaba. Madi a a kwa godimo a a betšhilweng mo go FY 2024/25 a itemogetswe kwa Kapa Botlhaba ka (28%), e bo e latelwa ke KZN ka (25%) le Gauteng ka (20%), jaaka go bontshiwa mo Setshwantshong 41.

MADI A DIBETŠHE TSA BINGO KA POROFENSE, FY 2024/25

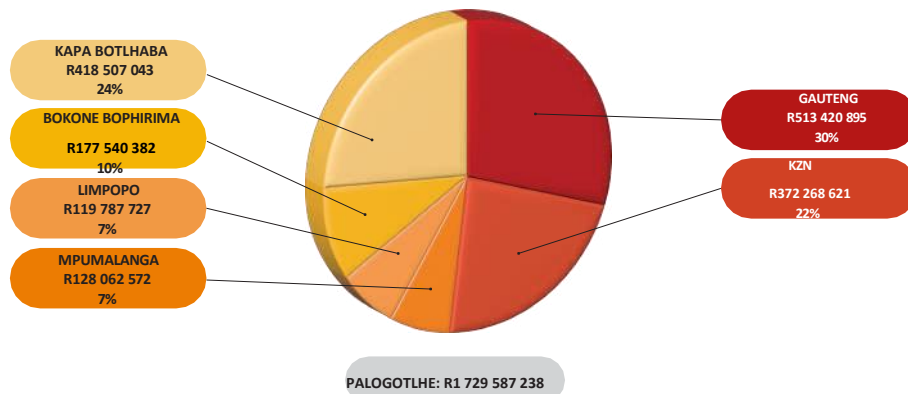


Setshwantsho 41: Madi a dibetšhe tsa bingo ka porofense, FY 2024/25

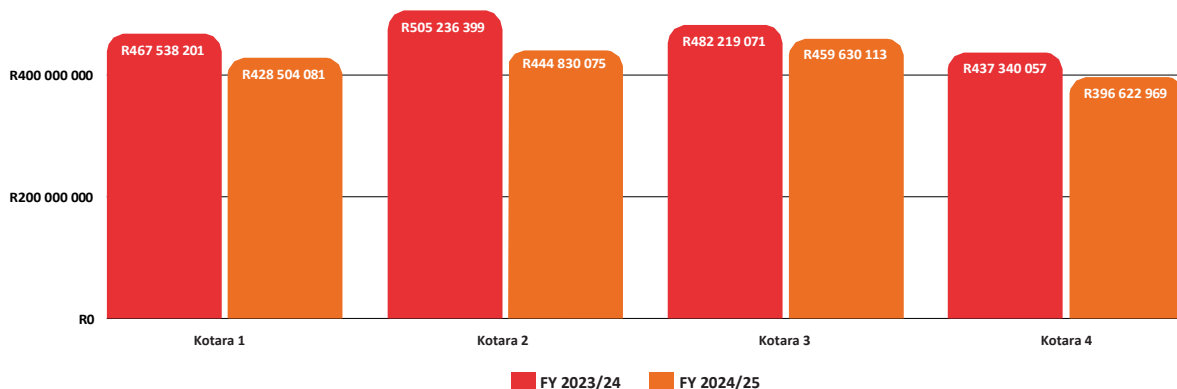
3. PALOGOTLHE YA LETSENO LA GO KEMBOLA

- 3.1 Palogotlhe ya GGR e e tlhagisitsweng mo lekaleng la bingo ka FY 2024/25 e ne e le dibilione di le R1.7, phokotsego ya 8.4% tsa mo ngwageng o o fetileng. Se se emela 2% tsa GGR go ralala mefuta yotlhe ya go kembola.
- 3.2 Gauteng ka (30%) e tlhagisitse GGR e e kwa godimo go gaisa mo go FY 2024/25, e bo e latelwa ke Kapa Botlhaba ka (24%) le KZN ka (22%), jaaka go bontshiwa mo Setshwantshong 42.

GGR YA BINGO KA POROFENSE, FY 2024/25



Setshwantsho 42: GGR ya bingo ka porofense, FY 2024/25

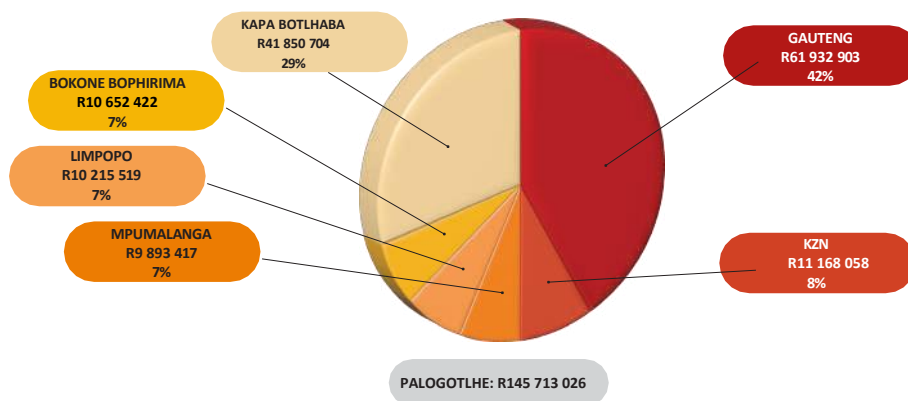


Setshwantsho 43: *Tlwaelo mo GGR, Bingo, FY 2024/2025*

4. MAKGETHO/MAKGETHWANA

- 4.1 Palogotlhe ya boleng jwa makgetho/makgethwana go tswa mo lekaleng la bingo mo go FY 2024/25 e ne e le dimilione di le R145.7, e emela phokotsego ya 10.3% go tswa mo ngwageng o o fetileng. Madi a a emela 3.0% tsa makgetho/makgethwana go ralala mefuta yotlhe ya go kembola.
- 4.2 Gauteng e dirile karolo e kgolo thata ya makgetho/makgethwana a a kokoantsweng mo go FY 2024/25, ka 42% e bo e latelwa ke Kapa Botlhaba ka (29%), jaaka go bontshiwa mo Setshwantshong 44.

MAKGETHO/MAKGETHWANA A BINGO KA POROFENSE, FY 2024/25



Setshwantsho 44: *Makgetho/makgethwana a bingo ka porofense, FY 2024/25*



KGAOLO 6

TIRO

TIRO YA KA TLHAMALALO

1. NGB e ela tlhoko ka tlhamalalo dipalo tsa ditiro mo lekaleng la go kembola (intaseteri le balaodi). Batho ba le 33 169 ba ne ba thapilwe mo intasetering ya go kembola (go akaretsa le balaodi) ka tiro ya ka tlhamalalo go tloga ka 31 Mopitlwe 2025 ba emela phokotsego ya 3% go tswa mo maemong a 34,316 a FY 2023/24. Makala a dikhasino le di-bookmaker a dirile palo e e kwa godimo ya badiri ba ka tlhamalalo mo intasetering ya go kembola, jaaka e botnshiwa mo Lenaaneng 3.

Lenaane 3: Tiro ya ka Tlhamalalo ka Profense le Mofuta, FY 2024/25

Mofuta wa go Kembola	Gauteng	Kapa Bophirima	KwaZulu-Natal	Mpumalanga	Limpopo	Bokone Bophirima	Kapa Bokone	Kapa Botlhaba	Foreisetata	PALOGOTLHE
Dikhasino	3,450	2,604	5,349	351	333	443	246	542	441	13,759
DI-totalisator	185	139	587	37	60	14	4	13	45	1084
Di-bookmaker	5,516	1,302	2,432	1,145	1,013	687	397	246	161	12,899
Di-LPM	644	65	95	320	882	114	23	724	27	2,894
Bingo	242	N/A	586	191	196	182	N/A	407	N/A	1,804
BALAODI										
Di-PLA	110	65	143	77	66	81	18	55	114	729
PALOGOTLHE	10,147	4,175	9,192	2,121	2,550	1,521	688	1,987	788	33,169



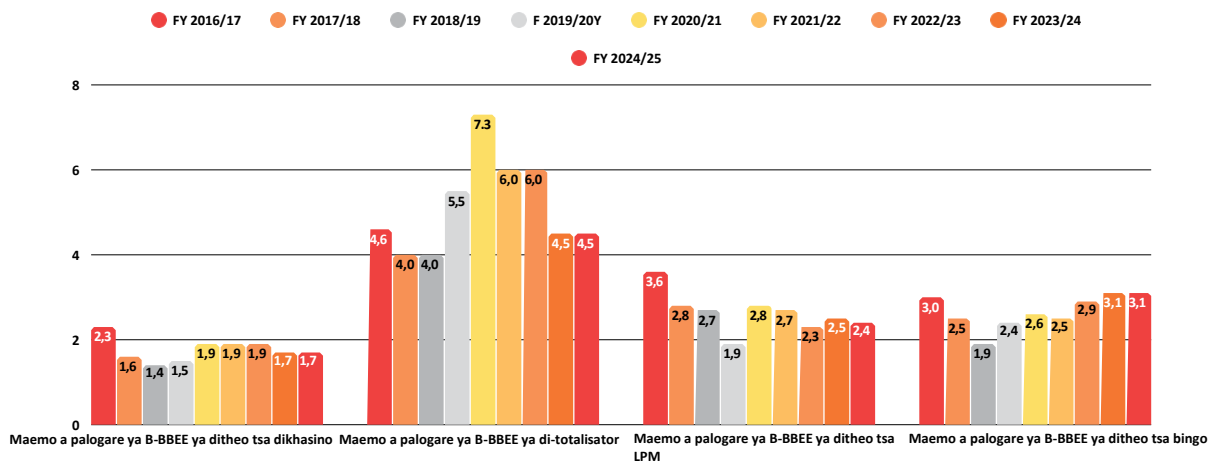
KGAOLO 7

**MAEMO A PHETOLO YA
MAATLAFATSO YA
IKONOMI YA BANTSHO
E E AKARETSANG
BOTLHE (B-BBEE)**

PHETOLO

- Maatlafatso ya Ikonomi e e Akaretsang Botlhe ya Bantsho (B-BBEE) ke selo sa botlhokwa sa ikonomi le polotiki mo Aforika Borwa. Maatlafatso mo intasetering ya go kembola mo Aforika Borwa e lekanyediwa go ya ka Melawana ya Tiro e Entle e e phasaladitsweng ke **dtic**. Go fitlha ga jaana, intaseteri ya go kembola ga e na tšhata ya phetogo e e leng ya yona. Dikgwebo tsa go kembola ka jalo di lekanyediwa go ya ka karata ya kakaretso ya maduo le, ka tšhamalalo, tse di latelang: Bong, Taolo ya Botsamaisi, Tekatekano ya Tiro, Tlhabololo ya Dikgono, Kgethegotheko, Tlhabololo ya Dikgwebo, le Tlhabololo ya Loago le Ikonomi. Le fa go ntse jalo, ka la 11 Diphlane 2013, **dtic** e ne ya golola Melawana ya Tiro e Entle ya B-BBEE e e tlhabolotsweng. Dikhoutu tsa bogologolo le tse dišwa di kopantswe go baya leitho maemo a bannaleseabe a a dirisitsweng ka 2018, ka tsela e e latelang:
 - bong;
 - taolo ya botsamaisi;
 - tlhabololo ya dikgono;
 - tlhabololo ya dikgwebo (motlamedi); le
 - tlhabololo ya loago le ikonomi.
- Go ikaegilwe ka tshedimosetso e e rometsweng ke di-PLA, maemo a magareng a B-BBEE (maemo a monnaleseabe) a intaseteri ya go kembola go tloga ka 31 Mopitlwe 2025, ka mofuta wa go kembola le setheo, di ne di le ka tsela e e latelang:
 - Maemo a palogare ya B-BBEE ya ditheo tsa dikhasino: Maemo a 1.7
 - Maemo a palogare ya B-BBEE ya di-totalisator: Maemo a 4.5
 - Maemo a palogare ya B-BBEE ya ditheo tsa LPM: Maemo a 2.4
 - Maemo a palogare ya B-BBEE ya ditheo tsa bingo: Maemo a 3.1 (ga jaana a dira fela kwa Gauteng, Mpumalanga, Bokone Bophirima, Kapa Botlhaba, KwaZulu-Natal le Limpopo)

MAEMO A PALOGARE YA B-BBEE KA MOFUTA WA GO KEMBOLA, FY 2016/17 – FY 2024/25



Setshwantsho 45: Maemo a Palogare ya B-BBEE ka Mofuta wa go Kembola, FY 2016/17 – FY 2024/25



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