



GLMS-EL-WLA WEBINAR ON SPORTS INTEGRITY 23-25 JUNE 2020

SOLIDARITY, COMMUNITY AND ALLIANCE – EMBODYING A NEW CULTURE OF SPORTS INTEGRITY

OVERVIEW OF SESSIONS

The sessions were vivid, fluid and engaging, with speakers and moderators from Africa, Asia, the Americas and Europe, including representatives from lotteries, the sport movement, law enforcement, sports betting suppliers and public authorities as well as from the World Lottery Association, European Lotteries and GLMS. Digital transformation, understanding the climate from the perspective of each stakeholder and finally working together was an underlining theme in all sessions. Speakers looked concretely at how lotteries and GLMS dealt with the threats to sport integrity during the pandemic, debunking the myth that no sport = no threat, lotteries found new sources to offer sports betting in e-sports, and started going digital and while still understanding that consumers continue to appreciate the social aspects of sports betting. Law enforcement continues to develop its targeted understanding of the sports betting world as this is a key factor in the wider context of identifying and capturing criminals, highlighting the importance of awareness raising for LEA and the betting sector on each other's needs. All agreed that a legislative and structured framework such as the Macolin Convention and its national platforms would facilitate an understanding of the whole context of a manipulation. The webinar also went on to address the rise of sports betting in the USA and Canada, especially as US States increasingly legalize sports betting, including mobile betting and finally addressed the digitalization of sports betting and products and boosting the activity to the next level.

GLMS DURING THE PANDEMIC: GEARING UP FOR A NEW NORMAL IN THE WORLD OF SPORT INTEGRITY Session 1 was an illustrative example of the true value of collective actions and collective responsibility by all stakeholders, made through a presentation of statistics of GLMS' monitoring activities over the last few months and the panel discussion that followed with representatives of FIFA, Interpol and GLMS. The effect of the pandemic will inevitably create conditions for fraudsters to exploit weaknesses and take advantage of this moment of vulnerability of the eco system in the "new normal". It is our duty to continue to be vigilant and protect the safeguarding measures put in place to guarantee the legality and protect athletes and all the actors involved across the globe.

IMPACT OF COVID19 ON THE LOTTERY SECTOR Session 2 panelists made up of lottery representatives from WLA, Europe (Loterie Romande), Africa (La Marocaine des Jeux et des Sports), Asia (Singapore Pools) and USA (Maryland Lottery) concluded that an answer to the lockdown was the digital offer. While respecting the restrictions put in place products were made available to players in order to collect money for good causes which are needed now more than ever. Consumers still however tend to revert to the social aspect of playing Lottery and betting products and old habits pre-lockdown are returning.

WORKING WITH LEA TO COMBAT CRIMINAL ASPECTS OF SPORTS MANIPULATIONS Session 3 speakers from Interpol, Europol, Australian Intelligence Commission and CSCF Foundation for Sport Integrity, together with GLMS, had a vivid exchange on the current status of involvement of Law enforcement with the betting sector and sport movement during COVID19 and in the more general context. The session highlighted, above all, that a mutual understanding of reports and alerts and adapting these for the purpose of investigations, and in court is extremely important as this can still



be an issue. The speakers, all with almost 30 years of law enforcement experience on the ground spoke about how important awareness raising is, so that law enforcement and the sport movement understand each other's priorities and needs and that they are a part of a larger context. The Macolin Convention, as an international and binding legal text, provides structures and legal protections for secure exchange and collaboration between the private and public stakeholders and the panelists concluded that not only do we need to understand the entirety of the text but we need to understand how to implement it as well.

WORKING WITH THE SPORT MOVEMENT TO PROTECT SPORTS INTEGRITY Session 4 experts from IOC, FIBA, the Italian NOC and GLMS exchanged on how COVID-19 has raised serious risks for match-fixing and criminal infiltration in sport, as recent figures tend to point out. The panelists underlined the pressing need to build capacity within the world of sport while strengthening collaboration between key stakeholders, notably lotteries, to tackle this threat and protect sport integrity paving the way for a swift and comprehensive implementation of the Macolin Convention.

LOTTERIES IN THE IMMEDIATE FUTURE During Session 5, panelists from lotteries/GLMS members in Uruguay, Morocco and Italy shared how they had to deal with full lockdown measures between March and June, and revealed their experience on how mobile quickly developed from being one of the channels within their omnichannel approach, to becoming **THE omnichannel itself**: centralising both, retailer based operations and facilities otherwise unavailable in stores due to the pandemic measures. Some even introduced e-sports with in-play mode and virtual games in their offer to their consumers, while such products were not available before pandemic. The main lesson is that lotteries must learn and explain to their retailers that the digital transformation we are experiencing it is not a threat but on the contrary it is an opportunity for both lotteries and retailers to add value to their activities.

THE RISE OF E-SPORTS AMIDST COVID-19 The message from the Session 6 panelists, working in e-sports, from ESIC to IESF, Danske Spil to La Marocaine des Jeux et des Sports, is that if you want to get into E-sports, understanding your audience is primordial. You cannot just offer it as a bulk; there are different games and different demographics. In addition, we need to be aware of the pitfalls without blindly offering everything from a feed provider without a filter. It is easier to teach people who know e-sports about betting than the other way around. There should be more opportunities such as this to educate about e-sports. The focus should be on common problems (governance and regulation issue). The core demographic is young and sound protection is needed. Common standards and firm regulations are needed as well as grassroots education on integrity values. This is a special community and a real understanding of its particularity is crucial.

SPORTS BETTING IN THE US & CANADA Session 7 had speakers from Tennessee Lottery Education Corporation, World Lottery Association, Tennessee Lottery Education Corporation, Lotto-Quebec, Washington DC Lottery and Maryland Lottery and Gaming. The industry leaders discussion on Sport Betting regulatory frameworks in North America and Canada showed that it is imperative for all stakeholders to support regulated, responsible and sustainable betting market environments instead of straight out bans that end up favouring the proliferation of black market, criminal organisations and match fixing. The discussion was very inspiring and has revealed the wide-ranging approaches in various North American jurisdictions introducing sports wagering tailored to the different state level cultural preferences and economic conditions. There will be a big difference between lotteries who regulate sports wagering awarding licences and those who will run their own sportsbook. Loto-



Quebec shared that it is an honour to host the new GLMS monitoring hub as it will be a benefit to sports books around the world.

SPORT BETTING PRODUCT STRATEGIES WITH GLMS ASSOCIATE MEMBERS POST COVID-19 In this enlightening Session 8 of the webinar, expert representatives from Intralot, Scientific Games Digital and Sporting Solutions, discussed the impact of COVID-19 and the way forward. Digital transformation is taking shape and retail transformation is close behind.

By leveraging in the latest technology, we can push Sports Betting to the next level.

More valuable content, vibrant in-play prop betting, AI-powered tools and mobile gaming innovation form the essential ingredients for future Sports Betting. Coronavirus is accelerating many of the trends that were already set to shape our industry in the years ahead. Digitalisation, automation and AI are now arriving at breakneck speed, meaning operators must embrace these forces through new technologies. With a differentiated pricing strategy and stronger brand position sportsbooks will be able to carve out a stable path to success. Unprecedented times call for out-of-the-box thinking, flexibility and adaptability. Adjusting to the “new normal” must be seen as an opportunity to leverage new technologies, invest in product diversification, enhance customer journeys and betting experience, while having sports integrity in the core of our operations.