



**THE EUROPEAN
LOTTERIES**

FOR THE BENEFIT OF SOCIETY

The European Lotteries

Annual 20 Report 23



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Chapter
01

President's Message

The European Lotteries Association (EL) is a special place. A vibrant community with its own unique culture and a profound mission: for the benefit of society.

Despite the many geographical, economic and cultural backgrounds that we all come from, we are inspiringly united in matters of importance. While being numerous and different sometimes presents challenges, we are also stronger for it. Our heritage, values and successes prove it.

The year 2023 stands as more evidence to the impact we are making as a responsible, forward-thinking group of highly successful entities. In our latest report (for the year 2022), 68 reporting EL members collectively secured €22,2 billion in funds for public good. In over 40 European countries we are the pillars on which societies build their aspirations – in sports, culture, healthcare, art, science, or services for the disabled or disadvantaged.

Increasingly, we are the force shaping the European games of chance landscape towards responsibility, sustainability and inclusion. Simultaneously, we remain a community of accomplished market players, as evidenced by last year's achievements.

The 11th EL Congress and Trade Show in Šibenik was a chance for us to reconnect, look to the future and learn from keynote speakers and each other.

During the 2023 General Assembly, I had the pleasure of taking over the role as newly appointed President of EL from much more experienced hands! The firm yet sensitive leadership of Hansjörg Höltkemeier paved the way for EL's progress and also my own clarity and sense of purpose.

In a heartfelt tribute we named Hansjörg Höltkemeier as EL Honorary President. Electing new members of the EL Executive Committee, we also named two Vice Presidents, Stéphane Pallez and Olli Sarekoski.

On the societal role of lotteries and the need to channel gambling desire towards promoting lower risk games, the General Assembly unanimously adopted the Antwerp–Šibenik Resolution. In addition, four position papers were approved, on relevant topics for EL at European level, namely: consumer protection and responsible gaming, taxonomy, videogames, and sport integrity.

The newly elected EL Executive Committee, along with the Secretary General and the senior EL team, engaged in strategic conversations, inviting EL members to share their perspectives as well. **As a result of this collective effort, the EL Strategic Outline for the period 2023–2025 was adopted.**

By reshaping the EL Working Bodies, we have established a new interdisciplinary team leading

the development of the content to position EL and its members as leaders in Positive Social Impact. Several new topics came to the forefront, such as better tailored service to our 20 non-EU members as well as highlighting the concept of a lottery as a longstanding European invention generating funds for public good to support numerous societal initiatives across Europe.

Thanks to EL's Responsible Gaming "buddy" Support Programme, **all EL members have successfully achieved independent Responsible Gaming certification, or a commitment level.** New members must obtain certification within one year.

Significantly upgraded EL Sustainability Guidelines were published in September 2023. By the end of the year, over 40 percent of EL members committed to the voluntary EL Environmental Initiative, also benefiting from the newly introduced Support Programme. The good work continues into 2024.

In Autumn, the fourth European class of WILL – Women's Initiative in Lottery Leadership – welcomed a record number of participating female mentees, 11 in total. For the first time, four of our male colleagues stepped forward as mentors. **WILL was also recognised externally as a 2023 finalist for the DEI award from the European Society of Association Executives.**

Throughout the year, we launched the DEI Growth e-learning platform for EL members, featuring 13 modules for self-awareness and skill-building.

Sadly, in 2023, we lost our esteemed colleague, Mr. Fabio Cairolì, IGT CEO Global Lottery and former colleague in the EL Executive Committee. Fabio's sudden passing leaves a void within our collective. We will remember him fondly.

In this large community, every success is a collective, collaborative achievement.

My heartfelt gratitude goes to all who actively participate in our working groups and contribute to EL in various capacities. Additionally, my special acknowledgment goes to the EL Secretary General and the professional team for their continuous support.

I also want to thank the EL partners and two Associations, the World Lotteries Association (WLA) and United Lotteries for Integrity in Sports (ULIS) for the important role they play in our progress and commitment to sport integrity.

Finally, I wish to acknowledge the Executive Committee and all of the EL members. It has been my privilege to contribute to this collective endeavour.

While they may not read this report directly, my biggest appreciation goes to each and every person of the (estimated) half of the European adult population who – by participating in our games – enable us to fulfil our mission, **For the Benefit of Society.**

With warmest regards,

Romana Girandon
EL President



In Brief: The European Lotteries (EL)

The European Lotteries Association (EL) is the European umbrella organisation of national lotteries operating games of chance, including sports betting, for the public benefit.

EL is the largest and most representative organisation in the European lottery and gambling sector, present in 39 countries, with 70 members in total.

The Association represents both state-owned and private operators offering lottery, gambling, and betting services on-and-offline. EL members operate only in jurisdictions where they are licensed by national governments, paying all taxes and adhering to legal requirements such as anti-money laundering (AML) and responsible gaming practices.

EL and its members prioritise consumer protection above all other interests, ensuring a high level of protection for players. This is highlighted as a key differentiator in how lotteries and other activities of EL members are operated in comparison to private gambling operators or illegal operators.

In 2023 EL adopted its new strategic outline for the period until 2025.

EL's all-important tagline "For the Benefit of Society" continues to represent EL's most foundational mission statement and purpose.

Our purpose

EL promotes and defends a sustainable lottery model, empowering its members to become successful and responsible organisations that inspire millions of players across Europe and generate funds for the public good.

Our vision

United in diversity, EL will be recognised as an Association of responsible and successful members making the most positive social impact. EL aims to deliver outstanding services and support its members in implementing the highest standards of safe entertainment, lead the sustainability transition and proactively facilitate innovation.



To defend the sustainable lottery model, EL support its members on a supra-national (EU), as well as, where deemed needed by the concerned Member, on a national level. EL will be seen as the thought leader to external stakeholders and a proactive expert organisation in the field.

Three focus areas are considered essential for achieving EL's strategic goals:

Positive Social Impact: By putting our purpose first, EL aims to position itself and its members as recognised leaders in Positive Social Impact.

Effective Communications: EL aims to communicate positions and messages to all relevant stakeholders, in an engaging and creative way.

Responsible Innovation Facilitation: EL, as an Association, will innovate towards the evolving landscape of the lottery sector and keep offering state-of-the-art services. Collaboration with strategic partners and sector suppliers is encouraged where needed.



For the Benefit of Society

EL Core Values

EL's sustainable lottery model is based on three core values. With the new strategic outline adopted in 2023, a natural transition has been made towards a focus on action-based values.



Forward Thinking

EL and its members are assertive and ambitious, actively fostering innovation, creativity and development. They anticipate on trends, share visions and discover new ways of thinking and working. Together, opportunities are found and initiatives bring fresh perspectives, marked by change, adaptability and improvement. EL and its members are committed to learn and grow.



Sustainability

EL and its members are a diverse community that aims to make their positive social impact bigger and more far reaching. Their common heritage of responsible games for public good is their core, and they understand sustainability comprehensively. EL and its members promote diversity, embrace equality, operate transparently and visibly enact environmentally friendly practices. EL and its members share sustainability know-how, while actively engaging their stakeholders.



Integrity

EL and its members promote clarity, in messages, activities, operations and intentions. Collectively, they raise standards in the field and adopt a zero-tolerance policy towards any kind of unethical practices. They strictly enact compliance and respect legal frameworks. Through awareness raising and advocacy work with governments and regulators, EL and its members strive towards greater public safety. In their actions and communication, they are reliable, honest, truthful and transparent, treating internal and external stakeholders fairly and equitably.

Overview of Key Data (2022/2023)

Every year EL members contribute significantly to society. In EL's latest report (for the year 2022), 68 report EL Members generated over 22 billion euros, a year-on-year growth of a little over 11 percent. Out of the total amount, 73 percent went to state budgets and the rest supported social projects, sports, culture and heritage, healthcare, and education.

The results gathered should be seen against the backdrop that more than half (55 percent) of EL members faced, or are facing advertisement restrictions. The restrictions can be of any kind and influence any game category, offline and online. Despite such challenges, EL members continue to offer legally controlled games aimed at protecting vulnerable players and channeling them away from illegal operations and the most

harmful games. EL continues to monitor developments.

Overall, it is clear that EL members continue to contribute significantly to society with a commitment to consumer protection, and efforts to navigate challenges, while providing regulated gaming services in a controlled and sustainable environment.

The total Gross Gaming Revenue (GGR) of all gaming categories amounted to over 38 billion euros in 2022, an increase of approximately six percent compared to 2021.

Sales for the three main categories of games (draw based DBGs, instant and sports games) by all reporting EL members amounted to 105.9 billion euros. DBGs experienced a three percent growth, while instant games grew by two percent. Sports betting grew by over seven percent compared to the previous year and became the second fastest growing game category within the EL members base in 2022.

Online operations grew further by nine percent, strengthened by the COVID impact with a shift to online channels. Retail also grew by nearly six percent compared to 2021.





68 EL Members

Contributing to the EL Report 2022.



€22.2bn

Money for Society.

11% higher contribution from EL Members to society than the previous year.



51,344

Direct full-time employment. (Yearly average number of full-time employees).

EL and its Members believe sustainability topics such as diversity, equity and inclusion (DEI) are of crucial importance in the workplace, for the advancement of society and to ensure fairness and inclusion for all.



€38.3bn

Gross Gaming Revenue (GGR). Sales minus prizes of the five gaming Categories.

57.8 percent of the GGR generated by EL Members went back to society (not including sponsorships) in the respective countries.

Secretary General's Message

Looking back at 2023, I can only say that it was again "a great EL year". An absolute highlight was the EL Congress in Šibenik, where we met with a record number of participants, and I had the privilege to talk with Sophia the Robot, the first human android! We enjoyed the contributions of all speakers, the magic, the fireworks, the good food and music in the evenings and the award winning best of the best commercial of Nederlandse Loterij. We apologised to the brave exhibitors of the EL Trade Show for the hot and wet conditions! And, last but certainly not least, we all welcomed the new EL Executive Committee and first female President Romana Girandon. Hansjörg Höltkemeier was honoured for his longstanding commitment to the Association with the title of honorary President. I thank him here once again for all his work for EL!

In 2023, under the supervision of the new President and together with the Executive Committee, it was a pleasure to contribute to the new strategic outline, aimed at setting goals and strengthening EL's position as the largest and most representative Association in the sector. To do even better for the benefit of society and to stay relevant and create value in this fast changing lottery sector.

As always, the EL team is proud to serve 70 EL members in today's market. A market that has recovered from the COVID-19 years on the one hand and one that has become more complicated and regulated on the other. Advertisement bans and illegal operations stand in the way of the legal lottery operators.

In 2023, **EL actively engaged in policy debates at both supra-national level and, when asked by an EL member, at national level.** The Association continued to advocate for the sustainable lottery model that it so importantly promotes and defends.

Next to the members, EL brings together some 30 suppliers to the lottery sector. **In 2023, our work was supported by EL's Level 1 partners IGT and Scientific Games and new Level 2 partner NeoGames**, visible with many more at the Trade Show in Šibenik. Other suppliers contributed, as always, to EL events.

Facilitated by the EL working groups, **successful seminars were organised on various themes**, from marketing, sustainability, legal and regulatory affairs to sport and risk management. Well attended events on retail and instant games returned in 2023, as well as a successful public procurement workshop, and a dedicated webinar on artificial intelligence (AI) with almost 200 participants. **The induction and executive modules of EL's corporate university remained popular. To serve its members, EL promoted further its Environmental Initiative, Sustainability**

Guidelines, the WiLL programme, e-learning modules and a new lottery commercials library.

The statutory seat of EL was transferred to Belgium in 2023, with further work on implementing relevant regulations. Financial and tax obligations under Belgian law and international regulations were addressed with the assistance of Grant Thornton. The EL team in Brussels expanded with a new accounts officer in early January 2024, while the team in Lausanne remained unchanged. Together, the team worked hard to support the working groups, events, communications, advocacy and to continuously improve all services to the EL members.

This edition of the Annual Report provides a detailed overview of EL's work in 2023. I thank the team for their commitment, the Executive Committee for the trust, and the EL regular and associate members for their support to EL's work and purpose.

Arjan van 't Veer,
Secretary General



Chapter 02



EL Governance

Composition of the EL Executive Committee in 2023

During the General Assembly, EL Members elected the new Executive Committee and appointed Romana Girandon as President for the period 2023–2025.



President:

Romana GIRANDON

President & CEO | Loterija Slovenija d.d. |

SLOVENIA

Member of the Executive Committee **since 2019**



First Vice-President:

Stéphane PALLEZ

Chairwoman and CEO | La Française des Jeux |

FRANCE

Member of the Executive Committee **since 2015**

First Vice-President **since 2017**



Second Vice-President:

Olli SAREKOSKI

President & CEO | Veikkaus Oy | **FINLAND**

Member of the Executive Committee **since 2017**



Member:

Olgierd CIELŚLIK

CEO | Totalizator Sportowy Sp. z o.o. | **POLAND**

Member of the Executive Committee **since 2019**

(Note: Mr Ionut-Valeriu Andrei was co-opted in the Executive Committee after the term as CEO of Mr Cieslik was concluded early 2024).



Member:

Jannie HAEK

CEO | Loterie Nationale | **BELGIUM**

Member of the Executive Committee **since 2015**



Member:

Hansjörg HÖLTKEMEIER

Member of the Managing Board |

Deutsche Klassenloterie Berlin | **GERMANY**

Member of the Executive Committee **since 2009**

President of the Association **from 2015–2023**



Member:

Jesús HUERTA ALMENDRO

President & CEO | Sociedad Estatal Loterías y

Apuestas del Estado | **SPAIN**

Member of the Executive Committee **since 2018**



Member:

Jan KARAS

CEO | OPAP | **GREECE**

Member of the Executive Committee **since 2023**



Member:

Jean-Luc MONER-BANET

CEO | Loterie Romande | **SWITZERLAND**

Member of the Executive Committee **since 2021**



Member:

Niels ONKENHOUT

CEO | Nederlandse Loterij | **THE NETHERLANDS**

Member of the Executive Committee **since 2023**

(Note: Mr Onkenhout has left the Executive Committee per 1 May 2024).



Member:

Rosangela ROBBIANI

Product Managing Director | Sisal S.p.A. | **ITALY**

Member of the Executive Committee **since 2023**

Secretary General:

Arjan 'VAN 'T VEER

Secretary General **since 1 March 2017**

In 2023 three physical meetings took place (Berlin, Brussels and Šibenik). The Executive Committee held three conference calls.

“Looking Forward” in 2023

**11th EL Congress & Trade Show,
4–7 June, Šibenik, Croatia**



The 11th EL Congress and Trade Show served as EL's lottery event of the year, bringing together a record number of industry stakeholders to discuss the evolving landscape of the lottery sector with the theme “Looking Forward – Lotteries of the Future”.

Originally planned for 2021 but delayed due to the pandemic, the Congress successfully served as a much-anticipated platform for engaging discussions, knowledge sharing and networking opportunities.

The Congress and Trade Show was hosted by the Croatia Lottery, and organised in partnership with EL Level 1 Partners IGT and Scientific Games and Level 2 Partner neogames.



- **Sophia the Robot** brought smart answers and deep thoughts, showing how emerging technologies such as AI could reshape the lottery sector.
- Celebratory reception for the **Women's Initiative in Lottery Leadership (WiLL) Mentoring Programme**.
- **Unique location and branding** with speculator opening fireworks and picturesque sea views.



- Insightful presentations from **EL Level 1 Partners Scientific Games and IGT, and Level 2 Partner neogames**.

- **22 EL suppliers exhibited at the Trade Show**, with new products and services.

- Inspiring **CEO panel discussions** to explore regulatory trends and challenges, such as advertisement bans, legal frameworks & RG practices.

- EL Secretary General Arjan van 't Veer inducted into **PGRI Lottery Hall of Fame**, together with Andreas Kötter, CEO of EL Member WestLotto.



- A **Breakout Bonanza** organised by the EL working groups brought together participants to speculate on future trends and developments in the sector.

- Illusionist **Victor Mids** brought us easy card tricks to mind twisting experiments, with extraordinary results!

- **Recognition of EL Responsible Gaming certified members** with dedicated award ceremony.



EL Advertising Awards 2023: Nederlandse Loterij awarded top prize

The EL Advertising Awards, held bi-annually, recognise and celebrate outstanding lottery advertisements across Europe. The award ceremony is traditionally part of the EL Congress, where commercials are honoured for their creativity, originality, and effectiveness in promoting lottery products or campaigns. Participants had the chance to vote for the winning commercials.



QR code to [the page](#) which includes the videos of the winners



EL Grand Prix (& best draw-based game) NEDERLANDSE LOTERIJ,

"Don't wait for luck to happen" (2022)



Best corporate campaign commercial

CAMELOT UK,
"A Christmas Love Story" (2022)



Best (online) instant game commercial

ONCE,
"The Cleopatra scratch card is trendy!" (2022)



Best sports betting commercial

OPAP,
"PAME STOIXIMA WORLD CUP" (2022)



Best responsible gaming commercial

LOTERIE ROMANDE,
*"Even when you really like something,
you have to set limits"* (2022)

EL General Assembly 2023

Comprised of all regular EL members, the General Assembly is the highest decision-making body within the Association. It sets the strategic direction, approves budgets, and elects the Executive Committee and President.

54 EL lottery Members present and eligible to vote.

Adoption of the Antwerp – Šibenik Resolution, giving members further support towards the risk based approach in gambling regulation.

Hansjörg Höltkemeier awarded title of EL Honorary President.



"I am delighted to be elected EL President. This is a real honour, and I would like to thank the members for trusting me to lead EL in the next mandate. I look forward to fulfilling my role together with a strong and experienced Executive Committee, to prove that we, The European Lotteries, are here to benefit society and make our positive social impact bigger and more far reaching." says Romana Girandon, EL President.

"Together we can make a difference and provide a new momentum for a sustainable and responsible future. I would like to thank especially Hansjörg Höltkemeier, now EL Honorary President, for his dedication and commitment to EL over the past years and wish him all the best for the future."

Two new EL Regular Lottery members: Loterie Korunka s.r.o. (Czech Republic) and National Lottery plc (Malta).

Korunka
National Lottery

Suspension of EL Associate membership of IMG Arena (UK).

EL Members elected a **new Executive Committee** and **first female President**.



Two new EL Associate members: OpenBet Ltd (UK) and Fennica Gaming (Finland).

OpenBet **FENNICA**

Membership developments

EL as an Association has Regular members, Observer members or Associate members. At the beginning of 2023, EL had:



70 Regular Members in 41 countries

- Conduct games of chance and/or skill such as lotto, toto, classic lotteries, sports betting, instant games
- In a country that is a Member State of the Council of Europe (CoE)
- Licensed or authorised in a relevant jurisdiction by the competent authorities to operate such games
- Larger part of sales in lottery games and substantial part of revenues for the benefit of society
- Executive voting rights in EL General Assembly.



33 Associate Members in 14 countries

- Person or organisation that supplies goods or services to Regular and Observer Members.
- No voting rights in EL General Assembly.



3 Observer Members in 2 countries

- Fulfil the criteria for Regular Membership but are outside the CoE.

Earlier in the year, EL and neogames signed a two-year partnership agreement, showcased during the EL/WLA Marketing Seminar in London. EL welcomes this collaboration with the good work continuing into 2024.



In the second half of 2023, the EL Executive Committee pre-approved the membership applications of five Associate members (Greentube GmbH, Austria, Allodium Games s.r.o., Czech Republic, Custom SpA, Italy, Intelligent Data s.l., Spain and Optimove, UK). These applications will be presented for formal approval by the EL General Assembly in 2024.

Chapter
03

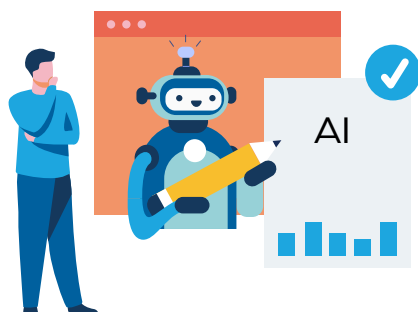


Statutory Tasks

Platform for education & exchange of best practices

By adhering to its governance structure and focusing on its core tasks, EL aims to effectively serve its members, advance the interests of the lottery industry, and contribute to the overall well-being of society.

2023 saw the full return of physical events with seminars covering various topics including marketing, retail, legal and regulatory affairs, instant games, sustainability, responsible gaming, sports betting and risk management. A dedicated workshop on public procurement took place and digital exchanges remained purposeful with well-attended webinars on AI, and data and research. All these events were organised in close collaboration with the EL Working Groups.



Responsibility and Sustainability at heart of EL activities

At the core of national lotteries lies a common heritage of responsible games for public good. EL and its members are dedicated to promoting diversity, embracing equality, operating transparently, and visibly enacting environmentally friendly practices. EL, together with its **Sustainability and Responsible Gaming working group** achieved the following in 2023.



In 2023, EL continued its efforts to promote **responsible gaming through its Certification programme**. Thanks to its Support Programme, as of 31 December 2023, an outstanding 99 percent of EL members (69 in total) had achieved RG certification – a 34 percent increase since certification became mandatory in 2021.

EL took a significant step forward by updating its **Sustainability Guidelines**, aimed at strengthening lotteries' commitments across a broader spectrum of responsibility. The Guidelines, presented at the 2023 EL/WLA Sustainability and Responsible Gaming seminar in Oslo, reflect EL's ongoing dedication to promoting sustainable practices within EL and aligning its members with the highest standards of corporate responsibility.

Through collaborative efforts and shared commitments (use of paper from certified sustainable forests, regular monitoring of GHG emissions), EL and its members are working towards reducing their environmental footprint and contributing to a more sustainable future for all. In 2023, **EL launched a Support Programme in relation to its Environmental Initiative**. By December 2023, nearly half of EL members (43 percent) committed to the Initiative.



DEI as an opportunity for change

In 2023, EL continued its commitment to sustainability topics such as DEI, recognising their crucial importance in the workplace, for both the advancement of society and to ensure fairness for all. EL launched dedicated learning modules on DEI and was recognised as a finalist for the European Society of Association Executives' DEI award.

The WiLL Mentoring Programme

continued its success in 2023, designed for female leaders in the lottery sector who want to realise their full potential. This last edition saw a record number of 11 duos joining the programme. EL's new initiative to cover one physical meeting for each duo at the Mentors' lottery allowed for greater interaction between the participants.



After eight inspiring months of exchange, the WiLL participants gathered for a celebratory closing ceremony at the EL Congress in Šibenik. Speeches from EL President Romana Girandon, European WiLL sponsor and first EL Vice President Stéphane Pallez and WiLL Founder Rebecca Paul, highlighted the importance and significance in empowering women leaders in the lottery sector.

ELCU – Back to school for EL members!

Induction and Executive Modules of the EL Corporate University proved successful once again in 2023 with a mix of in person and online courses. Two participants of the Executive Module were laureates of a previous Induction Module back in 2019.

Fostering innovation and forward thinking

In 2023, Rosangela Robbiani (Sisal Italia) became the new Supervisory Chair of the **Innovation and Technology working group** who brought forward an internal reflection on how the working group could align its objectives with the new Strategic Outline and emphasise the important role of innovation within it.

EL and its members explored and discussed several themes shaping the future of the lottery industry. These included, but were not limited to, AI, Machine Learning, Use of Data, Blockchain (including cryptocurrencies) and NFTs,

Omnichannel, Metaverse and Loyalty programmes. The working group also collaborated with the Public Affairs working group on a position paper on videogames and Web3.



EL launches Lottery Commercial Library to inspire creativity

As an initiative of the **EL Marketing and Communications working group**, the creation of an exclusive library of award winning and innovative commercials from the EL membership, proved a valuable knowledge sharing resource. This dedicated repository offers a unique opportunity for members to access and study the ads, but also to gain insights into the stories behind their creation. With this project, the working group aimed to facilitate knowledge sharing and inspire creativity between EL members.

Risk Reference Cards enhance operational resilience

In 2023, the **EL Operational Risk and Assurance working group** made significant progress in enhancing the overall operational resilience of EL members. This was achieved through the publication of 12 risk reference cards, each designed to provide comprehensive guidance on managing specific operational risks. Each card provides information on how a specific operational risk can be managed, a progress plan for addressing the specific risk and guidance on self-evaluation and monitoring the situation's evolution.

Promoting sport integrity

In 2023, Niels Onkenhout (Nederlandse Loterij) became the new Supervisory Chair of the **EL Sport and Sport Integrity working group**, and appointed Jens Nielsen (Danske Spil) as Executive Chair.

The commissioning of a market study focusing on European sports betting trends demonstrated a commitment to staying informed about the industry developments for the lottery sector. The working group also collaborated with the EL Public Affairs working group on a position paper on sport integrity, highlighting a shared commitment to combating match-fixing and championing integrity as one of EL's core values.

The organisation of the annual EL/WLA Sports Betting Seminar took place alongside the Rolex Paris Master and served as a platform for knowledge-sharing and networking. The event's focus on trends and innovations, while maintaining a strong emphasis on sport integrity, highlighted the importance of responsible and innovative practices in sports betting.



2023: EL events in numbers

- **4** EL seminars/workshop(s) (**247** participants) on retail, legal affairs, public procurement and instant games.
- **3** joint seminars with WLA (**450** participants) on marketing, sustainability/responsible gaming and sports betting.
- **1** in person ELCU Executive Module (**16** participants).
- **1** Congress and Trade Show (over **500** participants).
- **1** General Assembly (**54** members present)
- **1** joint event with ENGSO during the European Week of Sport (approx. **50** participants)
- **3** EL webinars (**262** participants) on AI, data and research and a WiLL kick off event
- **1** joint webinar with WLA (**176** participants) on security and operational risk
- **1** online edition of the ELCU Induction module (**32** participants)



Statutory Tasks

Advocating & promoting the interest of EL Members

In 2023, EL continued its role in monitoring policy developments, particularly at EU level. Several relevant dossiers continued with digital services, AI, the metaverse, AML, sustainability, and standardisation all being priorities to follow. These topics all reflect emerging regulatory landscapes that could have a significant impact on the operations and interest of national lotteries.

The **EL Public Affairs Coordination (PAC) working group** played a key role in facilitating advocacy efforts. By engaging with policy makers, both EL and the working group ensured effective representation of the interest of EL members in EU policy discussions. The involvement and expertise of EL's Legal Advisor further strengthened these efforts. Notably, national developments such as the Malta Bill 55 were closely followed.

In 2023, EL kept a close eye on the priorities of the rotating presidencies of the Council of the EU (Sweden & Spain) and highlighted EL's priorities in two dedicated letters.



EL calls for clear separation to be maintained between gambling and gaming

At the beginning of 2023, EL welcomed the European Parliament's adoption of its resolution on "Consumer Protection in Online Video Games." However, EL called for the clear separation between gambling and gaming to be maintained, with regulation at national level. The resolution acknowledges the importance and value of the video games sector whilst also calling for more measures to protect the players.

EL positions itself on key issues

As part of strategic advocacy efforts, EL, the PAC working group with the support of other relevant working groups developed a series of position papers on topics of relevance to the lottery sector. The papers aim at providing informed perspectives and recommendations on issues affecting the interests and operations of national lotteries within the European context. The specific topics were based on priorities identified by EL with specific calls to action.



Consumer protection and responsible gaming:

The closer to the players, the more efficient it is to protect them against any undesirable effects of gambling. Member States are best placed to address local needs and achieve the highest level of consumer protection in the gambling sector. EL calls on policymakers to sustain the current widespread and successful model of national lotteries in

Europe through continued regulation of gambling policies at the national level – also when it comes to consumer protection and responsible gambling – and by doing so safeguard the benefits of national lotteries for society.



Taxonomy: In any future discussions on the review of the environmental taxonomy or the future social taxonomy, EU

policymakers should consider the unique characteristics of lotteries and make sure they are . A broad sectoral exclusion would harm lotteries by hindering their collaboration with investors and insurers.



Videogames & Web3: Video games have profoundly influenced the entertainment sector. E-Sports are a

recognisable success and Web3 promises to be a game-changer in the evolution of online services. Lotteries have strong and relevant experience in the field, resulting in best practices that would be valuable in addressing related ethical concerns and safeguarding minors and vulnerable groups. "What is illegal offline, should also be illegal online".



Sports Integrity: The lottery sector has a strong track record in tackling match fixing issues. EL supports the Council of Europe's

Convention on the Manipulation of Sports Competitions and its key definition of "illegal sports

betting” as any sports betting activity whose type or operator is not allowed under the applicable law of the jurisdiction where the consumer is located”. EL invites EU institutions and all EU Member States that have not done it yet, to ratify the Convention.

EL submission to European Commission consultations

EL continued efforts to engage in relevant European Commission consultations, with the aim to influence the development of policies that uphold fair and responsible practices, and maintain a high level of consumer protection.

In its submission to the consultation on **“Business in Europe: Framework for Income Taxation (BEFIT)”**, EL called on the Commission to continue taking into account the specificities of the gambling sector and national lotteries in their ongoing work on BEFIT and any other (legislative) initiative possibly stemming therefrom. EL welcomed the initiative to establish appropriate business taxation rules that create a level playing field, particularly in the context of combating illegal gambling operators.

Similarly, in the consultation on **“Digital Fairness – Fitness Check on EU Consumer Law”**, EL reiterated the importance of considering the specificities of the gambling sector and the sustainable national lottery model in reviewing EU consumer protection legislation. By calling on the Commission to integrate these considerations into

legislative and non-legislative initiatives arising from the fitness check, EL aims to safeguard the interests of national lotteries and uphold responsible gaming practices within the evolving digital landscape.

EL as liaison organisation of the European Committee for Standardisation (CEN)

EL maintains its observer position within the European Committee for Standardisation, where work on the new standard started in 2023.

Gambling advertising and a risk based approach

In 2023, gambling advertising remained an important issue, particularly in light of severe restrictions and total bans, such as those implemented in Italy. To address the ongoing challenges, EL together with its **EL Legal and Regulatory working group**, recognised the need to update the Antwerp Resolution, to remain effective in safeguarding the interests of lotteries amidst changing regulatory landscapes. The updated resolution, adopted at the EL Congress in Šibenik in 2023, emphasised the fact that gambling advertising rules should (also) take into account: risk level of games, overall commercial strategy of the operator and responsible gaming principles applied by the operator.

The focus of a risk-based approach to gambling regulation was further highlighted during a dedicated EL Legal Seminar in 2023. This event emphasised the importance of evaluating



regulatory measures based on risk assessment to ensure a consistent and responsible gambling policy. By recognising the varying levels of risks associated with different game types, regulators can better safeguard player well-being and societal interests.

EL organises first public procurement workshop

As a new initiative, EL organised its first public procurement workshop with the goal of providing participants with an overview of European public procurement policy, focusing on the Public Procurement Directive and other relevant laws. This was seen as a valuable new knowledge sharing platform for EL members, who could discuss challenges, experiences and best practices of their national procurement policies.



Chapter

04

EL Communications: A snapshot in 2023.

Digital assets

EL website

In 2023 EL's website continued to act as a central hub, to facilitate communication and knowledge sharing as well as to serve as a valuable resource for lottery members, policymakers and the public alike.

- 32 articles published in 2023.
- **Over 127K users (+80K than 2022) with 618K page views (+253 than 2022).**
- Most traffic is either direct or referrals (mainly from EL members' websites).
- Top pages visited: About EL, Members, EL Congress and EL Calendar.



MYEL: Dedicated environment for EL members

- **NEW!** EL Lottery Commercials Library
- Reference Risk Cards (to enhance operational resilience of EL members)
- Regular updates: EU Dossiers, Association docs, Library of papers and studies.
- Over 2,000 users in 2023

EL e-learning platform

- Resource platform for EL members, free of charge, in four languages
- **2023 saw new modules on Diversity, Equity and Inclusion (DEI)**

Weekly newsletter to EL Members

- 46 editions
- **Celebratory 200th edition with refreshed design and format**
- Over 850 subscribers (+ 150 since 2022).

Social media interactions

In 2023, EL recognised the continued growth of LinkedIn as a professional networking and content sharing platform, as a valuable space for EL to engage with its target audiences. EL also understood the need to complement its LinkedIn presence with other relevant channels, and therefore continued to utilise X (formerly Twitter) when necessary.

LinkedIn

Over 200 posts with the most engagement for the EL Congress and EL events.
Over 2,500 followers.

X (formerly Twitter) @EuropeLotteries

317 posts in 2022, on average 26 posts per month.
26.7K impressions in 2023.



In 2023, lottery professionals at the annual EL/WLA Marketing Seminar in London took stock of the latest marketing trends, discussed evolving consumer behaviour and strategies for identifying how to seek opportunities in times of crisis. Supported by the EL Marketing and Communications Working Group, the seminar facilitated insightful discussions and knowledge sharing among participants.

As Winston Churchill famously once said: "Never let a good crisis go to waste."



Reports, questionnaires and studies

- EL Report on the Lottery Sector in Europe 2022.
- EL Legal Flashes
- Questionnaire on the EL Sustainability Guidelines
- Membership satisfaction survey

Stakeholder engagement

- Two letters to EU Council Presidencies (Sweden and Spain) on EL priorities in 2023.
- Four position papers prepared with the EL Public Affairs working group on: Consumer protection and RG, Taxonomy, Videogames and Web3, and Sport Integrity).
- Two EL submissions to European Commission consultations: "Business in Europe: Framework for Income Taxation (BEFIT)", and "Digital Fairness – Fitness Check on EU Consumer Law".



Media coverage

- Over 80 mentions in EU and sector press: VIXIO Gambling Compliance, Public Gaming (PGRI), Lottery Insider, Lottery Daily, European Gaming, Jamma, Press Giochi, Gioconews, Insider Sport, YogoNews International, SBC News, Gambling News, iGaming Express.



- Interviews with new EL President Romana Girandon and EL Secretary General Arjan van 't Veer in Lottery Daily, and outgoing President Hansjörg Höltkemeier in iGaming Express.



Partnerships and alliances

EL maintains its status as a trusted partner of the European Institutions, regulatory authorities and other relevant stakeholders. A collaborative approach fosters dialogue, cooperation, and mutual understanding, strengthening EL's partnerships and relationships.



#BeActive! European Commission led European Week of Sport 2023

As an official partner of the European Week of Sport, EL joined forces in 2023 with ENGSO, ENGSO Youth and Panathlon International to organise an event under the theme "Sport Integrity as an accelerator for inclusion and involvement in sport". In addition, through the year EL continued its support of the Youth Integrity Ambassadors Programme (YIAP), designed to train and empower young people and make them active Ambassadors of Integrity in Sport.



For the period 2022- 2025, EL supports the joint project "ACT- Addressing Competitions Manipulation Together" which promotes and enhances the implementation of the Convention of the Manipulation of Sports competitions (Macolin) as widely as possible.



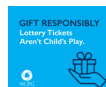
As a founding member of United Lotteries for Integrity in Sports ULIS, EL continues to fight match fixing & safeguard the integrity of sport.



EL continues its good work with the World Lottery Association (WLA), especially with the organisation of joint events.



EL Secretary General Arjan van 't Veer continues to act as Chairman of the European Association for the Study of Gambling and supports its work.



In 2023, EL endorsed the Gift Responsibly Campaign by the National Council on Problem Gambling (NCPG) and the International Centre for



Youth Gambling Problems and High-Risk Behaviours at McGill University. In 2023, nine EL Regular Members participated in the campaign.



In 2023, together with Digital RG, EL launched a tailor made support programme to help members achieve the two commitments of the Environmental Initiative by June 2024.



EL continued its close partnership with Doors Open – a learning and development platform – to support the Associations work on DEI.

In 2023 EL had two Level 1 Partners and one Level 2 Partner





Chapter
05

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Financial Statements and Accounts 2023

In this chapter the financial statement/balance sheet, profit and loss statement as well as the reserve funds of the Association for 2023 are presented.

Balance sheet as at 31 December 2023 (in EUR)

Assets			
Fixed assets			196.745,69
	Intangible fixed assets	28.163,71	
	Tangible fixed assets	133.942,91	
	Financial fixed assets	34.639,07	
Current assets			7.276.123,17
	Amounts receivable within one year	895.095,81	
	Cash at bank and in hand	6.254.154,87	
	Accruals and deferred income	126.872,49	
<i>Total assets</i>			7.472.868,86
Equity and liabilities			
Equity			6.842.041,01
	Reserves	3.995.994,93	
	Accumulated profits/losses	2.846.046,08	
Amounts Payable			630.827,85
	Amounts payable within one year	630.827,85	
<i>Total liabilities</i>			7.42.868,86

Profit and Loss account as of 31 December 2023 (in EUR)

Operational income		4.463.361,84
	Membership fees	2.126.400,00
	Associate Members fees	135.500,00
	Level 1 & 2 Partnerships	245.000,00
	Seminar & congress fees	1.949.216,52
	Other income	7.245,32
Operating charges		4.363.055,35
	Salaries, social costs and pensions	977.095,71
	Services and other goods	3.232.791,52
	Amortisations	57.324,90
	Other operating charges	95.843,22
Operational profit		100.576,49
Financial Income		376.194,03
	Other financial income	376.194,03
Financial charges		13.001,15
	Interest and other debt charges	2.735,23
	Other financial charges	10.265,92
Profit for 2022 before taxes		463.769,37
Taxes		323,26
Profit for 2023		463.446,11

Explanation to the 2023 accounts

The financial result over 2023 is positive. This result is caused on the one hand by a larger than expected number of participants at EL's events, especially the Instant Games seminar in Porto, the Marketing seminar in London (together with WLA) and the 11th EL Congress in Šibenik. On the other hand, there was a 'positive windfall' on the financial assets, where the exchange rates created a positive surplus as well. Membership fees were gradually higher in 2023 (2022: 2.088.578,50), mainly due to the full payment of membership fees in 2022 in EUR (2022 also partly in CHF) as well as two regular members accepted in 2022 (full membership fee paid in 2023).

General costs remained under control, where the cost level also reflects the 'investment' in the organisation and programme of especially the EL Congress, next to the other, smaller, events of EL (and/or organised together with WLA).

Remuneration costs over 2023 are slightly lower compared with 2022 (1.018.178,14 euro) due to the fact that one staff member (Accounts Officer) left the Association.

Under the Belgian VAT and taxation administration, it was formally decided by the competent authorities that the membership fees will be exempt from VAT. Events outside Belgium are as of 2023 organised VAT-compliant with the Belgian and other national regulations.





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 The European Lotteries

 @EuropeLotteries



**THE EUROPEAN
LOTTERIES**

FOR THE BENEFIT OF SOCIETY

Registration on EU Transparency Register: **97609783845-15**