

The New Map of Global Gaming

UK tax pressure, the UAE's regulated-market emergence and the payments infrastructure behind both.

Five questions for gaming and payments leaders

A concise executive briefing on margin pressure, licensing readiness, acquiring, settlement and market-entry strategy.

What changed - and why it matters

Gaming strategy can no longer treat tax, licensing and payments as separate workstreams. The UK is testing how operators absorb a major duty increase, while the UAE is building a federal commercial-gaming framework with licensed activity across several verticals. Both developments place payment economics and regulatory readiness at the centre of market strategy.

1 What is the UK duty reset?

HM Revenue & Customs increased Remote Gaming Duty from 21% to 40% for accounting periods beginning on or after 1 April 2026. A new 25% remote rate of General Betting Duty is scheduled from 1 April 2027, with stated exclusions for remote bets on UK horseracing and bets made through self-service terminals on licensed premises.

Commercial implication: A higher headline duty rate increases the value of disciplined payment acceptance, conversion, fraud control, settlement design and customer-value segmentation. Small execution gaps become more expensive when margins tighten.

2 What is emerging in the UAE?

The General Commercial Gaming Regulatory Authority states that its mandate covers lottery, internet gaming, sports wagering and land-based integrated gaming facilities or resorts. Its public licensee register now includes a lottery operator, a land-based gaming facility, gaming-related vendors, an internet-gaming licensee and a sports-wagering licensee.

Strategic implication: This is an emerging regulated market rather than an unrestricted opening. Operators and suppliers need to begin with the licensing perimeter, approved counterparties and permitted activity before considering product, distribution or payments.

The operating decisions behind the headlines

3 Where do payments enter the strategy?

Payments determine whether a licensed proposition can perform in practice. Market-entry planning should test the complete customer and treasury journey:

- Which local and international payment methods are permitted and commercially relevant?
- Which acquirers and payment providers will support the activity and jurisdiction?
- How will funds settle, in which currency, and into which regulated entity?
- How will withdrawals, refunds, chargebacks and responsible-gaming controls operate?
- What evidence will partners require for ongoing merchant monitoring?

4 What should boards measure?

Decision area	Useful board-level measure
Tax and margin	Net revenue after duty, bonuses, payment cost, fraud and chargebacks.
Acceptance	Authorisation and conversion by market, method, issuer and customer segment.
Liquidity	Settlement timing, reserve exposure and withdrawal-service levels.
Regulatory readiness	Licence dependencies, approved vendors and evidence ownership.
Resilience	Concentration by acquirer, provider, bank, method and jurisdiction.

5 What should happen next?

- Rebuild market P&Ls using the actual duty timetable and full payment cost.
- Map the regulated entity, customer, merchant, acquiring and settlement relationships.
- Stress-test provider concentration and fallback routes.
- Separate verified regulatory facts from assumptions about future market access.
- Prepare one board-owned readiness plan across legal, tax, payments, compliance and treasury.

The winners will not simply choose the right jurisdiction. They will make licensing, payments and commercial execution work as one system.

ABOUT THE AUTHOR

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Sources

HM Revenue & Customs. Gambling duty changes, published 26 November 2025.

<https://www.gov.uk/government/publications/changes-to-gambling-duties/gambling-duty-changes>

UAE General Commercial Gaming Regulatory Authority. Activities We Regulate.

<https://www.gcgra.gov.ae/en/commercial-gaming/activities-we-regulate/>

UAE General Commercial Gaming Regulatory Authority. Our Licensees.

<https://www.gcgra.gov.ae/en/licensing/our-licensees/>

Regulatory status and licensee lists can change. Readers should confirm the latest position directly with the relevant authority and obtain professional advice for their circumstances.