



World Lottery Association

2019

The year in review

Strength, inclusion, and diversity



In its 20 years of existence, the WLA has proven that our strength lies in unity and diversity.

And in our industry, strength has never been so crucial.

Having previously served as President of the International State Lotteries Association (AILE), I am honored to have completed my first full year as President of the WLA, which marked its 20th

anniversary in 2019. When AILE and Intertoto merged in 1999, the WLA became the de facto standard-bearer of the global lottery and sports betting community.

Every day, we are challenged a little more by betting operators intent on pushing the boundaries of territorial integrity and fair trading to turn a profit, encroaching on revenues intended for our jurisdictions and eroding the goodwill our members have worked so hard to build. Last year the WLA's newly formed Illegal Lotteries and Betting Committee, chaired by Westdeutsche Lotterie CEO Andreas Kötter, came together to establish a plan of action to help our members interact positively with their regulators and play a thought leadership role in this hazardous environment. Additionally in 2019, the WLA took on a similar role in sports betting.

As it grows in popularity, sports betting continues to be a potential minefield, particularly with the new legislation enacted in the United States. Our Sports Betting Integrity Committee became fully operational in 2019, spearheading our efforts to support sports organizations, policymakers, and sister organizations such as the GLMS, in protecting the principle of fairness in sport, maintaining the trust of our stakeholders, and upholding the values of our loyal players. As Chair of this new committee, Jean-Luc Moner-Banet, my predecessor as WLA President, has taken the reins to pursue this critical mission; I applaud his service and thank him for his continuing dedication to the WLA.

Both these examples illustrate the global nature of the challenges we face. Alongside our efforts at the global level, the local or regional dimension of our action on the ground is critical. In a market governed by jurisdictional interests, one of the core strengths of the WLA is its constitutional duty to interact and coordinate its projects with the regional lottery associations.

Throughout 2019, I nurtured our historical relationship with European Lotteries (EL) and continued to support active cooperation between our respective organizations. As a guest speaker at the ALA Convention in Casablanca, the APLA Convention in Brisbane, and the CIBELAE Convention in Costa Rica, I also had an opportunity to personally meet lottery professionals from Africa, Asia Pacific, and Latin America. In addition, I work closely with the North American Association of State and Provincial Lotteries (NASPL) through ongoing engagement with the association and as a regular conference contributor. I was able to update them about the latest WLA initiatives, and above all to learn first-hand about the specific challenges they face at the regional or local levels.

Through this ongoing interaction with our members and with the regional lottery associations, my belief in the power of diversity and inclusion as the best fuel for driving innovation and creativity has been affirmed countless times. The future of our industry relies on our ongoing ability to engage players – in this fast-moving and increasingly crowded field – by offering creative, innovative, and entertaining products and experiences.

As an inclusive and diverse organization, the WLA has a unique role to play in encouraging and enabling its members to leverage diversity and inclusion as a vehicle to unleash and maximize creative potential. And as a new decade begins, I am committed to supporting this specific role – for example through the Women's Initiative in Lottery Leadership – with renewed vigor and determination.

The 2020 World Lottery Summit (WLS 2020) in Vancouver, Canada in October will be a fantastic opportunity to showcase the lottery industry's potential for creativity and innovation. Preparations for WLA 2020 are progressing well – many thanks to NASPL for their support, and to the British Columbia Lottery Corporation (BCLC) for hosting this flagship event.

And to offer a quick note: I began my term of office in 2019 concurrently with our new executive director, Luca Esposito, and it has been a pleasure working with him for the past year. I thank him for his insights, his organizational talents, and his dedication to an industry that we cherish and respect.

A handwritten signature in blue ink that reads "Rebecca Hargrove". The signature is fluid and cursive, written in a professional style.

Rebecca Hargrove
WLA President

United in public service



Even though I have many years of experience in the lottery industry in Europe, my first full year as Executive Director of the WLA has been an incredibly instructive time. It has been an opportunity to connect with the lottery community in a new way, giving me a sharper awareness of the broader needs of the sector today and our key priorities for the future.

In 2019, the WLA continued to assert its position in the global lottery and sports betting community and its capacity to provide a respected frame of reference for state-sanctioned gaming operators in every region of the world. Through the WLA's continuing interactions with regional lottery associations, policymakers, and sports governance bodies, I have come to realize what it is that binds us together. Ultimately, all the stakeholders in our extended ecosystem are united in a single cause – public service.

Last year, WLA Member Lotteries generated revenues of USD 306.5 billion and returned USD 86.9 billion to good causes. These are significant figures. The global lottery community has a duty to protect and promote the role of our members in supporting good causes, encouraging responsible play, and protecting the integrity of sports and sports betting. As WLA Executive Director, I am honored to be part of this effort. This review of 2019 presents the WLA's latest achievements and outlines the progress we made during the year to support members as they step up to the challenges and opportunities that lie ahead.

In 2019, the WLA welcomed four new members and five new associate members, taking our membership to 152 lottery members and 78 associate members. Eight of our associate members participate in the WLA Contributor program, which plays a crucial role in guaranteeing continuity in supplier relations with WLA member lotteries, and helps to fund WLA member services. We were also pleased to see Pollard Banknote move up from Gold to Platinum level, and to win Carmanah Signs as a Gold Contributor.

The WLA continued to develop and promote its global standards on security and responsible gaming in 2019. The Security and Risk Management Committee was successfully restructured and commenced work on the next iteration of the WLA Security Control Standard, which will be released in time

for the World Lottery Summit in Vancouver in October 2020. Members continued to subscribe to the Responsible Gaming Framework, with a total of 96 member lotteries now certified at levels 2 through 4, including 69 at the highest level, compared with 64 at end-2018.

Two new committees were formed and became fully operational in 2019. The Illegal Lotteries and Betting Committee developed a plan of action to help lotteries rein in the power of illegal gambling providers. And the Sports Betting Integrity Committee structured its work to optimize the WLA's effort to keep sports and sports betting clean and fair.

Our continuing education program, organized in partnership with the regional lottery associations, once again attracted strong interest from members on every continent. Similarly, our information and communication services provided the lottery community and outside stakeholders with a unique source of regularly updated data of direct relevance to our industry. In this regard, we revamped the WLA communications platform, launching an online blog to provide the timely publication of industry-relevant articles. We also published a promotional brochure and video to highlight the role the WLA plays in serving the lottery industry. Furthermore, in seeking GDPR compliance, we leveraged our experience and published a guideline for our members. "GDPR at a Glance" is a brief guide in PDF format that allows WLA members to quickly assess if they are impacted by the GDPR and if so, how they can become compliant.

Also in 2019, we made preparations for the relocation of the WLA office to Lausanne in early 2020, which will be a great opportunity to interact even more closely with a number of sister organizations to better serve the interests of WLA members.

It is an exciting time for the lottery and gaming industry, and I consider it an honor to have a chance to contribute directly, with my dedicated team in Switzerland, to our members' success on this journey.

Thank you for your confidence.

A handwritten signature in blue ink that reads "Luca Esposito". The signature is fluid and cursive, written in a professional style.

Luca Esposito
WLA Executive Director

The WLA at a glance

Profile

The WLA was formed in August 1999 through the union of AILE (International State Lotteries Association) and Intertoto (International Association of Toto and Lotto Organizations). WLA Lottery Members are organizations licensed or otherwise authorized to conduct lotteries or sports betting operations in a jurisdiction domiciled in a state recognized by the United Nations. The majority of their net revenues must be dedicated to funding education, sports, culture, social programs, community projects, and other good causes in their respective jurisdictions.

WLA Associate Members are suppliers of goods and services to lottery or sports betting organizations whose business practices conform to the aims and objectives of the WLA. Associate Members include suppliers of online and offline systems, terminals, printers, video lottery terminals, special papers, vending machines, dispensers and drawing machines, telecommunication organizations, ticket printers, game designers, marketing and advertising specialists, consultants, auditors, trade magazines, and interactive gaming specialists.

The annual budget of the World Lottery Association remained constant at approximately CHF 3 million (USD 3.03 million), financed by membership subscriptions, the Contributor program, and any surpluses from seminars and the biennial convention.

Key figures

The number of WLA Lottery Members and Associate Members has varied very little over the years. As recorded in the 2019 edition of the Global Lottery Data Compendium, the membership stood at 152 Lottery Members and 78 Associate Members, compared with 146 Lottery Members and 60 Associate Members when the WLA was founded in 1999.

Of the WLA's 78 Associate Members, eight participate in the WLA Contributor program. In 2019, Pollard Banknote moved up from Gold to Platinum level, and Carmanah Signs joined the program as a Gold Contributor. Headquartered in Canada, Pollard Banknote specializes in the production of instant tickets and provides related programming, design, and marketing support, as well as lottery management services including warehousing and distribution. Carmanah Signs is the lottery and gaming division of STRATACACHE, a leading provider of intelligent digital media and in-store marketing technology based in the United States, and serves 54 lottery customers on four continents. At the end of 2019, there were four Platinum Contributors and four Gold Contributors.

The WLA Platinum Contributors are IGT, INTRALOT, Pollard Banknote, and Scientific Games. The WLA Gold Contributors are AGTech, Carmanah Signs, Jumbo Interactive, and Skilrock Technologies.

152
Lottery Members

78
Associate Members

\$306.5 bn
WLA Lottery Members generated revenues of USD 306.5 billion in 2018*.

\$86.9 bn
WLA Lottery Members returned USD 86.9 billion to good causes in 2018*.

* Based on figures provided by 93% of the WLA membership as published in the 2019 edition of the WLA Global Lottery Data Compendium. The sales figures for 2018 are 8.4% higher than for 2017; money to good causes rose by 6.0% over the same period.

The Gold Contributors



The Gold Contributors section displays the logos of four companies: AGTech (www.agtech.com), Carmanah Signs (a division of STRATACACHE), Jumbo Interactive, and Skilrock Technologies.

The Platinum Contributors



The Platinum Contributors section displays the logos of four companies: IGT, Pollard Banknote Limited, Intralot, and Scientific Games.

New WLA members

Several new Lottery Members were provisionally accepted by the Executive Committee in 2019, pending ratification by the delegates to the General Meeting in 2020, and a number of applications for associate membership were approved by the Executive Committee.

New Lottery Members



Florida Lottery
United States



IGT Antilles Lotteries (LILHCO)*
Lesser Antilles



New Mexico Lottery Authority
United States



Rhode Island Lottery
United States

* IGT Antilles manages and operates its lottery business via one centralized gaming system and portfolio in the following jurisdictions: Barbados (trading as "The Barbados Lottery"), and Anguilla, Antigua and Barbuda, St. Kitts and Nevis, St. Maarten, and the US Virgin Islands (trademarked "Caribbean Lottery").

New Associate Members



DIMOCO Europe GmbH
Germany



Greatgate Lottery Technology
China



mkodo
United Kingdom



Nirvana
Croatia



Sportech
United Kingdom



Honoré Gaming
France

WLA Committees

Alongside the existing Security and Risk Management, Audit, and Corporate Social Responsibility committees, two new committees were formed in 2018 – Illegal Lotteries and Betting, and Sports Betting Integrity. In 2019, the new committees established their structural details, rules of governance, and work programs. All committee chairs are invited to participate actively in WLA Executive Committee proceedings.

Security and Risk Management Committee

The WLA Security and Risk Management Committee (SRMC) was reorganized in 2019 into a policy group and a technical group. Members of the technical group have formed four task forces to deal with specific issues related to Security, Risk management, Certification and auditor accreditation, and Awareness.

In 2019, as well as preparing the 2020 iteration of the WLA Security Control Standard, which is being redrafted to expand its global reach, the SRMC launched a detailed review of the methodology and approach used to review member certification and assess potential auditors. Preparations also began on an updated version of the Guide to Certification to the WLA-SCS standard.



Chair of the Security and Risk Management Committee

Dato Lawrence Lim Swee Lin
CEO
Magnum Corporation, Malaysia

Policy Group

Gerald Aubin

Rhode Island Lottery, United States

Luca Esposito

WLA Executive Director, Switzerland

Driss Hamdoune (advisor)

La Marocaine des Jeux et des Sports, Morocco

Hansjörg Höltkemeier

DKLB and DKLB-Stiftung, Germany

Technical Group

Neil Kellar (Chair)

Camelot UK Lotteries Ltd., United Kingdom

Pablo Iglesias (Vice-Chair)

La Française des Jeux, France

Anton Stiglic (Vice-Chair)

Loto-Québec, Canada

Task force members

Task force 1 – Security

David Boda

Camelot UK Lotteries, United Kingdom

Gunnar Ewald

LOTTO Hamburg, Germany

Trond Laupstad

Norsk Tipping, Norway

Erich Schuster

Österreichische Lotterien, Austria

Anton Stiglic

Loto-Québec, Canada

Task force 2 – Risk management

Carlos Bachmaier

Sociedad Estatal Loterías y Apuestas del Estado, Spain

Giuliano Giuseppe Boggiali

Lottomatica, Italy

Anton Stiglic

Loto-Québec, Canada

Jan Seuri

Veikkaus, Finland

Task force 3 – Certification and auditor accreditation

Pascal Gervais

Société de la Loterie de la Suisse Romande, Switzerland

Driss Hamdoune

La Marocaine des Jeux et des Sports, Morocco

Diego González Quinteros

Banca de Quinielas de Montevideo, Uruguay

Task force 4 – Awareness

Swan Swan Beh

Magnum Corporation, Malaysia

Driss Hamdoune

La Marocaine des Jeux et des Sports, Morocco

Dawid Müller

Gidani, South Africa

Brendan Smith

Tabcorp, Australia

Additional SRMC members supporting the task forces

Denis Daly

Loto-Québec, Canada

Hongfang Dong

China Sports Lottery Administration Center, China

Corporate Social Responsibility Committee

The WLA Corporate Social Responsibility Committee (CSRC) manages the WLA's responsible gaming policy and continuous development of the WLA Responsible Gaming Framework (WLA-RGF), overseeing member accreditation in accordance with the recommendations of the Independent Assessment Panel (IAP) and lending guidance to the WLA Responsible Gaming Working Group.



Chair of the Corporate Social Responsibility Committee

Lynne Roiter
President and CEO
Loto-Québec, Canada

Policy Group

Chris Lyman
New Zealand Lottery, New Zealand

Sarah Taylor
Hoosier Lottery, United States

Alison Gardner
Camelot UK Lotteries, United Kingdom

Responsible Gaming Working Group

The WLA Responsible Gaming Working Group continued to play its role in 2019 in assisting both the WLA Corporate Responsibility Committee and the IAP with the evolution and maintenance of the WLA's responsible gaming program.

Chair

Alison Gardner
Camelot UK Lotteries, United Kingdom

Members

(representatives of regional lottery associations)

Stefania Colombo
Lottomatica, Italy (EL)

Sandra Conde Gomez de Freitas
Banca de Quinielas de Montevideo, Uruguay (CIBELAE)

Kathryn Haworth
Lotto New Zealand, New Zealand (APLA)

Sanaa Kabbaj
La Marocaine des Jeux et des Sports, Morocco (ALA)

Tay Boon Khai
Singapore Pools, Singapore (APLA)

Vincent Perrotin
La Française des Jeux, France

Lou Ann Russell
Tennessee Education Lottery, United States (NASPL)

Brian Uy
Hong Kong Jockey Club, Hong Kong (APLA)

Coordinator

Mélissa Azam
WLA Senior CSR Manager, Montreal

Independent Assessment Panel

The IAP evaluates individual certification submissions by Lottery Members. The sustainability expert Anne Pattberg continued to serve as chair of the panel in 2019, alongside Robert Ladouceur of Canada, an acclaimed researcher into problem gaming prevention and treatment, and lottery veteran Henry Chan, formerly of the Hong Kong Jockey Club, who continued to bring an important Asian perspective on responsible gaming issues.

Certification of Associate Members

Certification of Associate Members is a natural extension of the WLA-RGF program. To achieve this certification, WLA Associate Members must score at least 75% on eight key criteria, and are required to undergo a full assessment every three years to maintain the status of WLA-certified supplier. Currently the following five WLA Associate Members have achieved WLA-RGF certification:

- International Game Technology, Lottery Operations
- INTRALOT
- NOVOMATIC Lottery Solutions
- Scientific Games International GmbH
- Scientific Games International Leeds.

Illegal Lotteries and Betting Committee

The WLA Illegal Lotteries and Betting Committee (ILBC) is dedicated to the task of reviewing the tools and resources available to help member lotteries safeguard the interests of their stakeholders around the world. Steps to establish the structure of the ILBC were completed in 2019, with a chair, a four-member policy group, and a ten-member expert group. The expert group is to advise and support the chair and policy group in the committee's mandate to help member lotteries combat illegal gaming in their respective jurisdictions.



Chair of the Illegal Lotteries and Betting Committee

Andreas Kötter
CEO
Westdeutsche Lotterie (WestLotto), Germany

Policy Group

Luca Esposito
WLA Executive Director, Switzerland

Sue van der Merwe
Tabcorp, Australia

May Scheve Reardon
Missouri Lottery, United States

Lynne Roiter
Loto-Québec, Canada

Expert Group

Evangelos Alexandrakis

Global Lottery Monitoring System (GLMS), Switzerland

Lucile Goulard

La Française des Jeux, France

Dominic Gourgues

Loto-Québec, Canada

Lamia Jassab

La Marocaine des Jeux et des Sports, Morocco

Daniela Kunze

Westdeutsche Lotterie (WestLotto), Germany

Callum Mulvihill

Tabcorp, Australia

Gabriela Castro Pedrosa

Caixa Econômica Federal, Brazil

Giuseppe Pelle

Lottomatica, Italy

Douglas Robinson

Beijing HKJC Technology Development Limited, Hong Kong

Bret Toyne

Multi-State Lottery Association (MUSL), United States

Brian Uy

Beijing HKJC Technology Development Limited, Hong Kong

Sports Betting Integrity Committee

The Sports Betting Integrity Committee is dedicated to preserving the integrity of sport by leading the fight against match-fixing and illegal betting. The structure of the Sports Betting Integrity Committee (SBIC) is now fully established with a chair and a four-member policy group.



Chair of the Sports Betting Integrity Committee

Jean-Luc Moner-Banet

CEO
Société de la Loterie de la Suisse Romande, Switzerland

Policy Group

Younes El Mechrafi

La Marocaine des Jeux et des Sports, Morocco

Ludovico Calvi

GLMS President, Italy

Luca Esposito

WLA Executive Director, Switzerland

Gordon Medenica

Maryland Lottery and Gaming Control Agency, United States

Technical Advisory Group

The Global Lottery Monitoring System (GLMS) and its members act as a technical advisory group to the Sports Betting Integrity Committee, advising and supporting the chair and policy group in the committee's mandate to combat and prevent match fixing and the manipulation of sporting events.

Audit Committee

The Audit Committee establishes the audit mandate and meets with an external auditor to obtain their report on a yearly basis.



Chair of the Audit Committee

Younes El Mechrafi

General Director
La Marocaine des Jeux et des Sports, Morocco

Policy Group

Roger Fasnacht

Swisslos Interkantonale Landeslotterie, Switzerland

Rose Hudson

Louisiana Lottery Corporation, United States

Luca Esposito

WLA Executive Director, Switzerland

Global Lottery Monitoring System (GLMS)

GLMS is an independent association founded by the WLA and EL. It went live in 2015 and has gone from strength to strength, signing agreements with sports federations and partners, and consolidating the system's global reach. GLMS currently has two operational hubs – one in Hong Kong and one in Denmark – and is now capable of monitoring 1 million odds every 5 minutes on football alone. An agreement is in place to open a third hub in North America in 2020.

The Ontario Lottery and Gaming Corporation (OLG) joined GLMS in December 2019, bringing the total number

of GLMS member lotteries to 33, compared with 32 at the end of 2018.

An associate membership category was introduced after the modifications of the statutes of GLMS at its General Meeting in May 2018. IGT became a GLMS Associate Member in July 2019, joining Scientific Games International and INTRALOT who became Associate Members in 2018.

The GLMS Executive Committee comprises professionals from member lotteries that offer sports betting, and a General Secretary, Giancarlo Sergi, responsible for public relations, marketing, stakeholder relations, and administrative matters.

At the GLMS General Assembly in May 2019 in Antwerp, Ludovico Calvi was re-appointed President of the Association. The line-up of the GLMS Executive Committee for 2019–2021 is as follows:

Elected members

Ludovico Calvi (President)
Lottomatica, Italy

Younes El Mechrafi
La Marocaine des Jeux et des Sports,
Morocco

Sami Kauhanen
Veikkaus, Finland

Ilho Lee
KTOTO, Korea

Members appointed by EL or WLA

(GLMS founding members)

Rupert Bolingbroke (Vice-President)
Hong Kong Jockey Club, Hong Kong

Niels Erik Folmann
Danske Spil, Denmark

Fabian Garcia
La Banca, Uruguay

Gilles Maillet
La Française des Jeux, France

GLMS activities in 2019



The GLMS operation team generates an alert each time an irregular betting pattern, such as sudden or unexpected odds changes, is detected. An alert leads to thorough consultation with GLMS members, as well as in-depth investigation of the possible reasons for the irregularity. When the irregularity cannot be justified on objective grounds, GLMS issues a report. Over the year 2019, GLMS reported more than 150 matches to its partners out of approximately 800 alerts generated. These included football matches, but also basketball, tennis, badminton, volleyball, e-sports, and ice hockey games. Key facts and figures about the results of the GLMS monitoring and intelligence work are issued quarterly and compiled in an annual intelligence-monitoring report.

In 2019, GLMS continued to develop its partnerships with all the major stakeholders in the sports and sports betting sector. Members of the GLMS operation team also spoke at numerous industry events around the world, including high-profile conferences organized

by sports federations, gaming regulators and regional lottery associations.

In September 2019, the Macolin Convention (Council of Europe Convention on the Manipulation of Sports Competitions) came into effect. This was a significant milestone in that the Convention is the only legally binding international treaty promoting global cooperation to tackle the manipulation of sports competitions. Ever since the conceptualization and drafting phase of the Convention, the global lottery community – through GLMS, the WLA, and EL – has fully supported the initiative and assisted the Council of Europe in its efforts to promote the Convention and support states with the implementation of its provisions. Steps are now being taken to monitor implementation and establish a follow-up committee.

The Convention covers all topics relative to the fight against match-fixing, including:

- national and international cooperation
- the sharing of information
- national platforms
- criminal provisions
- whistle-blower protection
- education and prevention
- conflicts of interest
- measures against illegal sports betting.



In a live interview, GLMS President, Ludovico Calvi, reveals how GLMS advised the Brazilian government in crafting their sports betting regulation.

Continuing education

Throughout 2019, the WLA supported the professional development efforts of member lotteries and supplier organizations, working with the regional lottery associations to offer a varied program of seminars aimed at lottery professionals at middle management level.

2019 seminar program

The seminars run by the WLA Academy continued to attract lottery professionals from all over the world. Around 700 people took part in the 2019 seminar program, with attendance for each seminar ranging from around 80 to 150 participants.

Almost all WLA seminars are organized in cooperation with the regional lottery associations. In 2019, these joint seminars included the traditional marketing seminar in London with EL at the start of the year, technology workshops in Colombia and Vietnam, and a seminar on legal and tax issues in Ivory Coast. Seminars on security and integrity and responsible gaming were also held in Slovenia and Croatia, respectively.

The first continuing education session of the year, although not strictly a WLA event, was organized by the Global Lottery Monitoring System (GLMS) in Lausanne, Switzerland, in January. Jean-Luc Moner-Banet, immediate past President of the WLA and Chair of the WLA Sports Betting Integrity Committee, delivered one of the opening addresses and took part in a panel session alongside representatives of the IOC and FIFA.

In early February, the annual EL/WLA marketing seminar in London was designed to help participants spot the new marketing trends that come to the surface year by year and distinguish between those that will last and those that will simply fade away. The technology seminars in Medellín, Colombia, and Danang, Vietnam, jointly organized with CIBELAE and APLA, respectively, took

a closer look at the digital transformation and the challenges and opportunities involved for lottery organizations. The keynote speaker in Danang was Tim Kobe, the visionary behind Apple's iconic stores. In Abidjan, Ivory Coast, in April, legal affairs managers from lottery and betting organizations in Africa had a chance to share information on the most important regulatory issues facing the industry today, with experts from Africa offering insights into the legal landscape on the continent, and their European counterparts providing a global perspective on regulatory issues. The last three seminars of the year were co-organized with European Lotteries (EL) and focused on different aspects of gaming responsibility, security and integrity, with a particular focus on sports betting and sports integrity at the Madrid seminar in November.

Further details of past WLA Academy events, together with selected speaker presentations, are available to members on the WLA website at www.world-lotteries.org.

2020 seminar program

The detailed program of seminars and training opportunities for staff from WLA member organizations in 2020 was nearing completion as this publication went to press.

The 2020 seminar season began with the joint EL/WLA Marketing Seminar in



London, held from February 5–7, 2020. The seminar, entitled *It's All About the Player*, revealed how player-centric marketing is the key to a lottery's success in the digital age. Speakers from inside and outside the lottery sector discussed ways to drive player engagement, and outlined the latest trends in customer-centricity and associated marketing approaches.

In April 2020, the GLMS/EL/WLA Sport Integrity Conference will be organized in Lausanne in coordination with the International Olympic Committee (IOC). The program will include a discussion of the Macolin Convention and the needs of law enforcement authorities in terms of input from lotteries and sport organizations. The event is targeted at members and associate members of the three organizing bodies, as well as Council of Europe representatives, national platforms, betting regulatory authorities, and law enforcement/judicial authorities. It will be free of charge.





More than 700 lottery professionals from around the globe took part in the WLA seminar program in 2019.

The full line-up of 2019 seminars and workshops

Date	Topic	Location	Organizers
January 28–29	GLMS Training Session and Education Workshop	Lausanne, Switzerland	GLMS
February 6–8	Marketing Seminar – What’s New? What’s Hot? What’s Not?	London, United Kingdom	EL/WLA
April 1–2	Technology at the Service of Lotteries	Medellin, Colombia	CIBALAE/WLA
April 15–18	Lotteries in the Digital World – Disintermediation, Disruption or Transformation	Danang, Vietnam	APLA/WLA
April 22–25	Legal and tax seminar	Abidjan, Ivory Coast	ALA/WLA
June 10–14	English for Effective Communication in the Lottery Industry	York, United Kingdom	WLA/PinT
September 18–20	The Value of Responsibility	Dubrovnik, Croatia	EL/WLA
October 8–10	Security & Integrity Seminar	Ljubljana, Slovenia	EL/WLA
November 20–22	Game, Set, Match! Sports Betting, Integrity and Disruption	Madrid, Spain	EL/WLA

The 2020 seminar program will cover all the key issues and opportunities facing the sector, from marketing and security to sports integrity and responsible gaming. The full program of educational events can be consulted on the WLA website at www.world-lotteries.org.

WLA scholarship program

The WLA scholarship program was launched in 2013 to encourage lottery

professionals around the world to participate as speakers and delegates at WLA seminars, offering them the chance to take part in educational events that they would probably not be able to attend otherwise. It also allows the other delegates to benefit from their experiences.

Since the program began in 2013, more than 130 people have taken part. In 2019, a total of 14 lottery professionals benefited from the program either as speakers

or participants. Over the year, the program enabled NASPL member lotteries to send an additional five speakers to WLA seminars and workshops. Other program beneficiaries included one EL member, which sent an expert to speak at one seminar, while CIBELAE members sent one speaker and seven participants to various continuing education sessions.

The WLA will continue to support the scholarship program in 2020 as a further opportunity to fulfill the Association’s mandate as an inclusive, global organization and to bring the membership the broadest possible range of insights and lottery experiences from around the world.

Member lotteries should contact the WLA by e-mail at: info@world-lotteries.org if they wish to propose candidates for the WLA Scholarship program in 2020.



The sharing of experience and insights among lottery professionals is a core tenet of the WLA seminar program.

The WLA Executive Committee

The WLA Executive Committee met three times in 2019, in Miami, Florida, United States (February), Naples, Italy, (May), and Brisbane, Australia (October).

Seah Chin Siong, former CEO of Singapore Pools and the APLA representative on the WLA Executive Committee, left the lottery industry to become President and CEO of the Singapore Institute of Management. He stepped down from the WLA Executive Committee effective May 1, 2019 and was replaced by Sue van der Merwe, Managing Director Lotteries and Keno at Tabcorp, Australia.

The WLA thanks Seah Chin Siong for his commitment to the Association and the worldwide lottery community.

WLA President



Rebecca Hargrove

President and CEO
Tennessee Education Lottery Corporation
United States

WLA Senior Vice President



Nigel Railton

CEO
Camelot UK Lotteries Limited
The National Lottery
United Kingdom

WLA Co-Vice President



Richard Cheung

Executive Director
Customer and Marketing
HKJC Lotteries Limited
Hong Kong

WLA Co-Vice President



Gilson César Braga

National Superintendent of
Lotteries
Caixa Econômica Federal
Brazil

Members of the WLA Executive Committee appointed by the regional associations



Jesús Huerta Almendro
President and CEO
Sociedad Estatal Loterías y Apuestas del Estado
Spain
(representing the European Lotteries)



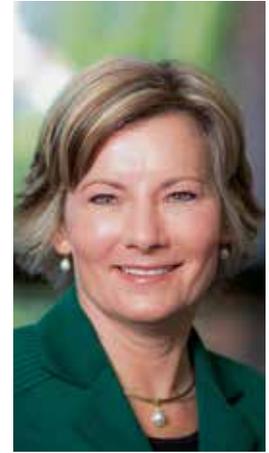
Luis Gama
Director
Dirección Nacional de Loterías y Quinielas Uruguay
(representing the Corporación Iberoamericana de Loterías y Apuestas del Estado)



Lynne Roiter
President and CEO
Loto-Québec Canada
(representing the North American Association of State and Provincial Lotteries)



Younes El Mechrafi
General Director
La Marocaine des Jeux et des Sports Morocco
(representing the African Lottery Association)



Sue van der Merwe
Managing Director
Lotteries and Keno Tabcorp Australia
(representing the Asia Pacific Lottery Association)

Elected members of the WLA Executive Committee



Fabio Cairoli
Chairman and CEO
Lottomatica
Italy



Jannie Haek
CEO
Nationale Loterij
Belgium



Andreas Kötter
CEO
Westdeutsche Lotterie (WestLotto)
Germany



Stéphane Pallez
President and CEO
La Française des Jeux
France



Jean-Luc Moner-Banet
CEO
Société de la Loterie de la Suisse Romande
Switzerland

Immediate Past President

WLA business activities and achievements 2019

In 2019, the WLA continued to pursue its key objectives:

- establishing global standards of ethical conduct and best practice
- providing educational and professional development services
- collecting and disseminating information about the lottery business and other areas of relevance
- providing a united voice together with the regional associations so that members may have a respected reference point and consistent messages and information to provide to those in authority.

Global standards

WLA Security Control Standard

The WLA Security Control Standard was first developed in 2003 and is currently in its sixth iteration (WLA-SCS:2016). A seventh iteration (WLA-SCS:2020) is scheduled for release in time for the World Lottery Summit in Vancouver in October 2020.

Taking a business risk approach, WLA-SCS:2020 will enhance the existing WLA-SCS framework and certification process. The new standard aims to be more widely accepted by WLA Lottery Members around the globe by taking into consideration their specific regional requirements. For WLA Associate Members, WLA-SCS:2020 will also see a more finely tuned certification process and a more comprehensive framework of controls.

The Security and Risk Management Committee (SRMC) is also working to streamline the accreditation process for potential auditors and are working to develop a communications platform on security and integrity matters for WLA members.

As of December 31, 2019, a total of 69 WLA Lottery Members from around the

Organization and governance

Governance

The WLA is an international, non-governmental, non-profit organization, incorporated under Swiss law and headquartered in Basel, Switzerland. The headquarters will move to Lausanne, Switzerland in 2020 (see page 20).

The WLA Executive Committee, which oversees the association, has 13 members. Eight of the members, including the President, are elected by the delegates of the WLA's biennial General Meeting. The other five members are appointed by the five regional lottery associations:

- ALA (Africa)
- APLA (Asia Pacific)
- CIBELAE (Latin America)
- EL (Europe)
- NASPL (North America).

The Senior Vice President and the two Co-Vice Presidents of the Association

are appointed by the WLA Executive Committee. The Executive Director of the Association reports to the WLA Executive Committee and is based in Basel with six staff members. The WLA also has an office in Montreal, Canada consisting of a General Secretary with one staff member.

Mission and objectives

The mission of the World Lottery Association is to advance the interests of its members as the recognized global authority on the state-authorized lottery sector, uphold the highest ethical principles, and support members in achieving their vision for their own communities. The WLA's core objectives are to create opportunities for learning and information sharing among members, establish global standards of best practice and ethical conduct, and provide a united voice, together with the regional associations, so that members can convey consistent messages to their stakeholders.

world were certified to the WLA-SCS, the same number as in 2017. Of these, 51 are based in Europe, 7 in Asia-Pacific, 4 in Africa, 4 in Latin America and 3 in North America. A complete list of WLA-SCS certified lotteries is available on the WLA website at www.world-lotteries.org.

Certification has also been open to WLA Associate Members since 2008. As of December 31, 2019, a total of 28 Associate Members were certified to WLA-SCS, compared with 22 in 2018.

As interest in WLA-SCS certification has increased, the number of WLA-approved assessment service entities and auditors has grown to ensure that certification is readily accessible to lotteries and suppliers in every region. There are currently 23

assessment service entities and more than 60 approved auditors around the world.

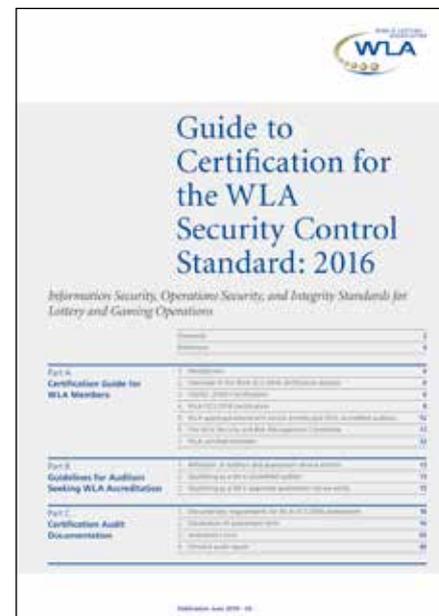
The standard is developed and maintained by the SRMC, an international group of top security professionals from WLA member lotteries around the globe (see page 6).

WLA Responsible Gaming Framework

Since the WLA Responsible Gaming Framework (WLA-RGF) was ratified by the delegates of the 2006 General Meeting in Singapore, the number of certified lotteries has risen steadily. As of December 31, 2019, a total of 96 member lotteries were certified to the WLA-RGF at levels 2 through 4, including 69 at the



As of December 31, 2019, a total of 69 WLA Lottery Members and 28 Associate Members were certified to the WLA Security Control Standard (WLA-SCS:2016).



Support documentation for the WLA's Security Control Standard and Responsible Gaming Framework are available on the WLA website.

highest level (compared with 64 at end-2018). These include 4 in Africa, 11 in Asia Pacific, 49 in Europe and the Middle East, 24 in North America, and 8 in Latin America.

WLA-RGF certification is valid for three years. To retain certified status after three years, organizations need to provide material evidence of continued compliance with the criteria for the same level or a higher level of certification.

The WLA Responsible Gaming Framework is administered by three international groups of professionals dedicated to the development and maintenance of global standards of responsible gaming practice, namely the WLA Corporate Social Responsibility Committee, the WLA Responsible Gaming Independent Assessment Panel (IAP), and the WLA

Responsible Gaming Working Group. Each of these groups individually performs a distinct function; together they form the backbone of the WLA's responsible gaming program. For a detailed explanation of the WLA's responsible gaming program organization (see page 7).

Information and communication services

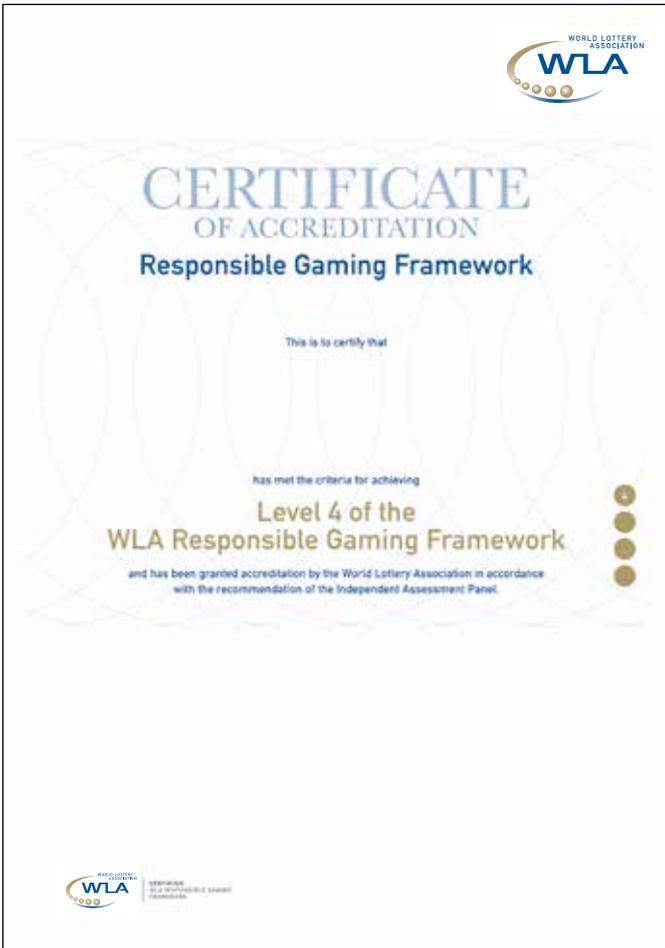
Online presence

The WLA website at www.world-lotteries.org continues to be a valuable source of information on global lottery industry issues for members and non-members alike. The website is constantly updated with lottery news, details about WLA events and member services, links, and discussion papers. It is also a central repository for application forms and in-

formational documents about the WLA Security Control Standard and the WLA Responsible Gaming Framework. Content is in English, with key documents also available in the WLA's other official languages (French, German, and Spanish).

The WLA blog launched in late 2018 provides members with more timely content and complements the WLA's existing publications, the WLA Magazine, the WLA Global Lottery Data Compendium, and the WLA Year in Review.

Traffic to the site is relatively stable and is expected to increase over the long term. The website team continued to investigate web monitoring and analytics tools to develop meaningful indicators of visitor numbers and preferences in order to adapt the WLA's online presence to us-



As of December 31, 2019, a total of 96 member lotteries were certified to the WLA's Responsible Gaming Framework, including 69 at the highest level, compared with 64 at year's end 2018.

pendium. The Quarterly Lottery Sales Indicator can be accessed freely on the WLA website. Registered members can also access and download the Global Lottery Data Compendium in PDF format from the website.

WLA Global Lottery Data Compendium

First published in 2014, the WLA Global Lottery Data Compendium provides statistics on sales and support for good causes by the vast majority of state lottery operators. This yearbook is designed to meet continuing demand from lotteries, suppliers, regulators, and other stakeholders for aggregated statistics and other information about state-authorized lotteries and suppliers to the lottery and sports betting industry. Its ultimate purpose is to build, over time, a pool of historical data that can be used to analyze long-term global trends in the industry.

The WLA assumes responsibility for requirements analysis, project design, data collection, data consolidation, and reporting. The twin phases of data collection and consolidation, in particular, represent significant investments of time and staff resources.

The sixth edition, published in January 2020, includes key performance indicators provided by 142 of 152 member lotteries, or 93% of the WLA's regular membership, together with 77 of 78 industry suppliers, or 99% of the WLA's associate membership. This virtually exhaustive coverage is one of the major strengths of the publication, making it the most authoritative and accurate dataset compiled on the global lottery industry to date.

For each of the five regions of the world, the Data Compendium also includes a brief history of the lottery industry, its current status and regulatory environment, and an introduction to the corresponding regional lottery association.

age patterns and optimize the user experience for members and other stakeholders.

Print magazine

The WLA Magazine is published in English, two to three times yearly, with a print run of 2,500. Copies are mailed to all Lottery Members and Associate Members and are distributed at all major WLA events. Advertising by WLA Associate Members continued to attract strong interest and helped to cover production and distribution costs.

The first of the three issues published in 2019 included extensive coverage of the World Lottery Summit in Buenos Aires in November 2018. The summer issue featured a retrospective to mark the 20th anniversary of the WLA, including contributions from five WLA Presidents

about the Association's place in the global lottery and sports betting industry and the role it should play in the future. That issue's Insights section focused on e-sports, the fastest growing category in sports betting. At the end of the year, the WLA Magazine ran a feature on the Women's Initiative in Lottery Leadership (WILL), which was founded in 2016 by Rebecca Hargrove, the current President of the WLA, to promote the advancement of women into top lottery management positions. WILL expanded its international reach in 2019, launching a pilot mentorship program in partnership with European Lotteries.

Data compendium and sales indicator

WLA information services include the WLA Quarterly Lottery Sales Indicator and the WLA Global Lottery Data Com-



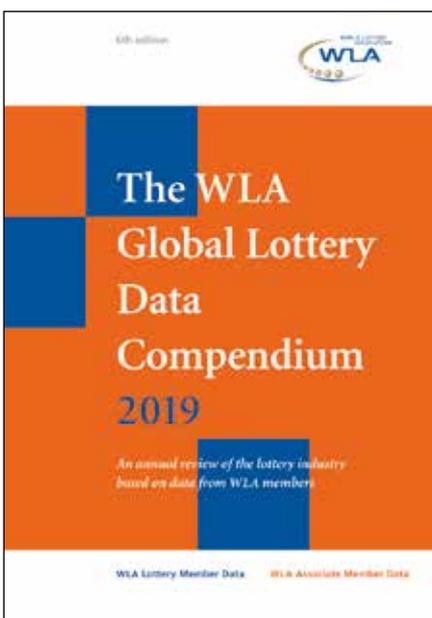
The first edition of the WLA Magazine covered the World Lottery Summit 2018 in Buenos Aires. It was followed up by a special retrospective edition to mark the WLA's 20th anniversary. The final issue of the year featured a reportage on the Women's Initiative in Lottery Leadership.

Other regional-level data includes the most prominent and popular products in the region and the main priorities of the region's State lottery operators in terms of distribution of funds to good causes. The overall status of corporate social responsibility and responsible gaming ini-

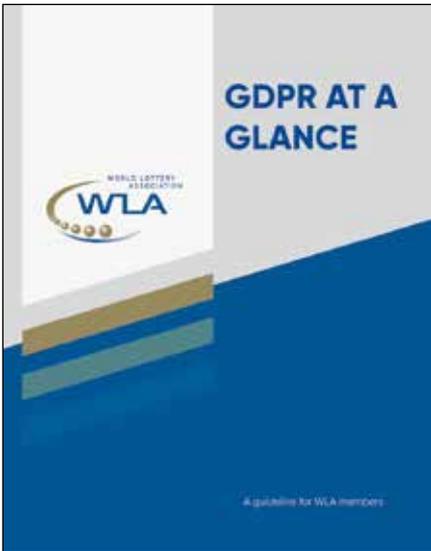
tiatives in the region is described and the most recent trends in each region are briefly highlighted.

A number of new key performance indicators were introduced in the 2019 edition of the Data Compendium: gross

gaming revenue (GGR), digital sales, digital GGR, and money spent on responsible gaming measures. All of the information reported in the Data Compendium is sourced directly from WLA members and checked for accuracy and completeness. The indicators are care-



The GLDC 2019 introduced a number of new key performance indicators, such as gross gaming revenue (GGR), digital sales, digital GGR, and money spent on responsible gaming measures.



“GDPR at a glance”: A four-page brochure outlining the applicability and compliance-related documentation requirements of GDPR.

fully selected to assure compliance with competition laws.

As well as providing valuable business intelligence for WLA Associate Members, the Data Compendium further consolidates the WLA’s unifying role within the global lottery industry and helps to

promote the core societal objectives of member lotteries.

WLA Quarterly Lottery Sales Indicator

Every quarter, the WLA collects and compiles lottery sales data from WLA members around the world. Currently around 36 lotteries, representing approximately 60% of global lottery sales by volume, provide these figures to the WLA on a quarterly basis. The data is aggregated and published as the WLA Quarterly Lottery Sales Indicator to provide lotteries, suppliers, and the general public with a snapshot of shorter-term global and regional sales trends. Now in its ninth year, the WLA Quarterly Lottery Sales Indicator is regularly quoted as a source in the trade press and is consulted frequently on the WLA website.

General Data Protection Regulation toolkit

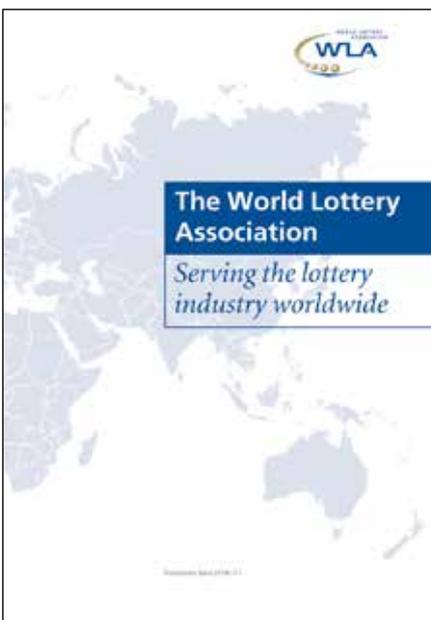
The European Union data privacy and security rules (General Data Protection Regulation – GDPR) came into effect on May 25, 2018. In view of the increasing importance of player data to the lottery and sports betting sector, the WLA developed a GDPR toolkit to help ensure that

its members with operations in the European Economic Area are aware of the requirements of GDPR and the potential consequences of non-compliance.

The toolkit includes a dedicated GDPR section of the WLA website, a four-page brochure outlining the applicability and compliance-related documentation requirements of GDPR, and a Telegram group to help establish a community of lottery professionals dealing with data privacy issues. A point of contact at the Basel office was also designated to provide expert assistance to members.

WLA promotional brochure

In order to promote the WLA and to broaden the scope of the WLA membership, a 16-page promotional brochure was produced in mid-April 2019. The brochure introduces and explains the WLA’s products, services, and initiatives. It also provides information on the three categories of WLA membership, the benefits of WLA membership, and how to join the Association. The brochure was adapted into Spanish to coincide with the CIBELAE convention in San José, Costa Rica, in November 2019.



A 16-page WLA promotional brochure, published at the beginning of 2019, details the WLA’s products, services, and initiatives and explains the benefits of WLA membership.



World Lottery Summit 2020 in Vancouver



Photo: Kristopher Grunert

Located on the waterfront with a breathtaking view of the mountains, the Vancouver Convention Centre is sure to set an inspirational tone for WLS 2020.



The WLA's biennial World Lottery Summit will be hosted by the British Columbia Lottery Corporation (BCLC) at the Vancouver Convention Centre in Vancouver, Canada, from October 26–30, 2020. As at the highly successful World Lottery Summit 2012 in Montreal, Canada, the WLA and NASPL have once again joined forces to stage a world-class lottery event.

Regularly ranked as one of the world's most livable cities and No. 1 in North America, Vancouver is a bustling west coast seaport and one of Canada's most vibrant cities. Through its ethnic diversity and progressive ideals, Vancouver echoes the spirit of the world lottery community and is a particularly fitting venue for WLA 2020.

The city is surrounded by an impressive range of mountains – Vancouver hosted the 2010 Olympic and Paralympic Winter Games – making it a popular tourist destination almost all year round. Its international airport is rated as a top North American airport, providing easy access from all over the world. Vancouver has good public transportation, but it's a great walking city that is clean, green, safe, and easily accessible. All WLA 2020 partner hotels are within 4–5 blocks of the venue.

Vancouver Convention Centre

With a harbor-front location and breathtaking views, the Vancouver Convention Centre offers one of the most beautiful settings in the world. A full 40% of the Convention Centre is built over water, with floor-to-ceiling glass windows treating guests to phenomenal harbor and mountain views. The award-winning facility is considered a global masterpiece of design, inspiration and sustainability.

The WLA 2020 organization team is currently putting together a top-notch curriculum for this important event. Registration opens in early 2020. Full details can be found on the WLA 2020 website at <https://www.worldlotterysummit.org>

The World Lottery Association

Lange Gasse 20
PO Box
4002 Basel
Switzerland
www.world-lotteries.org

New address as of March 1, 2020

The World Lottery Association

Avenue d'Ouchy 4
1006 Lausanne
Switzerland
www.world-lotteries.org

WLA headquarters to move to Lausanne, Switzerland



Photo: benkrut

As of March 1, 2020, the WLA Business office will be located in Lausanne, Switzerland.

In 2019, the WLA decided to move its headquarters from Basel to Lausanne. The WLA will officially occupy its new offices at

Avenue d'Ouchy 4
1006 Lausanne
Switzerland

on March 1, 2020, marking the beginning of a new era for the Association.

WLA headquarters have been located in Basel since the Association was founded in 2000. Initially, the WLA assumed the offices of Intertoto, located on the premises of the Sports-Toto Gesellschaft at Lange Gasse 20, in Basel. Intertoto had been dissolved when the WLA was formed through the merger of Intertoto and the International Association of State Lotteries (AILE) in 2000. Sports-Toto became Swisslos in 2003 through a

three-way merger with the Interkantonale Landeslotterie and the Berner Lotteriegenossenschaft SEVA. As office space became crowded through the Swisslos merger, the WLA moved its headquarters next door to Lange Gasse 8 – in a building also owned by Swisslos – that same year. For the past 16 years, Swisslos has provided the WLA with various infrastructure needs, and the Association thanks them for their generous support.

The move to Lausanne comes at a very important time in the evolution of the lottery and sports betting sectors. As sports betting has gained popularity around the globe, it has become an increasingly important source of revenue for state lotteries. For this reason, maintaining the integrity of sports has become vital for the global lottery community in its quest to raise money for good causes.

Lausanne is home to many international sports federations, including the International Olympic Committee (IOC). As such, Lausanne is an important hub for international sports. Relocating to Lausanne will enable the WLA to further its ties to these organizations and work alongside them in the effort to fight corruption and preserve sports integrity. Additionally, Lausanne is home to European Lotteries (EL) and the Global Lottery Monitoring System (GLMS): the WLA maintains close ties with both organizations, and the move is an opportunity to develop further synergies to better serve the world lottery community.

Loterie Romande, also located in Lausanne, will assume the infrastructure services that have previously been provided by Swisslos.