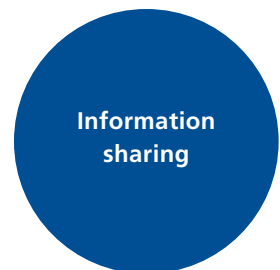
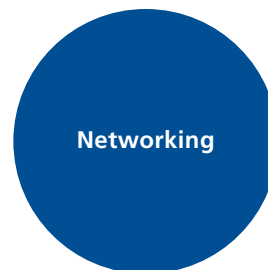


World Lottery Association



The year 2015 in review

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Upholding the fundamentals of the global lottery industry

In the ever-changing landscape of the lottery industry, what distinguishes WLA member lotteries from the for-profit gaming industry is their noble mission of raising funds for good causes. Each year, the majority of the profits that we generate go to support the public treasury, education, sports, culture, and various social causes. WLA member lotteries play a significant role in building a better society. The principle that lottery profits must be returned to society is at the heart of the WLA mission and it reinforces the legitimacy of our lottery business.

This business is unique in that it exists in the space between the private and public sectors. In order for us to be successful, we need to be at home in both worlds. On the one hand, we need to be innovative and creative in providing attractive and entertaining games, in order to remain competitive with the private sector. On the other hand, we need to deal respectfully with the public sector, operating ethically and transparently, always mindful of the laws and cultural differences within a given jurisdiction.

In bringing these two realms together, we create a land where the lottery player becomes an honored citizen and not merely a consumer.

This is why the WLA regards the promotion of its values and ethical principles as a matter of fundamental importance. It is also why the WLA will continue to actively strive for excellence in responsible gaming and in the security and integrity of gaming operations. Striving for excellence in these areas and in protecting the integrity of sport remains the foundation of the program that I will pursue with all my energies during the course of the coming year.

I would like to thank the WLA Executive Committee and the WLA membership for their trust, and I am confident that together we will continue to contribute effectively to the further development of the global lottery industry.

A stylized, handwritten signature in blue ink, consisting of several fluid, connected strokes.

Jean-Luc Moner-Banet
WLA President



Tailoring our services to the needs of the membership

This third edition of the WLA annual report serves to recap some of the highlights of 2015 and to direct your attention to some of the most significant achievements of the year, as well as preview some of our activities for 2016.

Among our major achievements in the last two years is the publication of the WLA Global Lottery Data Compendium. It was with pleasure and great pride that we recently published the 2015 edition of the compendium. It is a work that we are certain will prove to be the definitive guide to the lottery industry. Owing to the high participation of the WLA Lottery Members and Associate Members in the publication of the 2015 edition of the compendium, we were able to present an accurate, detailed picture of the global lottery industry. In a few years, we aim to have a time series to help understand developments in the lottery business. This will benefit anyone with an interest in lotteries as entertainment and fund-raising institutions in society. I wish to thank all the WLA members who provided their data and contributed to the success of this project.

Turning our sights toward 2016, the WLA SRMC is working on a new version of the WLA-SCS to be ready for presentation at the World Lottery

Summit 2016 (WLS 2016), which will take place from November 6–9 in Singapore. WLA-SCS:2016 will offer comprehensive controls for sports betting and Internet gaming as well as improved controls for VLTs. With the rising importance of online play and the ever-present threat of cybercrime, this is a highly important initiative for WLA members as we seek to protect our players and secure the integrity of our lottery operations.

And as mentioned above, the lottery event of the year, the World Lottery Summit will conclude 2016. We are appreciative of host lottery Singapore Pools, who have been working with the WLA staff since 2014 in preparation for this event. The WLS 2016 business program is taking shape, and we look forward to bringing you sessions covering a range of subjects such as gamification, big data, social media, games and marketing, and organizational performance. Save the date – November 6–9, 2016. I hope to see you in Singapore!

A handwritten signature in blue ink, appearing to read 'Jean Jørgensen', written in a cursive style.

Jean Jørgensen
WLA Executive Director

The WLA at a glance

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 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 with the aims and objectives of the WLA. WLA Associate Members include suppliers of online and off-line 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.

Over the years the number of WLA Lottery Members and Associate Members has remained stable. When the WLA was founded in 1999, the membership included 146 lottery organizations and 60 associate members, compared with 149 Lottery Members and 69 Associate Members today.

Of the 69 WLA Associate Members, eight participate in the WLA Contributor program. Currently there are four Platinum Contributors and four Gold Contributors. The WLA Platinum Contributors are *IGT*, *INTRALOT*, *Novomatic Lottery Solutions*, and *Scientific Games*. The WLA Gold Contributors are *500.com*, *Playtech*, *Pollard Banknote*, and *Jumbo Interactive*. *Novomatic Lottery Solutions* recently moved from WLA Gold Contributor to WLA Platinum Contributor while *Jumbo Interactive* moved from WLA Platinum Contributor to WLA Gold Contributor.

149

State lotteries

69

Lottery suppliers

\$273bn

WLA Member Lotteries generated revenues of USD 273 billion in 2014*.

\$78bn

WLA Member Lotteries returned USD 78 billion to good causes in 2014*.

* Estimate based on sales figures provided by 134 WLA Member Lotteries (90% of the membership) as published in the 2015 edition of the WLA Global Lottery Data Compendium.

The Platinum Contributors



The Gold Contributors



A learning organization



Just prior to the NASPL 2015 annual conference, the WLA and NASPL joined forces to organize a one-day workshop on responsible gaming and social responsibility. This unique workshop introduced North American participants to the WLA Responsible Gaming Framework. More than 60 lottery professionals were in attendance.

Supporting the learning process among member lotteries and suppliers is one of the WLA's key objectives. Each year, working with the regional lottery associations, the WLA offers a varied program of seminars targeting lottery professionals at middle management level.

WLA Academy: 2015 program

In 2015, eight seminars were jointly organized by the WLA and one of the five regional associations. Four were held in Europe in cooperation with the EL, one in Australia in cooperation with APLA, one in Argentina in cooperation with CIBELAE, one in Benin in cooperation with ALA, and one in the US in cooperation with NASPL.

A total of 962 lottery professionals took part in the 2015 program, with attendance ranging from 37 at the specialized Design Thinking workshop in London to a record 420 attendees at the Entertainment and Social Networks seminar in Argentina.

February 3, 2015, EL/WLA Workshop on Design Thinking

The Workshop on Design Thinking in London introduced lottery staff to a new way of working with customers to focus on the innovations they really want. The one-day workshop offered a general introduction to Design Thinking as well as practical sessions on lottery-specific use cases.

February 4–6, 2015, EL/WLA Marketing seminar: Rediscovering the Customer

The ever popular annual EL/WLA marketing seminar in London included sessions on cultural branding, customer experiences, the importance of sharing, and the need for authenticity. A total of 120 lottery marketing professionals took part.

**March 11–12, 2015, CIBELAE/WLA
Entertainment and Social Networks**
With keynote speakers from eight countries, this international seminar in Argentina attracted a record 420 delegates.



Younès El Mechrafi, General Director, MDJS, Morocco, presents at the EL/WLA sports betting seminar in May 2015.

It included a trade show and a full line-up of working sessions focusing on the importance of maintaining the entertainment value of the lottery experience.

April 27–30, 2015, APLA/WLA Marketing seminar: Divided by Oceans – Connected by Opportunities

The central themes for this lottery marketing seminar in Australia included digital technologies, multi-channel distribution, content marketing, and the future of retail. The seminar attracted 88 delegates from across the Asia Pacific region and also included a working lunch about the WLA Security Control Standard.

May 26–28, 2015, EL/WLA Sports betting seminar: Operate like a champion today!

Poland hosted the annual joint EL/WLA sports betting seminar, which was attended by 92 people. The work program included sessions on market liberalization, problem gaming, social media and



The APLA/WLA marketing seminar in April 2015 attracted more than 80 participants. Featured presenters shown above from left to right are: Sue van der Merwe, CEO of Tatts Lotteries; Dato Lawrence Lim Swee Lin, CEO of Magnum Corporation Sdn Bhd; and Bill Thorburn, Group Executive – Lotteries (International) at the Tatts Group.



In October 2015, a joint EL/WLA seminar on security was held in Stockholm, Sweden, covering a number of themes relevant to the secure operation of lotteries. Over 90 lottery professionals were in attendance.

mobile best practices, as well as case studies about lottery YouTube channels and optimized website design.

July 21–22, 2015, ALA/WLA Security and risk management seminar

This two-day seminar in Benin was an opportunity to present the WLA Security Control Standard to about 50 representatives of African lotteries. A series of participative workshops was also organized on a full range of security-related topics.

October 13–14, 2015, NASPL/WLA Responsible gaming seminar

Jointly sponsored by the WLA and NASPL, this workshop on responsible

gaming and social responsibility was held in Texas immediately before the NASPL 2015 annual conference. A total of 62 lottery professionals had a chance to find out more about the WLA Responsible Gaming Framework and how it applies to lottery operations across North America.

October 27–29, 2015, EL/WLA Security seminar: Secure, Monitor, React – or Pay the Price

From physical security to cyber security, the 2015 joint EL/WLA Security Seminar held in Stockholm, Sweden addressed a number of issues relevant to lottery security management. A total of 93 participants benefited from informa-

tive presentations covering such themes as potential weaknesses in lottery systems, the secure design of scratch cards, electronic “lottery tickets”, and the security of Random Number Generator draws.

WLA Academy: 2016 program

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

The first seminar of the year will be the joint EL/WLA marketing seminar in London from February 3–5, 2016. A number of other seminars for 2016 are

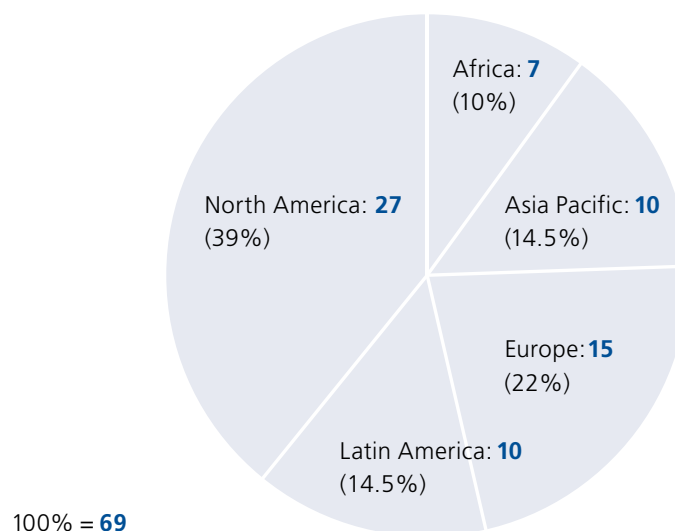
The WLA scholarship program

The scholarship program was launched in 2013 to encourage lottery professionals around the world to participate as speakers in WLA seminars. It also offers selected lottery staff a chance to take part in educational events that they would probably not be able to attend without WLA support.

For each seminar, the regional association representatives on the WLA Executive Committee can recommend candidates for the scholarship program. Scholarship candidates may not be from the region in which the seminar is to take place. Some candidates are staff from WLA member lotteries with management knowledge and experience of the seminar theme. Others are professionals from WLA member lotteries who would otherwise not have the opportunity to attend the event because of travel restrictions or other reasons. Professionals from non-WLA member lotteries can also be recommended for the scholarship program to help familiarize non-members with the WLA and promote WLA membership.

Since the scholarship program began in 2013, a total of 69 individuals have taken part. More than one-third of them (27) are from lotteries in North America – in large part because of the restrictions on out-of-state travel faced by lotteries in the United States – with

Providing learning opportunities for the world lottery community



Since 2013, a total of 69 lottery professionals have benefited from the WLA's scholarship program.

the remainder split roughly equally between Asia Pacific (10), Europe (15), Latin America (10) and Africa (7).

The program is a unique opportunity for lottery professionals to share their experiences and learn from their peers in other regions. For lotteries with travel restrictions, or simply with particularly tight budget constraints, the scholarship program is an important opportunity to benchmark business processes and see how their policies on topics such as security and responsible gaming match up against global best practices.

The WLA will continue to support the scholarship program in 2016 as a way to benefit from the broadest possible range of insights and lottery experiences and fulfil the WLA's mandate as an inclusive, global organization.

Lotteries in every region of the world are encouraged to contact the WLA Business office in Basel (e-mail: info@world-lotteries.org – Telephone: +41 61 284 1502) to learn more about how they can propose candidates for the WLA Scholarship program 2016.

currently in the planning stage. Notable among these are the EL/WLA sports betting seminar to be held from June 21–23, in Nice, France, where the UEFA European Championship in football will take place. The WLA together with APLA will also be organizing a seminar on operational excellence, from April 18–21, in Yangon, Myanmar. The WLA is also

planning a one-day workshop especially for US lotteries to take place in New York City on April 6. The workshop, titled "Everything you need to know before selling on the Internet", will provide valuable insights to lotteries that are in the process of planning or launching an online platform. Two seminars in 2016 have been tentatively planned in Africa

with ALA, one about responsible gaming and one about public order. The dates and places of the ALA seminars are to be confirmed.

The full line-up of educational events and confirmed dates throughout the year will be available on the WLA website at the start of 2016.

A united voice



WLA President Jean-Luc Moner-Banet together with IOC President Thomas Bach (right) and IOC Chief Ethics and Compliance Officer Pâquerette Girard Zappelli at a recent meeting in Lausanne.

One of the WLA's objectives is to help the global lottery industry to speak with a united voice and act in a coordinated fashion on lottery-related issues as they arise. The WLA is currently involved in a number of important initiatives to support the integrity of sport around the world, regulate the use of lottery-related Internet domain names, and negotiate conditions for the responsible distribution of mobile gaming apps.

Global Lottery Monitoring System for sports betting

Forming a united front against match-fixing in sports continues to be a priority for the WLA. More than half of the world's state-licensed lotteries offer sports betting products to their customers, so the lottery industry is clearly a key stakeholder in the fight to keep sports fair and honest.

The WLA reached a key milestone in 2015 with the official launch, in conjunction with European Lotteries (EL) and 27 lottery members, of the Global Lottery Monitoring System (GLMS), which went live on June 1. The GLMS is the successor

to its European counterpart, ELMS, which was created in 2005 and was then the first collaborative sports betting monitoring system.

The GLMS establishes a global, systematic surveillance system to monitor sports betting with the purpose of detecting any unusual or suspicious betting patterns. It is a main asset for the lottery industry to demonstrate its commitment towards the protection of clean sports competitions.

The WLA and EL have worked together closely on this project since 2012, as mandated by delegates of the 2012 WLA General Meeting. The expanded system provides 24/7 coverage of the various betting markets worldwide.

For its launch in 2015 and the initial implementation phase throughout 2016, the GLMS benefits from the operational resources and technical expertise of the Danish lottery Danske Spil. Two analysts from Danske Spil's sports betting department are dedicated full time to ensuring the everyday operation of the GLMS, sharing information about

GLMS Executive Committee



President

Seah Chin Siong (Singapore)

Vice President

Thierry Pujol (France)

Members appointed by WLA

Seah Chin Siong (Singapore)

Edmundo Augustin Dupre Echevarria (Chile)

Members appointed by EL

Thierry Pujol (France)

Almlid Torbjørn (Norway)

Elected members

Borut Bohinc (Slovenia)

Ludovico Calvi (Italy)

Younès El Mechrafi (Morocco)

alerts, and collecting feedback from the members.

Since June 2015, and at least until the end of 2016, the system has been enhanced by access to Sportradar's Fraud Detection System information, which provides a significant flow of alerts. A platform has been implemented to optimize exchanges of information between GLMS members.

At the same time, GLMS is reinforcing its relations with international sports and football governance bodies (notably the IOC, FIFA, and UEFA) in order to work together to follow up on suspicious patterns. Most notably, GLMS and the IOC will work together to monitor Olympic competitions at the 2016 Summer Games in Rio de Janeiro, Brazil.

To date GLMS has 27 members from 25 countries:

- Europe (17):
Austria, Belgium, Croatia, Denmark, Finland, France, Germany, Greece, Hungary, Italy (2), Norway, Portugal, Romania, Slovenia, Sweden, Switzerland (2), The Netherlands
- Asia (3):
Hong Kong, Singapore, South Korea
- North America (1):
Canada
- South America (2):
Chile, Uruguay
- Africa (2):
Morocco, Senegal

Unlike other sports betting monitoring systems, the added value of GLMS is that its members are not competitors. They operate only on their territories, and therefore are more open to sharing detailed information.

Throughout 2016, the GLMS Executive Committee (*see box on page 9*) will consider extending GLMS membership to the additional EL and WLA members that have expressed interest in taking part. For further information, please contact: glms@world-lotteries.org.

GLMS General Secretary appointed

Effective September 1, 2015, Sarah Lacarrière was engaged as GLMS General Secretary, with responsibility for public relations, marketing, stakeholder relations, and all administrative matters (*photo above*). She will be based in Lausanne, Switzerland, at the offices of Loterie Romande, while the operational headquarters of the GLMS will continue to be located at Danske Spil's facility in Copenhagen, where the Danish lottery was already hosting the ELMS set up by EL more than five years ago and now incorporated into the GLMS.

Sarah Lacarrière is a French national with a background in international rela-



Sarah Lacarrière has been working as GLMS General Secretary since September 1, 2015.

tions and global security. She co-authored a white paper on sports betting and corruption in 2012, and worked for three years as an integrity officer for SportAccord, also in Lausanne, with responsibility for public affairs, academic partnerships and institutional relations. She has also taken over the responsibilities of Certification Manager for the WLA Security Control Standard (WLA-SCS).

International Sports Convention 2016

The International Sports Convention is a two-day convention and trade show that will be held at the Palexpo exhibition center in Geneva on December 7–8, 2016. It aims at gathering under one roof many and diverse stakeholders of the sport industry to share knowledge and

good practices through a rich program of over 30 conferences and masterclasses.

In March 2015, the WLA and EL agreed with the ISC to work together to develop and manage a one-day conference on sport integrity, to be held on Wednesday, December 7, 2016. This conference will be a unique opportunity for the lottery industry to demonstrate its commitment towards sport integrity by aligning a high panel of experts to tackle the lotteries' role in the overall financing of sport and more specifically in the fight against match-fixing.

This conference will be a chance to review the activities of the GLMS since its launch in June 2015 and discuss the outlook for the future. Building on national seminars that took place in 2013–2014 throughout Europe, and on the lessons learnt from projects funded by the European Commission and the initiatives of the Council of Europe, the conference will be a unique opportunity to bring together all the stakeholders from the lotteries and beyond that are closely involved in the topic. It is expected to benefit from the input of WLA members worldwide to promote a broad approach to the issues in hand.

Domain names

As mentioned in last year's report, new Internet generic top-level domains (gTLDs), similar to *.com* and *.org* but



The WLA and EL will develop and manage a one-day conference on sports integrity at the International Sports Convention (ISC) 2016. The ISC will run from December 7–8, 2016 in Geneva, Switzerland.

denoting brand names or generic categories (like *.sport*), came into effect in 2013.

In mid-2013, the Internet Corporation for Assigned Names and Numbers (ICANN), which oversees the Internet domain name system, approved a bid by the Irish Internet registrar Afilias, Ltd., the second largest Internet registry operator worldwide, to operate a new gTLD called *.lotto*.

The WLA, EL, and NASPL have reached an agreement with the registrar to help Afilias ensure that the *.lotto* gTLD is operated in a regulated manner. At the initiative of the lottery associations, an official request was submitted to ICANN that *.lotto* be recognized under its Category 1 Safeguard Advice, which provides special safeguards for regulated markets to ensure that new gTLDs are operated in compliance with applicable laws. In the case of the lottery industry, these safeguards protect the *.lotto* gTLD from misuse by illegal gaming operators.

This proactive, cooperative effort by the lottery associations has helped to avert unrestricted use of *.lotto* domain names, which could have had a negative impact on state-authorized lottery organizations and their beneficiaries, and caused significant harm to the playing public.

The issue is now closed and the outcome for state-authorized lotteries can be considered satisfactory. The initial response to *.lotto* and interest from lotteries around the world has been growing. More than 140 registrants, many of them WLA members, have been recorded for a *.lotto* domain name.

Mobile gaming apps

Mobile growth is integral to the future of lotteries, and responsible distribution of lottery apps is therefore a key success factor for WLA members. However, on the Google Play Store, it is not currently

possible for lotteries to distribute apps that allow users to purchase lottery tickets. There are fewer problems on the Apple App Store, but the situation is still precarious.

In January 2015, the WLA organized a special meeting in Brussels, Belgium, to discuss the challenge and develop a strategy for solutions. The meeting was chaired by Chin Siong Seah, CEO of Singapore Pools, and was attended by lottery experts in digital technology and app development. Among those present at the meeting were:

- Anna Nowak-Riviere
Digital Transformation Manager of La Française des Jeux, France;
- David Kreuzinger
Manager Online for WestLotto, Germany;
- Pål Bergensen
Head of Digital Channels for Norsk Tipping, Norway;
- Jean Jørgensen
Executive Director of the World Lottery Association, Switzerland; and
- Tim Copper
Digital Director for Camelot, United Kingdom.

The group reviewed the progress to date and discussed ways to move toward resolving this issue.

Given the increasing importance of both digital and mobile to the future of lottery sales growth, a working group was formed by the EL in 2014 to tackle the Google Play issue. At the January 2015 Brussels meeting, it was then decided to pursue a strategy that the EL had already established. The EL working group developed a proposal, which was subsequently submitted to Google.

Commenting on the working group's progress, Camelot's Digital Director Tim Copper said the following, "Over the last six months we have been working with Google to further land the proposal and

explain the lottery position. The good news is that progress is being made, albeit somewhat slowly. Google has now confirmed that in principle the Google Policy team is comfortable with transactional lottery apps appearing in the Google Play store – that is, apps that allow for play and payment from within the app. This is a significant step forward. However, Google is requesting a number of key changes to the Google Play store to better support gambling/lottery apps. This will require all lottery apps to use these new features.

There is further evidence of this shift in policy whereby Google has supported an early pilot of two fantasy sports apps – DraftKings and FanDuel – on the Google Play store. Both apps are towards the 'softer' end of casual gaming, but they do charge an entrance fee for selecting your own team. Within weeks of the Google trial starting, the FBI opened an investigation into both DraftKings and FanDuel on the basis they are gambling operations rather than simply fantasy sports apps. It is unclear if there is any link with the start of the trial and the investigation. However, from a Google perspective this is likely to cause them to be more cautious in this space and hence delay speed of action."

According to Copper, Google also needs to make key changes to the Google Play store to better support the lottery world, for example they plan to introduce a number of new features including location checking and age gating to help verify a player's age. This of course requires Google engineering resource and hence competes with other priorities on their roadmap.

On the whole, progress has been made. Google's shift in policy is a key step forward. We will continue to work with Google for a clearer view on the implementation of changes to the Google Play store and will inform the members of any new developments.

Organization and governance

The WLA is an international, non-governmental, non-profit organization, incorporated under Swiss Law and headquartered in Basel, Switzerland.

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), and NASPL (North America). The Senior Vice President and Vice President 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 five full-time staff members. The WLA also has an office in Montreal, Canada consisting of a General Secretary with one assistant.

The annual budget of the World Lottery Association is approximately CHF 2.5 million (USD 2.46 million), financed by membership subscriptions, the contributors' program and any surpluses from seminars and the biennial convention.

WLA 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.

The WLA Executive Committee

President



Jean-Luc Moner-Banet

General Director
Société de la Loterie de la
Suisse Romande
Switzerland

Senior Vice President



Rebecca Paul Hargrove

President and CEO
Tennessee Education Lottery
USA

Vice President



Gilson César Pereira Braga

National Superintendent of Lotteries
Caixa Econômica Federal
Brazil

Elected members of the WLA Executive Committee



Fabio Cairolì
General Director
Lottomatica
Italy



Richard Cheung
Executive Director
Customer and Marketing
HKJC Lotteries Limited
Hong Kong



Andy Duncan
CEO
Camelot UK Lotteries Ltd.
United Kingdom



Inmaculada García
Chairman and CEO
Sociedad Estatal Loterías y Apuestas
del Estado (SELAE)
Spain



Theo Gossner
Managing Director
Westdeutsche Lotterie GmbH & Co. OHG
Germany

Members of the WLA Executive Committee appointed by the regional associations



Younès El Mechrafi
General Director
La Marocaine des Jeux et des Sports
Morocco
*Representing the African Lottery
Association (ALA)*



Dato Lawrence Lim Swee Lin
CEO
Magnum Corporation Sdn Bhd
Malaysia
*Representing the Asia-Pacific Lottery
Association (APLA)*



Stéphane Pallez
President and CEO, La Française des Jeux
France
*Representing the European State Lotteries
and Toto Association (EL)*



Luis Gama
Director
Dirección de Loterías y Quinielas
Uruguay
*Representing Corporación Iberoamericana
de Loterías y Apuestas del Estado (CIBELAE)*



David Loeb
President
Western Canada Lottery Corporation
Canada
*Representing the North American
Association of State and Provincial Lotteries
(NASPL)*

Owing to the unfortunate and continuing illness of WLA Executive Director, Jean Jørgensen, WLA General Secretary, Lynne Roiter assumed management of the WLA Business Office in Basel, Switzerland on October 1, 2015. Lynne will remain in charge of both the WLA Business Office in Basel and the WLA office in Montreal, Canada, until further notice.



Jean Jørgensen
WLA
Executive
Director



Lynne Roiter
WLA
General
Secretary

Information and communication



Figure 1: The WLA magazine reports on the latest trends in lottery technology and marketing, on WLA events and services, and publishes the latest in news from the WLA and the five regional associations.

WLA magazine

The WLA magazine is published in English twice a year 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 continues to attract strong interest and helps to cover production and distribution costs (figure1).

WLA website

The WLA website www.world-lotteries.org is constantly updated with lottery news, details about WLA events and member services, links and discussion papers. Website content is in English, with key documents also available in the WLA's other official languages (French, German, and Spanish).

Registered members can also access and download a range of lottery statistics, guides and other documents not available to the public. WLA information services include the WLA Quarterly Lottery Sales Indicator, the WLA Annual Global Data Compendium, and occasional special publications, all of which are outlined below.

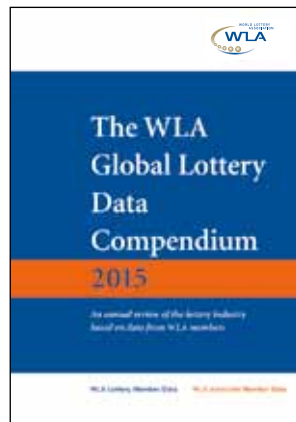


Figure 2: The WLA Global Lottery Data Compendium is an annual review of the lottery industry, based on comprehensive data provided by the WLA membership. This second edition offers expanded coverage of the global lottery industry, with 90% of Lottery Members and 88% of Associate Members providing their statistics. The WLA Global Lottery Data Compendium 2015 was distributed to the membership this past December. On the left, the front cover of the WLA Global Lottery Data Compendium 2015 is shown. The illustration below is a sample double page taken from the WLA Lottery Member Data.

Société de la Loterie de la Suisse Romande	
Principales ventes de catégories	11 2014
1000000	1000000
100000	100000
10000	10000
1000	1000
100	100
10	10
1	1
Société de la Loterie de la Suisse Romande	
Rue de la Loterie 10	
CH-1000 Lausanne	
Tél: 021 310 10 10	
Fax: 021 310 10 11	
E-mail: info@loterie.ch	
Internet: www.loterie.ch	
Société de la Loterie de la Suisse Romande	
Rue de la Loterie 10	
CH-1000 Lausanne	
Tél: 021 310 10 10	
Fax: 021 310 10 11	
E-mail: info@loterie.ch	
Internet: www.loterie.ch	

Športna loterija d.d.	
Principales ventes de catégories	11 2014
1000000	1000000
100000	100000
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Športna loterija d.d.	
Ulica Športna 10	
SI-1000 Ljubljana	
Tél: 01 422 22 22	
Fax: 01 422 22 23	
E-mail: info@sloterija.si	
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WLA Quarterly Lottery Sales Indicator

The WLA collects and compiles quarterly lottery sales data from 36 WLA member lotteries from around the world. Sales from these lotteries represent approximately 62% of global sales by volume. The Florida Lottery, which is the second largest lottery in the United States, joined the program in 2015, strengthening the representation of the North American region in the sales indicator. Each quarter, the WLA aggregates the data and publishes the WLA Quarterly Lottery Sales Indicator to provide lotteries, suppliers, and the general public with a snapshot of global and regional

sales trends. The WLA Quarterly Lottery Sales Indicator appears on the WLA website and is also quoted in a range of industry publications.

WLA Global Lottery Data Compendium 2015

There continues to be strong demand from WLA Lottery Members and external stakeholders for accurate data on the state of the lottery industry worldwide. Responding to this demand, the WLA published the first edition of the WLA Global Lottery Data Compendium (GLDC) in October 2014. A total of 73 WLA Lottery Members and 32 WLA Associate Members, or approximately half

the total WLA membership, provided data for the 2014 edition.

The GLDC is based on a number of key performance indicators, such as sales volume and money returned to good causes. It helps to promote the role that WLA member lotteries play globally in raising funds for society, and also provides valuable business intelligence for WLA Associate Members.

All the data is from primary sources, and the WLA makes every effort to guarantee the accuracy of the information. The indicators are carefully selected to ensure compliance with competition laws.

With the encouraging reception of the first edition of the Global Lottery Data Compendium, the WLA began production on the second edition in early 2015, which was completed and distributed to the members in December 2015 (figure 2). The second edition WLA Global Lottery Data Compendium offers significantly expanded coverage of the global lottery industry, with a total of 134 Lottery Members (90% of the membership) and 61 Associate Members (88% of the membership) providing their statistics.

WLA special publications

Focus on regional cooperation

In the middle of 2015, the WLA produced a 16-page brochure entitled *Cooperation* (figure 3). Distributed at the 2015 EL Congress, the publication focused attention on the fundamental role of the regional lottery associations in an increasingly interdependent world. The Executive Directors and Secretaries General of each of the five regional associations were invited to describe existing and future synergies with the WLA.

This special publication also helped to promote the WLA's joint seminar program – all WLA seminars are co-organ-



Figure 4: *Around the World in 80 Games*, published as a special edition booklet, takes the reader on an entertaining global journey in search of lottery facts and figures.

nized with one of the regional lottery associations – and provided practical details and background information about the WLA Security Control Standards, the WLA Responsible Gaming Framework, and the Global Lottery Monitoring System.

The *Cooperation* brochure was included in the WLA's 2015 communication plan to highlight the WLA's role in avoiding

duplication of effort and competition with regional lottery associations and ensuring that members benefit from the services provided by their professional associations at regional as well as global levels.

Around the World in 80 Games

With the help of lottery expert and historian Göran Wessberg, the WLA produced a booklet entitled *Around the World in 80 Games*, primarily for the pleasure and entertainment of members and to mark the holiday season in a majority of lottery jurisdictions (figure 4). Following in the footsteps of his renowned grandfather, a fictitious Phileas Fogg Jr. circumnavigates the globe in search of tidbits of information and interesting facts and figures relating to the fascinating and multifaceted global lottery industry.

The booklet was distributed to the membership in mid-December 2015. Additional copies are available from the WLA's business office in Basel, info@world-lotteries.org.



Figure 3: *The Cooperation* brochure focuses on the interdependent relationship between the WLA and the regional associations.

Global standards



Two globally recognized industry standards: The WLA Security Control Standard and the WLA Responsible Gaming Framework.

The WLA supports two internationally recognized standards for the lottery industry: the WLA Security Control Standard (WLA-SCS) and the WLA Responsible Gaming Framework (WLA-RGF).

WLA Security Control Standard

This internationally recognized security and risk management standard for the lottery sector is based on ISO 27001, a leading international standard for information security management, and includes a number of additional controls that are specific to the lottery and gaming sector (figure 1).

As of December 31, 2015, a total of 66 Lottery Members were certified to the standard, up from 62 a year earlier. Lottery suppliers can also complete certification to WLA-SCS. A total of 12 WLA Associate Members, up from 10 a year earlier, have achieved certification to date. As the number of WLA-SCS certified member organizations has increased, the number of WLA-approved auditors has grown to over 50. This trend marks



Figure 1:
The WLA-SCS certificate establishes that a WLA member is in conformity with the lottery sector's only internationally recognized security standard, the WLA Security Control Standard.

the increasing interest in the WLA-SCS and underlines its importance as an industry standard.

The standard is developed and maintained by the WLA Security and Risk Management Committee (SRMC), an international group of 20 top security professionals from WLA member lotteries around the globe. The SRMC is well aware of the need for constant adaptation to the rapidly evolving gaming and betting industry and mindful of the importance of remaining vigilant to new and increasingly challenging security threats. In 2015 the Committee began working on a new version of the standard, expanding and enhancing controls for interactive sales and online gaming services, as well as the secure handling of sports betting operations. WLA-SCS:2016 will replace the current WLA-

SCS:2012 standard and will be ready for presentation to delegates at the biennial WLA General Meeting in Singapore in November 2016.

The SRMC also took further steps in 2015 to acquire official ISO recognition for the WLA-SCS, building on the ISO International Workshop Agreement (ISO IWA) that was formally initiated in 2014. The Agreement will take three to six years to complete and will consolidate the WLA-SCS's position as the lottery sector's only internationally recognized security standard.

Sarah Lacarrière, who has been appointed General Secretary of the Global Lottery Sports Betting Monitoring System in Lausanne (see page 10), has also joined the WLA as WLA-SCS Certification Manager. As WLA-SCS certification



Figure 2:
WLA Responsible Gaming Framework certification has been an internationally recognized benchmark for responsible gaming and social responsibility in the lottery industry since 2009.

(IAP) to evaluate individual certification submissions. Every few years, as stipulated in the WLA-RGF terms of reference, a new panel of experts is formed. In 2015, international sustainability consultant Anne Pattberg took over as Chair of the IAP. She is joined by Robert Ladouceur of Canada and Hermano Taveres of Brazil, both of whom are acclaimed for their extensive research into problem gaming prevention and treatment. Henry Chan from the Hong Kong Jockey Club will continue to serve on the IAP and will ensure continuity with the work of the outgoing panel. The WLA thanks former panel members Maria Sillanpaa of Finland (Chair), Inés García Pintos Balbás of Spain, and John Luff of the United Kingdom for their valuable insights over the last three years.

Supplier certification

Also in 2015, certification was opened up to WLA Associate Members following the successful completion of a pilot project with four major lottery vendors. To achieve WLA-RGF certification, Associate Members must score at least 75 percent on eight key criteria: research, employee awareness and training, client awareness, product development, remote gaming, advertising and marketing, stakeholder engagement, and systematic reporting on the responsible gaming measures in place within their organizations.

Applications for certification by supplier organizations are not referred to the Independent Assessment Panel but are subject to evaluation by a WLA-approved independent third-party assessor such as an accredited auditing or sustainability assurance body. In this respect, the process for Associate Members is similar to certification to the WLA Security Control Standard. Associate Members are required to undergo a full assessment every three years to maintain the status of WLA-certified supplier.

manager, Sarah will liaise with WLA members, WLA-approved auditors and potential auditors, and the SRMC on all WLA-SCS matters, and will tend to the issuing of WLA-SCS certificates. Working closely with the SRMC, she will develop and maintain the WLA-SCS and all documentation relevant to the standard. She will also assist with the organization of SRMC meetings that are held internationally throughout the year. Sarah can be reached by e-mail at sl@world-lotteries.org.

WLA Responsible Gaming Framework

WLA certification continues to gain recognition as an international hallmark of excellence in responsible gaming performance, and represents a significant competitive advantage in today's increasingly

crowded gaming marketplace. The WLA Responsible Gaming Framework (WLA-RGF) framework consists of ten responsible gaming elements and four performance levels. To achieve certification, lotteries are required to undergo a full examination of their operations to determine how fully the principles of responsible gaming and continuous improvement are embedded into their business processes.

At November 30, 2015, a total of 77 member lotteries (up from 70 a year before) were certified to the WLA-RGF at level 2 or higher. The highest level of certification (level 4) has been achieved by 46 member lotteries (up from 43 at December 31, 2014) (figure 2).

Four international sustainability experts sit on an Independent Assessment Panel

WLA Conventions

Held every two years, the World Lottery Summit (WLS) is the global lottery industry's flagship event, attracting large numbers of lottery professionals from around the world. It features a comprehensive business program, an extensive social program, and a trade show presenting the latest innovations in lottery products and services. In synchronization with the needs of the regional associations and to accommodate WLA contributors, WLS is held biennially on even years, (2012, 2014, 2016, etc.), whereas the EL Congress, one of the larger regional conventions, is held biennially, on odd years (2011, 2013, 2015). NASPL, which until now held its regional convention and trade show annually, has also decided to follow a similar course and, as of 2017, only have a trade show on odd years.

Rome 2014



Around 1,100 delegates attended the latest World Lottery Summit (WLS 2014) hosted by Lottomatica in Rome, Italy, from November 2–5, 2014. Keynote speakers included thought leaders and pioneers in a whole range of professions and sectors of activity, from aviation and motor sports to gaming research and digital media. As well as such perennial topics as sustainable advertising and lottery regulation, the parallel sessions addressed a range of more cutting-edge themes such as the use of social media and mobile apps by lottery organizations. The business program included a number of panel discussions, the now-traditional Lottery Pep Talk and the Platinum Contributors' Forum.

The biennial WLA General Meeting was held at the end of the World Lottery Summit.

WORLD LOTTERY SUMMIT SINGAPORE

6-9 NOV 2016



Winning in the New World
Meet the challenge, Make the change

Singapore 2016

The World Lottery Summit 2016 (WLS 2016) will be held from November 6–9, 2016 in Singapore and will be hosted by Singapore Pools at the Marina Bay Sands Hotel.

The theme for WLS 2016, “Winning in the new world. Meet the challenge, make the change”, illustrates the complex challenges that the lottery industry faces on the socio-political, economic, and technological levels. Singapore Pools and the WLA staff are finalizing the details of the event and arrangements are proceeding as planned.

Business program

Subject to confirmation, parallel sessions will include a forward-looking discussion of corporate social responsibility and responsible gaming, with a summary of the lottery industry's achievements over the last decade and an exploration of its objectives in this area for the next five years.

A session on social safeguards will look at the implications of player protection measures, with discussions of privacy and enforcement issues related to new technologies and potential benefits for lotteries in areas such as customer rela-



The World Lottery Summit 2016 (WLS 2016) will take place in Singapore from November 6–9, and will be held at the world famous Marina Bay Sands Hotel (shown above). Host lottery Singapore Pools, together with the WLA staff, has been working to make this the lottery event of the year.

tionship management. A related session on Big Data will examine how the details provided through loyalty programs and online registration can be used responsibly to benefit both players and lottery organizations.

Marketing sessions will focus on targeting millennials, innovation, personalization, and the potential of social media for sharing stories of winning and giving.

Constructive ways to manage a lottery's relationships with its regulators in the age of the Internet will also be examined. Another session will explain how gaming organizations can interact with the Global Lottery Monitoring System.

The agenda for the business program also includes updates on the WLA Secu-

rity Control Standard and the pressing need for cybersecurity solutions, the future of retail, and the implications of growth in online play for lottery organizations in terms of corporate culture and human resources.

A unique venue

Ten years after the first WLA convention in Singapore, the WLA is happy to be returning to this uniquely cosmopolitan location. Known as the gateway to Asia, the city-state is a vibrant melting pot of cultures from every continent.

The WLS 2016 venue will be the famed Marina Bay Sands Hotel. The resort has three 55-story towers with 2,561 luxury rooms and suites, and is capped by the Sands SkyPark, offering a 360-degree

view of Singapore's skyline. The Sky Park houses restaurants, gardens, and a 150-meter vanishing-edge swimming pool. The Sands Expo and Convention Center has five floors of exhibition and convention space, with up to 2,000 exhibition booths and 250 meeting rooms.

The full business program, including keynotes, panels and parallel sessions, will be announced shortly on the dedicated website www.wls2016.org. Online registration for WLS 2016 will open in the second quarter of 2016.

Winning in the New World

Meet the challenge, Make the change

WORLD
LOTTERY
SUMMIT
SINGAPORE



Marina Bay Sands, 6-9 Nov, 2016

Singapore, a bustling metropolis set in the crossroads of the Asia Pacific, plays host to the World Lottery Summit in 2016. The business program covers a diverse range of topics with winning strategies and best practices by distinguished external keynote speakers from various industries both in Asia and around the world, as well as speakers from the lottery industry.

The WLA and host organization Singapore Pools have crafted an exciting business and social programme for delegates befitting the Republic's status as a top convention and meeting venue. A world-class integrated resort, vibrant festivals, delectable cuisine, fabulous shopping await you.

Join us in Surprising Singapore from November 6 to 9, 2016 for a truly unforgettable experience!

**Singapore
Welcomes You!**

**SAVE
THE
DATE!**

Visit www.wls2016.org
for more information



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